

| Integrated Support Services (ISS) Project – Project Charter | |
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| Executive Sponsors | Johannes Britz & Robin Van Harpen |
| Project Sponsor | Robin Van Harpen |
| Project Manager | Sylvia Banda |
| Project Description / Statement of Work | |
| <p>The purpose of this project is 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. Among other goals, it is intended to accomplish long-term service efficiencies, effectiveness and make better use of technology, and enhance professional development opportunities in administrative areas.</p> <p><u>In Scope:</u></p> <ul style="list-style-type: none"> • Transactional / administrative work <ul style="list-style-type: none"> ○ The greater the likelihood of standardization, the more in scope ○ The greater the volume, the more in scope ○ The less complex, the more in scope • Strategic / Consultative work (<i>Partial Scope</i>) <ul style="list-style-type: none"> ○ Key administrators in divisions /schools / colleges may have a relationship with leadership in business centers of excellence such that strategic work is in scope ○ Other support services where we could leverage central structure and administration <p><u>Out of Scope</u></p> <ul style="list-style-type: none"> • Administrative Organizational Structure <ul style="list-style-type: none"> ○ Deans / division heads will continue to determine how they will receive strategic / consultative advice. | |
| Business Case / Statement of Need | |
| <ul style="list-style-type: none"> • A significant budget reduction for UWM is driving the institution to think of bold, innovative methods to deliver business functions for long term efficiencies and cost reduction savings • Present business practices/procedures, inefficiencies and opportunities for ineffectiveness. • Present business practices/procedures and compliance/security risks. | |
| Project Benefits | |
| <ul style="list-style-type: none"> • Long term cost savings on the administrative support side across the institution • Enhanced effectiveness of service <ul style="list-style-type: none"> ○ Deeper understanding of business processes by those involved in completing processes, including how to complete them, using appropriate tools, will decrease error in process completion. | |

- Enhanced efficiencies
 - Eliminating a central “gatekeeper” step in most processes will decrease the time necessary for process completion.
 - The introduction of an e-workflow platform to assist in process completion will increase the likelihood of processes being initiated correctly, decrease the time to route for approvals, and decrease necessary key stroking. This will result in decreased time necessary for process completion.
- Reduction of risk
 - Business process and technology standardization (software licensing compliance, purchasing compliance, information risk, cloud, etc.) will increase the likelihood processes are completed in a compliant way, reducing risk.
- Identification of career paths
 - Employees involved in delivering the function will be able to clearly see where they are and where they can go within the organizational structure.
- Appropriate alignment of salaries
 - Employee salaries readily align with the organizational structure of the function.
- Measuring effectiveness of regional centers through established metrics
 - Business process standardization allows for the establishment of metrics within regionalized business centers, subscribing to the theory that what gets measured will improve.
- Better utilization of technology
- Enhanced dissemination of communication
 - A clear, streamlined organizational structure around a business function allows for communication to occur easily.
- Clear understanding of accountability of individuals doing the work
 - Employees involved in completing business processes will not be responsible to a local administrator and a centralized gatekeeper.
- Employees reporting to supervisors with an understanding of their work
- Enhanced professional development opportunities
 - Levels within the organizational structure will have specific competencies associated with them. This allows employees to identify competencies of a higher level position, determine (with the assistance of their supervisor) what competencies they may need to develop, and determine a fitting professional development plan.
- Academic department administrators can focus attention on duties other than HR, BFS and IT
 - This should relieve some of the administrative functions burden on Faculty
- Role clarity and business process standardization established
 - In business process completion, who does what, when, and in what sequence, will be clear.
- Role clarity and a potential decision making model established for IT functions (e.g. desktop computing)
- Opportunity for CIO, CFO and CHRO roles to be more reflective of strategic nature of roles.

| Stakeholders | |
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| <ul style="list-style-type: none"> • Chancellor • Vice Chancellor of Finance & Administration Affairs (FAA) • Provost & Vice Chancellor Academic Affairs • Chancellor’s Cabinet • AVCs of Functional Areas • Academic Deans and Department Chairs • Academic and Research Program Directors / Managers • Directors and Managers of Administrative Units • Employees Involved in Delivery of Functions • Employees Accessing Services | |
| Project Definition | |
| Project Critical Success Factors | <ul style="list-style-type: none"> • Unwavering support of Chancellor and Chancellor’s Cabinet • Support and participation of Deans and Division Heads • Ability to identify and maintain necessary resources for implementation • UW System interaction with UWM Human Resources • Active participation/support of those on Advisory Team/other Project Teams Structure / Training and support for project teams / participants |
| Project Deliverables | <ul style="list-style-type: none"> • Phase 1: AS-IS Assessment (12 months) <ul style="list-style-type: none"> ○ Current State Assessment of Business & Financial Services (BFS), Human Resources (HR), and Information Technology (IT) functions • Phase 2: TO-BE Design (3 months) <ul style="list-style-type: none"> ○ Huron Engagement includes <ul style="list-style-type: none"> - Business case - Implementation Plan - Change Management Plan - Recommendations ○ Organizational Design Plan • Phase 3: Detailed Design (4 months) <ul style="list-style-type: none"> ○ Refined Organizational Design Plan • Phase 4 - Implementation: (3-18 months) <ul style="list-style-type: none"> ○ Staffing Strategy ○ Organizational Change Management Strategy & Plan |

