



CONCEPTUAL ROADMAP

January 18, 2019

About UW-Shared Services

UW-Shared Services is a new organization within the UW System that advances UW's Commitment to Operational Reform & Excellence (CORE) agenda by streamlining and standardizing operations across the system to improve results through efficiencies and effectiveness in **Information Technology, Human Resources** and **Business Services**.

About the Conceptual Roadmap

This Conceptual Roadmap is a living document intended for review by stakeholders across the UW System, and aims to present three sets of information:

- An **overview of the structure** and decision-making process that *UW-Shared Services* will follow;
- A **high-level summary of the services** that *UW-Shared Services* may offer over next two years (FY2020 & FY2021) based on initial feedback from stakeholders; and
- The **next steps** that *UW-Shared Services* will follow after discussing this document with stakeholders.

How to Interpret this Roadmap

UW-Shared Services developed this roadmap based on feedback from stakeholders across the UW System, including leadership from the campuses, the Board of Regents, and UW System Administration. This roadmap is intended to explain to stakeholders which services *UW-Shared Services* will prioritize for development and deployment across the UW System. Stakeholders are encouraged to provide input to *UW-Shared Services* on this roadmap so that input can help guide the organization's direction in the future.

UW-Shared Services's Stakeholders

The UW System President established *UW-Shared Services* to accomplish the mission and goals identified previously. *UW-Shared Services* engaged a formal Customer Council comprised of three Provosts and three Chief Business Officers from UW campuses to advise and provide guidance to the new organization. Some of the stakeholders for *UW-Shared Services* include:

Campus Leadership

Provosts

Chief Business Officers

Chancellors

Subject Matter (SME) Councils

Directors of Human Resources

Chief Information Officers

Directors of Purchasing

Controllers

UW System Administration

Vice President for Administration

President

Board of Regents

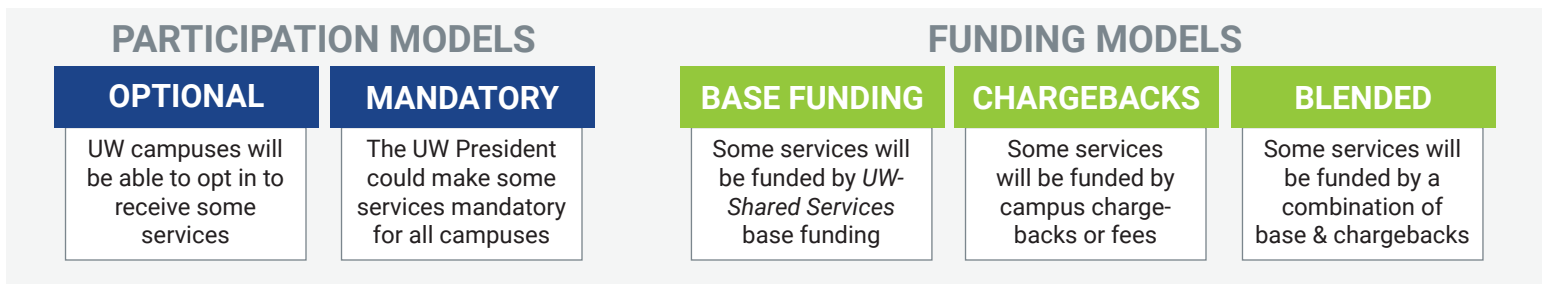
Decision-Making Process

No decisions have been made about which services will be provided by *UW-Shared Services*. As explained on pages 3 and 7 of this roadmap, *UW-Shared Services* will move through a formal feedback and decision-making process to determine which services to implement and how to implement them over the coming months.

UW-Shared Services has developed several structures and processes to ensure consistency and standards across all services provided in **Business Services, Human Resources, and Information Technology**.

