

# UW-Shared Services Customer Council – Meeting Summary

## Wednesday, 1/9/19

### **Attendees – All Members Present**

Provosts – Rob Ducoffe, UW-Parkside; Patricia Kleine, UW-Eau Claire; John Koker, UW-Oshkosh

Chief Business Officers – Grace Crickette, UW-Whitewater; Kristen Hendrickson, UW-Stevens Point; Bob Hetzel, UW-La Crosse

UW-Shared Services staff – Steve Wildeck, Executive Director

Invited Guests - Jason Beier, Director of Human Resources; Werner Gade, Director of Information Technology & Chief Information Officer; Rhonda Loger, Director of Procurement; Diann Sypula, Director of UW Service Center; Shawna Connor, Communications & Marketing; Amy Ziebell, Communications & Marketing

### **Meeting Summary**

#### Timeline of Events January-February, 2019

This was the second Customer Council meeting, and members discussed the timeline of events for the next several weeks. The UW-Shared Services (UWSS) Management Team wraps up the initial round of campus visits on January 23<sup>rd</sup>. These meetings provided campus leadership and HR/IT/Business Services team members the opportunity to meet UW-Shared Services Directors, ask probing questions and provide valuable input to those building UW-Shared Services.

The Town Hall Meeting on Thursday, January 10<sup>th</sup>, from 12-1pm, is intended to share with broader audiences the Customer Council information from the November 2018 meeting, including Definitions and Taxonomies, the Service Development Lifecycle and Funding and Participation Models. Council members discussed the possibility and benefits of future Town Hall Meetings and encouraged UWSS to consider them as appropriate.

UWSS has been working diligently on a Conceptual Roadmap, a collection of service ideas for the next two years, which is synthesized from a host of sources including assessments, strategic plans, institutional requests, functional team meetings and more. Council members were the first to review the Conceptual Roadmap, which is followed by socialization with Subject Matter Expert (SME) Councils in meetings facilitated by UWSS Directors the week of January 14<sup>th</sup>. UWSS Directors will have in-depth conversations with SME Councils the week of January 28<sup>th</sup> to gather feedback. February 11<sup>th</sup> begins a week of discussion with SME Councils on the Service Definition document, which is a pre-design document that contains much more detail about each proposed service. The service definitions are developed from the feedback provided during this process.

#### Overview and Discussion of UW-Shared Services Conceptual Roadmap

Council members discussed that the purpose of the Conceptual Roadmap is to begin the socialization and feedback processes. The document explains Participation and Funding Models, the five forms in which a service may be offered and the Service Development Lifecycle. The Lifecycle features three phases, and UWSS is in the first of four stages within the first phase.

UWSS Directors then gave brief overviews of their individual functional units within the Conceptual Roadmap. Council members asked questions, provided feedback on the proposed service array, and discussed the forms each service could assume.

#### Next Steps

Council members chose to reconvene in early February to receive an update on the Conceptual Roadmap socialization process and also to provide feedback on Service Definition documents.

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