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| | <ul style="list-style-type: none"> ○ Communication Strategy & Plan ○ Training Plan ○ Implementation / Roll-out Plan ○ Critical Success Factors for Implementation Evaluation ● Overall Project Management Deliverables <ul style="list-style-type: none"> ○ Project Plan & Framework ○ Stakeholder Identification Analysis ○ Risk Management Plan ○ Issues Management Plan ○ Communication and Change Management Plan ○ Stakeholder Status Reporting ○ Implementation Plan |
| Currently Identified Risks | |
| <ul style="list-style-type: none"> ● Perception that the effectiveness of services will go down ● PReps and UBRs may feel their level of influence will be decreased ● Fear of change ● Administrators feeling they have lost influence over those responsible for BFS, HR and IT functions in their area ● Availability of necessary technology appropriately timed ● The loss of current branding and identity in some decentralized areas ● Determining the geography of regionalized centers ● Space determined and developed for regionalized business centers ● The lack of staffing in IT may necessitate shuffling ● Within the new organizational structure, how will it be decided who fills what positions, including who will decide | |

- Areas of the University that have created their own complex structures
- Concern from those responsible for the completion of out of scope work
- Availability of project resources
- Successful implementation of an e-Workflow platform (BPLogix)
- Implementation and coordination across project teams

Currently Known Dependencies

- Decision making among inter-campus collaborations, the University of Wisconsin System Administration, including the UW Service Center must align with UWM objectives
- Financial investment in the project
- Availability of space

Currently Known Constraints

- Entrenched practices/procedures, structure and culture at UWM
- Employees feeling fatigued by change and seeking routinization

Milestones / Timeline

- Refer to detailed project plan

Project Budget / Resources

To be continually evaluated during project life cycle

- Consideration of overload/overtime for leadership of the project teams during the Detailed Design Phase
- Training for Process Improvement

| Project Team Roles and Responsibilities (AS-IS ASSESSMENT & TO BE DESIGN PHASES)- COMPLETED Sept 2016 | | | |
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| Roles | Name | Contact Information | Responsibilities |
| Advisory / Steering Committee | Suzanne Abler Margie Anunson Eric Dietenberger Beryl Foreman Peter Geissinger Prasenjit Guptasarma Randall Trumbull Holper Mark Jacobson Ron Perez Brett Peters Beth Schaefer Alan Shoho | | <ul style="list-style-type: none"> • Supports the Project Sponsor • Provides high-level advice and input |
| Executive Sponsors | Robin Van Harpen & Johannes Britz | Office of the Provost; Office of the Vice Chancellor, Finance & Administrative Affairs | <ul style="list-style-type: none"> • Champions the project throughout the university • Acts as the link between the project, the UWM Budget Planning Task Force, and management decision making groups |
| Project Sponsor | Robin Van Harpen | Office of the Vice Chancellor, Finance & Administrative Affairs | <ul style="list-style-type: none"> • Has overall accountability for the project • Provides business expertise and guidance to the Functional Leadership team • Acts as an arbitrator in making decisions that may be beyond the authority of the Functional Leadership team |
| Project Manager | Sylvia Banda | bandas@uwm.edu | <ul style="list-style-type: none"> • Provides process expertise, tracking and reporting • Responsible for planning, organizing, managing, controlling and communicating on all phases of project • Resolves issues and escalates to Functional Leadership team when required |

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| <p>Change Management Team</p> | <p>Co-Leads: Kathy Heath Kim Garman</p> | <p>zheath@uwm.edu garman@uwm.edu</p> | <ul style="list-style-type: none"> • Create change management strategy <ul style="list-style-type: none"> • Identify key change impacts • Develop and implement plan for change • Identify communication required to facilitate change • Identify and help to manage anticipated resistance • Create actionable deliverables for change management levers, including: communications plan, training plan, resistance management plan • Support communication efforts • Provide coaching, support and input to functional teams related to communication and change management activities • Integrate change management activities into project plan and monitor change progress |
| <p>Functional Leadership Team</p> | <p>Bob Beck</p> | <p>rjbeck@uwm.edu</p> | <ul style="list-style-type: none"> • Provides subject matter expertise and functional/subject matter expertise, ownership, leadership and accountability for assigned project results • Provides day-to-day leadership for planning and implementation of project • Provides business expertise and guidance to the Project Manager • Facilitates the identification of project resource requirements and works with resource managers and the project manager to construct project teams • Managers their functional teams and pursues the team’s given objectives (i.e. project tasks) • Resolves issues and escalates to Project Sponsor when needed |
| <p>Tim Danielson</p> | <p>danieltj@uwm.edu</p> | | |
| <p>Jerry Tarrer</p> | <p>jtarrer@uwm.edu</p> | | |
| <p>Kathy Heath</p> | <p>zheath@uwm.edu</p> | | |
| <p>Sylvia Banda</p> | <p>bandas@uwm.edu</p> | | |
| <p>Project Core Team</p> | <p>Functional Team Leads & Functional Leadership Team</p> | | <ul style="list-style-type: none"> • Attends and actively participates in project team meetings • Contributes to overall project objectives and specific team deliverables • Performs assigned activities defined in project plan |