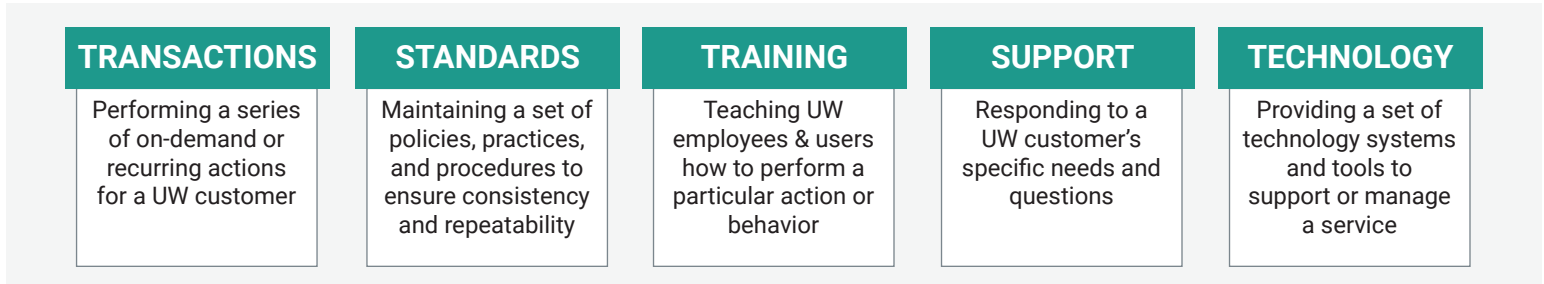
Models for Services

UW-Shared Services will work with stakeholders to determine the appropriate **Participation Model** and **Funding Model** for each service.



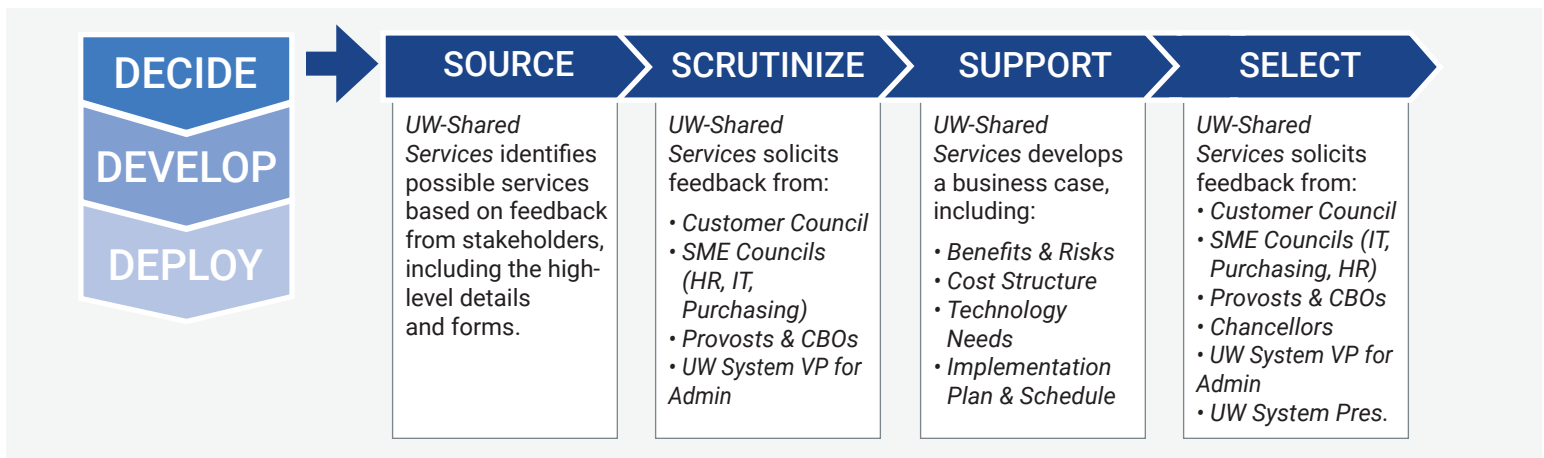
Forms of Services

UW-Shared Services will offer services in a variety of forms, based on the needs of stakeholders and the UW System as a whole. Some services may only have a few of these forms, while others could include all of them.



Service Development Lifecycle

UW-Shared Services will follow an approach comprised of the **Decide, Develop, and Deploy** phases. The **Decide** phase, focused on determining which services to implement, has four steps which are outlined below.

