Integrated Support Services (ISS) Update

Dept Chair Retreat

Aug 21st, 2017
Presentation Goals & Expectations

Provide an update on Project Deliverables to date

Describe what will be taking place during the Implementation Phase of the project

Receive and respond to questions about the project
ISS Project – Shared Services Initiative

The consolidation of administrative or business support functions from several departments into a single organizational unit that has one mission: to provide services as efficiently and effectively as possible.
Project Scope

- Human Resources
- Finance
- Procurement
- Information Technology

ISSP Scope
Project Approach

• A coordinated and inclusive approach to identify how UWM will achieve the project benefits. The project approach proposed will result in:
  – A design for service delivery of support functions (Finance & Accounting, Human Resources, Information Technology and Procurement)
  – A plan for implementation of the service delivery / organizational design including a staffing strategy and change management
  – A plan for training and communication
## Benefits of Integrated Support Model

<table>
<thead>
<tr>
<th>Faculty, Staff, Students</th>
<th>Staff</th>
<th>UWM</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Process outcomes meet expectations (effectiveness)</td>
<td>• Opportunities for professional development and career growth</td>
<td>• Ability to scale operations for reduced cost of labor</td>
</tr>
<tr>
<td>• Increased efficiency – timely completion of processes</td>
<td>• Team environment with back-up and support from professional colleagues and leadership</td>
<td>• Academic focus on education and research</td>
</tr>
<tr>
<td>• Reduced administrative burden on academic leadership, faculty, and staff</td>
<td>• Strong connection to supported departments</td>
<td>• Demonstrated efforts towards operational excellence</td>
</tr>
<tr>
<td>• Consistent support levels across campus (no “haves” and “have nots”)</td>
<td>• Clear roles, responsibilities, and empowerment</td>
<td>• Aligned support staff who understand needs of customer department</td>
</tr>
</tbody>
</table>
Integrated Support Services (ISS) Project – Overall High Level Timeline

2015

2016

2017

2018

DESIGN

As-Is Assessment

To-Be Design

Detailed Design

We are here

Project Management / Communication / Change Management

Functional Teams
Steering Team
Campus Stakeholders

Implementation
Planning and Roll-out
Key Accomplishments / Decisions To Date

• AS-IS Final Report (Current State Assessment) – June 2016
• ISS Business Case – Sept 2016
• ISS Organization Structure – April 2017
• ISS Hub Grouping – May 2017
• Prioritized In-Scope Services – June 2017
• Initial Process Improvement Training Plans – June 2017
• Staffing Options and Recommendations - June 2017
• ISS Initial Space Plan - June 2017
### ISS Implementation Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>July</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kick-off and Team Onboarding</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detailed Data Gathering and Analysis of staff work breakdown for Prototype Hub</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Out of Scope Needs Assessment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication and Planning with Prototype Units</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Staff and Leadership Discussions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Negotiation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Out of Scope Transition Plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Allocation and Space Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-Scope Transition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Process Documentation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Communication</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• New Staff Roles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Approach will apply to each hub implementation**
Executive / Project Sponsors
Johannes Britz, Robin Van Harpen

Executive Steering Team
Johannes Britz, Robin Van Harpen, Bob Beck, Tim Danielson, Tom Scrivener, Ted Wiebel, Kathy Heath, Sylvia Banda, ISS Manager (TBD)

ISS Leadership Team
Bob Beck, Tim Danielson, Tom Scrivener, Ted Wiebel, Kathy Heath, Sylvia Banda, ISS Manager (TBD)

Business Process Management Team
Christine Leung, Cal Stoffel, Adrienne Thompson

Facilities Planning & Transition Lead(s)
Geoff Hurtado / Mike Priem

Communication Lead
Amanda Steinhoff

Communications SMEs
Shannon Bradbury (University Relations: Michelle Johnson, John Schumacher)

Facilities Planning & Transition SMES
Kristene Surerus (Space Planning)

Governance Structure
Autumn Anfang, Mario Babicic, John Bartelt, Kelly Haag, John Hubbard

Performance Measures
Elise Bechly, Natalie Benavides, Amanda Eischen, Noelle Fredrich, Chad Rathsack, Cal Stoffel, Cindy Wirtz

Service Level Agreements
Bob Meyer, Bobby Jo Morse, Amanda Obermeyer, Jarad Parker, Vickie Schuh, Chris Spadanuda, Amanda Thompson, Ayron Vander Linden, Kim Wesley

Functional Sub Groups (Finance / Accounting, Procurement, Human Resources & Information Technology) Subject Matter Experts

