

ADMINISTRATIVE TRANSFORMATION PROGRAM

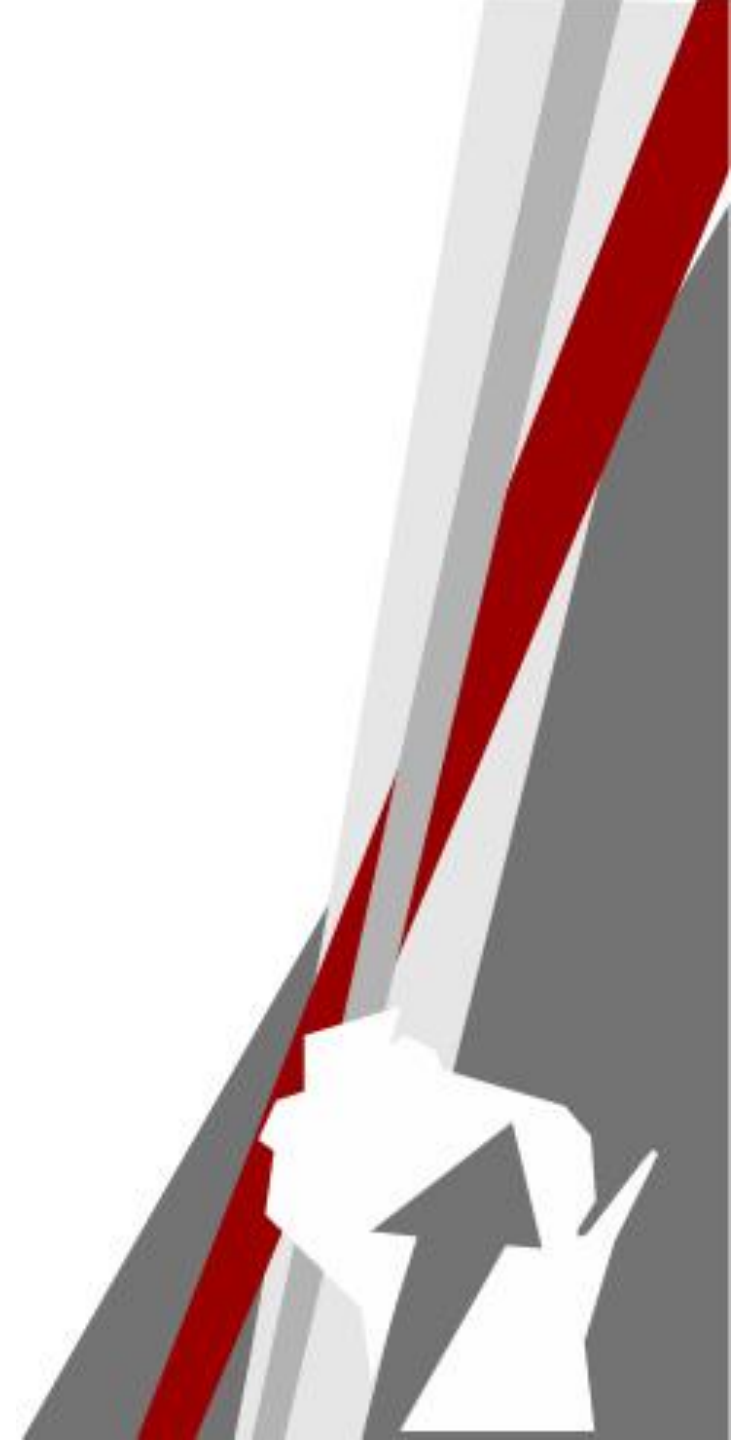
Status Update

October 21, 2020



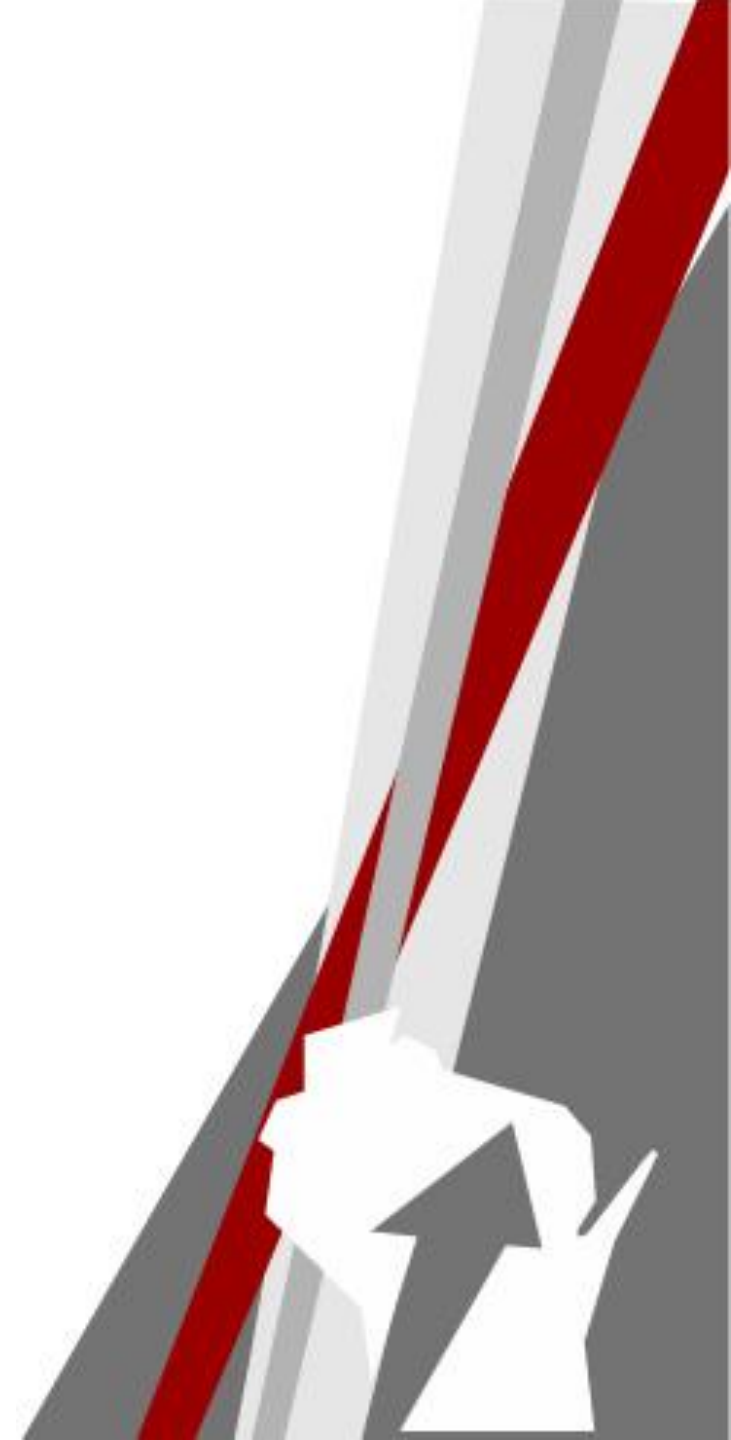
Agenda

- Program Overview
- Recent Accomplishments
- Updates
- Q&A
 - Send questions to **atp@vc.wisc.edu**



ATP will **modernize** the UW's
business for **continuous
improvement** — and stage its
long-term success and
leadership for Wisconsin and
the world.

WHAT IS ATP?

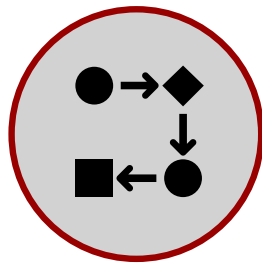


ATP

A multi-year program working with our people to return time to UW's mission and build a resilient administration in service to Wisconsin's greatest economic engine.