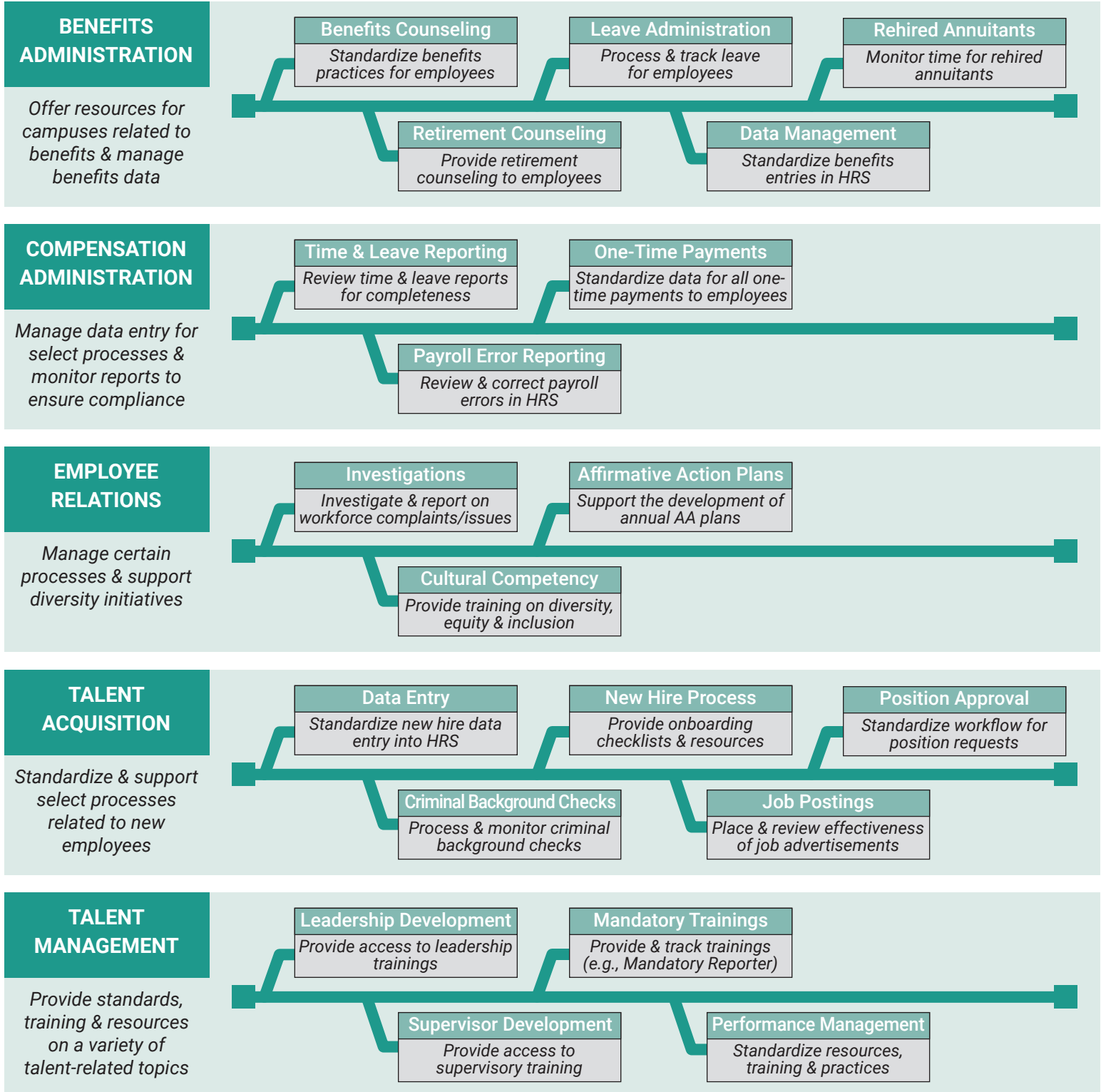


CONCEPTUAL ROADMAP

Human Resources

UW-Shared Services could focus on standardizing practices and training related to specific human resources processes, and offering some transactional support as requested by the campuses.

The following **20 Services** grouped into **5 Sub-Functions** were identified based on initial feedback from stakeholders.

