Integrated Support Services (ISS) Project

Implementation Phase Kick-off
Thursday July 20th
Kick-off Agenda

- Welcome / Introduction – 15 min
- Kick-off Objective – 10 min
- Project Approach – 10 min
- Key Decisions To Date – 10 min
- Implementation High Level Scope of Work & Timeline – 10 min
- Implementation Phase Project Structure – 15 min
- ‘Meet and Greet’ Your Team Session – 5 min
- Q&A / Next Steps – 15 min
Welcome & Introduction

• https://www.dropbox.com/s/7tvasken27m3u28/Chancellor%20Message%20ISS%202017.mp4?dl=0
Kick-off Objective

• Build a common understanding and commitment to the Project Deliverables:
  – Project Objective
    • *to design and implement a structure to provide administrative service excellence across UWM, focusing on the functions of Finance and Accounting, Procurement, Human Resources and Information Technology.*
    • *to accomplish long-term service efficiencies, effectiveness and make better use of technology, and enhance professional development opportunities in administrative areas.*
  – Project Scope of Work
  – Project Stakeholder Approach
  – Project Management Approach
  – Project Implementation Approach
  – Project Timelines
Project Approach

• A coordinated and inclusive approach to identify how UWM will achieve the project benefits. The project approach proposed will result in:
  – A design for service delivery of support functions (Finance & Accounting, Human Resources, Information Technology and Procurement)
  – A plan for implementation of the service delivery / organizational design including a staffing strategy and change management
  – A plan for training and communication
# Benefits of Integrated Support Model

## Faculty, Staff, Students
- Process outcomes meet expectations (effectiveness)
- Increased efficiency – timely completion of processes
- Reduced administrative burden on academic leadership, faculty, and staff
- Consistent support levels across campus (no “haves” and “have nots”)
- Aligned support staff who understand needs of customer department

## Staff
- Opportunities for professional development and career growth
- Team environment with back-up and support from professional colleagues and leadership
- Strong connection to supported departments
- Clear roles, responsibilities, and empowerment

## UWM
- Ability to scale operations for reduced cost of labor
- Academic focus on education and research
- Demonstrated efforts towards operational excellence
Key Accomplishments / Decisions To Date

• AS-IS Final Report (Current State Assessment)
• ISS Business Case
• ISS Organization Structure
• ISS Hub Grouping
• Prioritized In-Scope Services
• Initial Process Improvement Training Plans
• Staffing Options and Recommendations
• ISS Initial Space Plan
Integrated Support Services (ISS) Project – Overall High Level Timeline

2015  2016  2017  2018

DESIGN

As-Is Assessment

To-Be Design

Detailed Design

We are here

Functional Teams
Steering Team
Campus Stakeholders

Implementation
Planning and Roll-out

Project Management / Communication / Change Management
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** Approach will apply to each hub implementation
ISS Project - Implementation Phase Organization Chart

Advisory Committee
Suzanne Abler, Autumn Anfang, Carla Jane Durand, Prasenjit Guptasarma, Scott Hoffland, Paul Klajbor, Kim Litwack, Brett Peters, Beth Schaefer, Leigh Wallace, Stan Yasaitis

Executive / Project Sponsors
Johannes Britz, Robin Van Harpen

Executive Steering Team
Johannes Britz, Robin Van Harpen, Bob Beck, Tim Danielson, Tom Scrivener, Ted Wiebel, Kathy Heath, Sylvia Banda, ISSO Director (TBD)

Project Manager
Sylvia Banda

Business Process Management Team
Christine Leung, Cal Stoffel, Adrienne Thompson

Implementation Readiness Committee
Sylvia Banda, Bob Beck, Tim Danielson, Kelly Haag, Kathy Heath, Tom Scrivener, Amanda Steinhoff, Ted Wiebel (more team members to be added)

ISS Leadership Team
Bob Beck, Tim Danielson, Tom Scrivener, Ted Wiebel, Kathy Heath, Sylvia Banda, ISS Manager (TBD)

Implementation Core Team
Dave Crass, Kristin Fekete, Gina Halenka, Heidi Janzen, Christine Leung, Karen Massetti-Moran, Karen Miyoshi, Yvette Alicia-Reed, Jessica Russell, Dan Siercks, Amanda Steinhoff, Susan Voit, Linda Woods, Erica Yewlett
Lead: Kathy Heath

Process Improvement Team Leads
Michael Enstrom (e-Workflow project), Karen Massetti Moran, Monica Rodriguez, Carla Sagert, Andrew Thimmesch