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| Functional Team Leads | <p>Joan Aguado /Tom Scrivener (Procurement)</p> <p>Autumn Anfang (Procurement)</p> <p>Wendy Labinski (HR)</p> <p>Scott Kleba (IT)</p> <p>Keith Kunkel (IT)</p> <p>Karen Massetti-Moran (HR)</p> <p>Dave Rice (Finance / Accounting)</p> <p>Matt Schutz / Paul Klajbor (Finance / Accounting)</p> | | <ul style="list-style-type: none"> • Work with the functional leadership team and their respective functional team to achieve the key project goals and major objectives. • Maintain focus and provide clear direction to their functional team members. Be the champion for the project and be clear about the project’s priorities as well as require excellence from team members and support them • Keep their functional team members informed of key developments, project decisions, issues and changes to the project and / or project plan. Provide timely reporting and / or relevant information to the project core team. Also promote and support suggestions made by their functional team • Responsible for executing the project plan activities assigned to their functional teams. Also ensure that their respective functional team work plans are aligned to the overall project strategy, objectives and plan • Execute defined communication plan to ensure effective communication flow across all communication channels established within their respective functional teams • Negotiate amendments to the project plan with project manager / project core team especially those that change deliverable completion dates • Responsible for organizing, facilitating and ensuring follow-up action on issues raised in their functional team meetings to the project core team • Include their functional team in formulating decisions but should accept accountability for the decision • Make sure all their functional team members support the project |
| Functional teams | Human Resources | | <ul style="list-style-type: none"> • Performs assigned activities defined in project plan |
| | IT | | |

| | Finance / Accounting | | <ul style="list-style-type: none"> • Contributes to overall project objectives and specific team deliverables • Contributes subject matter expertise and input as needed throughout the project life cycle • Attends and actively participates in project team meetings as needed |
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| | Procurement | | |
| Project Team Roles and Responsibilities (DETAILED DESIGN PHASE)- Scheduled to begin Jan 2017 | | | |
| Roles | Names | Contact Information | Responsibilities |
| Executive Sponsors | Robin Van Harpen & Johannes Britz | Office of the Vice Chancellor, Finance & Administrative Affairs Office of the Provost | <ul style="list-style-type: none"> • Champion the project throughout the university • Acts as the link between the project, the UWM Budget Planning Task Force, and management decision making groups • Consider recommended strategies to address known project risks Receive and accept, escalate, or otherwise take action on recommendations |
| Project Sponsor | Robin Van Harpen | Office of the Vice Chancellor, Finance & Administrative Affairs | <ul style="list-style-type: none"> • Has overall accountability for the project • Provides business expertise and guidance to the Functional Leadership team • Acts as an arbitrator in making decisions that may be beyond the authority of the ISS Leadership |

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| <p>Executive Steering Committee</p> | <p>Robin Van Harpen Johannes Britz Tim Danielson Bob Beck Tom Scrivener Kathy Heath Sylvia Banda</p> | <p>Office of the Vice Chancellor, Finance & Administrative Affairs Office of the Provost AVC, Human Resources AVC, CIO Information Technology Interim Director, Purchasing Director Integrated Administrative Services, FAA Senior Project Manager</p> | <p>Make Decisions</p> <ul style="list-style-type: none"> • Responsible for initial model determination • Determine framework for the ultimate service delivery model and resource management design • Ratify final service delivery model and implementation plan |
| <p>Advisory Committee</p> | | | <ul style="list-style-type: none"> • Guide, influence and advise on the implementation of the ISS Organization • Support the implementation of the ISS Organization • Advise on the implementation of the initial hub and broad implementation • Provide input and guidance on policy and process issues that arise during implementation • Provide input into the Service Level Agreements • Garner buy-in and support from key stakeholders and address push back. Communicate project information as appropriate <p>Key Deliverable:</p> <p>1) Data Analysis, feedback and project support</p> |

