FY17

Annual Performance

Plan

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Division of Business Services

August 8, 2016

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VCFA Strategic Priorities

VCFA Strategic Priority 1: EID

In FY17, the Division of Business Services will continue to support the VCFA's strategic priority of Engagement, Inclusion and Diversity (EID) through the following goals and planned actions:

➢ *INCREASING REPRESENTATION AND RECRUITMENT*

Division goal/objective statement: Demonstrate an increase of currently under-represented populations in the division's workforce.

Milestones to be accomplished:
- Work with Human Resources in order to draw from a more diverse pool of qualified applicants when recruiting for positions, including reaching out to diverse demographics.
- Frame division hiring practices that integrate diversity, including balanced and diverse interview panels and search and screen committees.
- Provide training to interview panels, search and screen committees, and hiring managers regarding bias literacy (i.e., WISELI Training on Excellence and Diversity).
- Continue involvement with the PEOPLE (Pre-College Enrichment Opportunity Program for Learning Excellence) program to expose high school students of color to a professional working environment.
- Stay active in campus diversity initiatives such as maintaining representation on the VCFA EID Council.

➢ *INCREASING ENGAGEMENT*

Division goal/objective statement: Build a collaborative work environment that enhances employees' engagement with their position and the University.

Milestones to be accomplished:
- Promote and fund professional development opportunities for division employees.
- Organize two supervisor forums this year to discuss ways to improve the working environment.
- Continue to leverage the division's intranet as a valuable resource for shared information.
- Highlight and showcase the division's accomplishments across campus via the University's intranet site (Working-At-UW) and other outlets.
- Continue to collaborate with the Recruitment Initiative for Student Employees (RISE) and participate in RISE job fairs and activities.

➢ *INCREASING INCLUSION*

Division goal/objective statement: Build a work environment so that all employees feel included, supported and connected.

Milestones to be accomplished:
- Strengthen and promote a more deliberate and consistent onboarding program within the division.
- Provide division-wide training opportunities to promote respectful behaviors and cultural understanding.
- Support and continue the efforts of the division's community committee for employees to connect and understand other cultures and interests.

VCFA Strategic Priority 2: **Student Leadership Development**

(1) Division goal/objective statement: Conduct initial WiGrow conversations with all new student employees in the Division of Business Services within 45 days of employment start dates.

Baseline measures: The percentage and number of new student employees who received their first WiGrow conversations within 45 days of employment were as follows in the last three fiscal years:

FY14: 6%, or two out of 32 new student employees
FY15: 33%, or eight out of 24 new student employees
FY16: 95%, or 18 out of 19 new student employees

Performance target: In FY17, 100% of the division's new student employees will receive their initial WiGrow conversation during their first 45 days of employment.

Milestones to be accomplished:
- All new student employees will be welcomed with an email within two weeks of arrival explaining the WiGrow Program.
- Monthly email reminders will be sent to supervisors notifying them of 45-day target dates for all new student hires.
- All new student supervisors in Business Services will be trained in the Red Folder/WiGrow Programs in a timely manner so they are prepared to conduct WiGrow conversations when needed.
- Department directors will be notified if a new student employee has not received his/her first WiGrow conversation after 35 days of joining the team.

Risks, challenges, barriers to success:
- Time constraints and heavy workloads for supervisors, particularly during critical times of the fiscal year.
- Hiring and starting of student employees shortly before winter break sometimes results in the new students being gone for many of the 45 days.

(2) Division goal/objective statement: Maintain the percentage of student employees who moderately or strongly agree with the following WiGrow survey statement in FY17, *"My supervisor helps me make connections between my current work and my academic pursuits."*

Baseline measures: The percentage of students who moderately or strongly agreed with the statement was as follows in the last three fiscal years:

FY14: 75%
FY15: 71%
FY16: 95%

Performance target: 95% of the student employees in Business Services will again moderately or strongly agree with the survey statement.

Milestones to be accomplished:
- Results from the Spring 2016 Student Employee WiGrow Survey will be shared with supervisors by July 15, 2016.
- A divisional student supervisor forum will be held to involve supervisors in making the WiGrow Program more relevant and impactful within the division.

- All new student supervisors will be trained in the WiGrow/Red Folder Programs.
- 100% of student employee and supervisor will participate in WiGrow conversations during both Fall and Spring semesters.
- Communication will be sent to student employees and to supervisors regularly to keep them informed about WiGrow updates, events, deadlines and news.
- Student employees will be encouraged to attend student employee WiGrow forums.
- Encourage student employees to complete the 2017 Spring WiGrow survey.

