



# ROADMAP

*July 3, 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 Roadmap

This 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	

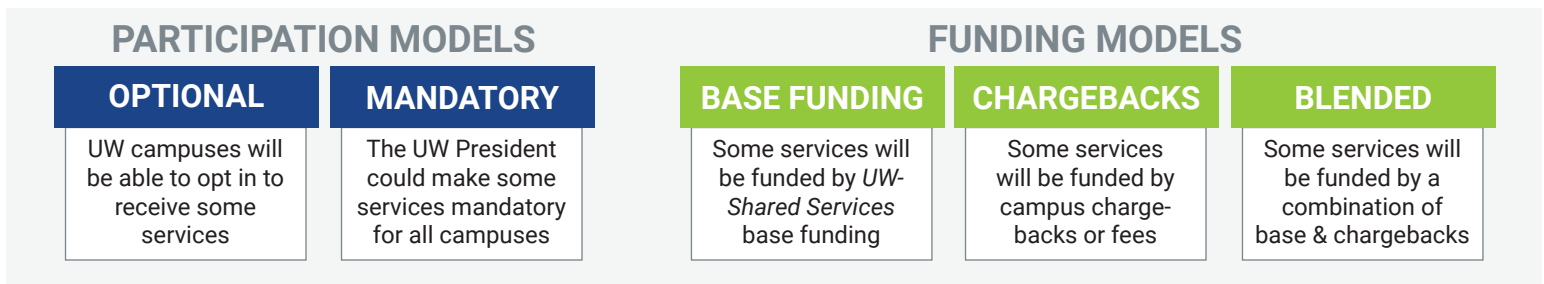
## Decision-Making Process

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**.

