

## **ISSP Meeting Notes 3.22.16**

**Tuesday, 3/22/16 (11am-12pm)**

**Library, 4<sup>th</sup> floor**

**Present:** Joan Aguado, Margie Anunson, Mario Babicic, Sylvia Banda, Bob Beck, Shannon Bradbury, Johannes Britz, Dave Crass, Tim Danielson, Eric Diertenberger, Keith Emmons, Kristin Fekete, Noelle Fredrich, Kim Garman, Mike Grypp, Kurt Hennemann, Pamela Hutchins, Mark Jacobson, Kevin Jahnke, Nicole Johnson, Paul Klajbor, Scott Kleba, Keith Kunkel, Bob Meyer, Mark Mielenz, Amanda Obermeyer, Tom Osmanski, Ron Perez, Brett Peters, Stephanie Plavec, Jen Powell, Julie Reindl, Dave Rice, Cara Sagert, Beth Schaefer, Angie Schmocker, JJ Stenitzer, Cal Stoffel, Jerry Tarrer, Amanda Thompson, Randy Trumbull, Robin Van Harpen, Kim Wesley, Joey Zafra

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**Slide 1: Welcome – ISS project steering committee kickoff by Robin Van Harpen and Johannes Britz, project co-sponsors**

- Robin highlighted the Chancellor's budget presentation of March 21<sup>st</sup> that acknowledged the ISS project team efforts and the university support for this project
- Johannes thanked the project team for their efforts to date and also stressed the importance of this project work to the university. He stated that while it is difficult to endure change, the end result will be a positive reshaping of services. He emphasized how important it is to take an approach where we start with small, incremental changes before transitioning to major changes. He also urged the teams to not lose sight of the importance of communication to dispel potential rumors.
- Johannes also touched on the potential in the long run for faculty to be able to move between different schools, share students, and stop duplicating courses.

**Slide 2: Project overview by Robin Van Harpen**

- Robin provided an overview of the project scope The team chose the four core functions based on the fact that they are the most common in examples from other universities.
- She stated that we are focusing on improved services (the number one goal), improvement of processes, and reduction of costs. She said that during the creation of the Chancellor's three-year plan, members debated whether to attribute up front project cost savings, however, these savings will be recorded starting in FY '18. We're looking for small, incremental savings.
- She also said that we want to reduce the amount of transactions through improved processes, increase value-added strategic work, and utilize technology when able.

### **Slide 3: Project team structure by Robin Van Harpen**

- Robin introduced the project team structure to the Steering Committee. The Provost (Johannes Britz) and Vice Chancellor, Finance & Administrative Affairs (Robin Van Harpen) are the two project sponsors, and the functional leadership team is made up of current operational heads – Finance & Accounting and Procurement (Jerry Tarrer), Human Resources (Tim Danielson) and Information Technology (Bob Beck), the Director Integrated Administrative Services (Kathy Heath) and Project Manager (Sylvia Banda). The project core team is comprised of the functional leadership team, functional team leads and the change management team which is responsible for communicating updates to the University. [https://panthers-my.sharepoint.com/personal/bandas\\_uwm\\_edu/\\_layouts/15/guestaccess.aspx?guestaccesstoken=6HELQ1nbX9%2bgc7a4bBslA9QVnpQyC1hHqhaeNlp2NeA%3d&docid=2\\_192e00c0964b14e7b9bca72d2a2114ed2](https://panthers-my.sharepoint.com/personal/bandas_uwm_edu/_layouts/15/guestaccess.aspx?guestaccesstoken=6HELQ1nbX9%2bgc7a4bBslA9QVnpQyC1hHqhaeNlp2NeA%3d&docid=2_192e00c0964b14e7b9bca72d2a2114ed2)

### **Slide 4: Role of steering by Robin Van Harpen**

- Robin indicated that as part of the selection criteria, the project leadership intentionally looked for individuals from academic areas and governance that are not necessarily involved in the day-to-day processes outlined in the project functional team makeup however, these individuals can serve as sounding boards as the project progresses. She also stated that this process would not take over the usual governance processes.

### **Slide 5: Accomplishments by Tim Danielson**

- Tim referenced the project charter for further project details. He also highlighted the project website itself as an accomplishment by the project team thus far.
- Tim also said that the project team had identified individuals involved in the completion of business processes, and we have analyzed example information from various, similar institutions.

### **Slide 6: Current status by Tim Danielson**

- Tim stated that as part of the current status, the functional teams are taking survey data into consideration and are validating processes as we understand them today. He also said that teams are now reaching out to stakeholders for follow-up input.
- Tim also sighted the March 10<sup>th</sup> communication from the Chancellor's Report which gave updates on the budget model and the ISS project.

### **Slide 7: Upcoming key milestones by Tim Danielson**

- Tim presented the upcoming key milestones and also said that the project team was currently working on the as-is phase, which will help inform the to-be phase that will follow.