People



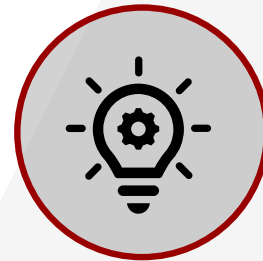
Process



Policy



Technology



Benefits
Realization



Change
Management



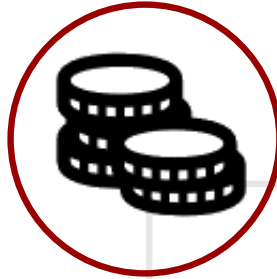
Continuous
Improvement

FUNCTIONAL TRANSFORMATION



Human Resources

- Streamline and simplify key policies and processes, such as:
 - Recruitment
 - Payroll & benefits
 - Absence management



Finance

- Comprehensive reimaging of core finance functions, such as:
 - Chart of accounts
 - Accrual accounting
 - Travel and expense



Research Admin

- Simplify key processes in service to faculty, such as:
 - Effort reporting
 - Cost-share scope
 - Proposal development and submission

TECHNOLOGY TRANSFORMATION



Integrated ERP

- Implement an integrated cloud-based ERP to support HR, finance, and research post-award administration
- Eliminates the need for hundreds of ancillary systems
- Mitigates security and compliance risks
- Supports improved analytics automation



Research System

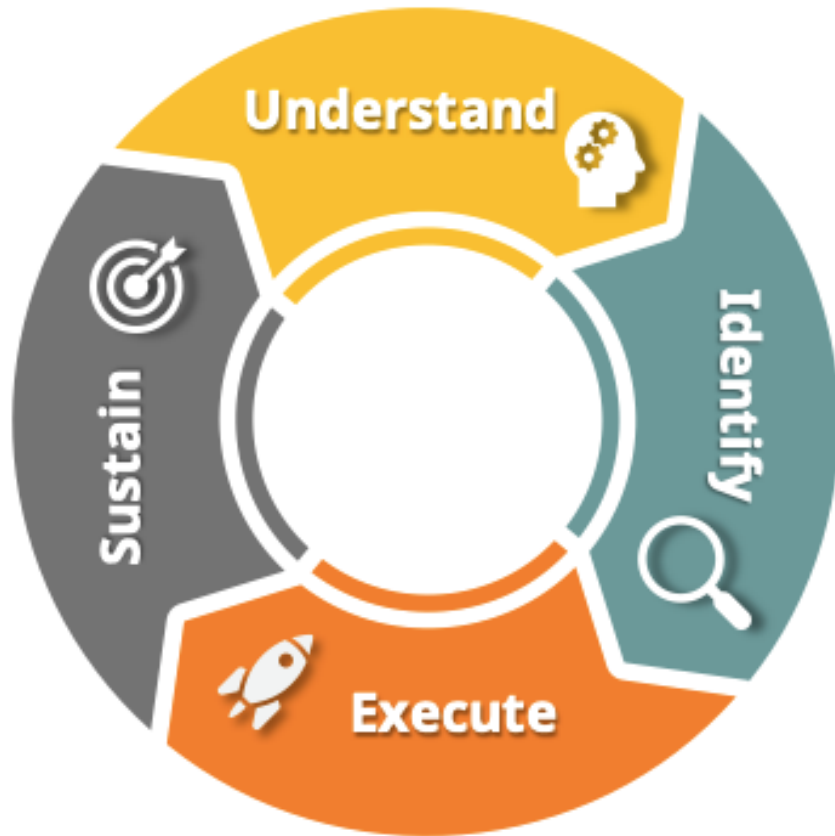
- Implement technology to support the entire life cycle of research administration, from pre- through post-award
- Improves information
- Reduces faculty and staff burden
- Increases capacity

BENEFITS REALIZATION

Specific, realistic, and time-bounded gains that result in positive outcomes for staff, while aligning with the UW's organizational objectives.



BENEFITS REALIZATION FRAMEWORK



- **Understand:** Outline the objectives and goals of the BRM framework to ensure alignment with program strategy.
- **Identify:** Define, organize, and capture benefit attributes to help identify what benefits to pursue during the program life cycle.
- **Execute:** Create or modify the products, services, and processes that will yield the identified benefits.
- **Sustain:** Focus on the acceptance of project outcomes leading to the realization of established benefits.