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| Project Manager | Sylvia Banda | bandas@uwm.edu | <ul style="list-style-type: none"> • Define scope, plan and manage project delivery • Responsible for planning, organizing, managing, controlling and communicating on all phases of project • Provides process expertise, tracking and reporting • Ensures risks and issues are identified and communicated in a timely fashion • Works collaboratively across stakeholder groups to resolve complex issues and avoid risks to the project • Ensure the project team and key stakeholders are kept informed across relevant project activities • Communicate effectively with impacted staff and stakeholders • Manage change in coordination with team leads • Ensure effective operational handover of the project to the organization's operational team |
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| <p>ISS Leadership Team (will include ISSO Director)</p> | <p>Bob Beck Tim Danielson Kathy Heath Sylvia K Banda Tom Scrivener</p> | <p>rjbeck@uwm.edu tjdaniels@uwm.edu zheath@uwm.edu bandas@uwm.edu scrivene@uwm.edu</p> | <ul style="list-style-type: none"> • Provides subject matter expertise and functional/subject matter expertise, ownership, leadership and accountability for assigned project results • Provides business expertise and guidance to the Project Manager • Provide direction, empower, motivate and develop others to achieve project goals • Foster a partnership approach to working with key stakeholders • Establish and proactively manage project relationships • Assist with the facilitation of project team sessions as needed to encourage involvement and understanding of all aspects of change • Ensure the appropriate change expertise is engaged during the project to ensure compliance with campus policies and any people related changes • Facilitate the identification of project resource requirements and works with resource managers and the project manager to construct project teams • Manage their functional teams and pursues the team’s given objectives (i.e. project tasks) • Establish direction and vision for project teams • Resolve issues and escalates to Project Sponsor when needed • Take action on recommendations with decisions or escalation / support of recommendations to Executive Sponsors • Facilitate information gathering • Provide context and surface concerns • AVCs intervention to monitor and correct any team performance issues |
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| <p>Process Improvement & Training Team</p> | | | <ul style="list-style-type: none"> • For each of the core activities that will move to the ISS Organization, help determine and document processes, tools, practices, procedures and reporting guidelines for the initial ISS Organization processes • Prioritize processes for change / improvement • Support the creation of new processes, practices, procedures and reporting guidelines that will be used in the ISS Organization • Identify any additional workflow or technology changes needed to further optimize the processes, practices, procedures, reporting • Work with the Facilities Planning and Transition team to ensure this is worked into implementation • Provide recommended training guides for the new process rollout • Provide understanding, interpretation and articulation of campus culture, policies and procedures • Develop materials such as process flows, standard operating procedures, job descriptions and training manuals • Identify skills required for staff to perform these functions • Provide leadership, expertise and insight • Recommend ongoing review and continuous improvement of processes once the ISS Organization is operational • Recommend Onboarding Plan for new ISSO employees • Identification of any new or reconfigured IT tools <p>Key Deliverables:</p> <ol style="list-style-type: none"> 1) Flowcharts and standard operating procedures documenting the in-scope processes 2) Recommended policy changes 3) Skillset and task lists, training plans for process improvement |
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| | | | <p>4) Training plans and materials for new ISSO clients</p> <p>Organization Competencies:</p> <ul style="list-style-type: none"> ✓ Strong Communication and Change Management practices ✓ Ability to work collaboratively to utilize strengths of team members , facilitate and influence multi-disciplinary groups ✓ Strong interpersonal skills ✓ Excellent Problem Solving skills ✓ Thorough data and design analytical skills ✓ Focus on Results ✓ Rules and decision management ✓ Process Analysis ✓ Technical writing skills ✓ Detail Orientation |
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| <p>Organizational Design Team</p> | | | <ul style="list-style-type: none"> • Responsible for analyzing data and making detailed recommendations such as: <ul style="list-style-type: none"> ○ Number of hubs ○ Grouping of hubs ○ Location ○ Funding mechanism ○ Governance structure • Determine in-scope and out-of-scope activities • Recommend the design for hubs on the campus and recommend this model to the Executive Sponsors • Recommend hub grouping for Executive Sponsor approval • Recommend prototype and sequencing of hubs • Recommend staffing plan for hubs • Review options and recommend the funding mechanism for ISSO for Executive Sponsor approval • Provide guidance around mechanisms for accountability • Provide leadership, expertise and insight • Provide understanding, interpretation and articulation of campus culture, policies and procedures <p>Key Deliverables:</p> <ol style="list-style-type: none"> 1) Recommended ISSO model for the Executive Sponsors, including number of hubs, hub groupings, funding mechanism and governance structure <p>Organization Competencies:</p> <ul style="list-style-type: none"> ✓ Strong Communication and Change Management practices ✓ Thorough data and design analytical skills |
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| <p>Facilities Planning & Transition Team</p> | | | <ul style="list-style-type: none"> • Identify available space on campus and frame the challenges and opportunities related to the space • Identify the resources needed by the ISSO staff and provide significant input into the transition plan • Develop transition plan for staff to move staff into new space • Coordinate unit movement into physical space • Coordinate movement / sequencing to new space • Assess and recommend technology needs <p>Key Deliverables:</p> <ol style="list-style-type: none"> 1) Identification of a suitable space(s) for the initial hub that will be implemented 2) Coordinate and plan the physical preparation of the initial hub including furniture, telecom and modification of the facilities (if needed) <p>Organization Competencies:</p> <ul style="list-style-type: none"> ✓ Flexibility and Creativity |
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| <p>Communication and Change Management</p> | | | <ul style="list-style-type: none"> • Provide input into the communications strategy and specific communication pieces • Provide input into the implementation communication plan • Determine the most appropriate methods to reach each stakeholder group and campus community • Provide input into messaging (content, delivery and timing) • Help share the vision, dispel rumors and mitigate turbulence • Gather feedback and disseminate information throughout the implementation process • Keep the campus community informed about the project • Generate ideas to help overcome obstacles as they come • Provide leadership, expertise and insight • Provide understanding, interpretation and articulation of campus culture, policies and procedures <p>Key Deliverables:</p> <ol style="list-style-type: none"> 1) Communication Plan 2) Periodic communication delivered in a variety of formats <p>Organization Competencies:</p> <ul style="list-style-type: none"> ✓ Strong Communication and Change Management skills |
| <p>Functional Sub-groups (Accounting, HR, IT and Procurement) <i>these groups will vary over design and implementation</i></p> | | | <ul style="list-style-type: none"> • Subject matter experts for the functions in-scope • Be advocates for process improvements • Engage in discussions to resolve specific issues • Bring knowledge of local unit practices • Bring knowledge of central unit practices • Actively participate in process recommendations • Collaborate and recommend solutions • Review and address unresolved issues from the design and implementation phases |