Facilities Planning & Transition Lead(s)
Geoff Hurtado / Mike Priem

Facilities Planning & Transition SMEs
Kristene Surerus (Space Planning)

Communications Lead
Amanda Steinhoff

Communications SMEs
Shannon Bradbury
University Relations: (Michelle Johnson, John Schumacher)

Functional / Unit SMEs
Keith Emmons, Steve Kennedy, Tony Quintero, Angie Schmocker
(more team members to be added)

Service Excellence and Accountability

Service Level Agreements
Bob Meyer, Bobby Jo Morse, Amanda Obermeyer, Jarad Parker, Vickie Schuh, Chris Spadanuda, Amanda Thompson, Ayrone Vander Linden, Kim Wesley

Governance Structure
Autumn Anfang, Mario Babicic, John Bartelt, Kelly Haag, John Hubbard

Performance Measures
Elise Bechly, Natalie Benavides, Amanda Eischen, Noelle Fredrich, Chad Rathsack, Cal Stoffel, Cindy Wirtz

Unit (Department, School, Colleges, etc.) Liaisons

Functional Sub Groups (Finance / Accounting, Procurement, Human Resources & Information Technology) Subject Matter Experts
ISS Project – Implementation Phase Project Structure

Executive / Project Sponsors
- Johannes Britz
- Robin Van Harpen

Advisory Committee

Implementation Readiness Team

Executive Steering Team

ISS Leadership Team

Project Manager

Business Process Management Team

Implementation Core Team

Service & Accountability Teams
- Service Level Agreements
- Governance Structure
- Performance Measures

Process Improvement & Training Leads

Facilities Planning & Transition Team Leads

Communication & Change Management Lead

Unit Liaisons

Functional Sub-groups, SMEs
ISS Project – Implementation Phase Project Structure

Executive / Project Sponsors

- Johannes Britz, Provost
- Robin Van Harpen, Vice Chancellor – Finance & Administrative Affairs

- Champion project
- Approve strategy and goals of project
- Take action on recommendations
- Lead Executive Steering Team
ISS Project – Implementation Phase Project Structure

Executive / Project Sponsors
• Johannes Britz
• Robin Van Harpen

ISS Leadership Team
• Bob Beck
• Tim Danielson
• Tom Scrivener
• Ted Wiebel
• Kathy Heath
• Sylvia Banda

Project Manager
• Sylvia Banda

Business Process Management Team
• Christine Leung
• Cal Stoffel
• Adrienne Thompson

• Guide and support project teams
• Provide project resources
• Take action on recommendations
ISS Project – Implementation Phase Project Structure

Executive / Project Sponsors
• Johannes Britz
• Robin Van Harpen

Executive Steering Team

ISS Leadership Team
• Bob Beck, CIO
• Tim Danielson, Associate Vice Chancellor, HR
• Tom Scrivener, Purchasing Director
• Ted Wiebel, Controller
• Kathy Heath, FAA Integrated Administrative Services
• Sylvia Banda, Senior Project Manager

Business Process Management Team

• Approve staffing plans
• Approve implementation recommendations
• Approve transition plan
ISS Project – Implementation Phase Project Structure

Advisory Committee
- Suzanne Abler
- Autumn Anfang
- Carla Jane Durand
- Prasenjit Guptasarma
- Scott Hoffland
- Paul Klaibor
- Kim Litwack
- Brett Peters
- Beth Schaefer
- Leigh Wallace
- Stan Yasaitis

Executive / Project Sponsors
- Johannes Britz
- Robin Van Harpen

Executive Steering Team

ISS Leadership Team

Project Manager

Business Process Management Team

Implementation Readiness Team

- Guide, influence, and advise
- Provide input and guidance on policy questions and issues
- Support project communication and implementation efforts
ISS Project – Implementation Phase Project Structure

**Executive / Project Sponsors**
- Johannes Britz
- Robin Van Harpen

**Executive Steering Team**
- Sylvia Banda
- Bob Beck
- Tim Danielson
- Kelly Haag
- Kathy Heath
- Tom Scrivener
- Amanda Steinhoff
- Ted Wiebel
  (More to come)

**Implementation Readiness Team**

- Establish a formal approach to ensure that all stakeholders are involved in the ISS Organization go-live decision
- Determine the set of criteria/key factors that will be evaluated throughout the Implementation Phase to ensure adequate preparation for the ISS prototype implementation and confirm the go-live date
- Work closely with the Implementation Core Team, ISS Project Manager and ISS Leadership to successfully implement the ISS prototype hub environment
ISS Project – Implementation Phase Project Structure