Risks, challenges, barriers to success:
- Given the relatively small number of student employees in the division, our survey percentages can be significantly altered by ratings of just one or two student employees.
- If supervisor time constraints and/or workloads prevent us from accomplishing the milestone of 100% student and supervisor participation in WiGrow conversations, survey results will be noticeably affected.

(3) Division goal/objective statement: Increase the percentage of student employees who moderately or strongly agree with the following WiGrow survey statement in FY17, *"My supervisor helps me see connections between skills gained/used in my current work that are transferable to a future occupation."*

Baseline measures: The percentage of students who moderately or strongly agreed with the statement was as follows in the last three fiscal years:

FY14: 88%
FY15: 86%
FY16: 89%

Performance target: 92% of the Business Services student employees will moderately or strongly agree with the survey statement.

Milestones to be accomplished:
- Same as those identified in goal/objective statement (2).

Risks, challenges, barriers to success:
- Same as those identified in goal/objective statement (2).

VCFA Strategic Priority 3: **Resource Stewardship through Process Improvement**

The Division of Business Services has not selected an individual project to highlight for the VCFA priority of resource stewardship through process improvement. Rather, several projects or initiatives are included later in the division's plan that are aimed at improving process efficiency and effectiveness, enhancing services, increasing collaboration, increasing responsiveness to customers, and improving the University's financial performance.

Division Strategic Priorities & Goals - Overview

The Division of Business Services supports UW-Madison's institutional responsibilities of higher education and research through the delivery of business services to campus. The division's service areas are accounting, purchasing, materials distribution and surplus property disposition, risk management, and student account, payment and loan services.

Services have historically focused on compiling data and processing transactions. While these services are essential, this fiscal year (FY17), the division will continue on a path of transformation. As a central unit, the division is expanding its role to position itself at the forefront of managing and coordinating financial and business functions and services across campus. In order to do so, the division will need to develop the infrastructure and staff capabilities to assess and oversee financial internal controls, prepare financial reports for internal and external constituencies, identify and mitigate risk, and advance strategic sourcing.

The division will continue to strive towards five long-term strategic priorities (highlighted in red below). For the FY17 Annual Performance Plan, the division will measure performance for a total of nine goals related to four of the strategic priorities:

> Division Strategic Priority 1: **Cultivate a Quality Workforce**
> Division Strategic Priority 2: **Serve as an Effective Campus Partner**
> > **Goal:** Improve and Increase Use of Shop@UW
> > **Goal:** Improve MDS/SWAP Alignment of Revenues with Costs
> > **Goal:** Redesign the Division's Website
> Division Strategic Priority 3: **Ensure Financial Integrity and Preservation of Campus Assets**
> > **Goal:** Develop a Campus Internal Control Framework
> > **Goal:** Explore a Shared Service Model for Employee Expense Report Auditing
> > **Goal:** Implement Additional Prompt Payment Terms
> > **Goal:** Improve Bursar's Office Collection of Past Due Student Accounts
> Division Strategic Priority 4: **Promote Strategic Sourcing and Demand Management**
> > **Goal:** Continue Strategic Sourcing Efforts
> Division Strategic Priority 5: **Enrich the Student Experience**
> > **Goal:** Improve Bursar's Office Communications with Students and Parents

It is important to note that many of the division's goals are strategic in nature and will require the cooperation of campus partners, stakeholders and customers in order to be successful. They also relate to the division's transformation to a central unit at the forefront of managing and coordinating financial and business functions and services across campus and, therefore, will involve a significant paradigm shift. Other goals are operational and are aimed at monitoring and improving the division's existing functions and processes.

Finally, in keeping with the VCFA's mission and strategic priority of resource stewardship, all of the goals are aimed at improving process efficiency and effectiveness, enhancing services, increasing collaboration, increasing responsiveness to customers, and improving the University's financial performance.