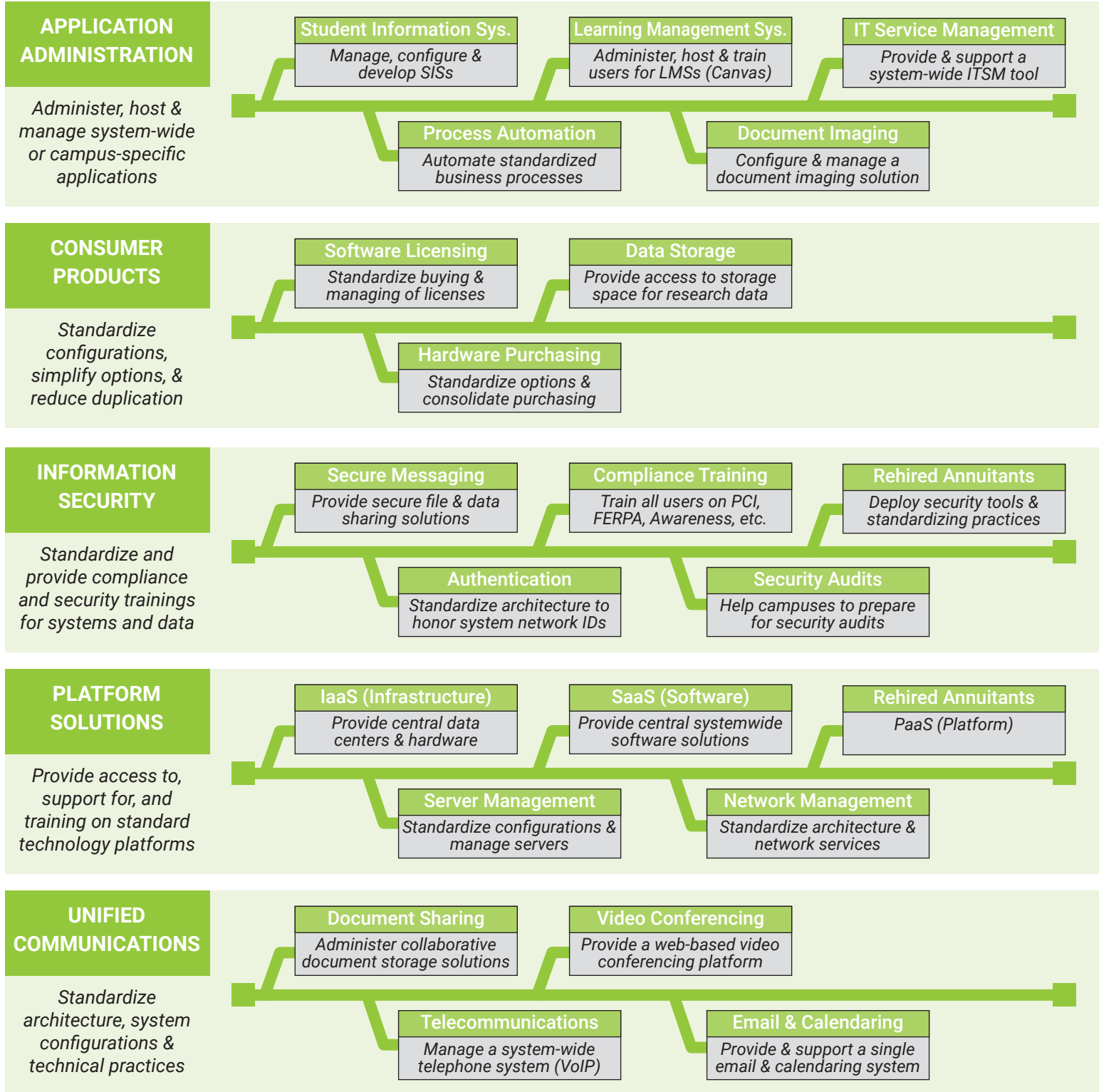


CONCEPTUAL ROADMAP

Information Technology

UW-Shared Services could focus on standardizing practices and training related to data and systems, and offer niche technical services that may be difficult or expensive for campuses to procure independently.

The following **22 Services** grouped into **5 Sub-Functions** were identified based on initial feedback from stakeholders.

