

UW-Shared Services Customer Council – Meeting Summary

Monday, 6/17/19

Attendees

Provosts – Rob Ducoffe, UW-Parkside; Patricia Kleine, UW-Eau Claire; John Koker, UW-Oshkosh (not present)

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, UW-Shared Services Director of Human Resources; Amy Ziebell, UW-Shared Services Communications & Marketing

Meeting Summary

Operational Status Update

Customer Council members discussed the UW-Shared Services work portfolio, including Service Development; Soft Launch of Services; Base & Cyclical Operations; Prioritized Operational Projects and Organizational Development. Specifically, regarding Service Development, 15 initial Service Definitions were approved by President Cross in March and those are now moving forward through development. Council members were reminded the organization is providing tactical services to some institutions and soft launching some Roadmap services as well. Base & Cyclical Operations includes all the work done every day to keep the organization running, and Prioritized Operational Projects involves upgrades and maintenance items that do not individually constitute services. Finally, members received an update on the activities underway to develop the UW-Shared Services organization.

Design Review

Council members discussed the first Roadmap service that is through the design phase – Mandatory Employee Training. UW-Shared Services Director of Human Resources Jason Beier joined members to talk about the goals and functional flow of this service. Deployment is expected to begin in September. Key design features include:

- The service will use Canvas as the electronic environment to support mandatory employee training.
- Employees will be automatically prompted via e-mail, with scheduled reminders and eventual institutional notification if training is not completed.
- Training completion data will be maintained in HRS, via an interface with Canvas.
- The system is scalable for additional training programs, mandates and employee populations.

Roadmap Changes & New Service Definition Review

Beier then shared information with members about Roadmap changes, including the addition of Sexual Harassment Reference Checks and the combining of Payroll Error Reporting and Time and Leave Reporting into a single service titled Time and Leave Administration. Council members were briefed on the Service Definitions for Sexual Harassment Reference Checks and Time and Leave Administration.

Organizational Status Update

Customer Council members discussed the complexities and technology involved with creating a new UW-Shared Services organization. Executive Director Steve Wildeck emphasized that everything the organization does internally will be seen externally and must result in a high level of customer service. Council members learned a kickoff was scheduled for the following week, bringing all the organization's members together for a morning meeting.

UW-Shared Services Customer Council – Meeting Summary Continued

Budget Status

Council members were made aware that former UW Colleges Associate Vice Chancellor Colleen Godfriaux has stepped into an acting role as Finance Officer for UW-Shared Services, working on financial modeling and planning. Members also heard from Wildeck that discussions were ongoing with UW System Administration about what the funding structure will look like for UW-Shared Services.

Next Meeting

Council members discussed holding a late summer meeting and were reminded of the many ways to offer feedback to UW-Shared Services.

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