## **Slide 8: Alignment with CCOET final report by Robin Van Harpen**

- Robin reported that the Chancellor had reviewed the ISS project, and the project team had ~~we~~ have received a recommendation for an outside consultant (Huron) to assist the project team. Huron has already been working with the procurement team on the Procure to Pay process.
- Robin emphasized that reorganizing personnel was not as important as evaluating the entire process involved.
- Robin mentioned that as next steps, the functional leadership team was developing a specific scope of work for Huron. She emphasized the fact that project leadership didn't want Huron to take over design, as it is important to create this for ourselves. She said that Huron would train us to identify key work processes during the as-is evaluation, and how to go through the process review stages. There are no recommendations yet as to whether consultant involvement would modify the timeline.

## **Next steps for steering by Tim Danielson**

- Tim stated that going forward there would be regular reporting and quarterly meetings with the project team. In addition to that, the project manager will send monthly reports.
- The final as-is report will go to the Steering Committee by the end of May.

## **1. Questions – Open to audience**

- Question: Would it be important to leverage some of the same Huron consultants who have already worked with us in the past? They would have more familiarity with us.
  - Tarrer: Huron has specialists but also works as a team. They are familiar with UWM and would send a shared services consultant.
  - Van Harpen: Huron should be able to build off of work done in the past.
- Do you have specific thoughts about what you want us to convey back to the groups that we're representing?
  - Tim Danielson: As you encounter discussion about the project, help provide your knowledge and expertise. Help other employees by encouraging them to be patient if they are worried about project, and to allow the project to run its course. Steering Committee members could share information in a meeting if necessary.
  - Tarrer: Help address rumors and misinformation. Function as project champions.
  - Van Harpen: The Steering Committee will monitor the right time for a campus-wide announcement with updates. The Change Management Team will provide updates to the Steering Committee.
  - Bob Beck: We have never known as much about business processes on campus as we do now. It's important to emphasize the length of the project, and systematic efforts being done to analyze data. There is also widespread involvement across campus.

- The CCOET report mentioned trying to align the implementation phase with budget model development. Is this still the case?
  - Danielson: The implementation phase will take time.
  - Van Harpen: FY '18 would be the first year where this project's planning would be reflected in the budget. We will have to make adjustments as we go, so the budget model shouldn't affect the timeline. The schools and colleges are also on a slower track to determine when and where units would be combined, so we want to stay flexible. Want to be flexible.
  
- Is there a discussion about long-term (2018 and beyond) ongoing service sharing and analysis?
  - Danielson: A major component the project is determine what we are measuring. We don't intend to have a perfect model by 2017 and then wrapping up the project. Rather, we will be making adjustments as we continue to refine project and process measurement. There could be opportunities even later to share services across other units based on our success.
  
- Who gets the as-is data? Who do we present to and how? Will there be reports or briefings?
  - The functional leadership team is discussing this now. There will be an as-is report soon, which should be accessible and understandable. The web also has a space for people to ask questions, which the Change Management team monitors. Individuals could be referred to this website if they have questions or need information.
  
- Should we look at efficiencies, cost savings, and better benefits as part of the shared services plan? Should we factor in new processes that might cost some money?
  - Danielson: We want to consider all variables. The functional leadership will help with this, as analysis can't be just about efficiency or effectiveness.
  - Eric Dietenberger: We want to put everything on the table, even if it will cost money, as part of as-is. Later, we could identify processes that would mitigate that cost. When you do the design, you could ferret out processes that cost too much money or time.
  - Van Harpen: The project as a whole is to improve effectiveness, efficiency, and cost effectiveness. There may not be resources available to functional areas to address all points, so that process could take time depending on funds available.
  
- As we go more towards the to-be design, will we receive more direction about what type of model to look at (centralized vs hybrid)? Is there any feedback on scope or structure?
  - Van Harpen: Huron can give more holistic view as to what the process would look like. One function could be more centralized while another may not be.
  - Tarrer: We are hoping to leverage Huron to identify structure-type tradeoffs. Huron will quantitatively help us understand tradeoffs and possible end points depending on the route.
  - Danielson: We don't want to impose a structure right away that could inhibit process improvement brainstorming.

- Comment: It may be useful from the beginning to think about Phase 4 (implementation plan). We won't be able to do everything we want right away but we may gain ideas through the design process.
  
- Would Huron help identify an ideal layout, for example centralized vs hybrid, and do this at same time of the to-be phase? Or, should their work start before that stage to avoid overlap?
  - Tarrer: Up front, we would want to make sure our work is meshing with Huron.
  - Beck: We're dealing with dynamic structure and don't know what the schools and colleges will be doing, but Huron can help. Other layouts could be geographical or functional, for example.
  
- Some individuals in schools and colleges have already identified some business processes ahead of our efforts. What has been done to gather that info? Can we find out what has and hasn't worked in those models?
  - Danielson: We are already working on this identification. The HR functional team will also continue to learn from all individuals involved.
  - Beck: IT has identified staff with shared services experience: Keith in BATO, and Dave Crass who has performed shared services research support for high performance computing.