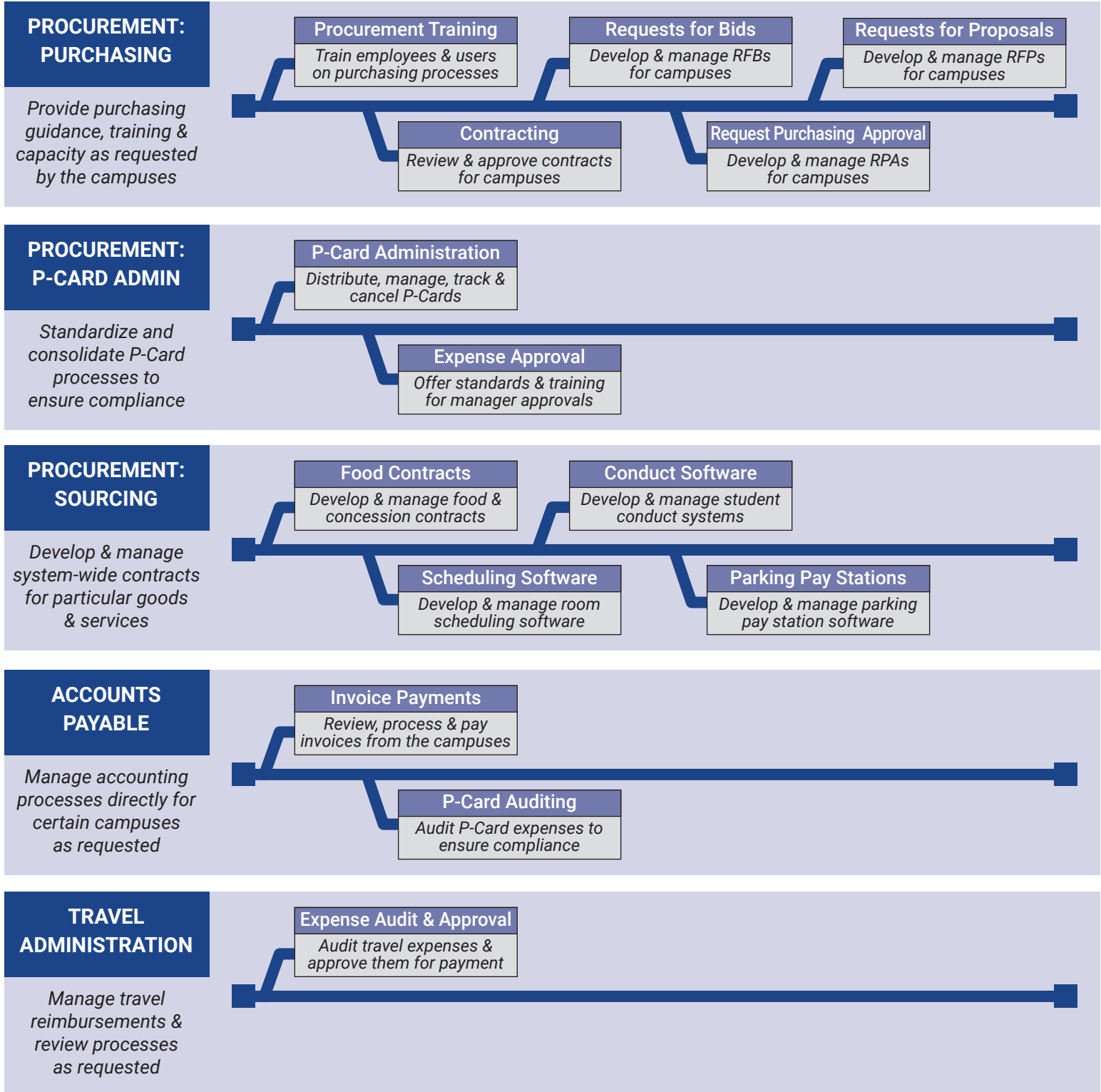


CONCEPTUAL ROADMAP

Business Services

UW-Shared Services could focus on standardizing business services and offering some optional transactional support as requested in five key areas, covering Procurement and General Accounting.

The following **14 Services** grouped into **5 Sub-Functions** were identified based on initial feedback from stakeholders.



Feedback

UW-Shared Services will be discussing the content of this roadmap with stakeholders across the UW System, including the Provosts; Chief Business Officers; leaders from the UW System Administration; and Directors of Human Resources, Information Technology, and Purchasing. Based on feedback from those stakeholders, *UW-Shared Services* will update the roadmap, develop additional detail for these services in the **Source** stage, and begin preparing to disseminate the first few services for review in the **Scrutinize** stage.

Source & Scrutinize Stages

UW-Shared Services will begin preparing to disseminate the first few services for review based on the feedback to this roadmap in February 2019. Several groups will be asked to provide additional feedback, including:

- The **Subject Matter Expert (SME) Councils** (the Directors of Human Resources, Information Technology, and Purchasing);
- The campus **Provosts**; and
- The campus **Chief Business Officers**.

The **Vice President for Administration** at UW System Administration will determine which services should be moved on to the next stage based on the feedback from stakeholders.