RECENT ACCOMPLISHMENTS



REGENTS APPROVAL

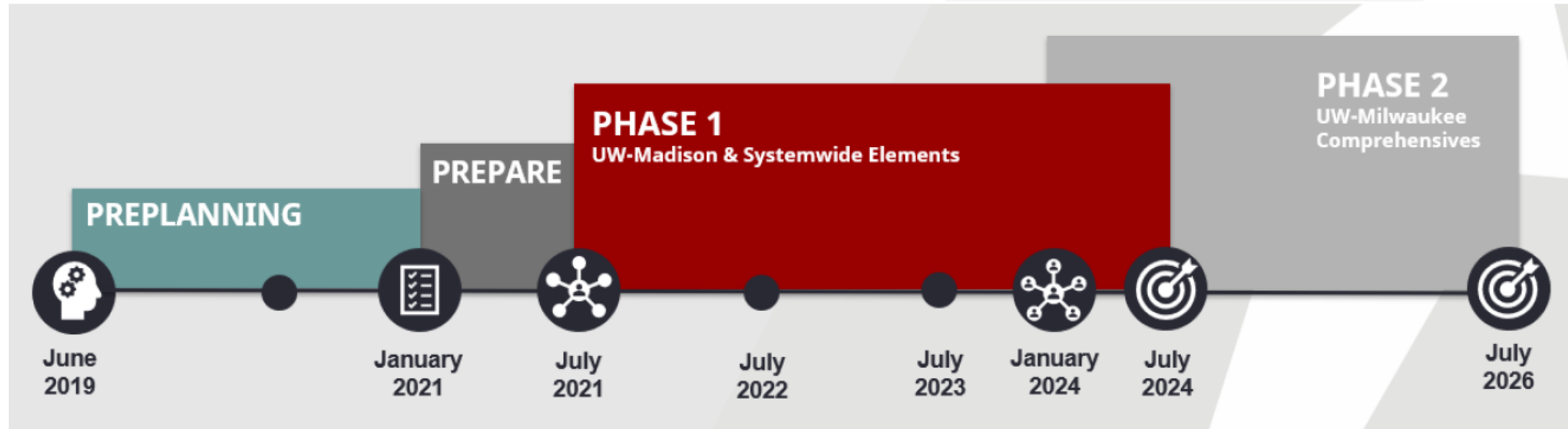
- October 8, 2020: University of Wisconsin **Board of Regents approves** ATP activities
- ATP is **currently in Preplanning Phase**, which concludes at the end of 2020
- ATP team can now begin **planning for Preparation Phase** activities, expected to begin in January 2021





Building on the work of the
Preplanning Phase, ATP's
next phase will focus on
designing and preparing
UW's staff for a new
administrative infrastructure.