INTEGRATED SUPPORT SERVICES

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| Unit Liaisons | | | <ul style="list-style-type: none">• Facilitate readiness activities to help build awareness and understanding within their 'units'• Bring a deep understanding as well as a perspective on the changes and challenges faced by the campus• Be the primary point of contact between the project and their unit• Understand the new processes and their impact on current unit operations• Disseminate information from Unit Rep meetings (presentations, messages, etc.) to their unit colleagues <p>Key Deliverables:</p> <ol style="list-style-type: none">1) Strong two-way communications and a collaborative approach when implementing the ISS Organization2) Support of the ISS Organization |
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| <p>ISS Team Leads</p> <p>Dave Crass, Kristin Fekete, Kelly Haag, John Hubbard, Karen Massetti-Moran, Mike Priem, Monica Rodriguez, Kim Wesley</p> | | | <p><i>Those of a team member (refer to Project Charter Roles and Responsibilities) plus:</i></p> <ul style="list-style-type: none"> • Provide guidance to team based on ISS Leadership direction. • Communicate and resolve coordination issues with other teams. • Ensure team is consistently delivering work to the standards established by ISS Leadership. • Clearly establish team priorities and facilitate completion of activities based on established priorities. • Ensure that the team takes collective responsibility for the work they do. • Effectively resolve issues within the team, escalating concerns to Functional Leadership as appropriate. • Ensure understanding of and adherence to the ISSP Guiding Principles and other project practices and consistently demonstrate commitment to project principles and practices. • Provide guidance and understanding about the scope and importance of work of the team so the entire team works together effectively and understands why they are so valuable. • Ensure collaboration with and among functional sub groups and subject matter experts. • Clarify and effectively communicate team objectives and requirements, ensuring team is focused on priority activities and issues are resolved in a timely manner and escalated to ISS leadership as necessary. • Document and report progress for visibility to the team, functional sub groups, other teams, and the ISS Leadership. • Lead and facilitate constructive communication with the team. • Develop a strategy to ensure team accomplishes its goals. • Recommend training for team and team members as appropriate. |
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| <p>ISS Lead PMOs</p> <p>Sylvia Banda, Natalie Benavides, Amanda Eischen, Dale Matenaer, Wendi Steinberg, Cal Stoffel</p> | | | <p><i>Those of a team member (refer to Project Charter Roles and Responsibilities) and provide support to the Team Lead role.</i></p> <p><i>In addition:</i></p> <ul style="list-style-type: none"> • Apply the project management process /structure established by the ISS Project Manager to the management of their team’s work plan. • Prepare the team work plan and ensure alignment with the overall ISS project plan developed by the ISS Project Manager. • Responsible for developing and implementing a timeline the team will use to accomplish their goals. • Ensure that all team members understand their roles and accept their responsibilities. • Escalate issues that cannot be resolved by the team to the ISS Project Manager and communicate team views to ISS Leadership. • Analyze risk and instigate avoidance activities. Establish contingency plans and identify trigger events and responsibility for initiating corrective actions. • Keep ISS Project Manager informed of progress, risks and issues. • Keep stakeholders informed of progress and issues. • Involve functional expertise in team’s key decisions and risk strategies. • Establish and publish clear priorities for team activities. • Coordinate the team’s management and technical decisions. • Arbitrate and resolve team conflict and escalate appropriately to the ISS Project Manager. |
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INTEGRATED SUPPORT SERVICES