Support & Select Stages

Based on the feedback obtained in the **Scrutinize** stage, *UW-Shared Services* will develop detailed business cases for the desired services in March 2019. Several groups will be asked to provide feedback on these business cases, including:

- The **Subject Matter Expert (SME) Councils** – the Directors of Human Resources, Information Technology, Purchasing, and Accounting (Controllers);
- The **Chancellors**;
- The campus **Provosts**; and
- The campus **Chief Business Officers**.

The **President** and **Vice President for Administration** will decide which services should advance to the **Development** phase.

Contact Us

Please send any questions or comments on this roadmap to feedback@uwss.wisconsin.edu. Additional information is provided on *UW-Shared Services*'s website, <https://uwss.wisconsin.edu>.

CONCEPTUAL ROADMAP

Human Resources

APPENDIX - ADDITIONAL DETAIL FOR PROPOSED SERVICES

The following table offers additional detail on the services that could be offered in the first two years related to Human Resources. They are in no particular order.



Name	Description	Forms of Service					Sources
Employee Relations - Manage certain processes & support diversity initiatives							
Investigations	Conduct investigations; Provide reports on discrimination, complaints & disciplinary matters.	●	●	○	●	○	UWSA HR Transformational Workgroup; UW-Shared Services Campus Visits
Cultural Competency	Provide professional development on awareness & appreciation of diversity/equity principles & practices.	○	○	●	●	●	UWSA HR Transformational Workgroup
Affirmative Action Plans	Create, draft and/or prepare annual Affirmative Action Plans, including analyzing data and setting standards.	●	●	○	●	○	UWSA HR Transformational Workgroup
Talent Aquisition - Standardize & support select processes related to new employees							
Criminal Background Checks	Process & monitor criminal background checks for applicants/employees; Communicate results with customers.	●	●	●	●	●	UWSA HR Transformational Workgroup;- Campus HR Directors
Data Entry	Standardize new hire data entry into HRS; Provide UW System orientation resources to customers.	●	●	○	○	●	UWSA HR Transformational Workgroup; Campus HR Directors
Orientation Checklist	Provide onboarding checklists & resources to ensure provisioning, access & compliance with applicable law.	●	●	●	○	○	UWSA HR Transformational Workgroup; Discussions w/Campus HR teams
Job Postings	Post advertisements for jobs; Track effectiveness of placements; Pursue systemwide publication contracts.	●	●	●	●	●	UWSA HR Transformational Workgroup; Campus HR Directors
Position Approval	Develop & standardize automated workflow for requesting new position & securing necessary approvals.	●	●	○	●	●	UWSA HR Transformational Workgroup; Discussions w/Campus HR teams
Talent Management - Provide standards, training & resources on a variety of talent-related topics							
Leadership Development	Coordinate professional development resources & design/deliver skills development training for leaders.	○	○	●	○	●	UWSA HR Transformational Workgroup; Campus HR Directors
Supervisor Development	Design/deliver in-person or online training & instructional material for supervisory development.	○	○	●	○	●	UWSA HR Transformational Workgroup; Campus HR Directors
Mandatory Trainings	Track, modify & monitor completion of mandated training (e.g., Sexual Harassment, Mandatory Reporter).	○	●	●	○	●	UWSA HR Transformational Workgroup; Campus HR Directors
Performance Management	Standardize resources/materials for performance management & provide EPerformance tool.	○	●	●	●	●	UWSA HR Transformational Workgroup; Campus HR Directors

CONCEPTUAL ROADMAP

Human Resources

APPENDIX - ADDITIONAL DETAIL FOR PROPOSED SERVICES

The following table offers additional detail on the services that could be offered in the first two years related to Human Resources. They are in no particular order.