TIMELINE



WHAT'S NEXT

Preparation Phase

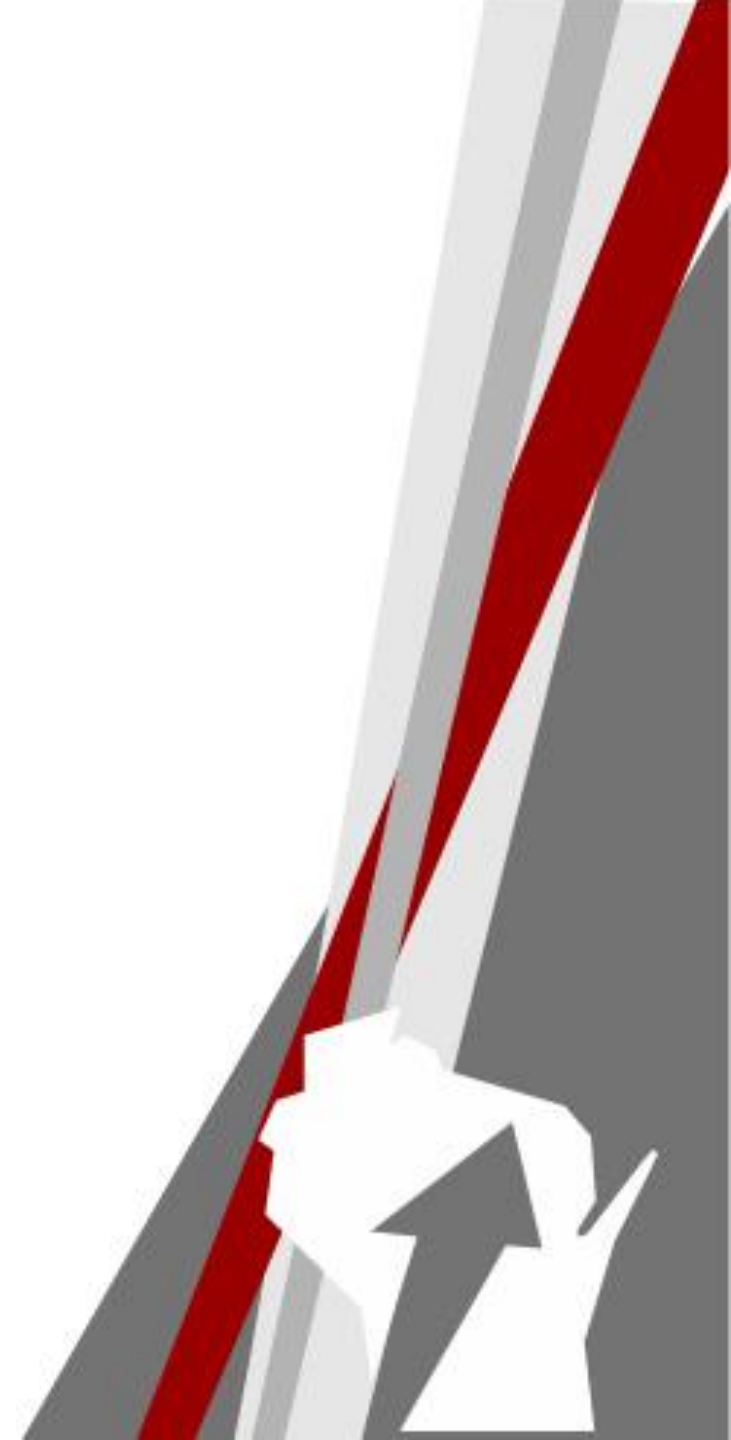
- Includes internal ATP team only
- Begin organizational design work, including how we define roles
- Work with UWSA to develop future-state support model
 - How will the ERP will be supported in the future?
 - How does that work fit within organizational models on campuses?
- Develop internal training content to ensure ATP team is fully prepared for the work to come

WHAT IT MEANS FOR YOU

Engagement, Collaboration & Learning

- Expanding Ambassador Program activity
- Ramping up collaboration with subject-matter experts to redesign business processes and simplify the policy landscape
- Working with local units to assess the hundreds of administrative ancillary systems and understand their role following the implementation of the new ERP
- Developing a comprehensive learning and development plan to prepare faculty and staff for the future of work at UW

WHAT'S NEW



FINANCE UPDATE

- **UDDS:** Discovery interviews → recommendation
- **Accrual Accounting:** Discovery interviews → recommendation
- **Central Reporting Inventory:** Create guiding principles for reporting

HUMAN RESOURCES UPDATE

- **Position Management:** Seeking input to support development of future-state position management structure
- **Policy:** Completed review of recruitment and selection policies; currently reviewing core HR policies
- **9 over 12:** Determining objectives and obstacles to implementation

IT UPDATE

- **Ancillary Systems:** Information gathering and validation of preliminary disposition to define project scope
- **Data, Reporting & Analytics:** Refining ATP's role with UW-Madison and UWSA strategies
- **Budget:** Defining ATP's role around PlanUW and overall direction for budget and planning

RESEARCH ADMINISTRATION UPDATE

- **Effort Reporting:** Exploring alternative approaches to transition from traditional effort reporting
- **Post-Award Scope:** Identifying key areas for transformation in research admin coupled with cloud ERP capabilities
- **Cost-Share Future State:** Analyzing bounds of transformation for cost sharing and what the future-state capabilities entail

PROCUREMENT UPDATE

- **Cloud ERP:** Resume discussion surrounding ERP selection; award contingent on funding
- **System Implementation Partners:** Working with Accenture and Huron to wrap up Preplanning Phase, ending 2020
 - SIs will not continue into Preparation Phase
- **Quality Assurance Vendor:** Vendor selected
- **Research Administration Software Demos:** Virtual software vendor demonstrations for a new cloud-based pre- through post-award system are ongoing

QUESTIONS?

Share with us at atp@vc.wisc.edu



SHARE YOUR FEEDBACK

Don't forget to take the event survey!

