

Shared Services at UWM: An Update



INTEGRATED SUPPORT SERVICES

Robert J. Beck, CIO

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- “All change is accomplished by people!”
 - Bill Clebsch, Stanford CIO
- “Be bold, and mighty forces will come to your aid!”
 - Basil King

Overview

- Recently completed milestones
- Huron engagement
- Future state

Recently Completed Milestones

- IT Functional Team Report has completed its documentation of the “current state” (people/processes/tools) of campus
 - Desktop support
 - Mediated space support
 - Security
 - Help Desk
 - Website support
 - Data reporting
 - Purchase advising

Recently Completed Milestones

- IT Functional Team Report has
 - Reviewed best practices/lessons learned
 - Offered recommendations on
 - Addressing gaps/bottlenecks/pain points
 - Enhancing security

Recently Completed Milestones

- June 6 - The consolidated Final Report has been completed by the Project Change Management Team
- June 13 – “To Be” Design phase kick-off



As-Is FINAL REPORT (CURRENT STATE ASSESSMENT)
Integrated Support Services Project
June 2016

Introduction

The University of Wisconsin – Milwaukee is taking a coordinated and inclusive approach to identify how the administrative support services of 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), and Information Technology can be delivered with service excellence. UWM seeks to identify opportunities to increase efficiency, effectiveness, and quality of service to the campus, with a focus on how an integrated services model, which incorporates shared services components, may provide the foundation for such excellence.

Universities across the country are developing and implementing a wide range of alternative service delivery models to address the same challenges faced by UWM today, including extreme budget pressure and the need to direct resources to core activities. Over the last 10 years, Universities have increasingly incorporated aspects of shared services for benefits such as: cost reduction through simplification and standardization; concentration of resources on core higher value activities; increased service quality to the Campus community; improved response to organizational changes; as well as facilitation of technology deployment.

The goal of the As-Is Assessment is to assess and understand the current processes, organization, and technological challenges within the four business functions to inform a design to provide high quality in functional delivery. The project framework [Integrated Support Services](#) was developed to enable a review that includes broad input from campus stakeholders and direct input and leadership from people with in-depth knowledge of the functions and service delivery details. This assessment provides a basis for the recommendation to further explore the case for shared services at UWM.

Huron: Elizabeth Coleman

- Serving as consultant, with the support of Kurt Dorschel



Huron

- 11-12 week Huron engagement will include significant interaction with all project teams
 - Core Team, Functional Leadership Team, Functional Teams
- Huron is now assessing the “current state” based on data provided by the UWM team

Huron

- In collaboration with ISS Project teams, Huron will develop “business case”
 - “Potential opportunity” assessment
 - Analyze operations and financial performance of units
 - Cost-Benefit analysis
 - Not specific savings targets, but general scale of opportunity
 - Implications for service levels and risk exposure

Project Plan

High-Level Activities	6/6	6/13	6/20	6/27	7/4	7/11	7/18	7/25	8/1	8/8	8/15	8/22	8/29
Project Kick-off / Review of Current State Analysis													
Launch To-Be Phase													
Conduct Baseline Data Analysis													
Develop Future State Service Delivery Model (High-level)													
Develop Business Case, Change Plan & Impl. Roadmap													

Meeting Schedule													
Steering Committee*		6/13						7/25		8/8		8/23	
Project Core Team	6/6		6/22		7/7		7/20		8/4		8/18		8/29
Functional Leadership Team	6/6	6/15	6/21	6/29	7/7	7/13	7/20	7/28	8/4	8/10		8/24	8/29
Change Management Team		6/13	6/20	6/27		7/11	7/18	7/25	8/1	8/8	8/15	8/22	8/29

Key Interim Project Milestones

Interim Project Milestones (1 of 2)

Week	Key Activities / Milestones	Huron Role	UWM Role	Key Deliverables
6/6	<ul style="list-style-type: none"> Launch of Huron engagement Review / finalization of "As-Is" Final Report Preparations for launch of "To-Be" phase 	Huron to review "As-Is" Report and assist with kick-off materials	ISSP teams to complete and finalize "As-Is" Report	"As-Is" Final Report, "To-Be" Project Launch Presentation
6/20	<ul style="list-style-type: none"> Consensus reached on project governance decisions (key project-related approvals) Data analyses and data sources identified with preliminary analysis underway Initial conversations with all Functional Leads completed 	<p>Huron to facilitate governance decision-making discussion</p> <p>Huron to manage all data collection and analysis</p>	<p>ISSP teams to review and discuss key project decisions and approvals</p> <p>Functional Leads to meet with Huron</p>	
7/4	<ul style="list-style-type: none"> Baseline data analyses completed (dependent upon timely receipt of data) Launch of data review and vetting with identified parties for each functional area 	Huron to conduct and present data analyses	ISSP teams to identify appropriate data "validators" and begin review of analyses	Baseline data slides for each functional area
7/18	<ul style="list-style-type: none"> Validation received for data analyses Discussion and agreement on high-level model design principles Review of in-scope job titles for each functional area 	Huron to prepare high-level model principles based on "As-Is" findings, data analysis, and peer review	<p>Data "validators" to provide final sign-off</p> <p>ISSP teams to provide input on job titles and model principles</p>	

Key Interim Project Milestones

Interim Project Milestones (2 of 2)				
Week	Key Activities / Milestones	Huron Role	UWM Role	Key Deliverables
8/1	<ul style="list-style-type: none"> • Discussion and agreement on high-level model structures for each functional area • Discussion of key change management and implementation considerations • Follow-on conversations with all Functional Leads completed 	Huron to incorporate feedback and present revised model structures for each functional area	ISSP teams to provide feedback on model structures Functional Leads to meet with Huron	
8/15	<ul style="list-style-type: none"> • Review of draft materials for three final deliverables (business case, change management plan, implementation plan) in order to incorporate feedback and edits 	Huron to prepare and present draft deliverables	ISSP teams to review draft deliverables and provide feedback	Draft deliverables (business case, change plan, implementation plan)
8/29	<ul style="list-style-type: none"> • Finalized deliverables submitted to leadership for review, discussion, and final decision 	Huron to incorporate all feedback and present final deliverables	Leadership decision point	Final deliverables (business case, change plan, implementation plan)

Future State for IT Professionals

- Identification of ***career paths***
 - IT professionals will be able to see clearly where they are and where they can go within the organizational structure
- Appropriate alignment of ***salaries***
 - IT professionals' salaries will readily align with the organizational structure of the function

Future State for IT Professionals

- Enhanced ***communication***
 - a clear, streamlined organizational structure for IT will greatly facilitate communication flows
- IT professionals will report to ***supervisors with an understanding of IT work***

Future State for IT Professionals

- Enhanced ***professional development*** opportunities
 - Levels within the organizational structure will have specific associated “competencies”
 - This structure will allow IT professionals to
 - identify competencies of a higher level position,
 - determine, in consultation with their supervisors, what competencies they may need to develop, and
 - devise a fitting professional development plan.

Future State for IT Professionals

- ***Role clarity***
 - For individual IT professionals, role clarity will provide protection against job-related “scope creep” and unrealistic expectations
- ***Business process standardization***
 - Common use, support, and understanding of core IT tools and processes

Future State for IT Professionals

- ***Information security*** will be greatly enhanced
- ***Back-up*** IT staff colleagues
 - Someone else will be available to “mind the store”

Forward!



INTEGRATED SUPPORT SERVICES