Division Strategic Priorities & Goals - Summary Chart

Priority	Goal/Objective	Baseline Measures	Performance Target	FY17 Mid-Year Actuals	FY17 Year-End Actuals
Serve as an Effective Campus Partner	Improve and Increase Use of Shop@UW	- Number of FY16 Shop@UW Transactions: 257,260 - % of Addressable Spend Transactions: 38.5% - Shop@UW Spend: $40,978,592 - % of Addressable Spend: 8.4%	- Number of FY17 Shop@UW Transactions: 260,000 - % of Addressable Spend Transactions: 39% - Shop@UW Spend: $41,500,000 - % of Addressable Spend: 8.5%		
(same as above)	Improve Alignment of MDS/SWAP Revenues with Costs	In FY16, MDS produced a net gain of $80,333 In FY16, SWAP produced a net loss of $50,233	Break-even financial results by the end of FY17 and completion of identified milestones.		
(same as above)	Redesign the Division's Website	Do not currently exist.	Completion of identified milestones.		
Ensure Financial Integrity and Preservation of Campus Assets	Develop a Campus Financial Internal Control Framework	Do not currently exist.	Completion of identified milestones.		
(same as above)	Explore a Shared Services Model for Employee Expense Report Auditing	Do not currently exist.	Completion of identified milestones.		
(same as above)	Implement Additional Prompt Payment Terms	Do not currently exist.	Completion of identified milestones.		
(same as above)	Improve Bursar's Office Collection of Past Due Student Accounts	AR past due balance of $11,313,547.	Reduce AR past due balance by 10%.		
Promote Strategic Sourcing and Demand Management	Continue Strategic Sourcing Efforts	Spend in select categories prior to implementation.	Completion of milestones and documentation of cost savings.		
Enrich the Student Experience	Improve Bursar's Office Communication with Students and Parents	FY16 Number of Phone Contacts: - General Tuition: 2,195 - Financial Aid: 1,334 - Refund Timing: 605 - 1098T: 604 - Authorized Payer: 617	Reduce by 10% in each category.		

Goal: Improve and Increase Use of Shop@UW

Why is it important? Shop@UW Is the University's online eCommerce tool, powered by the software SciQuest, which provides users with an efficient method to order and pay for commonly purchased products at a negotiated contract price. Improving Shop@UW, thereby increasing the adoption and use of the tool by users, allows the University to reduce costs associated with the purchase of goods and services, more effectively capture spend data, and better align staff time and resources with higher value activities.

How do we measure it? Shop@UW usage is measured by the number of Shop@UW transactions and Shop@UW spend.
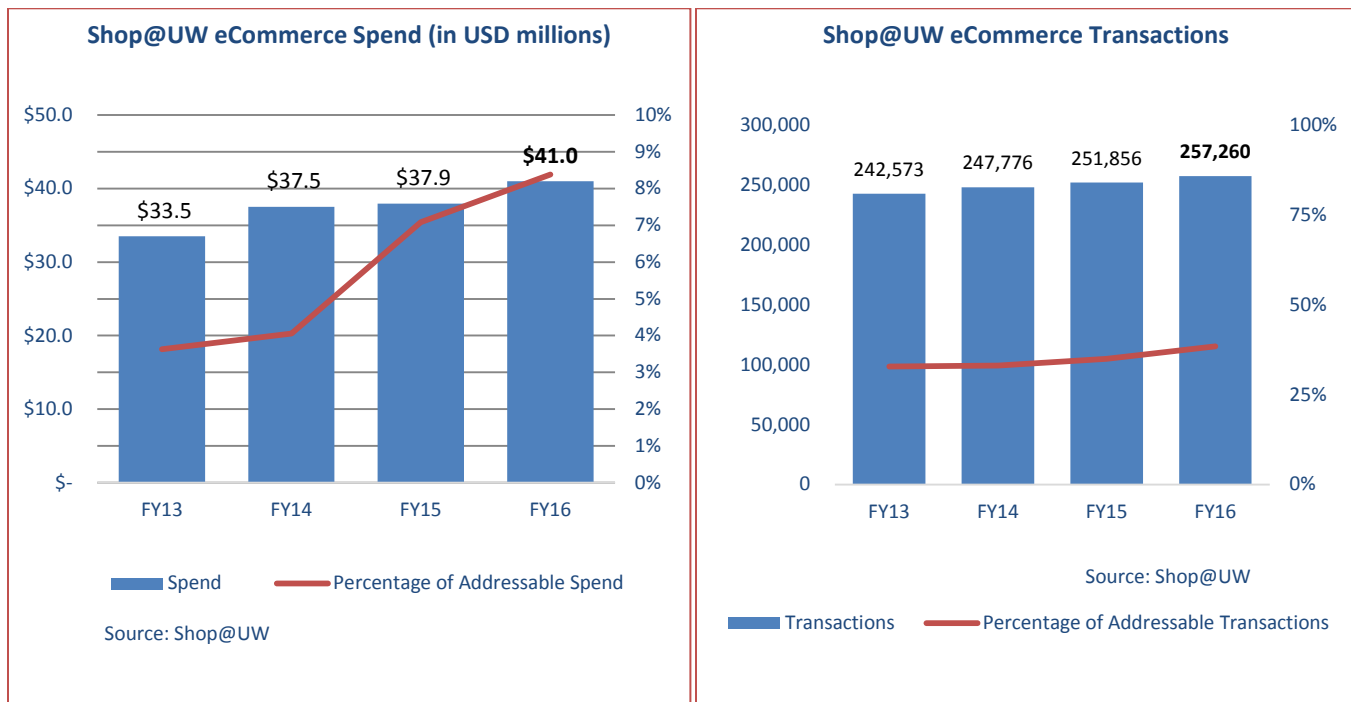
Baseline measure: Baseline measures are the following for FY16:
-   Number of Shop@UW Transactions: 257,260
-   % of FY16 Addressable Spend Transactions: 38.5%
-   Shop@UW Spend: $40,978,592
-   % of Addressable Spend: 8.4%

