UW-Shared Services Town Hall
1/10/19

Submitted Questions

COMMUNICATIONS

Is the January 10, 2019 Town Hall presentation available?

- Yes, please find the full presentation available on the UW-Shared Services website at https://uwss.wisconsin.edu/news-and-updates/.

FUNDING

How is UW-Shared Services being funded (where is the source of these funds) to deliver base services?

- UW-Shared Services activities will be funded through two primary sources; base funding and chargeback for services. The source of base funding is under consideration by UW System leadership. The sources and amounts of chargeback funding will be determined as service proposals are further developed.

If individual campuses will be impacted (costs to convert to a standard process, change systems, etc.) financially or resource-wise, how will these costs be covered or addressed within the UW-Shared Services business model?

- Incidental cost is an important consideration when implementing any change in process or service. It is too early to say exactly how any such cost will be addressed, but it will need to be.

SERVICES

Will travel be absorbed into UW-Shared Services in the future?

- This has been suggested and the decision to include travel in UW-Shared Services will be determined in future weeks – in accordance with the Decide phase process. (This response is dated Monday, January 21, 2019.)

Will consideration be given to move the audit of the pCards to UW-Shared Services?

- The Conceptual Roadmap will clearly reveal the services being proposed by UW-Shared Services. The Roadmap will be posted to the UW-Shared Services website on January 25.

PROCESS

What are criteria for identifying services under the Decide - Source phase?

- UW-Shared Services considers information and feedback from SME Councils, operational experience, past studies and audits, campus feedback or feedback from campus visits and discussions and individual suggestions.

Will the source of the shared service idea be communicated - i.e. a specific campus, a UWS initiative, etc. to help understand why the service is proposed?

- Yes.

What are the term lengths for members of the Customer Council?

- Term length is no more than three years, as determined by the Vice President of Administration – and cited here: https://uwss.wisconsin.edu/customer-council/.

What additional scrutiny will be used for mandatory services during the decide phase?

- Mandatory services may be recommended after considering risk, scale, complexity. Any services recommended by UW-Shared Services to be mandatory will require approval by Vice President of Administration and the UW System President.

What are the planned models for delivery of services - central, distributed but centrally managed, or other, as this will have a direct impact on staff and concerns?

- Delivery of services could be either, both or a combination of these options. Service delivery will depend upon specific characteristics of any particular service.

The Executive Director mentioned the "next two years" as part of the current timeline. Can you break that down and talk about what will be accomplished in the next two years and how the "Decide," "Develop," and "Deploy" phases fit in?

- Two years is a reasonable timeframe for planning our work and setting goals. Therefore, the Conceptual Roadmap has been created to focus our efforts in that timeframe. The service proposals contained within the Roadmap are now moving through the Decide phase. Those that survive that scrutiny will move into Develop, where they will be built. Services will be implemented during the Deploy phase. Depending upon stakeholder feedback, some services could move through these phases quickly (within months) while others will take longer.

How are the Customer Council and SME Councils involved in the Source phase of the service lifecycle? Who proposes the ideas?

- In this initial launch, councils are asked to respond to and provide feedback on these ideas. The sources of these ideas are varied; prior studies, emails, team comments, campus visits and more.

What is the process for identifying the need to initiate an end-of-life for a service?

- In the future, the need for service termination will be the same as identifying a new service or a change to an existing service. That info will come from SME Councils, Customer Council, institutional customers (campus staff) and UW-Shared Services staff.

How can an individual user propose a UW-Shared Services service?

- Individual users may propose a service by contacting the appropriate UW-Shared Services functional director or by submitting a request to feedback@uwss.wisconsin.edu.

What is the process for determining the final financial model for a service?

- The financial model will be recommended as part of a services business case and will consider factors such as: the recommended participation model, the level of fixed vs. variable cost, the level of need to incentivize and the ability or ease of tracking costs.

How does the talk of a new system ERP impact or guide what UW-Shared Services is going to do?

- Any major ERP project will require significant involvement by UW-Shared Services. UW-Shared Services will stay engaged in any conversations about an ERP.

How will you be sure to incorporate SME feedback into the development process for services?

- All feedback will be considered as UW-Shared Services further develops and defines services and business cases.

Isn't the 'consideration' of ideas for service development a strategy process and not a shared service operation process?

- The identification of service ideas is critical to supporting strategic plans, direction and goals. Identifying and defining how the services can be performed, what administrative considerations exist and what cost models are most appropriate all inform whether the services will support strategic direction.

Who is advising the Customer Council and SME Councils on UW System strategy and policy?

- The Customer Council consists of Provosts and Chief Business Officers. SME Councils consist of directors of various functions on a campus. All council members are part of groups that meet regularly with UWSA strategy and policy leaders.

Developed once and deployed to other campuses for commonly identified needs is usually a cost-effective strategy in the IT world. Will that be a consideration/initiative for the shared service concept?

