



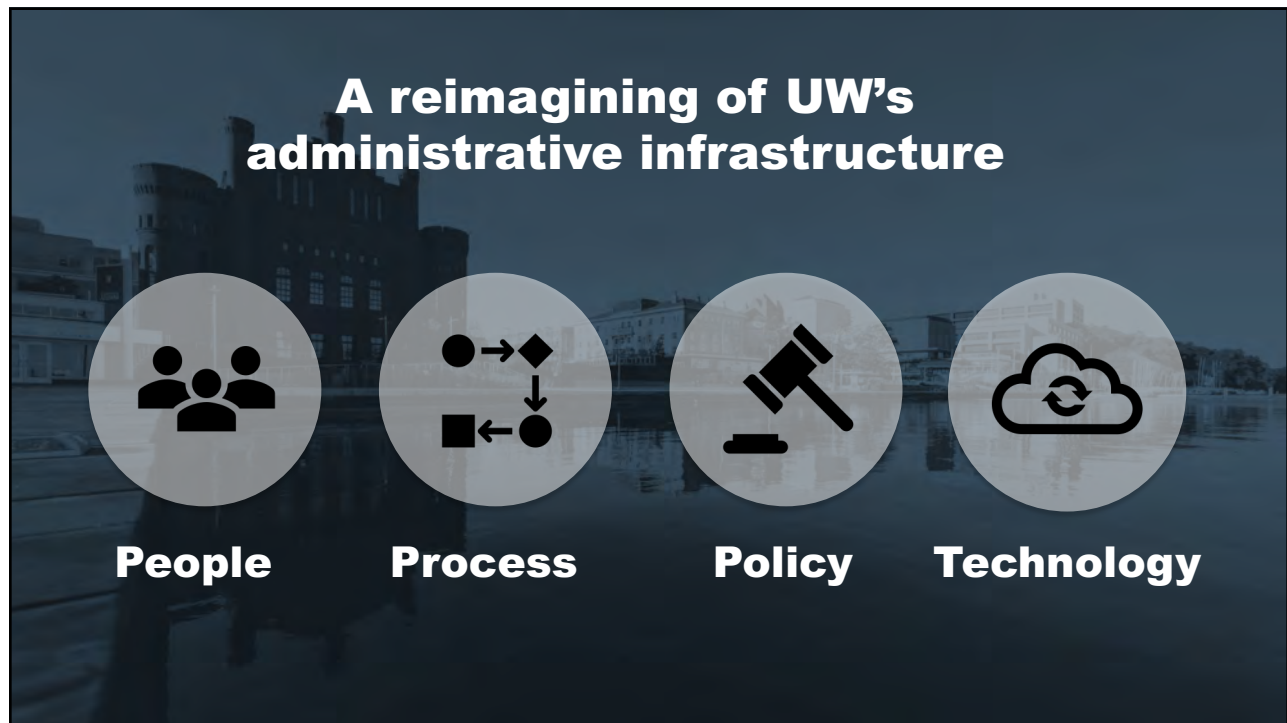
ADMINISTRATIVE TRANSFORMATION PROGRAM

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