INTEGRATED SUPPORT SERVICES PROJECT (ISSP)

"TO-BE" PHASE KICK-OFF

JUNE 13, 2016
MEETING AGENDA

- WELCOME
- PROJECT OVERVIEW
- PROJECT TEAM STRUCTURE
- ACCOMPLISHMENTS
- “TO-BE” PHASE SCOPE
- “TO-BE” PHASE KEY CONSIDERATIONS
- UNDERSTANDING INTERCONNECTIONS
- UPCOMING KEY MILESTONES
- CHARGE FOR PROJECT TEAMS
- QUESTIONS?
WELCOME

• Johannes Britz – Provost and Vice Chancellor Academic Affairs
• Robin Van Harpen – Vice Chancellor Finance & Administrative Affairs
PROJECT OVERVIEW

• The Business Challenge
• Project Approach
THE BUSINESS CHALLENGE

- A significant budget reduction for UWM is driving the institution to think of bold, innovative methods to deliver business functions for long term efficiencies and cost reduction savings.

- Present business practices/procedures inefficiencies and opportunities for ineffectiveness.

- Present business practices/procedures and compliance/security risks.

Given the seriousness of this context:

Administrative support services need to be delivered in the most efficient and effective manner, in order to ensure that our limited resources are deployed as strategically as possible and in support of UWM’s strategic directions.
PROJECT APPROACH

• A **coordinated** and **inclusive** approach
• Administrative services in scope
  – **Finance & Accounting**
  – **Human Resources**
  – **Procurement** (i.e. a combination of processes related to the acquisition of goods or services currently provided by the Accounts Payable and Purchasing departments)
  – **Information Technology**
• Identify opportunities to increase **efficiency**, **effectiveness** and **quality** of these services to the campus
• Focus on how an **integrated services** model, which incorporates shared services components may provide the foundation for **service excellence**
PROJECT TEAM STRUCTURE

Steering Committee
Margie Anunson, Eric Dietenberger, Beryl Forman, Randall Trumbull Holper, Mark Jacobson, Ron Perez, Brett Peters, Gabriel Rei-Doval, Beth Schaefer, Alan Shoho, Joey Zafra

Executive / Project Sponsor
Johannes Britz, Robin Van Harpen

Functional Leadership Team
Sylvia Banda, Bob Beck, Tim Danielson, Kathy Heath, Jerry Tarrer

Project Core Team

Project Manager
Sylvia Banda

Project Assistant
Pam Hutchins

Change Management Team
Sylvia Banda, Heidi Janzen, Sara Tully
Lead: Kathy Heath
Co-Lead: Shannon Bradbury

Business Process Management Team

Finance / Accounting
Krystle Anderson, Carla Durand, Kristin Fekete, Pat Kissinger, Heather Lee, Tom Osmanski, Stephanie Plavec
Leads: Paul Klajbor, Dave Rice

Procurement (Procure-To-Pay ‘P2P’)
Jill Baum, Bonnie Gonnering, Barb-Breed Heidt, Kathy Kercheck, Amanda Obermeyer, Kim Scherzer, Angie Schmocker, Nicole Schueler, Andrew Thimmesch, Kim Wesley, Cindy Wirtz
Leads: Autumn Anfang, Tom Scrivener

Human Resources
Mario Babicic, Elise Bechly, Kurt Hennemann, Mark Mielenz, Jennifer Powell, Yvette Alicea-Reed, Amanda Thompson, Craig Wesley, Erica Yewlett
Lead: Karen Massetti-Moran

Information Technology
Chris Cook, David Crass, J. Shane Dunlap, Keith Emmons, Noelle Fredrich, Mike Grypp, Kevin Jahnke, Bob Meyer, Julie Reindl, Carla Sagert, JJ Stenitzer
Leads: Scott Kleba, Keith Kunkel

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

Functional Teams:

Capable of responding to questions related to the structure, roles, and responsibilities of the project team.
<table>
<thead>
<tr>
<th>Period</th>
<th>Description</th>
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<tbody>
<tr>
<td>March 2015 – Nov 2015</td>
<td>Project Development &amp; Initiation</td>
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<tr>
<td></td>
<td>Presentations to governance &amp; leadership groups providing the context &amp; approach for the project</td>
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<td>May 2015 – Sep 2015</td>
<td>Project Team Formation</td>
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<td>Presentations to governance &amp; leadership groups providing the context &amp; approach for the project</td>
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<tr>
<td></td>
<td>Includes staff &amp; managers from central administrative offices, school/college departments and division offices, &amp; administrative department &amp; division offices</td>
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<tr>
<td>March 2015 — March 2016</td>
<td>Lessons Learned from other institutions</td>
</tr>
<tr>
<td></td>
<td>Presentations to governance &amp; leadership groups providing the context &amp; approach for the project</td>
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<tr>
<td></td>
<td>Providers of services to academic and/or administrative units</td>
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<tr>
<td></td>
<td>Faculty &amp; staff who rely on these support services</td>
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<tr>
<td>March 2015 - May 2016</td>
<td>Identification &amp; Engagement of Stakeholders</td>
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<td>Presentations to governance &amp; leadership groups providing the context &amp; approach for the project</td>
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<tr>
<td>Identification, documentation &amp; evaluation of Key processes</td>
<td>Focused data gathering</td>
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- Inventory of IT hardware, mediated spaces & classroom technology
- Purchasing & Payables transaction volume, policies, organization charts, position descriptions & relevant technology

**YAYY !!!!**
“TO-BE” PHASE – SCOPE

This phase will explore and answer many questions, including:

- What is the best way to deliver the business functions associated with this project?
- What roles should be established to complete business processes and provide important advice, counsel and guidance to all those who rely upon the business functions?
- How will service groups be defined (e.g., geography, affinity)?
- What services will be provided?
- How will the reporting relationships work?
- What will the framework be for metrics and KPIs?

