MEETING AGENDA

- Welcome
- Project Overview
- Project Team Structure
- Role of Steering
- Accomplishments
- Current Status
- Upcoming Key Milestones
- Alignment with CCOET
- Next Steps
Welcome
Project Overview

• An effort to design and implement an administrative structure that provides excellence across UWM, focusing on the functions of Finance & Accounting, Procurement, Human Resources and Information Technology.

• Project Goals
  – Long-term service efficiencies, increase effectiveness, better use of technology and enhance professional development opportunities in administrative areas
  – Reduce costs through simplification and standardization
  – Concentrate University resources on higher core value activities
  – Improve the quality of service to the academic and administrative units
  – Improve response to organizational changes
  – Facilitate technology deployment
Role of Steering

• Provide general advice and counsel to the project
• Review and monitor strategic direction and progress toward achieving project objectives
• Provide policy guidance to the project teams and other stakeholders
• Speak with a general level of familiarity and support for the project
Accomplishments

• Project Team Formation
• Project Charter
• Project Plan / Schedule
• ISSP Website
• Stakeholder Identification & Communication Plan
• Stakeholder Survey for Initial Profiles
• Lessons Learned from other institutions
Current Status

- Data Gathering activities (for providers and recipients of services) in progress
- Analysis of data gathering information in progress
- Identification of key questions that need to be answered before we proceed to Design phase
- Communication planning
Upcoming Key Milestones

• March 11th – Identification of stakeholders to participate in completing AS-IS phase (providers and recipients of services)
• April 29th – Complete data gathering analysis for both providers and recipients of services
• May 13th – AS-IS Phase Final report complete
• May 17th – Revised Plan to communicate AS-IS results to project stakeholders complete
• May 27th – High Level Project Plan for Design Phase
• June 2nd – Design Phase Kick-Off
Alignment with CCOET Final Report

• CCOET recommended:

  **Accelerate implementation of Integrated Support Services (ISS) project**

  Shared Services is a way of organizing administrative functions to optimize the delivery of cost-effective, flexible, and reliable services to stakeholders (faculty, staff, and students).

  The basic principles underlying implementation of shared services are as follows:
  • Shared services must increase efficiency without sacrificing service quality.
  • Stakeholders must have the opportunity to provide input.
  • Changes in service arrangements must not negatively impact UWM’s core mission or the experiences of faculty, staff, and students.

• Chancellor approved recommendation
  • Included comment at campus budget forum on Monday, March 21

• Project leadership is exploring consulting engagement to supplement current project structure for accelerated timeline
Next Steps for Steering

• Regular Reporting
  – Quarterly meetings with project team
  – Monthly status report from project manager to Steering

• AS-IS final report to Steering end of May
Questions?