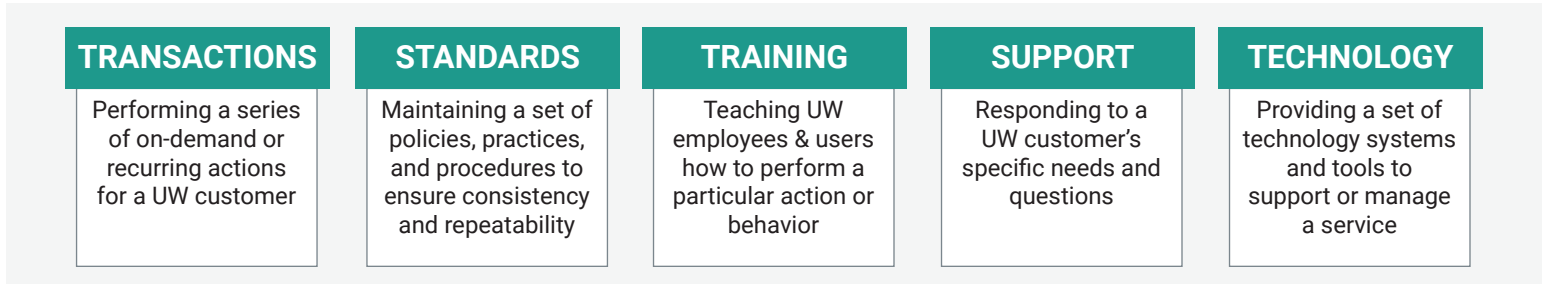
## Models for Services

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



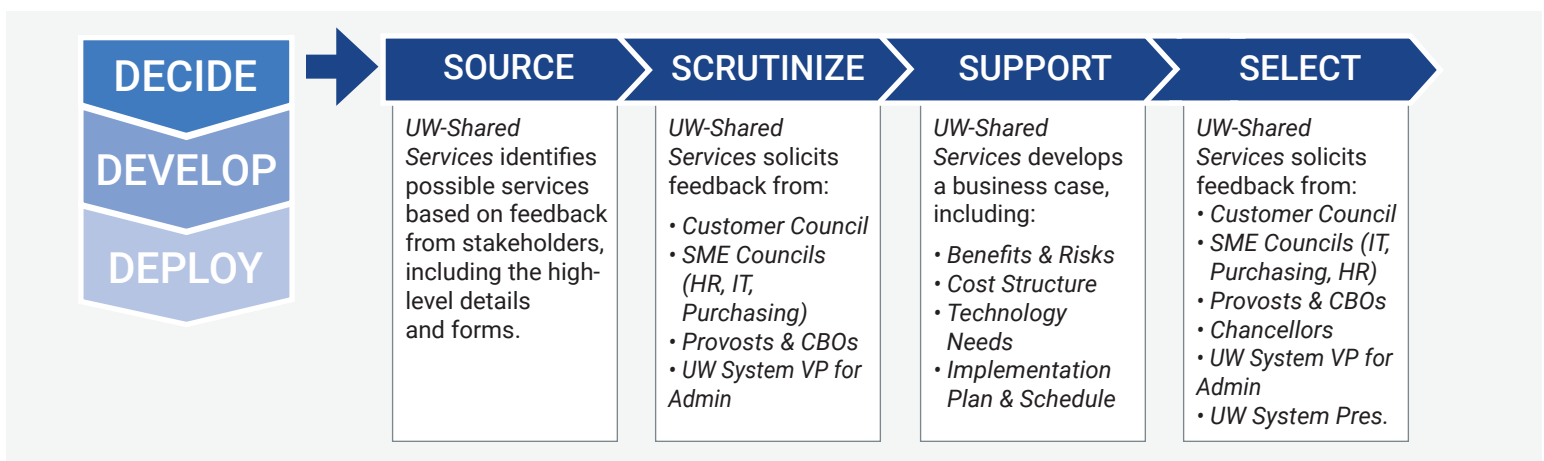
## Forms of Services

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.