Unit (Department, School, Colleges, etc.) Liaisons

Advisory Committee
Suzanne Abler, Autumn Anfang, Carla Jane Durand, Prasenjit Guptasarma, Scott Hoffland, Jay Kapellusch, Paul Klajbor, Kim Litwack, Brett Peters, Beth Schaefer, Leigh Wallace, Stan Yasaitis

Implementation Readiness Committee
Sylvia Banda, Bob Beck, Tim Danielson, Kelly Haag, Kathy Heath, Gwat-Yong Lie, Kim Litwack, Jeri-Anne Lyons, Ron Perez, Tom Scrivener, Alan Shoho, Amanda Steinhoff, Ted Wiebel
Lead: Sylvia Banda

Implementation Core Team
Dave Crass, Kristin Fekete, Gina Halenka, Heidi Janzen, Christine Leung, Karen Massetti-Moran, Karen Miyoshi, Yvette Alicia-Reed, Jessica Russell, Dan Siercks, Amanda Steinhoff, Susan Voit, Linda Woods, Erica Yewlett
Lead: Kathy Heath

Process Improvement Team Leads
Michael Enstrom (e-Workflow project), Karen Massetti Moran, Monica Rodriguez, Carla Sagert, Andrew Thimmesch

Functional/Unit SMEs
Keith Emmons, Steve Kennedy, Tony Quintero, Angie Schmocker
(more team members to be added)

Service Excellence and Accountability

Facilities Planning & Transition
Geoff Hurtado / Mike Priem

Facilities Planning & Transition SMES
Kristene Surerus (Space Planning)
Implementation Readiness Team

- Sylvia Banda
- Bob Beck
- Tim Danielson
- Kelly Haag
- Kathy Heath
- Gwat-Yong Lie
- Kim Litwack
- Jeri-Anne Lyons
- Ron Perez
- Tom Scrivener
- Alan Shoho
- Amanda Steinhoff
- Ted Wiebel

Executive / Project Sponsors
- Johannes Britz
- Robin Van Harpen

Executive Steering Team

ISS Leadership Team

Project Manager

Business Process Management Team

- Establish a formal approach to ensure that all stakeholders are involved in the ISS Organization go-live decision
- Determine the set of criteria/key factors that will be evaluated throughout the Implementation Phase to ensure adequate preparation for the ISS prototype implementation and confirm the go-live date
- Work closely with the Implementation Core Team, ISS Project Manager and ISS Leadership to successfully implement the ISS prototype hub environment
Upcoming ISS Stakeholder Communication

• Campus Communication
  – Project Updates (announcements, updates in the UWM Report, emails, etc.)

• Open Fora in the Fall
  – Areas in Prototype Hubs (sessions for staff in each of the schools/areas)
  – Campus community (general sessions for all UWM faculty/staff to attend)

• Website Refresh
  – Content (up-to-date project info, past accomplishments, future goals, etc.)
  – Resources (where to go for questions/feedback, project and communication updates, etc.)
Chancellor’s Video

https://www.dropbox.com/s/7tvasken27m3u28/Chancellor%20Message%20ISS%202017.mp4?dl=0
Learn more about the project from our web site at http://uwm.edu/issp-integrated-support-services/
APPENDIX SECTION
Current Workflow for In-Scope ISS Services
*HR, Accounting, Purchasing, IT*

**Departments**
Interact with Department, Division, and/or Central Offices

**Department & Division**
Anticipate and respond to Department needs for in-scope services, processing requests through central offices

**Central Offices**
Work with Department and Division offices to review, approve, and process transactions.
Future Workflow – In-Scope ISS Services

HR, Accounting, Purchasing, IT

**Departments**
Interact with aligned ISS hub (personal and electronic requests)

**Integrated Support Services**
Anticipate and respond to department needs related to in-scope services, fully executing 90% of in-scope services

**Central Offices**
Advise on complex cases, training, and policy implementation; establish vision/strategic direction
Integrated Support Services Staffing Model

Multiple ISS teams aligned with groupings of school/college/division units (3 hub groupings were recommended during the Detailed Design phase)

Functional Specialists
- Front-line support
- Strong service excellence focus
- Aligned with specific school/college/division group
- Empowered to fully execute processes

Operations Teams
- Transactional and system specialists with strong attention to detail

Leadership
- Management focused on effective integration of services and operational excellence
What will happen to existing staff?

Department, Division, Central Office Staff

Evaluate

Discuss

Negotiate

ISS Team

Central Office

Department/Division Office
## What will happen to existing staff?

### ISS Team

<table>
<thead>
<tr>
<th>% of Time</th>
<th>Major Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>

### Central Office

<table>
<thead>
<tr>
<th>% of Time</th>
<th>Major Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>

### Department/Division Office

<table>
<thead>
<tr>
<th>% of Time</th>
<th>Major Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>
What will happen to existing staff?