Name	Description	Forms of Service					Sources
Compensation Administration - Manage data entry for select processes & monitor reports to ensure compliance							
Time & Leave Reporting	Ensure timesheets & leave reports are appropriately entered in HRS & approved by supervisors.	●	●	●	●	●	UWSA HR Transformational Workgroup; Campus HR Directors
Payroll Error Reporting	Review payroll edits, payroll error messages & missing payroll reports; Make necessary corrections to payroll data.	●	●	○	○	○	Regional Cloud Sessions (Aug 2018)
One-Time Payments	Standardize data entry for all one-time payments to employees in HRS.	●	●	●	●	●	UW-Shared Services/Service Center Suggestion
Benefits Administration - Offer resources for campuses related to benefits & manage benefits data							
Benefits Counseling	Standardize documentation; Provide resources & best practices for benefits counseling.	○	●	●	●	●	UW-Shared Services/Service Center Suggestion
Retirement Counseling	Provide retirement information & counseling to employees before retirement consultation with ETF.	○	●	●	●	●	UWSA HR Transformational Workgroup
Leave Administration	Monitor leave reporting to ensure compliance with leave entitlements; Certify sick leave amounts for retirement.	●	●	○	●	○	HR Summer Conference; Regional Cloud Sessions (Aug 2018)
Data Management	Process benefit entries in HRS (e.g., adjusted continuous service dates) & other ETF data entry.	●	●	○	●	●	HR Conference; Regional Cloud Sessions; UWSA HR Transformational Workgroup
Rehired Annuitants	Monitor hours worked by rehired annuitants to ensure compliance with applicable restrictions under state law.	●	●	○	●	●	UW-Shared Services/Service Center Suggestion

CONCEPTUAL ROADMAP

Information Technology

APPENDIX - ADDITIONAL DETAIL FOR PROPOSED SERVICES

The following table offers additional detail on the services that could be offered in the first two years related to Information Technology. They are in no particular order.



Name	Description	Forms of Service					Sources
Application Administration - Administer, host and manage systemwide or campus-specific applications							
Student Info Systems	Administer, maintain, support, develop & upgrade campus-based PeopleSoft Student Information Systems.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	Campus CIOs; UW-Shared Services Campus Visits
Process Automation	Administer BP Logix & other process automation software by providing web form and automation development services.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	Campus CIOs; UW-Shared Services Campus Visits
Learning Mgmt Systems	Administer Learning Management Systems (e.g., Canvas); Manage professional development for learning technologies.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	DLE Project Team
Document Imaging	Administer, host, configure & manage a document imaging solution (e.g., ImageNow).	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	Campus CIOs
IT Service Management	Provide & support an IT Service Management tool covering incidents, problems, changes, and assets.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UW-Shared Services Campus Visits
Consumer Products - Standardize configurations, simplify options, and reduce duplication							
Hardware Purchasing	Develop standardized hardware options for workstations & other IT equipment; Consolidate purchasing for consistency.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	UW-Shared Services Campus Visits
Software Licensing	Standardize purchasing processes; Consolidate purchasing/management of software licenses to ensure compliance.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	UW-Shared Services Campus Visits
Data Storage	Provide a standardized central repository for the storage of research data to campus faculty & staff.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	Campus CIOs
Information Security - Standardize and provide compliance and security trainings for systems and data							
Secure Messaging	Provide secure file & data sharing solutions for sharing e-Pfiles and confidential data.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UWSA General Counsel; UWSA OIS
Authentication	Standardize architecture & practices for authentication; Prepare systemwide authentication solutions.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UWSA OIS; UW-Shared Services Campus Visits
Compliance Training	Develop & deliver training to users/employees on Payment Card Industry (PCI), FERPA, and security awareness.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Campus CIOs; UWSA OIS; UW-Shared Services Campus Visits

CONCEPTUAL ROADMAP

Information Technology

APPENDIX - ADDITIONAL DETAIL FOR PROPOSED SERVICES

The following table offers additional detail on the services that could be offered in the first two years related to Information Technology. They are in no particular order.