Performance target: Performance targets will be the following for FY17:
-   Number of Shop@UW Transactions: 260,000
-   % of Addressable Spend Transactions: 39%
-   Shop@UW Spend: $41,500,000
-   % of Addressable Spend: 8.5%

Illustration:

Shop@UW eCommerce Spend (in USD millions)

FY13: $33.5 FY14: $37.5 FY15: $37.9 FY16: $41.0

Spend — Percentage of Addressable Spend

Source: Shop@UW

Shop@UW eCommerce Transactions

FY13: 242,573 FY14: 247,776 FY15: 251,856 FY16: 257,260

Source: Shop@UW

Transactions — Percentage of Addressable Transactions

What will we do this fiscal year *(milestones to be accomplished)***?**
- Deliver regular ongoing training for UW-Madison users ("How to Use Shop@UW").
- Perform Shop@UW spend analyses.
- Complete a review of eCommerce technology options, including an evaluation of alternative eCommerce providers or solutions.
- Modify the funding allocation tool (Pre-Posting Allocation Tool) used by Shop@UW account managers to reallocate payments for purchased products to the appropriate funding source in order to close internal control gaps.
- Develop a Shop@UW technology support plan with AIMS (Administrative Information Management Support Services).

What factors may affect results *(risks, challenges, barriers to success)***?**
- Resource capacity within Purchasing Services and AIMS may be stretched in light of other projects and initiatives.
- There is no requirement or policy supporting the use of Shop@UW over other purchasing methods.

Division Strategic Priority 2: **Serve as an Effective Campus Partner**

Goal: Improve Alignment of MDS/SWAP Revenues with Costs

Why is it important? The Material Distribution Services (MDS) and SWAP (Surplus-with-a-Purpose) are revenue generating operations intended to recover the costs of services delivered to the University. MDS collects revenues as a portion of product sales through Shop@UW. SWAP collects revenue through sales commissions for surplus, recycled or disposed of property. In recent years, both MDS and SWAP revenues have not consistently covered the costs of operations, resulting in declining fund balances.

How do we measure it? This goal will be measured by financial performance.

Baseline measure: In FY16, MDS produced a net gain of $80,333.
             In FY16, SWAP produced a net loss of $50,233.

Performance target: Break-even financial results by the end of FY17 and completion of key actions according to plan.

What will we do this fiscal year *(milestones to be accomplished)***?**
- Develop financial model options, including an assessment of current costs and cost recovery methodologies.
- Review the need and feasibility of continuing to provide services to customers outside of UW-Madison.
- Work with Administrative Information Management Systems (AIMS) to modify IT systems that support and process cost recoveries from customers.
- Communicate and implement desired options by June 2017.

What factors may affect results *(risks, challenges, barriers to success)***?**
- The MDS/SWAP operations currently occupy 103,000 sq/ft of a warehouse facility in Verona. The costs associated with occupancy (i.e., building bond payments, utilities, maintenance) are substantial, some are fixed, and are not possible to reduce unless alternate space becomes available.
- Other campus functions that maintain warehouse, inventory and local distribution centers may not be accepting of the new models.

Division Strategic Priority 2: **Serve as an Effective Campus Partner**

Goal: <u>Redesign the Division's Website</u>

Why is it important? The website for the Division of Business Services has over 2,000 pages which contain information about contracts, policies and procedures, account coding, "How-To" sections, links to our ecommerce system, personnel directories, tuition payment links, and much more. It has been over five years since the division's website pages were comprehensively reviewed and updated. Given the speed of recent technology and the increase in mobile device web browsing (i.e., smart phones, tablets), it is important to update the division's website to accommodate visitors. Additionally, the website for the University was recently updated, and it is desirable that the division's website follow in the same direction.