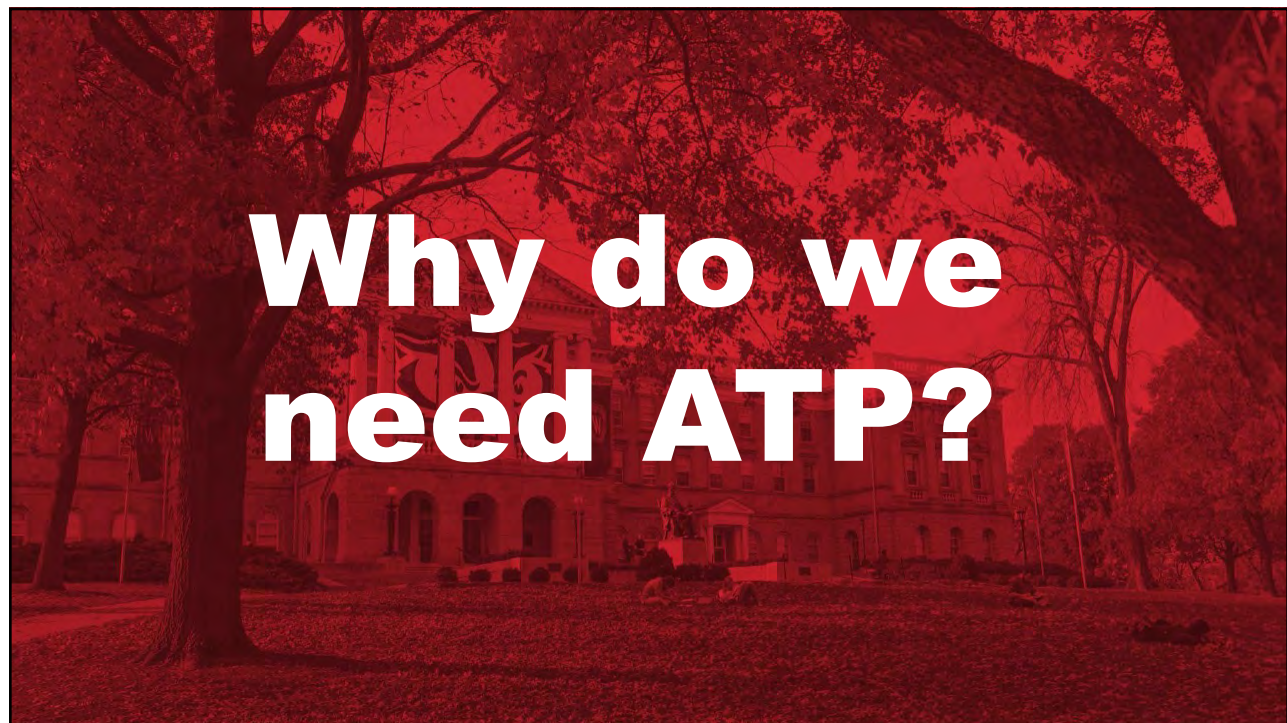


What is it?

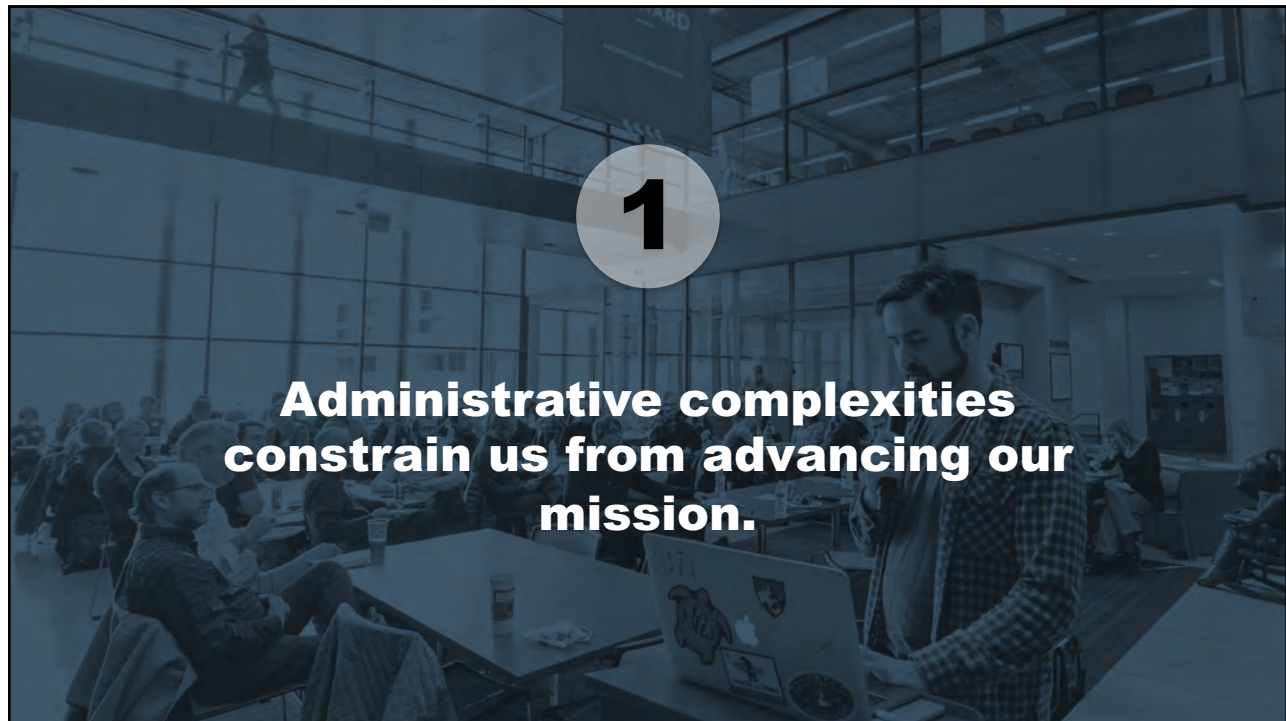
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No formal career pathing

