The University of Iowa

Quarterly
Budget Officers Meeting

January 2015 Organized by the Controller’s Office, Finance & Operations
Today’s Agenda

I. United Way

II. TIER Update
   I. Sourcing and Procurement
   II. University Wide Shared Services
Sourcing and Procurement

- Project Lead – Debby Zumbach
- University Proposal?
- Huron Consulting
- February – May initial engagement
- Data and Savings Validation
- Potential 7-10 Cases
Board of Regents determined a University-Wide Shared Services Model would be implemented.

- RFP’s were issued to Consulting Firms
- Board approved the University of Iowa’s plan to migrate to a University-Wide Shared Services Model.
- Board Hired Chazey Consulting
Future State Solution

- President
- Finance and Operations
- University-Wide Shared Services
  - Central Administration
  - College A
  - College B
  - College C

University-Wide Shared Services Staff will report directly to the Shared Services Director.
FN-01 Savings Goal $3.9M – To Be Validated
Proposed Timeline

University-Wide Financial Shared Services Model

Finance Implementation Timeline

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Detailed Design/Change Management
Infrastructure Building/Test
Implementation
Optimization
Potential Services Provided

- **Financial Accounting:** General accounting entries
- **Accounts Payable and Travel:** Procurement card reconciliation, non-purchase order (PO) payment requests, travel arrangements, requests for travel and travel expense vouchers
- **Purchasing:** Requests for purchase orders for supplies, services and equipment
- **Human Resources:** Student biweekly appointment, change-of-status, and termination
UWSS Team Structure

- Mark Braun - BOR Transformation Project Manager
- Laura McLeran - TIER Lead
  - Sounding Board
  - Steering Committee
- Debby Zumbach - Project Manager
  - UWSS Advisory Board
  - Project Team
UWSS Next Steps

- BOR Consultant – Chazey Consulting

- Role of Consultant
  - Same consultants for SUI, ISU and UNI
  - Validation of plan and savings
  - Position Analysis

- Invitations to Advisory Board
- Invitations to Sounding Board
Design Phase – 6 months

- Meetings and consultations with departments, budget officers, faculty and staff
- Creation of UWSS advisory committee
- Consultant Verification of Pahn
- Communication Plan
- Survey of staff and analysis of data
- Review data with departments, faculty and staff
Building and Infrastructure – 12 Months

- Communicate
- Engage Change Management Group
- Create project implementation plan for overall transition
- Create Service Level Agreements
- Determine pilot group
- Campus Information Meetings
- Finalize Job Descriptions/Process Flows
Implementation – 9 months

- Review and discuss pilot departments success/opportunities
- Meeting with Departments
- Engage Change Management Group
- Communicate with Affected Staff
- Adjust, monitor, and communicate with customers.
Optimization – 9 Months

- Review Key Performance Indicators
- Survey departments regarding UWSS service
- Meet with Departments
- Continuous quality improvement
- Engage Change Management where necessary
- Adjust performance and services according to feedback
Next Steps for you

- Communicate interest in the advisory committee to Debby Zumbach
- Not everyone will be selected
- But EVERYONE will be
  - Involved in the process for their units
  - Be responsible for engaging staff
  - Be responsible for sharing information and timely communication
Questions