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| | | | <ul style="list-style-type: none">• Ensuring that every member of the team is contributing to the work assigned to their team.• Remove impediments where possible and escalate to the ISS Project Manager when necessary, ensuring continued progress by the team.• Ensure that all team members turn up promptly to team meetings including stand up, retrospective and planning so that meeting time is most effective.• Communicate clear instructions to team members.• Listen to team members' feedback.• Provide input on the performance of team members to their respective functional leaders. |
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| <p>ISS Communications Lead</p> <p>TBD</p> | | | <p>Team Lead expectations as defined for all ISSP Team Leads (refer to Project Charter Roles and Responsibilities)</p> <p><i>Specific to the Communications / Change Management Team:</i></p> <ul style="list-style-type: none"> • Develop overall Communication Strategy in agreement with ISS Leadership. • Ensure timely delivery of key objectives as defined in the Communication Strategy. • Work closely with the ISS Leadership team to create communication messages. • Evaluate existing communications for consistency and effectiveness and suggest changes to improve or replace the current communication strategy. • Act as a liaison for the ISS Project with University Relations. • Synchronize ISS project communication efforts with other campus communication priorities. • Regularly meet with ISSP Leadership to identify communication needs for the ISS Project. • Provide input to the communications plan and timeline developed by the communications Team Project Manager. • Responsible for measuring the effectiveness of ISS Project communications. • Review all ISS project communication to ensure the brand and messaging is consistent. • Report to the ISS Leadership on all matters related to communication for the project. |
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| <p>ISS Change Management Lead</p> <p>John Hubbard</p> | | | <p>Team Lead expectations as defined for all ISSP Team Leads (refer to Project Charter Roles and Responsibilities)</p> <p><i>Specific to the Communications / Change Management Team:</i></p> <ul style="list-style-type: none"> • Clearly identify ISS project stakeholders and establish stakeholder groups, as well as their characteristics. • Apply a structured methodology and lead change management activities by applying the established change management process and tools to create a strategy to support adoption of the changes required by the ISS project. • Support the design, development, delivery and management of communications. • Assess the change impact by conducting impact analyses, assessing change readiness and identifying key stakeholders. • Support training efforts by providing input, documenting requirements, and supporting the design and delivery of training programs. • Work with stakeholders and the project team to prioritize collected change impacts. • Complete change management assessments. • Identify, analyze and prepare risk mitigation tactics. • Identify and manage anticipated resistance. • Provide input to the actionable deliverables for the five change management levers: communications plan, ISS roadmap, coaching plan, training plan, and resistance management plan. • Support the ISS organizational design and definition of roles and responsibilities. • Integrate change management activities into project plan. • Define and measure success metrics and monitor change progress. • Support change management at the organizational level. |
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INTEGRATED SUPPORT SERVICES

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| | | | <ul style="list-style-type: none">• Assist with the interpretation of change impacts into feasible options, and communicate these back to the ISS Leadership.• Communicate change impacts to Project Manager, ISSP Leadership, Sponsors, and other Stakeholders so that issues and solutions are clearly understood. |
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| Project Team Roles and Responsibilities (DETAILED D PHASE)- Kickoff scheduled for July 20, 2017 | | | |
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| Executive Sponsors | Johannes Britz Robin Van Harpen | Office of the Provost Office of the Vice Chancellor, Finance & Administrative Affairs | <ul style="list-style-type: none"> Champion the project throughout the university Acts as the link between the project, the UWM Budget Planning Task Force, and management decision making groups Consider recommended strategies to address known project risks <p>Receive and accept, escalate, or otherwise take action on recommendations</p> |
| Project Sponsor | Robin Van Harpen | Office of the Vice Chancellor, Finance & Administrative Affairs | <ul style="list-style-type: none"> Has overall accountability for the project Provides business expertise and guidance to the Functional Leadership team <p>Acts as an arbitrator in making decisions that may be beyond the authority of the Functional Leadership team</p> |
| Executive Steering Committee | Robin Van Harpen Johannes Britz Tim Danielson Bob Beck Tom Scrivener Ted Wiebel Kathy Heath Sylvia Banda | Office of the Vice Chancellor, Finance & Administrative Affairs Office of the Provost AVC, Human Resources AVC, CIO Information Technology Director Purchasing Controller Director Integrated Administrative Affairs Senior Project Manager | <p>Make Decisions</p> <ul style="list-style-type: none"> Determine framework for the ultimate service delivery model and resource management design Ratify final service delivery model and implementation plan |

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| <p>Advisory Committee</p> | <p>Suzanne Abler Autumn Anfang Carla Jane Durand Prasenjit Guptasarma Scott Hoffland Paul Klajbor Kim Litwack Brett Peters Beth Schaefer Leigh Wallace Stan Yasaitis</p> | | <ul style="list-style-type: none"> • Guide, influence and advise on the implementation of the ISS Organization • Support the implementation of the ISS Organization • Advise on the implementation of the initial hub and broad implementation • Provide input and guidance on policy and policy issues that arise during implementation • Provide input to the Service Level Agreements • Garner buy-in and support from key stakeholders and address push back • Communicate project information as appropriate <p>Key Deliverable: Data Analysis, feedback and project support</p> |
| <p>Project Manager</p> | <p>Sylvia Banda</p> | <p>bandas@uwm.edu</p> | <ul style="list-style-type: none"> • Define scope, plan and manage project delivery • Responsible for planning, organizing, managing, controlling and communicating on all phases of project • Provides process expertise, tracking and reporting • Ensures risks and issues are identified and communicated in a timely fashion • Works collaboratively across stakeholder groups to resolve complex issues and avoid risks to the project • Ensure the project team and key stakeholders are kept informed across relevant project activities • Communicate effectively with impacted staff and stakeholders • Manage change in coordination with team leads • Ensure effective operational handover of the project to the ISS Organization's operational team |