“Everything is urgent...”

Systems developed to address gaps in enterprise software



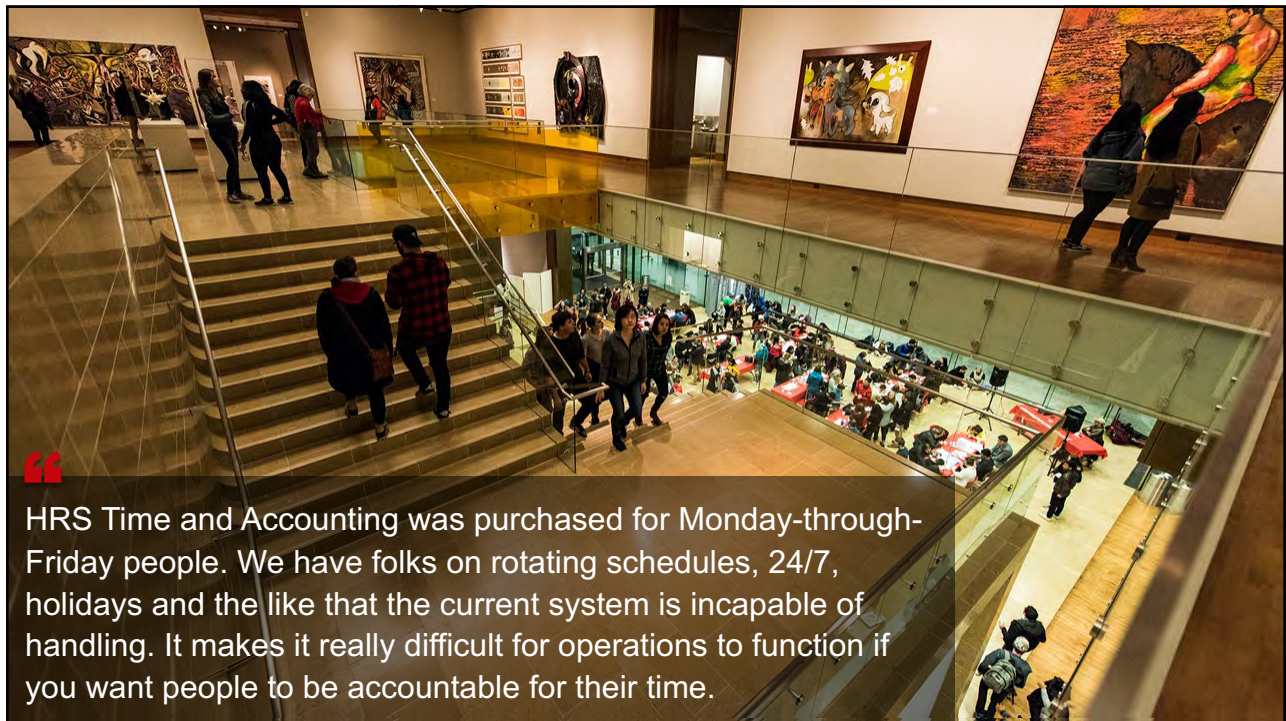
“We have a huge lack of internal controls.”