Name	Description	Forms of Service					Sources
Information Security - Standardize & provide compliance and security trainings for systems and data							
Security Audits	Develop consistent approaches for audit responses; Assist campuses in preparing for or responding to security audits.	●	●	○	●	○	Campus CIOs; UW-Shared Services Campus Visits
Security Operations	Deploy security tools & standardized practices; Manage enterprise assets; Monitor security vulnerabilities & attacks.	●	●	●	●	●	Campus CIOs; UWSA OIS; UW-Shared Services Campus Visits
Platform Solutions - Provide access to, support for, and training on standard technology platforms							
IaaS (Infrastructure)	Provide computer room capacity in central data centers for equipment owned, managed & supported by campuses.	○	●	○	●	●	Campus CIOs; UW-Shared Services Campus Visits
Server Management	Manage & support systemwide server hardware; Standardize processes & practices for server management.	○	●	○	●	●	UW-Shared Services Campus Visits
SaaS (Software)	Administer & manage systemwide software solutions for vendor-supported hardware or software.	○	●	○	●	●	Campus CIOs; UW-Shared Services Campus Visits
Network Management	Standardize local/wide area network architecture, hardware & practices to facilitate access, shared printing, WiFi, etc.	○	●	○	●	●	2015 Huron Assessment; Campus CIOs; UW-Shared Services Campus Visits
PaaS (Platform)	Manage hardware & software to run institution or systemwide applications (combination of IaaS & SaaS).	○	●	○	●	●	Campus CIOs; UW-Shared Services Campus Visits
Unified Communications - Standardize architecture, system configurations and technical practices							
Document Sharing	Administer collaborative document sharing solutions for low & medium risk information; Standardize collaboration practices.	○	●	●	●	●	Campus CIOs; DoIT; Common Systems; UW-Shared Services Campus Visits
Tele-communications	Manage a single systemwide telephone system (VoIP); Standardize phone equipment options & services.	○	●	●	●	●	Campus CIOs
Video Conferencing	Manage a standard architecture & platform for web-based video conferencing, webcasting & distance learning.	○	●	●	●	●	Campus CIOs; EMTC; UW Colleges Office of Distance Learning
Email & Calendaring	Provide a single email & calendaring system to improve the efficiency of meeting facilitation and reducing duplication.	○	●	●	●	●	Campus CIOs

CONCEPTUAL ROADMAP

Business Services

APPENDIX - ADDITIONAL DETAIL FOR PROPOSED SERVICES

The following table offers additional detail on the services that could be offered in the first two years related to Business Services. They are in no particular order.



Name	Description	Forms of Service					Sources
Procurement: Purchasing - Provide purchasing guidance, training & capacity as requested by the campuses							
Procurement Training	Train employees & users on purchasing practices/processes, spending/approval authorities & procurement policies.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	UW-Shared Services Campus Visits
Contracting	Review & approve purchasing contracts for goods and services for campus employees.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UW-Shared Services Campus Visits
Requests for Bids	Develop Requests for Bids (RFBs); Manage the vendor selection process for campuses.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UW-Shared Services Campus Visits
Requests for Proposals	Develop Requests for Proposals (RFPs); Manage the vendor selection process for campuses.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UW-Shared Services Campus Visits
Request Purch. Authority	Develop Requests for Purchasing Authority (RPAs); Manage the vendor selection/authorization processes for campuses.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UW-Shared Services Campus Visits
Procurement: P-Card Administration - Standardize & consolidate P-Card processes to ensure compliance							
P-Card Administration	Distribute, manage, track & cancel P-Cards for campuses; Train end users/employees on the processes & policies.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UW-Shared Services Campus Visits
Expense Approval	Offer standards & train managers on the appropriate processes & practices for manager on the campuses.	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	UW-Shared Services Campus Visits
Procurement: Sourcing - Develop & manage systemwide contracts for particular products to leverage buying power							
Food Contracts	Develop & manage systemwide contracts for food/concession that the campuses can leverage.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Campus Feedback
Scheduling Software	Develop & manage systemwide contracts for room scheduling software that the campuses can leverage.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Campus Feedback
Conduct Software	Develop & manage systemwide contracts for student conduct information systems that the campuses can leverage.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Campus Feedback
Parking Pay Stations	Develop & manage systemwide contracts for parking pay station software systems that the campuses can leverage.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Campus Feedback

CONCEPTUAL ROADMAP

Business Services

APPENDIX - ADDITIONAL DETAIL FOR PROPOSED SERVICES

The following table offers additional detail on the services that could be offered in the first two years related to Business Services. They are in no particular order.



Name	Description	Forms of Service					Sources
Accounts Payable - Manage accounting processes directly for certain campuses as requested							
Invoice Payments	Review, process & pay invoices submitted by campus employees; Resolve issues with vendors.	●	●	●	●	●	Campus Feedback
P-Card Auditing	Audit P-Card expenses from campus employees to ensure compliance; Resolve issues/non-compliance.	●	●	●	●	●	Campus Feedback; UW-Shared Services Campus Visits
Travel Administration - Manage travel reimbursements & review processes as requested							
Expense Audit & Approval	Audit travel expenses from campus employees; Approve appropriate travel expenses for payment.	●	●	●	●	●	UWSA Feedback; Campus Feedback