

Chancellors Status Update October 26, 2018

UW-Shared Services Organization

UW-Shared Services was created in July, 2018. Since its creation, UW-Shared Services has been occasionally described as a “separate” or “independent” UW service organization. These descriptions have led to confusion.

Although a stand-alone entity, UW-Shared Services is a part of the UW System. As an entity within the University of Wisconsin System, UW-Shared Services *is*:

- wholly subject to the administrative authority of the Board of Regents;
- subject to the administrative supervision of the UW System President and the UW System Vice President for Administration;
- subject to all state and federal statutes, rules, and policies which govern the UW System; and
- dedicated to providing scalable operational services to UW institutions and UW System Administration

UW-Shared Services *is not*:

- an “independent” organization;
- a private, non-profit, or public-private entity;
- free of accountability to the President, Board of Regents, or the legislature
- outside the purview of UW System’s commitment to shared governance representation

Planning Project

Under the leadership of Executive Director Steve Wildeck, UW-Shared Services commenced detailed planning to develop standards and processes for the identification, proposal, assessment and decisions for shared services.

Our planning will continue through early 2019. Any potential services will align with at least one of the following:

- Priorities; as expressed in UW System strategic plans, goals, policies, and institutional leadership
- Needs; as expressed by the Board of Regents, UW System President and System leadership, institutional leadership teams including both functional teams and operational teams
- Opportunities; as presented by available expertise, timing, and/or capacity

Frameworks are being drafted to inform service-level decisions, and feedback will be sought from institutional stakeholders. These frameworks will include:

- Cost-benefit
- Performance and accountability standards
- Funding models (base funded, fee-for-service, blended)
- Participation models (mandatory vs. opt-in) and timing of adoption

These frameworks will be discussed with stakeholder groups within the next few weeks.

Customer Council

The Customer Council will be an advisory group that represents customers across the UW System, provides input and feedback on customer satisfaction, reviews and recommends service offerings, and assists with service design and service delivery.

The Customer Council will consist of three Provosts and three Chief Business Officers. Council members will serve terms of two to three years. Members will be selected to ensure geographic and institutional diversity of representation. Members have been solicited by Vice President Cramer and he will be announcing those appointments soon.

The first meeting of the Customer Council is expected by mid-November, as there are already a number of items for which feedback is needed. The detailed Customer Council charter was shared broadly and will be located at uwss.wisconsin.edu by November 1.

Services "Roadmap"

Discussions with institutional partners revealed a strong desire for more specific information regarding the services and processes that UW-Shared Services intends to provide.

Therefore, as part of the current planning project, the UW-Shared Services team will identify a set of proposed initial service priorities, and will begin socializing those ideas with functional teams (CIOs, HR directors, etc.) and the Customer Council. It is our goal to produce a conceptual roadmap by the end of December. This conceptual proposal will allow institutions to consider the potential service directions in their budget planning for 2019-20 and future fiscal years.

Tactical Response Service Needs

Some institutions and functional teams expressed needs for more immediate tactical support services, primarily due to staffing issues. Requests and expressions of interest have included services in accounts payable, purchasing, human resources, and occupational safety training.

While UW-Shared Services is several months away from being able to provide full services, UW Colleges & UW Extension Consolidated Services has capacity in some administrative areas to provide assistance by utilizing its current operations and processes. We welcome these opportunities. Please contact steve.wildeck@uwex.uwc.edu to inquire about available capacity in a specific administrative function.

Campus Visits

The UW-Shared Services management team is traveling to every comprehensive institution to meet with campus leaders and administrative stakeholders. The purpose of our visits is to engage our institutional level partners in active discussions around shared services.

Our visits provide an opportunity for candid questions, information sharing, and discussion of institutional needs and priorities. Typical visits include meetings with the chancellor, chancellor's cabinet, leaders of the initial priority areas (IT, HR, PRO), and meetings with functional team

staff (e.g., office of human resources staff). The eventual format of the visit is entirely up to the institution.

UW-Shared Services members attending the campus visits include:

- Steve Wildeck, Executive Director
- Diann Sypula, Director UW Service Center
- Jason Beier, Director of Human Resources
- Rhonda Loger, Director of Procurement
- Werner Gade, Director of Information Technology & CIO

Visits have already taken place at UW-La Crosse, UW-Oshkosh, UW-Parkside, and UW-Superior. Scheduling of other visits to comprehensive institutions is either complete or underway.

Conclusion

UW-Shared services will serve as a partner to UW System institutions. Our goal is to improve operational efficiency through standardization, consolidation, and streamlining, and by providing customer centered support to UW institutions. As previously stated, UW-Shared services is subject to the Board of Regents; will face administrative oversight by the UW System Vice President of Administration and UW System President; and will be regulated by all applicable state and federal laws.

For any questions, comments or concerns about UW-Shared Services, please do not hesitate to contact Steve Wildeck at steve.wildeck@uwss.wisconsin.edu, or 608-265-3040.