“I spend a lot of time on little transactions versus big picture/strategic work.”

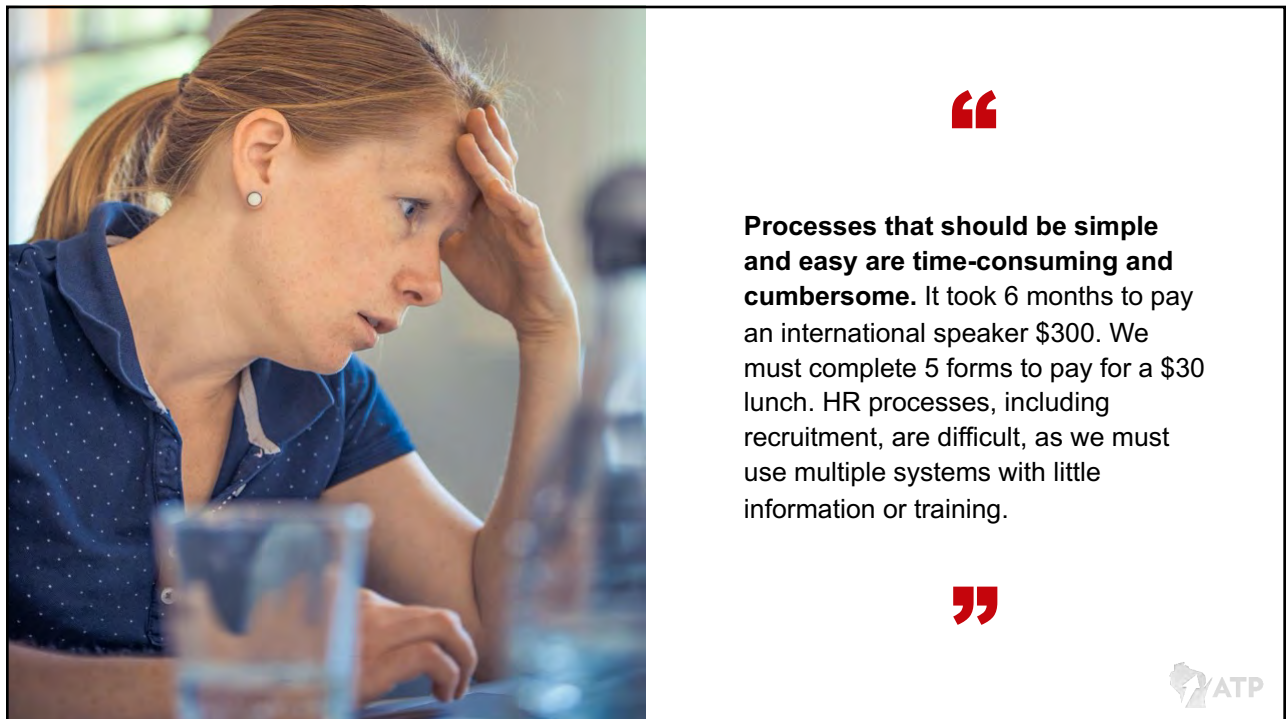
Inconsistent role definitions

ATP

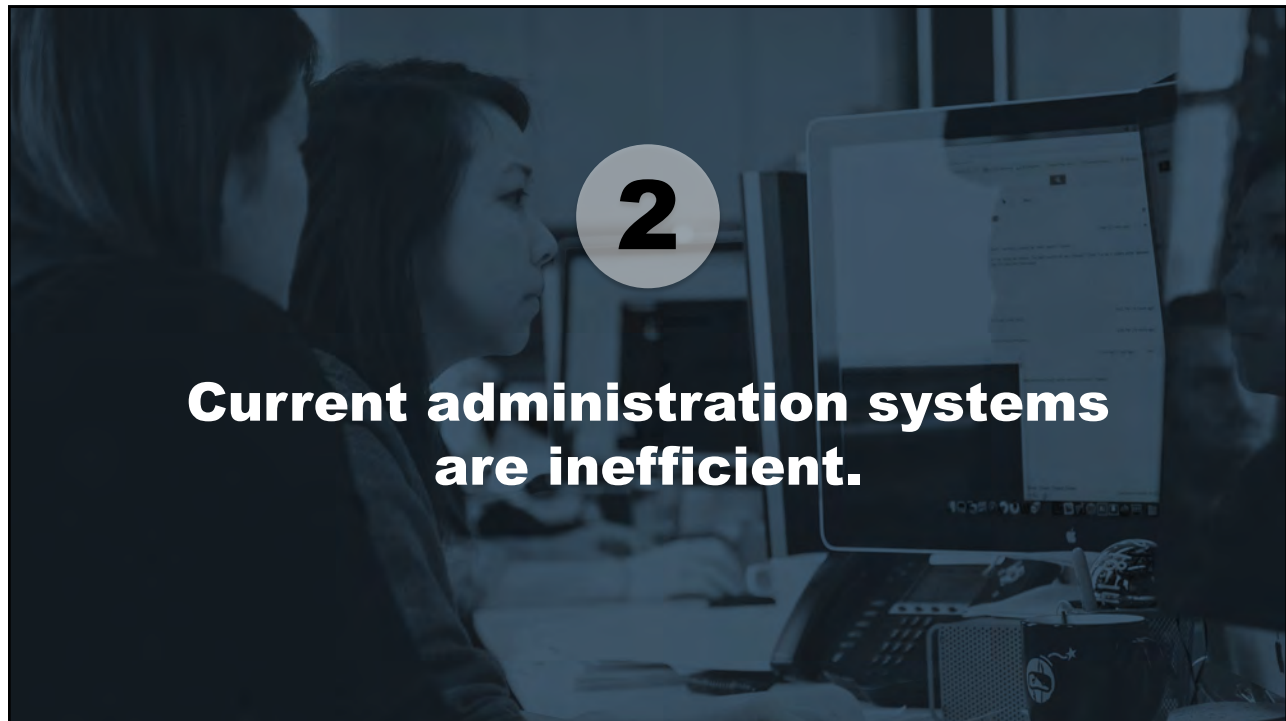
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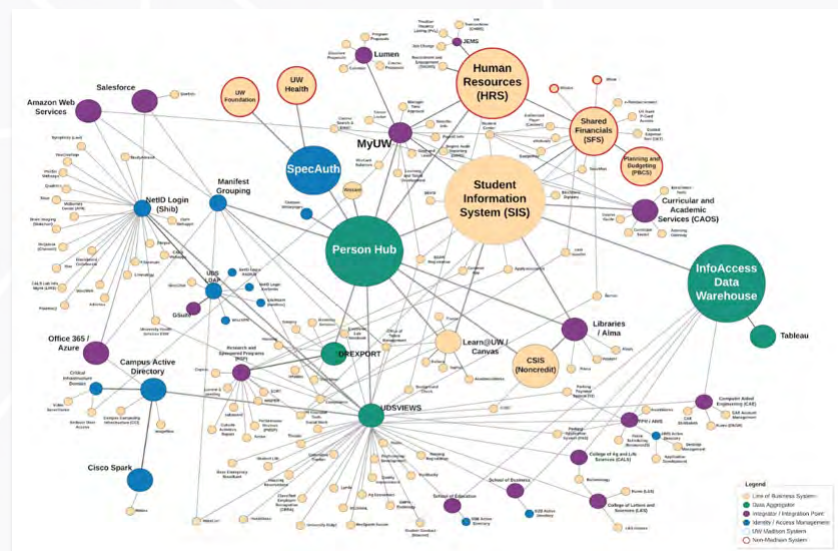
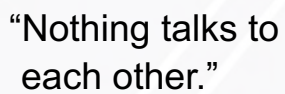
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Making changes to one's direct deposit is an unnecessarily complicated process. Say one wants to update their bank account. That employee must complete at least four steps, including delivering an updated form in-person. Then staff make the update manually. The entire process should be a simple update an employee makes online, completed in seconds or minutes, instead of the days or weeks that it takes presently.