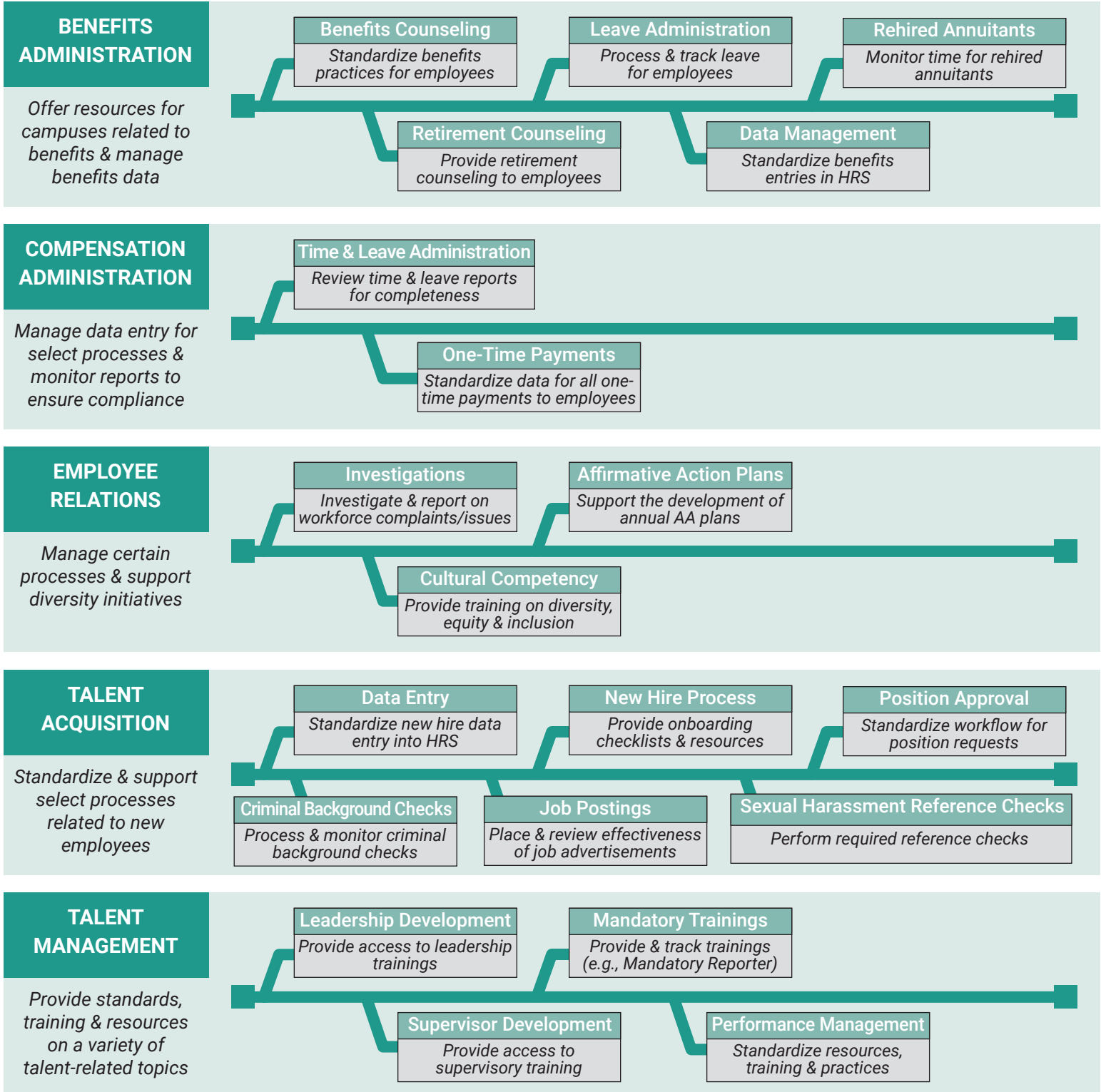


# ROADMAP

# 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.

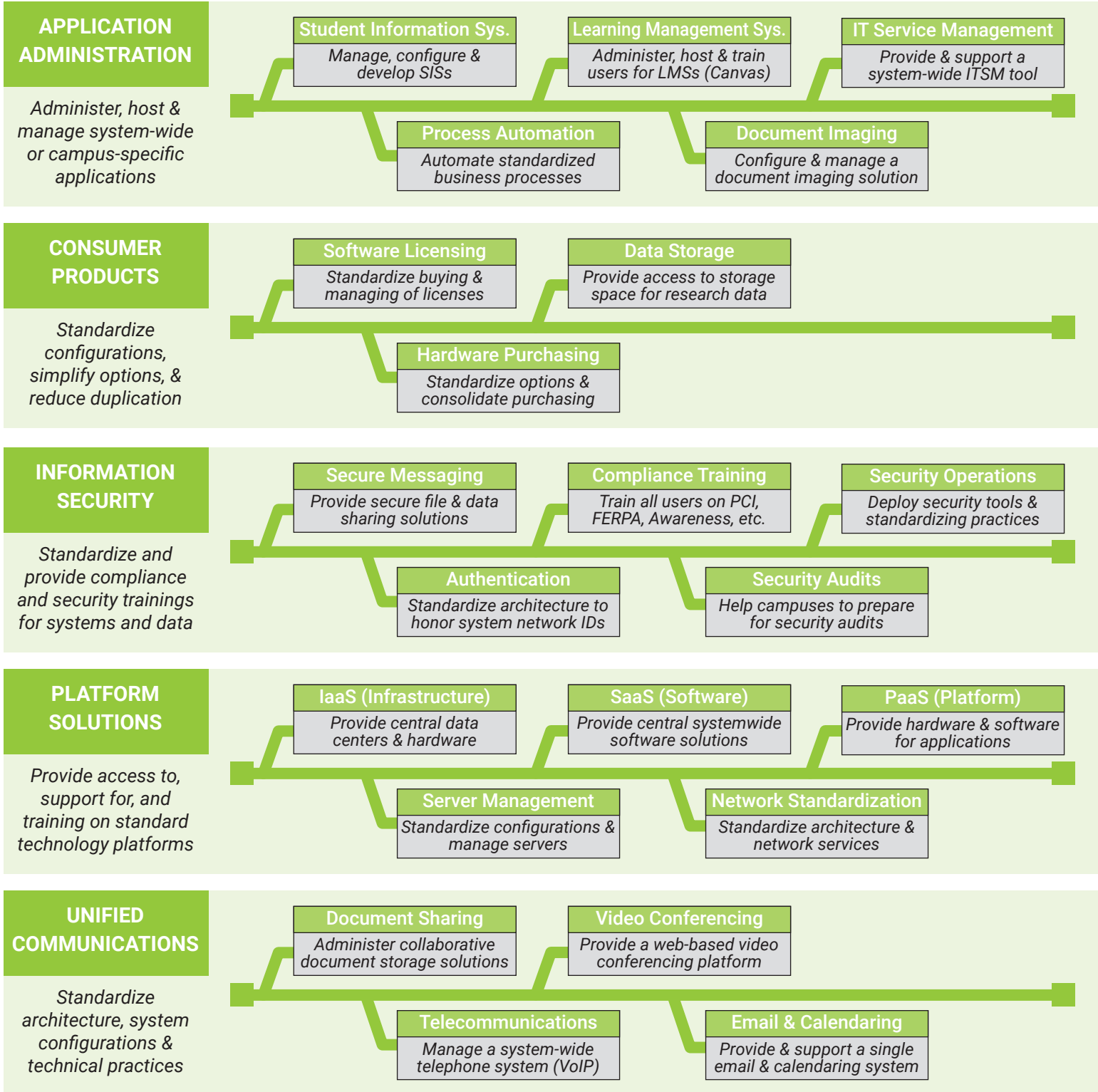


# ROADMAP

# 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.

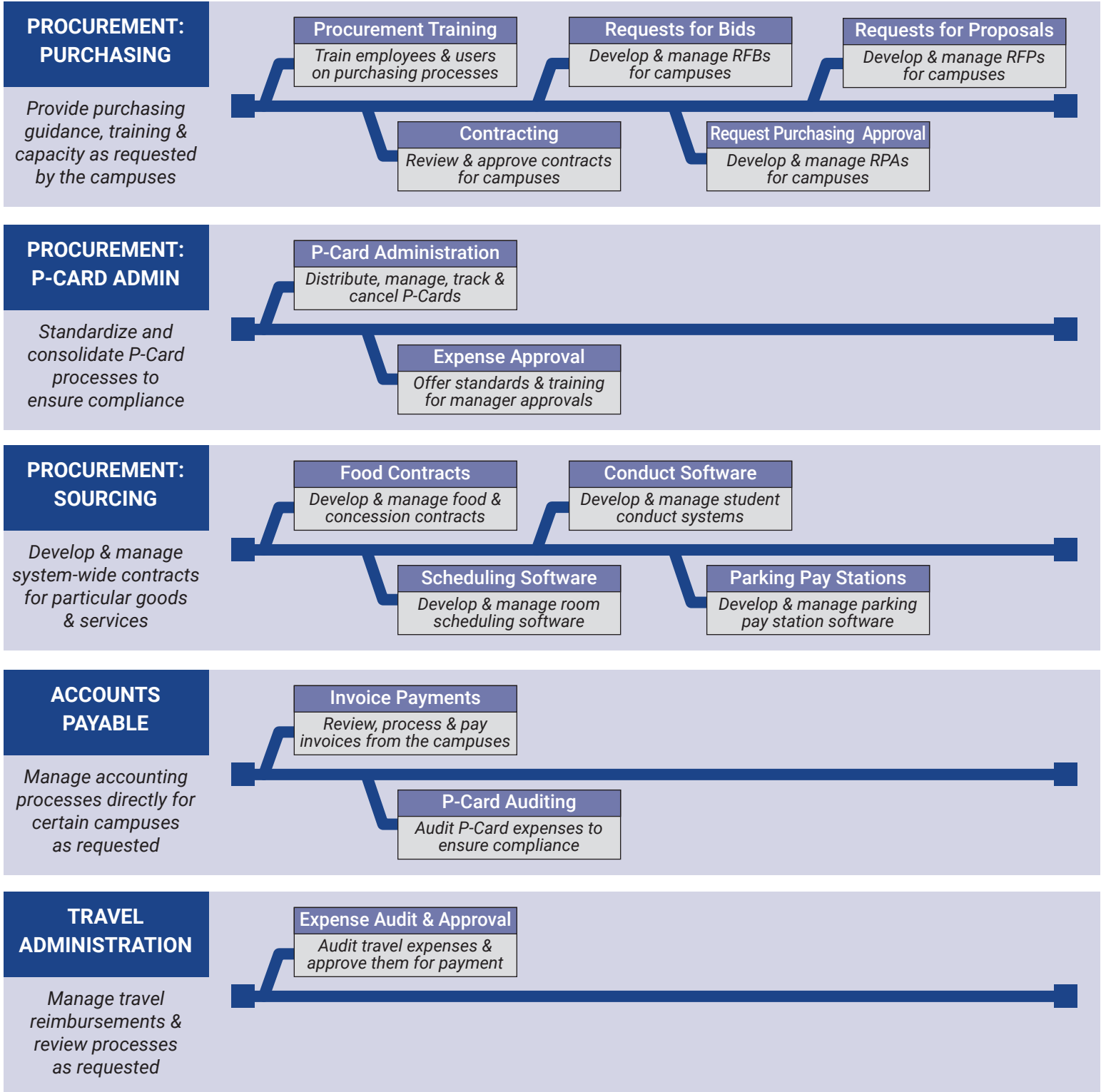


# ROADMAP

# 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](mailto:feedback@uwss.wisconsin.edu). Additional information is provided on *UW-Shared Services*'s website, <https://uwss.wisconsin.edu>.