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| <p>ISS Leadership Team (will include ISS Manager)</p> | <p>Bob Beck Tim Danielson Tom Scrivener Ted Wiebel Kathy Heath Sylvia Banda</p> | <p>rjbeck@uwm.edu tjdaniels@uwm.edu scrivene@uwm.edu tdwiebel@uwm.edu zheath@uwm.edu bandas@uwm.edu</p> | <ul style="list-style-type: none"> • Provides subject matter expertise and functional/subject matter expertise, ownership, leadership and accountability for assigned project results • Provides business expertise and guidance to the Project Manager • Provide direction, empower, motivate and develop others to achieve project goals • Foster a partnership approach to working with key stakeholders • Establish and proactively manage project relationships • Assist with the facilitation of project team sessions as needed to encourage involvement and understanding of all aspects of change • Ensure the appropriate change expertise is engaged during the project to ensure compliance with campus policies and any people related changes • Facilitates the identification of project resource requirements and works with resource managers and the project manager to construct project teams • Manages their functional teams and pursues the team’s given objectives (i.e. project tasks) • Establish direction and vision for project teams • Resolve issues and escalates to Project Sponsor when needed • Take action on recommendations with decisions or escalation / support of recommendations to Executive Sponsors • Facilitate information gathering • Provide context and surface concerns • AVCs intervention to monitor and correct any team performance issues |
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| <p>Implementation Readiness Team</p> | <p>Sylvia Banda Bob Beck Tim Danielson Kelly Haag Tom Scrivener Amanda Steinhoff Ted Wiebel (More to come)</p> | | <ul style="list-style-type: none"> • Establish a formal approach that will ensure that all stakeholders are involved in the ISS Organization go-live decision • Determine the set of criteria /key factors that will be constantly evaluated throughout the Implementation Phase to ensure adequate preparation for the ISS prototype implementation and confirm the go-live date • Establish a feedback mechanism that will ensure alignment among all stakeholders throughout execution of the ISS implementation activities • Develop an Implementation Readiness Checklist derived from the defined set of criteria to be used to monitor progress of the implementation activities up till go-live date • Work closely with the Implementation Core Team, ISS Project Manager and ISS Leadership to define the steps required to successfully implement the ISS hub prototype environment • Develop a Risk Assessment Report and Escalation Process that will clearly and unambiguously illustrate the assumptions, risks and related issues that could potentially derail the prototype implementation, and the mitigation steps necessary to address those issues |
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| <p>Implementation Core Team</p> | <p>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)</p> | | <ul style="list-style-type: none"> • Develop framework for detailed data gathering to include individual job inventories, staff communication and feedback, and out of scope process details and needs assessment • Facilitate and carry out data gathering activities, coordinating efforts • Analyze data and stakeholder feedback to best inform staffing and transition planning • Develop and present recommendation for detailed staffing plan to ISS Leadership Team • Develop and present transition plan for out-of-scope process changes within supported units • Coordinate planning and execution of ISS transition activities, working closely with the ISS Project Manager and other Implementation Teams |
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| <p>Service & Accountability Teams</p> <p>Governance Team</p> | <p>Autumn Anfang</p> <p>Mario Babicic</p> <p>John Bartelt</p> <p>Kelly Haag</p> <p>John Hubbard</p> | | <ul style="list-style-type: none"> • Works closely with the ISS Leadership to establish accountability for the ISS Organization, Central Offices and Schools/Colleges/Divisions • Establish a structured approach that will be used to work with the Schools/Colleges/Divisions to understand their needs and clearly demonstrate improvements • Define ways in which the ISS Organization will interact with its key stakeholders such as the Central Offices and Schools/Colleges/Divisions • Develop mechanisms used to manage the ISS Organization’s relationship with its key stakeholders such as the Schools/Colleges/Divisions are involved in the decision making and shape of the ISS Organization • Define the decision making processes that will confirm that the ISS Organization’s operations and outcomes are aligned with the Schools/Colleges/Divisions strategic priorities and needs • Define channels that the ISS Organization and its key stakeholders will use to channel issues and communicate success |
| <p>Service & Accountability Teams</p> <p>Performance Measures Team</p> | <p>Elise Bechly</p> <p>Natalie Benavides</p> <p>Amanda Eischen</p> <p>Noelle Fredrich</p> <p>Chad Rathsack</p> <p>Cal Stoffel</p> <p>Cindy Wirtz</p> | | <ul style="list-style-type: none"> • Define Key Performance Indicators (KPIs) that are critical to the success of the ISS Organization, and that will gauge performance and measure progress against desired outcomes • Define a cascading process that will successfully measure, track and analyze metrics for the ISS Organization and the Schools/Colleges/Divisions served • Work closely with the Service Level Agreements (SLAs) team and ISS Leadership to determine KPIs that will be monitored and incorporated in the Service Level Agreements (SLAs) |