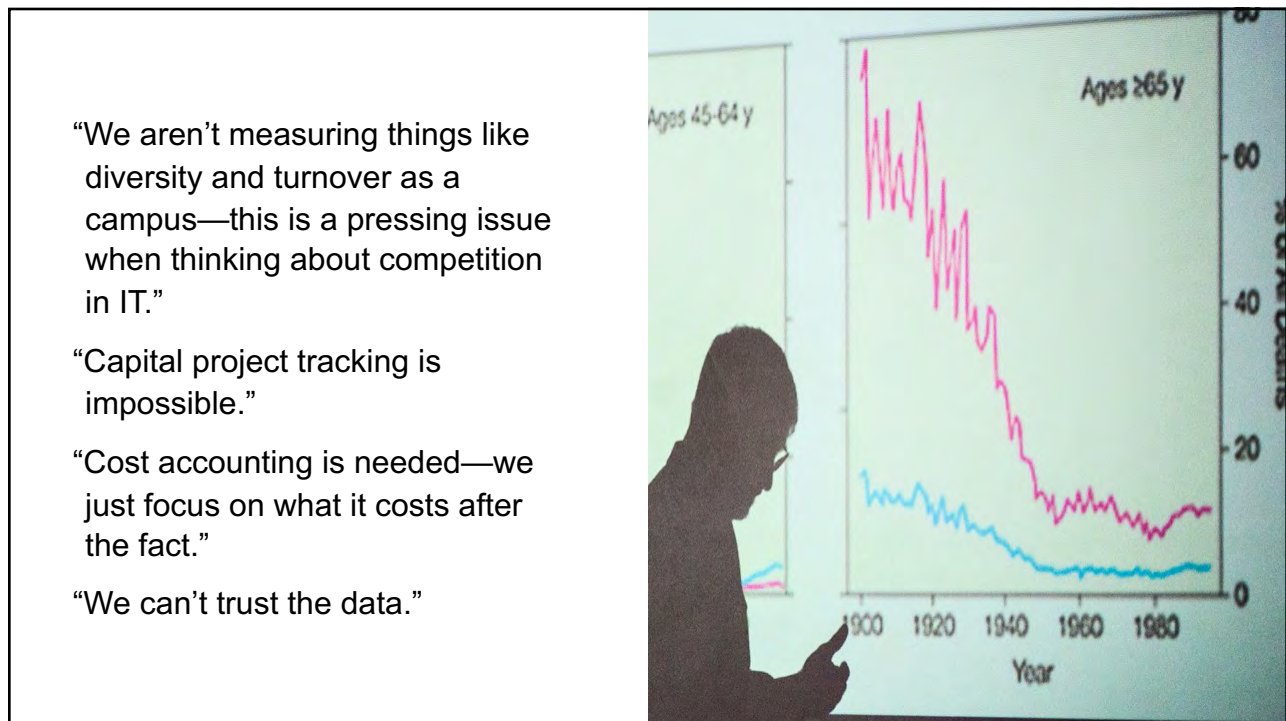
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What are the goals of ATP?

