Steering Committee Meeting
July 25, 2016
9am
Agenda

- Welcome & Introduction
- Charge for Steering
- ISSP Guiding Principles
- Huron Engagement Update
- ISSP Communication Update
- Key ISSP Decisions
- Upcoming Work In Progress Checkpoints for Steering
- Q&A
Welcome & Introduction

• Welcome new Steering members
Charge for Steering

• 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
ISSP Guiding Principles

• ISSP Core Guiding Principles (refer to documentation distributed in meeting)
  • ISSP Guiding Principles.docx
Huron Engagement Update - Project Approach

**Purpose**
- Solidify and deepen the understanding of the challenges in the current state
- Provide leadership with information for go/no go decision
- Provide framework for detailed design phase
- Gain buy-in and support for the proposed approach
- Ensure a shared understanding of the work and the potential impact

**Key Outcomes**
- Integrated Support Services Project As-Is Final Report for each in-scope functional area
- Business Case
- Change Management Plan
- Implementation Plan
- Stakeholder discussions through a variety of communications channels

**Roles**
- Primary UWM responsibility; Huron to evaluate the efforts and recommend any additions
- Primary Huron responsibility; UWM to provide campus input and perspective
- Primary UWM responsibility; Huron to share higher ed best practices

**Next Steps for UW-M**
- Complete Detailed Design and Develop Transition Materials
  - Activity Assessment
  - Staffing and Transition Plan
  - Facilities Plan
  - Business Processes
  - Position Descriptions
  - Standard Operation Procedures
  - Website Development
- Implement New Service Delivery Model
  - Execute Facilities Plan
  - Execute Staffing and Transition Plan
  - Execute Training Plan
  - Begin Operations In New Model
Parallel Design Progression

Top Down

1. Understand Current Structures
2. Define Variables
3. Identify Options
4. Evaluate Options
5. Develop Structure

- Organizational alignment
- Functional alignment
- Service center differentiation
- Service management
- Transition approach

Bottom Up – Services to Staffing

1. Define Services and Activities
2. Categorize Them
3. Align with Role Segments
4. Develop Role Definitions
5. Develop Staffing Plan
Huron Engagement Update – Progress to Date

• Work to Date
  • Huron team reviewed the ‘As-Is’ report
  • Conducted outreach to key project leadership and participants to understand goals and objectives
  • Requested additional data to support the development of the business case
  • Began working with Functional Teams to inform the integrated, ‘To-Be’ model design
  • Began analyzing baseline data received to date

• Next Steps
  • Continue working with Functional Teams to draft initial ‘To-Be’ service delivery model
  • Continue data analysis to support development of the business case
  • Begin development of business case, implementation plan, and change management plan
Upcoming Communication (now through Sept)

- Chancellor’s E-mail Update, Provost’s E-mail Update, and the UWM Report
  - Announcement about the AS-IS completion and the launch of the TO-BE phase
- Meeting with Governance Groups Leadership
  - The ISSP Leadership Team will be meeting with the governance groups leadership to discuss how to approach the governance groups themselves and also how to approach the campus at large when there is a design proposal
- Chancellor’s Plenary in September
  - Campus announcement of the business case preliminary recommendations
- Monthly PRep/UBR meetings
  - Ongoing project updates
- Campus-wide Communication
  - Ongoing updates once design proposal is complete via ways that the governance groups will have suggested, as well as campus-wide Open Fora
- Continuous FAQ updates as project progresses
ISSP Key Decisions

• Refer to ISSP Key Decisions document ([ISSP Project Decisions Outline.pdf](ISSP Project Decisions Outline.pdf))
Upcoming Work In Progress Checkpoints for Steering

• Steering meeting – Aug 8th
  • Discussion and agreement on high-level model structures for each functional area
  • Discussion of key change management and implementation considerations

• Steering meeting – Aug 23rd
  • 1st Review of draft materials for three final deliverables (business case, change management plan, implementation plan) in order to incorporate feedback and edits

• Steering meeting – Sept 7th
  • 2nd Review of draft materials for three final deliverables (business case, change management plan, implementation plan) in order to incorporate feedback and edits before submission to leadership for review, discussion and final decision
# UWM Service Delivery Support

## Project Plan

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## Meeting Schedule

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Q&A