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| <p>Service & Accountability Teams</p> <p>Service Level Agreements (SLA) Team</p> | <p>Bob Meyer</p> <p>Bobby Jo Morse</p> <p>Amanda Obermeyer</p> <p>Jarad Parker</p> <p>Vickie Schuh</p> <p>Chris Spadanuda</p> <p>Amanda Thompson</p> <p>Ayron Vander Linden</p> <p>Kim Wesley</p> | | <ul style="list-style-type: none"> • Define and establish service expectations that will reinforce the ISS Organization accountability to the Schools/Colleges/Divisions • Work closely with the Performance Measures team and ISS Leadership to provide benchmarks to measure service performance against expectations in order to objectively measure whether expectations are met • Define the process of negotiating service targets to create a framework for capturing changing schools/colleges/divisions needs • Develop a feedback mechanism that will be used to assess the quality of support being given to the Schools/Colleges/Divisions • Establish a collaborative written agreement detailing the range of support services, levels of services to be provided to the Schools/Colleges/Divisions and expected performance levels between the ISS Organization and the Schools/Colleges/Divisions |
| <p>Communication & Change Management</p> | <p>Michelle Johnson (University Relations)</p> <p>John Schumacher (University Relations)</p> <p>Shannon Bradbury (SME)</p> <p>Amanda Steinhoff (Lead)</p> | | <ul style="list-style-type: none"> • Recommend communication strategies • Develop communication and change management plans • Recommend specific messaging (content, delivery, timing) • Generate ideas to address project obstacles |
| <p>Facilities, Planning & Transition Team</p> | <p>Kristene Surerus (Space Planning SME)</p> <p>Geoff Hurtado (Lead)</p> <p>Mike Priem (Lead)</p> | | <ul style="list-style-type: none"> • 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 |



INTEGRATED SUPPORT SERVICES

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| Functional SMEs | | | <ul style="list-style-type: none"> • Subject matter experts for the functions in-scope • Provide insights and knowledge of process details and service requirements • Address questions and provide input to address questions • Engage in discussions to resolve specific issues • Provide input to specific implementation activities related to area of expertise • Bring knowledge of local unit practices • Bring knowledge of central unit practices • Actively participate in process recommendations • Collaborate and recommend solutions • Review and address unresolved issues from the design and implementation phases |
| Unit Liaisons | | | <ul style="list-style-type: none"> • Facilitate readiness activities to help build awareness and understanding within their 'units' • Bring a deep understanding as well as a perspective on the changes and challenges faced by the campus • Be the primary point of contact between the project and their unit • Understand the new processes and their impact on current unit operations • Disseminate information from Unit Rep meetings (presentations, messages, etc.) to their unit colleagues |
| Revision History: | | | |
| Updated By | Updated On | Reasons for the Change | |

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| Sylvia K Banda | 5/12/15 | Initial Draft |
| Tim Danielson | 5/13/15 | Draft |
| Sylvia K Banda | 5/27/15 | Draft |
| Sylvia KBanda | 8/13/15 | Final Version |
| Sylvia K Banda | 4/15/16 | Project benefits and Project description |
| Pamela Hutchins | 7/14/16 | Revised project timeline to reflects changes in the AS_IS assessment from 5-6 months to 12 months) Huron Engagement includes business case, implementation plan, change management plan and recommendations for the PHASE 2 to -be section of project deliverables |
| Sylvia K Banda | 12/15/16 | Updated project charter with Detailed Design documentation(DRAFT) |
| Sylvia K Banda | 1/18/17 | Updated Project Charter following draft review of 12/15 with ISS Leadership. <ul style="list-style-type: none"> - Project Description / Statement of work (added 'effectiveness in SOW and rephrased Out of Scope statement) - Added Academic and research Program Directors / Managers & Directors and Managers of Administrative Units to Stakeholder list - Updated Project Critical Success Factors - Updated Currently Known Dependencies list - Updated Project Budget/ Resources section - Made revisions to Project Team Roles and Responsibilities for Detailed Design Phase |
| Sylvia K Banda | 2/7/17 | Updated Project Charter with Lead Roles and Responsibilities <ul style="list-style-type: none"> - ISS Team Lead - ISS Lead PMO - ISS Communications Lead - ISS Change Management Lead |
| Sylvia K Banda | 7/24/17 | Updated Project Charter with Implementation Phase Roles and Responsibilities - |



Acceptance and Authorization (Sponsor's Signature obtained on Jan 31st. Please refer to actual baseline copy scanned on Jan 31st and uploaded into the Final Deliverables folder. Has all changes as of that day. Any changes throughout the project lifecycle will be updated in this document)

Authorized by: _____
(Sponsor Name)

Date: _____

Authorized by: _____
(Project Manager Name)

Date: _____