How do we measure it? This goal will be measured by the completion of key actions according to plan.

Baseline measure: There is no baseline measure as this is a new initiative for the division.

Performance target: The completion of identified milestones (see below).

What will we do this fiscal year *(milestones to be accomplished)*?
- Study Google Analytics and understand the current traffic volumes and patterns of those accessing the division's website.
- Conduct a content audit to identify pages that need to remain and pages which are redundant, outdated and trivial (ROT).
- Identify objectives and gather input from department leaders and customers.
- Develop recommendations for the new website and content strategy that fits within the UW-Madison environment.
- Develop a redesign plan to match look and feel within the UW-Madison WordPress content management system (i.e., CMS).
- Develop a new content strategy for division website messaging.
- Complete website redesign and deployment by June 2017.

What factors may affect results *(risks, challenges, barriers to success)*?
- Resource capacity within both the Division of Business Services and the Division of Information Technology (DoIT) to devote to the initiative.

Division Strategic Priority 3: **Ensure Financial Integrity and Preservation of Campus Assets**

Goal: Develop a Campus Financial Internal Control Framework

Why is it important? UW-Madison operates in a highly decentralized environment and is exposed to risks that could be mitigated with a planned and consistent approach to financial internal controls. In the Spring of 2015, under the sponsorship of the Vice Chancellor of Finance and Administration (VCFA), UW-Madison launched a comprehensive Financial Internal Controls Initiative to improve campus-wide financial processes and develop a financial internal control framework using the Committee on Sponsoring Organizations (COSO) as a guide. As a precursor to the formal launch, UW-Madison engaged Price Waterhouse Coopers (PWC) to conduct a high-level risk assessment of the University's financial and accounting operations. PWC concluded that twelve (12) campus-wide financial processes were at risk and not adequate to detect fraud or material misstatements in financial data and reports. The twelve (12) financial processes identified as at risk were:

- Financial Information Management and Financial Reporting
- Cash Handling
- Revenue
- Internal Billing
- Capital Equipment
- Inventory
- Procure-to-Pay
- Grants
- Gifts / Development
- Payroll System (HRS) Management
- Scholarship / Financial Aid / Tuition
- Cost Transfers

How do we measure it? Since this endeavor is an ongoing effort, the basis for measurement will be the completion of activities that further the development of a campus financial internal control framework according to the project plan.

Baseline measure: Baseline measures do not currently exist.

Performance target: Performance targets for FY17 will be the completion of identified milestones according to the project plan.

What will we do this fiscal year *(milestones to be accomplished)*: Project management for the Financial Internal Controls Initiative is being provided by the Office of Administrative Process Redesign (APR) using the Lean Six Sigma methodology. An overall charter and project plan, as well as internal control and process improvement recommendations from the first seven (7) of the process improvement teams noted above, have been prepared and submitted to the VCFA under separate cover. The project plan will be updated and progress reports submitted to the VCFA throughout the fiscal year. Given the nature of the content of the teams' recommendations, staff in the Division of Business Services will be heavily involved in implementation.

What factors may affect results *(risks, challenges, barriers to success)*?
- The initiative is a large undertaking and will require cooperation across campus.
- In order to effectively implement the teams' recommendations, changes to organizational structures and roles and responsibilities of financial staff may be necessary.
- A significant financial investment in new or existing IT systems will be necessary to support adequate financial internal controls.

Division Strategic Priority 3: **Ensure Financial Integrity and Preservation of Campus Assets**

Goal: Explore a Shared Services Model for Employee Expense Report Auditing

Why is it important? Currently, the auditing of electronic employee expense report is distributed across campus and performed locally by staff in the campus unit. In FY16, a total of 50,764 employee expense reports were processed through the University's expense reporting application (eReimbursement) within the PeopleSoft Shared Financial System (SFS). In past years, inconsistencies in the auditing of employee expense reports have been problematic despite extensive training and communication. Centralizing the auditing function into a shared services model would provide uniformity in the interpretation and enforcement of expense reporting policy. This would also establish consistent expense report processing time frames, reduce financial risk of payment of non-compliant expenses, and assist in monitoring for compliance with IRS Accountable Plan rules.

How do we measure it? This is an exploration of a new service delivery model, so the basis of measurement will be the completion of milestones.

Baseline measure: Baseline measures do not currently exist.

Performance target: Performance targets for FY17 will be completion of identified milestones (see below).