- Taking advantage of economies of scale will be a factor always considered by UW-Shared Services. This is one approach to developing and deploying services which UW-Shared Services will use, along with many others, depending upon the service type, complexity, timeline, etc.

How will the roadmap be shared with Chancellors, Provosts, CBOs, etc.? Before or after you share with the SME Council?

- The roadmap will be shared with these parties after each SME Council has had a chance to see its respective proposed services in each function of the roadmap.

EVALUATION

What will be the ramifications if service levels are not met by UW-Shared Services?

- UW-Shared Services is responsible to its stakeholders and will strive to continually meet customer service standards; any problems that arise in service delivery will be thoroughly examined and appropriate actions taken to improve service to customers.

What is the assessment / feedback loop to determine if the delivered service truly and effectively addresses the stated need?

- That mechanism will vary for each service – because assessments will be different for services – and will be developed in the Develop and Deploy phases.

How are services reviewed and measured on performance and relevancy to the need of the customers? What is the frequency of the review process?

- Performance and accountability measures will mostly vary from service to service. Standards for review have not yet been established.

Will there be a process to communicate directly to the Customer Council in the future versus submitting comments to the general comments email?

- In response to this request, an e-mail account has been created: customercouncil@uwss.wisconsin.edu. Any message sent to this account will be directed to Customer Council members.

INTEGRATION

How will the UW-Shared Services process outlined today (January 10, 2019) affect current services, changes to them and additional services administered as part of the work of UW Service Center?

- For the foreseeable future or until further notice, processes used by UW Service Center to review, modify or otherwise consider changes to their services, will remain in place.

Can you give an example of a policy that would be managed by UW System Administration versus UW-Shared Services in one of the functional areas?

- Yes. UW System Administration manages any benefit that is offered to employees by the UW System, and not through the State of Wisconsin; for example, whether to offer UIA insurance would continue to be a decision made by UW System Administration. UW-Shared Services may provide assistance and guidance in how to administer those benefits, but the policy decision to continue the insurance would be from UW System Administration.

STRUCTURE/STAFFING

Who is the PMO listed under "next steps" sections?

- This question refers to the Decide phase flowchart, in cases where there has been a "No" decision by either the UW-Shared Services Executive Director or the UW System Vice President for Administration. A "No" decision means that a specific service proposal will not proceed in its current form through the Service Development Lifecycle. In the event of a "No" decision, the UW-Shared Services Project Management Office (PMO) will discuss the proposal with the function director, after which the proposal will either be modified and re-socialized with the appropriate SME Council or the proposal will be suspended.

What will the hiring process look like for the staffing of UW-Shared Services to ensure that individuals are qualified to provide the services?

- When a need to fill a position is identified, the duties will be defined and an appropriate title will be used. Requisite qualifications for the position will be identified based on the defined duties and an open search will be run in the

vast majority of cases.

Where are you in terms of a staffing model that clarifies who will work in HR, IT, and Business Services at campuses versus for UW-Shared Services, directly?

- We don't have that information at this time (January 2019), however, the most effective staffing model for service delivery will be chosen based on the service definition and needs and will have no limitation or requirement for particular geographic location.

Are consultants planned to supplement internal expertise to standardize services?

- UW-Shared Services plans to engage outside resources where necessary to efficiently and effectively move services through the services development lifecycle.

How large is the UW-Shared Services staff today, and what is the plan for staffing to provide services?

- As of January 10, UW-Shared Services officially has only four employees. As part of UW System restructuring, UW System leadership made the decision to preserve existing capacities of UW Colleges & UW-Extension in the areas of IT, HR, and Procurement, and to commit those resources to support shared services. As restructuring transition and closeout is completed, these resources can be reconfigured and redeployed to support UW-Shared Services.

As I'm sure you can understand (and as your site's FAQ section suggests), people understand that UWSS's primary directive has to do with improving operational efficiency, and this may result in the consolidation of positions. There is a lot of apprehension in this area and I'm finding that simply telling people that "it's no one's intention to cut jobs" isn't adequately addressing concerns. I don't expect UWSS to have a staffing model completely ironed out, but what can you share?

- Effect on jobs and effect on employment are distinctly different. UW-Shared Services will likely impact jobs, whether through standardization of processes, training to provide more professional support, or though the relocation of where transactional activity is performed. The effect on employment is far less clear and will likely be determined more by the

decisions of a customer institution than by UW-Shared Services.

Are the Subject Matter Expert (SME) Council and Customer Council meetings open to the public?

- SME Council and Customer Council members are not elected nor do the councils serve as a governing body, therefore their meetings do not meet the open meetings standard. Customer Council meeting agendas and summaries are available on our website, however, and can be found here: https://uwss.wisconsin.edu/news-and-updates/. Council members can also be reached throughout this process through our feedback@uwss.wisconsin.edu or customercouncil@uwss.wisconsin.edu email addresses.

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