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1

Return time to UW's mission through reducing administrative complexity

2

Build an administration that is resilient and supports increasing pace of change

3

Strengthen data availability, financial controls, and information security


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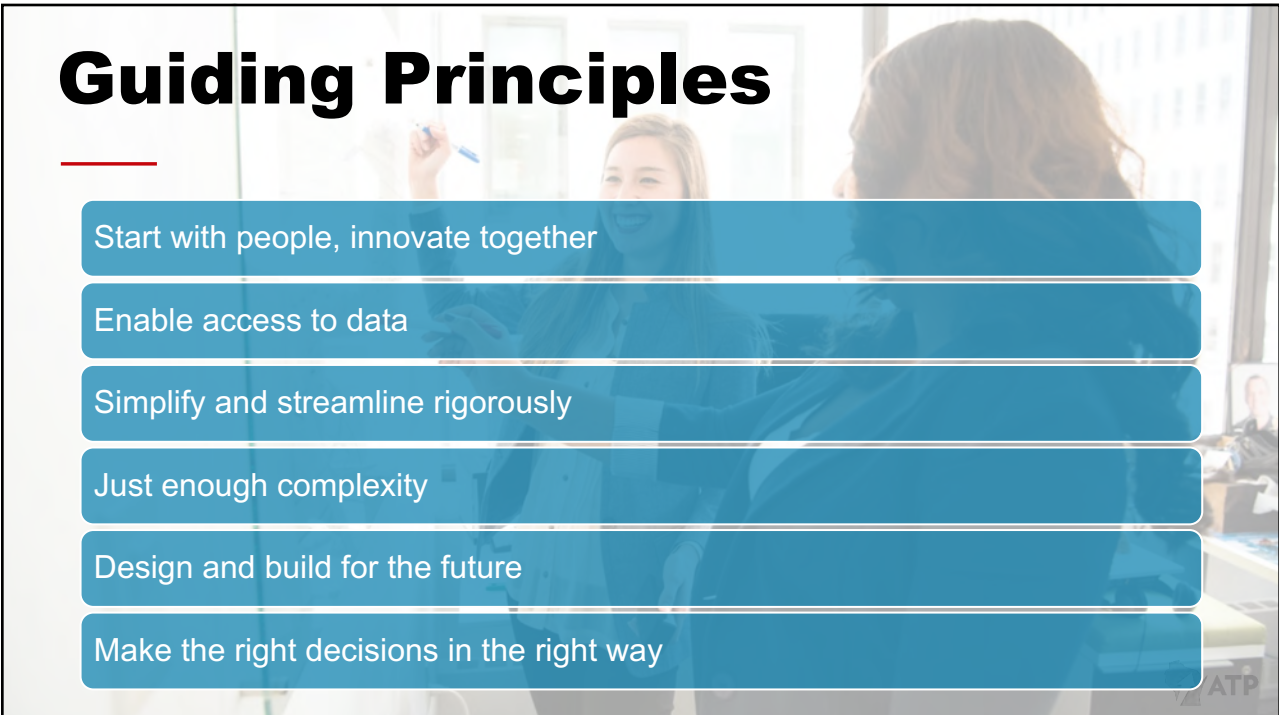


Vision

Advancing the University of Wisconsin's mission by engaging staff and building an intuitive, intelligent, and innovative work environment.




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Guiding Principles

- Start with people, innovate together
- Enable access to data
- Simplify and streamline rigorously
- Just enough complexity
- Design and build for the future
- Make the right decisions in the right way



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Change Strategy

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Change Strategy Objectives

Inspire excitement.

Provide opportunities for involvement and ownership.

Prioritize in-person engagements.

Develop consistent content using language that resonates with us.