What will we do this fiscal year *(milestones to be accomplished)***?**
- Prepare a project plan for a shared services model, including:
    - Identifying executive sponsorship and operational owner(s).
    - Defining a Shared Services strategy:
        - Recognize and analyze the intricacies and requirements of the current process.
        - Identify what in the current process is not working.
        - Identify the types of expense reports having shared services opportunities, giving consideration to dollars per expense report, divisional personnel resource limitations, etc.
        - Establish base line metrics potentially based on:
            - Transactional expense report review and approvals per person,
            - Internal control segregation of duties where applicable, and
            - Auditing transaction timeframes.
        - Preserve autonomy where deemed appropriate.
        - Assess resources needed and the location of those resources in a shared services model.
        - Establish a plan for communication and socialization of the model.
- Complete a plan for piloting a shared services model by June 2017.

What factors may affect results *(risks, challenges, barriers to success)***?**
- Necessary resources to participate in the development of a shared services model may be a challenge given other required duties or projects.
- The shared services model may be perceived as a threat to some current employee's employment status and reporting relationships.

Division Strategic Priority 3: **Ensure Financial Integrity and Preservation of Campus Assets**

Goal: Implement Additional Prompt Payment Terms

Why is it important? According to s. 16.528(2)(a), Wis. Stats., UW institutions are required to pay a properly completed invoice or receipt and acceptance property/services under an order or contract within 31 days of receipt of the invoice. However, many vendors will offer additional discounts for more prompt payment of invoices. UW-Madison's current payment terms are configured to pay every voucher the day after it is entered in the AP system (PeopleSoft). PeopleSoft can be configured to identify payment terms on Purchase Orders (POs) and automatically deduct applicable discounts or hold payments until the end of the month or the latest payment day. Taking advantage of payment terms will save money for the University including early payment discounts and bundling of some vendor payments, thereby reducing payment processing costs.

How do we measure it? The basis of measurement will be the amount of discounts earned, which can be tracked by monitoring credits posted to chart-of-account code 3998 (discounts earned).

Baseline Measure: Baseline measures do not currently exist.

Performance Target: The full completion of identified milestones (see below).

What will we do this fiscal year *(milestones to be accomplished)***?**
- Engage with Purchasing Services staff to capture payment terms on POs and establish a discount earned target for FY17.
- Modify AP processes to capture payment terms from the Shared Financial System (SFS), which will allow AP staff to expedite POs with prompt pay discounts.
- Engage with the SFS team at UW-System Administration to configure and test payment terms in SFS.

What factors may affect results *(risks, challenges, barriers to success)***?**
- The SFS team at UW-System Administration may have limited resource availability to devote to the project.
- Encountering hurdles to implementing the interface of payment term data between the current legacy vendor file (BusPO) and SFS.
- The training of Purchasing Services and AP staff on new business processes entering and identifying payment terms may be time intensive.

Division Strategic Priority 3: **Ensure Financial Integrity and Preservation of Campus Assets**

Goal: Improve Bursar's Office Collection of Past Due Student Accounts

Why is it important? Approximately 1% of the tuition/fees owed on student accounts are unpaid each fiscal year. Student bills are processed and posted to CASHNet monthly and email notices are sent to student email accounts. Once a student is no longer enrolled, a paper bill is sent out quarterly and follow up emails with balance information are sent each semester to available email accounts. In the past, the Bursar's Office has relied on enrollment and transcript holds to encourage students to pay their bills in full. However, for students that do not intend to complete their degree, the holds do not always provide enough incentive. Consequently, the total amount of past due student accounts has accumulated to over $11 million through the end of FY15.

How do we measure it? The basis for measurement will be the amount of past due student accounts collected.

Baseline measure: The current total Account Receivable (AR) past due balance of $11,313,547.

Performance target: Reduce the total Account Receivable (AR) past due balance by 10%.

