TO-BE Phase Kickoff Meeting – June 13, 2016

I) Welcome & Thank You

Robin Van Harpen, Vice Chancellor Finance & Administrative Affairs and Project Sponsor welcomed attendees to the meetings and began with a ‘thank you’ message to the project team for their hard work that led us to the end of the AS-IS phase that was being celebrated. She talked about how important this project was to the campus and that the main driver of this project was ensuring that we are being efficient with the services we provide to campus especially in light of the many budget cuts occurring around campus. She also said that the AS-IS Assessment showed many opportunities that can be applied to ensure that these services become more effective. She highlighted the new technology on board such as e-Workflow, procurement solutions being reviewed. All this upcoming work would be done with the assistance of Huron in a number of different roles.

Johannes Britz, Provost and Vice Chancellor Academic Affairs, and Project Co-Sponsor also thanked the attendees for their hard work. He said there were a number of ongoing discussions that involve collaborations between various schools and colleges related to service delivery and that it was important that the ISS project collaborates with these various schools. He sighted three schools/colleges: College of Nursing, College of Health Sciences, and Joseph J. Zilber School of Public Health. He emphasized that as a campus-wide initiative, the project should reach out to these schools/college and ensure that the ongoing shared services efforts are well aligned. He urged team members to reach out to either him or Robin if there are any misunderstandings regarding this that are occurring.

[refer to Slides 1-3]

II) Meeting Presentation & Discussion

Tim Danielson took off from that point and reminded the project team about the business challenge that led to the launching of the project. He mentioned that the work done during the AS-IS phase had led to the discovery of the key challenges and issues discussed earlier on prior to the official start of the project. He also talked about the coordinated and inclusive project approach that is clearly evidenced by the project team structure that clearly shows that there are lots of people working on this effort. He talked of the project coordination that is being done by a professional experienced project manager with the help of Huron consultants. Tim thanked everyone especially the functional team co-leads for the efforts put into this project. He reminded them that they are the subject matter experts and experienced people that are leading this effort. [refer to Slides 4-7 of the presentation]

Jerry Tarrer presented the project team accomplishments from the AS-IS phase. He gave a bit of the project history stating that it started over a year ago. He recalled meeting with Bob Beck, Kathy Heath and Tim Danielson over a year ago in Kathy Heath’s office where they all agreed it was the right time to start a project like this. This was way back in March 2015. He thanked everyone for their efforts and told the project team it surely was worth celebrating the milestones given all the hard work done during this just completed AS-IS phase. [refer to slides 8-9]

Tim Danielson introduced Kurt Dorschel and Elizabeth Coleman, the Huron consultants assigned to the project in the next phase before they took over presenting the next set of slides.

Elizabeth talked about the long history Huron has had working with UWM. She stated the fact that this effort would most certainly 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. She also went over the scope of the TO-BE phase.
Kurt then presented the next slides. He reiterated the fact that other institutions are faced with similar types of issues that UWM is trying to address. He said it was important to understand how services are connected through the service delivery model. He used the example of the game Jenga saying when you start pulling on certain items in service delivery, you start to see other interconnections. He talked of the need to redesign Business Processes but Roles are how some of these processes can be glued together. He also talked about ensuring sensible career paths throughout the university.

Elizabeth then went over a high level of the upcoming project milestones [refer to Slides 10-16]

Bob Beck wrapped up the remaining presentation slides where he went over the Charge for the project teams – Steering, Functional teams and Change Management team. Bob mentioned to the attendees the fact that the Chancellor frequently speaks about how much he appreciates the work from the functional teams and how this project would change how business is done at the campus in an unprecedented way.

He also thanked the entire project team for all efforts done up to this point and for the work yet to come in the next phases of the project. [refer to Slides 17-19]

III) Questions

The attendees were then invited to ask any questions they had. Tim encouraged everyone to reach out to the Functional Leadership team if they had any questions about what’s going on with the project and to feel free to share their thoughts.

A team member from The Office of Sponsored Programs made a comment in relation to internal controls being a major area specifically where an issue with effectiveness is identified. Another Team Member asked what would be the next steps after the recommendations are in place? Would Huron be the end of the TO-BE Phase? Tim Danielson basically explained the project phases stating that the next stage would be the Implementation phase. Autumn Anfang further clarified that the TO-BE phase extends past the 12 weeks Huron is with us.

Robin Van Harpen explained that Huron was brought in to drop time off the current timeline, and hence move into the implementation phase faster. At the end of the business case Huron is providing assistance with, there will be recommendations for a new plan for our new structure. There will be an approval process established by leadership that will be established as these recommendations are built and reviewed.

Robert Beck began to discuss that the final recommendation for design won’t be perfect, given the fact that there are a really complex set of issues we need to work through as well as the scope size and scale of the campus, and hence the need for an ongoing process of tweaking during this phase.