  - alignment with campus efforts on administrative metrics?

Huron will assist with a quantitative analysis of UWM’s operational and financial performance, paying particular attention to staffing levels, transaction volumes, and systems access; this data analysis is necessary to understand the current state (e.g., What work is done today? Who is doing it? How much are they doing?)

The deliverables for this phase include a detailed business case, a change management plan, and an implementation plan, all of which will provide leadership with the necessary information to make a go/no go decision.
“TO-BE” PHASE – KEY CONSIDERATIONS

• This project will be a partnership between the UWM teams and the Huron team, with an emphasis on a collaborative and iterative process, as model recommendations will be continually reviewed and refined by the teams.

• There are some limitations to the data analysis:
  
  – Staffing figures and cost savings projections will be largely directional – these will serve to demonstrate the scale of the opportunity but not provide specific savings targets.
  
  – There are unquantifiable aspects – both benefits and costs – which the business case will explore and assess.

• It will be important to maintain coordination, alignment, and consistency across the in-scope functional areas.
### SERVICE DELIVERY

<table>
<thead>
<tr>
<th>In the units</th>
<th>In a Service Center</th>
<th>In Central Administration</th>
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<tbody>
<tr>
<td><strong>Most appropriate when...</strong></td>
<td><strong>Most appropriate when...</strong></td>
<td><strong>Most appropriate when...</strong></td>
</tr>
<tr>
<td>• Activities influence unit-specific philosophy or policy</td>
<td>• Activities are transactional</td>
<td>• Activities influence university-wide policy or strategy</td>
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<tr>
<td>• Benefits from unit-specific expertise outweigh benefits from centralization</td>
<td>• Activities have high level of standardization</td>
<td>• Activities require appropriate monitoring and controls of units</td>
</tr>
<tr>
<td>• Increased accountability, proximity and flexibility to a unit outweighs benefits of lower cost</td>
<td>• Cost-savings outweighs benefits from physical proximity</td>
<td>• Cross-unit initiatives must be managed</td>
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<td></td>
<td>• Staff advise units on crucial business decisions</td>
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<td></td>
<td>• Co-location improves effectiveness</td>
<td></td>
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<tr>
<td></td>
<td>• There are efficiency gains with scale</td>
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<tr>
<td></td>
<td>• Activities require expertise in a particular field</td>
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UNDERSTANDING THE INTERCONNECTIONS

• Service delivery redesign requires reviewing and changing processes

• However, too narrow focus on individual processes may ignore how activities are interconnected

• Service delivery design is foundationally about redesigning roles

• Role definitions provide the underlying structure for processes—the swim lanes

• Roles are the way to glue your blocks together
UPCOMING PROJECT MILESTONES

Near-term objectives (June):

- Huron and ISSP Project Management to document clear roles and responsibilities for the various teams and establish a detailed project plan.
- Huron to meet with Functional Team Leads to gain their perspective on the “As-Is” phase and hear their initial thoughts on model design.
- Huron to conduct baseline data analysis for each functional area (e.g., staffing, transactions, systems access).
- Functional Teams to validate baseline data analyses for accuracy and completeness.
UPCOMING PROJECT MILESTONES

Intermediate-term objectives (July/August):

- Huron and UWM to work together to identify service delivery model opportunities and gain input from key ISSP teams and constituencies
- Huron and UWM to identify preliminary service center costs, benefits, assumptions, risks, and mitigation strategies to inform the final deliverables
- Huron and UWM to develop detailed business case, change management plan, and implementation plan
CHARGE FOR PROJECT TEAMS

Project Steering Team

- Participate in Work In Progress checkpoints
  - Policy and organizational considerations
- Provide input to identified decision points
  - Will be reflected as key milestones in project plan
- Act in an advisory capacity with the Project Core Team
- Review project status reports
 Functional Teams

- Continue to adhere to the mission and ground rules of your team, as authored by you
- Remain a champion for the project
- Be bold and innovative
- As subject matter experts, recommend the roles needed, definition of service groups, and organizational structure (including reporting relationships) to deliver the specific functions in the most effective and efficient way possible.
- Recommend how the most high volume and high impact business processes should be completed
- In forming recommendations, consider all that has been learned in the As-Is phase and the consultation to be received from Huron
CHARGE FOR PROJECT TEAMS

Change Management team

- Develop and facilitate plan(s) for communication about the As-Is Assessment and the To-Be Phase
- Collaborate with Huron and facilitate the development of a plan for communication about the detailed business case
- Collaborate with Huron on the development of a change management plan
QUESTIONS ?