Illustration:
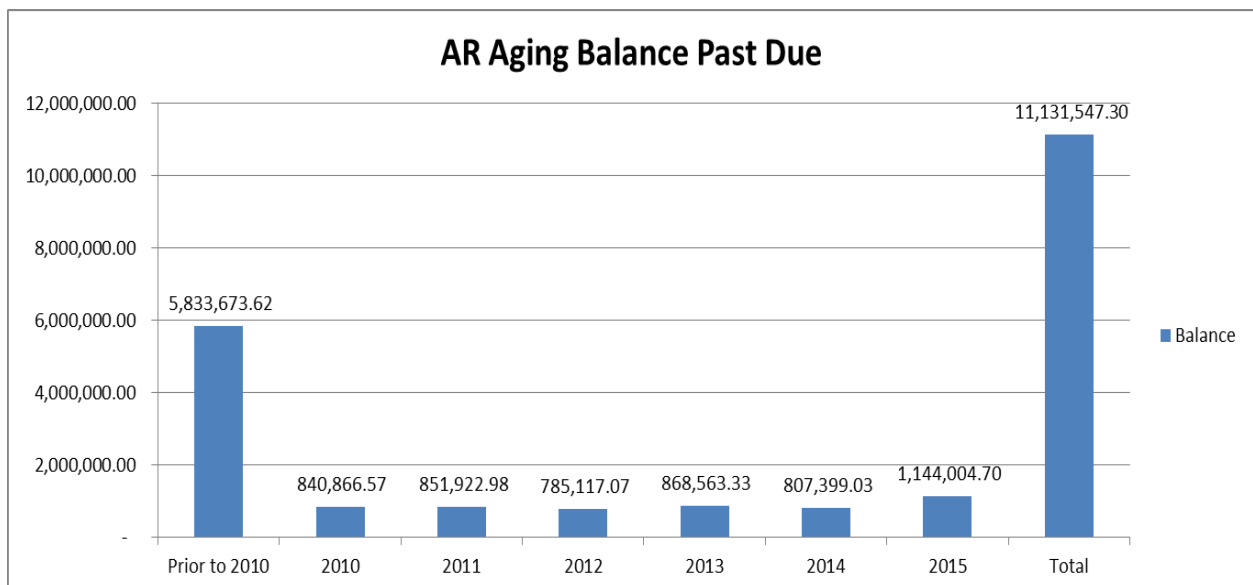
What will we do this fiscal year *(milestones to be accomplished)***?**
- Explore participation with the WI Department of Revenue (DOR) in the State Debt Collection Initiative to collect on past due student accounts.
- Work with DOR to develop the electronic transfer of files.
- Identify the student accounts that should be turned over to DOR for collection (e.g., residents, nonresidents, international students, length of time the account is delinquent).
- Identify and develop processes and methods to support collection of past due accounts by DOR, such as tracking the students that have received the 30 day notification to submit to DOR for collections, developing student bills that include new language about DOR collections, and a posting payments received from DOR.
- Submit the first file of past due student accounts to DOR by March 2017.

What factors may affect results *(risks, challenges, barriers to success)*?
- UW-Madison has not aggressively collected on past due student accounts in the past and there may be a negative perception associated with turning student accounts to DOR for collection and possible garnishment of tax refunds.
- For debtors who do not live within Wisconsin, this may not be an effective means of collection.
- Work and timing of staff in the Bursar's Office to devote sufficient resources to a new collection process.

Strategic Priority 4: **Promote Strategic Sourcing and Demand Management**

Goal: Continue Strategic Sourcing Efforts

Why is it important? Strategic sourcing allows the University to focus its purchasing resources on the highest value activities while reducing risks associated with the supply of goods and services needed for research, instruction and operations. The practice is conceptually grounded in managing suppliers of related commodities and services consistently across an enterprise. Last fiscal year, Purchasing Services documented several specific category strategies which identified cost savings opportunities. The goal for FY17 is to execute on selected categories (e.g., janitorial/sanitation supplies) with willing campus partners and begin implementing category management as a practice across the University.

How do we measure it? Consistent use of contracts for purchases (spend under contract) and cost savings through the adoption of specific sourcing actions.

Baseline measure: Spend in select categories prior to implementation.

Performance target: Completion of milestones and documentation of cost savings.

What will we do this fiscal year *(milestones to be accomplished)***?**
- Work with UW-System Administration to request flexibility from State of Wisconsin procurement rules administered by the Department of Administration (DOA), thus making effective category management possible.
- Present selected category strategies to campus leaders to obtain support.
- Obtain campus partner acceptance and establish campus teams as needed to execute strategies.
- Develop a self-service spend data base to provide purchasing agents with ready access to spend data
- Analyze spending patterns, markets and the supply base to identify additional opportunities for category strategies and cost savings.
- If necessary, prepare a business case for additional staff resources to meet the demands of developing and implementing a comprehensive approach to strategic sourcing.

What factors may affect results *(risks, challenges, barriers to success)***?**
- UW-Madison may not be granted purchasing flexibilities as requested.
- Some category strategies require a waiver from a mandatory DOA contract, and cannot be executed without one.
- While strategic sourcing concepts are not new to UW-Madison, the decentralized and distributed authority for purchasing across campus makes effective strategic sourcing a challenge.
- Based on past attempts at strategic sourcing pilot projects, not all campus partners lend support to center-led procurement strategies.