Executive / Project Sponsors
- Advisory Committee
- Implementation Readiness Team

Executive Steering Team
- ISS Leadership Team

Project Manager
- Business Process Management Team

Implementation Core Team
- Service & Accountability Teams
  - Governance Team
  - Performance Measures Team
  - Service Level Agreement Team
- Facilities Planning & Transition Team Leads
  - Space Planning SME

Process Improvement Team Leads

Communication & Change Management Team Lead
- University Relations
- SMEs

Unit Liaisons
- Functional SMEs
The Core Implementation Team’s work will drive critical communication with staff and leadership in the supported units and inform decisions made by project and unit leadership related to:

- new roles for existing departmental and central office staff
- strategies to meet identified resource needs
- support for out-of-scope process changes

Implementation Core Team:

- Dave Crass
- Kristin Fekete
- Gina Halenka
- Heidi Janzen
- Christine Leung
- Karen Massetti-Moran
- Karen Miyoshi
- Yvette Alicia-Reed
- Jessica Russell
- Dan Siercks
- Amanda Steinhoff
- Susan Voit
- Linda Woods
- Erica Yewlett
- Kathy Heath (Lead)
ISS Project – Implementation Phase Project Structure

Service & Accountability Teams
Governance Team

- Autumn Anfang
- Mario Babicic
- John Bartelt
- Kelly Haag
- John Hubbard

The Governance Team’s work will focus on formal structures for communication and accountability and will inform decisions made by project and unit leadership related to:

- formal communication pathways between supported units, ISS, and central offices
- decision making processes to align ISS operations with supported units’ needs and priorities
- operating procedures to regularly address accountability measures and ongoing improvement
The Performance Measures Team’s work will inform decisions made by the project and unit leadership related to:

- Key Performance Indicators (KPIs) to gauge performance and measure progress towards goals
- Processes to track and analyze metrics
- Reporting tools for ongoing review of KPIs and ISS metrics
ISS Project – Implementation Phase Project Structure

Service & Accountability Teams

Service Level Agreements (SLAs)

- Bob Meyer
- Bobby Jo Morse
- Amanda Obermeyer
- Jarad Parker
- Vickie Schuh
- Chris Spadanuda
- Amanda Thompson
- Ayron Vander Linden
- Kim Wesley

The SLA Team’s work will inform decisions made by the project and unit leadership related to:

- process to establish ISS service expectations and targets
- tools to document and track service levels and improvements
- mechanisms for feedback and service assessments
ISS Project – Implementation Phase Project Structure

Process Improvement & Training Team Leads (Core)
- Andrew Thimmesch
- Karen Massetti-Moran
- Monica Rodriguez
- Carla Sagert
- Michael Enstrom (eWorkflow Project)

- Establish consistent approach for review and analysis of processes
- Coordinate efforts with the Implementation Core Team
- Recommend process improvement training plans
- Develop framework for prioritization of process improvement plans
ISS Project – Implementation Phase Project Structure

Communication & Change Management Team
• Amanda Steinhoff (Lead)
• Michelle Johnson (University Relations)
• John Schumacher (University Relations)
• Shannon Bradbury (SME)

• Recommend communication strategies
• Develop communication and change management plans
• Recommend specific messaging (content, delivery, timing)
• Generate ideas to address project obstacles
ISS Project – Implementation Phase Project Structure

Facilities Planning & Transition Team
• Geoff Hurtado (Team Lead)
• Mike Priem (Team Lead)
• Kristene Surerus (Space Planning SME)

• Work closely with the Implementation Core Team and ISS Leadership to determine location of hubs and create space for the Prototype Hub and subsequent hubs
Next Steps

• Team Onboarding Sessions through Friday, Aug 4th
  Sign in at: https://doodle.com/poll/4sv7at3emn288a7c

• Coordination of ISS Implementation activities (PIT, FPT and Core teams) – Thur, Aug 3rd (9:30am – 10:30am)
  • Detailed Scope of Work Discussion
  • Team Dependencies

• Week of Aug 7th
  • Implementation Core Team work begins
  • Detailed scope of work, plans and next steps for the other Implementation teams in project structure to be finalized and communicated to teams (with the exception of PIT teams that will continue with their work plans developed during Detailed Design)
‘Meet & Greet’ Your Team