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Preplanning Milestones

Completed Milestones

- Program Vision, Mission, Guiding Principles
- Governance Structure & Decision-making Framework
- Team Formation
- Change Management Strategy
- Campus Discovery Reports
- Chart of Accounts Prototype

Milestones in Progress

- Benefits, Metrics, Accountability (Feb 2020)
- Phasing Strategy (Dec 2019)
- Procurement for Software, QA vendor (Spring 2020)
- Funding Model (Dec 2019)
- Future support model (Feb 2020)

Upcoming Milestones

- Business Case (Feb 2020)
- Systems Implementation Partner Procurement (Summer 2020)

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“RIDE” Decision Making Framework



Recommend

Convert the best ideas into concrete recommendations



Input

Broaden perspective and get feedback



Decide

Evaluate options, impacts, and make decisions



Execute

Implement the plan and track progress



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UW System Discovery



75+ Survey Responses



365+ Interview Participants



125+ Discovery Interviews



13 Institutions



4 Themes summarizing the overarching needs across the UW System



17 Discovery Findings capturing staff observations on challenges and needed operational improvements



28 Opportunities for operational and technological improvements to help realize an optimal future state



27 ERP / ATP Considerations to inform the selection and design of a future ERP solution



28

UW-Madison Discovery


30+ Process Mapping Sessions


250+ Interview Participants


125+ Discovery Interviews


48 Campus Units



101 Distinct Business Needs that encapsulate the many different operations on campus which may require a unique or non-standard solution.



50 Exception Process Maps documenting how and why processes are variable and providing a starting place for workflow in the new ERP.



290 Finance and HR Shadow and Bolt-on Systems with documentation describing underlying need and likelihood of rationalized.



105 Data and Reporting Requirements describing what data our administrative staff wants to review and how they want to access it.

ATP

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Benefits, Metrics and Accountability

A catalog of intended benefits, aligned to the campus strategic plan, to be achieved through ATP and associated metrics for evaluation

The plan will communicate the work of ATP, serve as the basis of a program of continuous improvement, guide that work, provide focus and accountability, and provide a way to measure success

Benefits categorized into four areas: establishing efficiencies, improving services and infrastructure, fully enabling decision making, reducing risk

ATP

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Example Benefit Area

Streamline the travel and expense process.

Benefits

- Significantly decrease reimbursement times for faculty and staff by eliminating the need for manual re-keying and reducing the need for additional manual efforts.
- Ability to more accurately allocate expenses.
- Reduce errors due to auto filling and dropdown functionality.
- Proactively resolve expense issues to expedite automated processing.
- Improve decision-making and increase accuracy during expense transaction entry.
- Control costs and increase visibility into expense-related spending.
- Reduce transaction processing costs and data entry errors

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Technology Procurement



Software Selection *Fall 2019 – Spring 2020*

- Selection of a cloud-based HR and Finance ERP solution that will help serve to support the administrative work of the UW.
- Activities Include: software vendor education; peer institution knowledge share; requirements gathering; software vendor on-campus demos; and selection / procurement.



System Integrator / Implementation Partner Selection *Winter 2019 – Summer 2020*

- Selection of a system integrator / implementation partner with a wealth of knowledge and experience to assist the University in optimizing operations and realizing the anticipated benefits.

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Chart of Accounts Prototype

1 Assemble the Requirements

27. Ability to track financial activity for cross-disciplinary programs

28. Ability to track expenses for a single event across organizations

29. Ability to track financial activity by facilities

2 Determine the Data Elements

Requirement	Data Element 1	Data Element 2
28. Ability to track expenses for a single event across organizations	Activity/Event	Org

3 Create the Prototype

	Account	Entity	Fund	Department	Function	Program	Project	Flex
Use	What?	Who?	How?	Who?	Why?	Why?	Why?	Why?
Required/Conditional	Always Required	Always Required	Always Required	Always Required	Sometimes Required	Conditional	Conditional	Conditional
Institutional Use	Shared	Unique	Shared	Shared/Unique	Shared	Unique / Shared	Unique / Shared	Unique

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Where are we going?

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