Priority 5: **Enrich the Student Experience**

Goal: Improve Bursar's Office Communication with Students and Parents

Why is it important? Students and parents want to have a positive experience with administrative units at UW-Madison, including the Bursar's Office. Providing excellent, proactive communications between the Bursar's Office and students and parents allows both to focus on the academic reasons the students are at the University, as well as creating an excellent customer experience.

How do we measure it? The Bursar's Office tracked phone call data from July 1, 2015 through June 30, 2016 to measure what topics were generating the most questions from parents and students. The phone call data included information about the caller, the tone of the call, and the outcome of the call. A reduction in the number of calls suggests that there is less confusion about certain topics. Performance will be measured by tracking the reduction in phone calls in five top categories (see below).

Baseline measures:

FY16 Totals	Total	Students	Parents	Other
General Tuition and Tuition Bill	2,195	1,616	560	19
Financial Aid	1,334	1,127	204	3
Holds on Account	1,068	946	113	9
Authorized Payer	617	106	508	3
Refund Timing (FA & Non-FA)	605	497	102	6
Total Calls	**5,819**	**4,292**	**1,487**	**40**

Performance target: Reduce by 10% the number of phone calls received in each category.

Illustration:
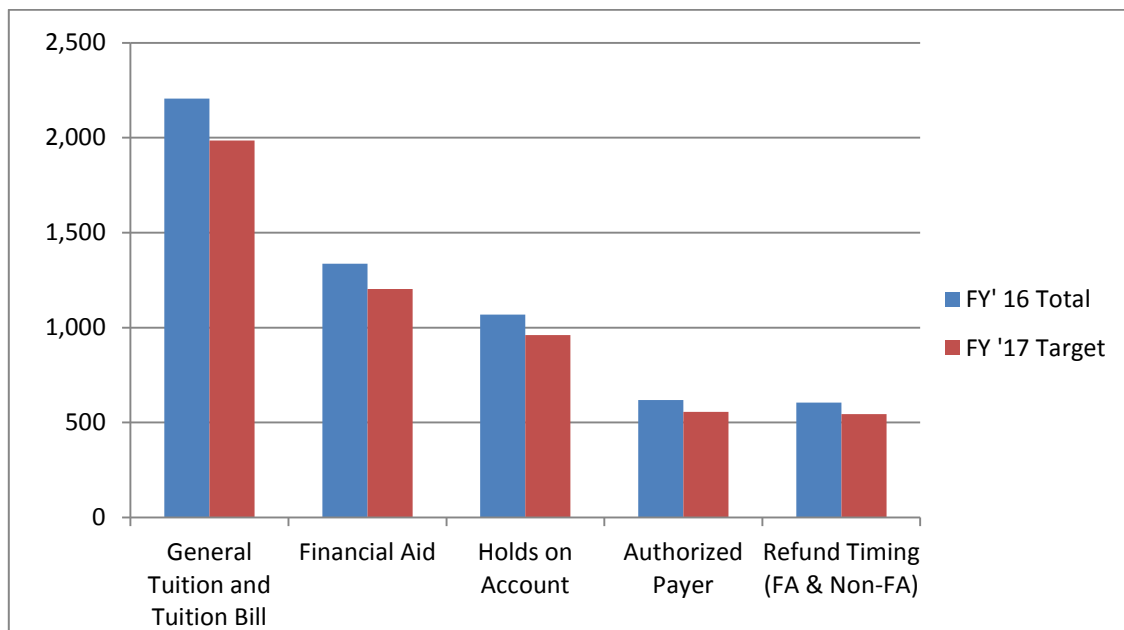
What will we do this fiscal year *(milestones to be accomplished)*?
- Continue to improve the content as well as the look and feel of the Bursar Office website.
- Add information about tuition and fee holds to the website.
- Send out a start of the semester reminder email to enrolled students for both fall and spring.
- Continue to develop the question decision tree to include all of the main topics.
- Develop a Student Permissions "How To" video. The new student permissions option in ISIS allows the student to authorize the use of financial aid to apply towards fees that financial aid would not otherwise apply towards.

What factors may affect results *(risks, challenges, barriers to success)*?
- Students may not reference our website to gather information prior to calling the office.
- Changes in the University's tuition and fee structure may increase the number of phone calls received regardless.
- Providing information in a way that all customers can understand is challenging.
- Recent departures of staff with years of departmental knowledge may affect the results.
- Tracking the phone calls is a manual process which requires each staff member to document the calls.