UW-Madison
Administrative Excellence – Shaping Our Future
Phase II Work Team Project Charter
Computer Bundles

Team Name	Strategic Purchasing - Computer Bundles
Business Process Owner	UW-Madison Purchasing
Objective	The objective of this project, as prioritized by the Advisory Committee and approved by the Steering Committee, is to build out the computer hardware area within the strategic purchasing (aka demand management) opportunities identified in Phase I of the Administrative Excellence (AE) initiative, specifically developing campus-wide computer bundles to optimize purchasing. Team members will refine data, propose solutions and develop a business case and implementation plan for computer hardware purchasing at UW-Madison.
Goal	Identify a suite of no more than four (4) competitively priced standardized desktop and laptop computer bundles with a single vendor for administrative use campus-wide. Maximize savings through implementation of strategies to consolidate vendors and require an articulated business need for purchase of non-bundle configurations.
Scope	The scope of work for this project includes: • further data collection and analysis, and review of current policies and operations to support and enhance computer hardware purchasing. • developing detailed business cases to support implementation of proposed campus-wide computer bundle solutions. • assisting in the development of strategies and plans for communication, stakeholder engagement, policy development, and step-by-step implementation. The scope of this work will be limited to the development of necessary implementation planning deliverables related to computer hardware purchasing and will not include negotiation of new contracts and/or pricing with vendors.
Critical Assumptions	• Team members and leadership will have the knowledge and skills to be able to contribute to necessary policy requirements, solutions and implementation strategies. • Team members will be able to dedicate at least one day (8 hours) per week for a concentrated period of approximately 8 weeks, and then lesser amounts of additional time for an estimated period of 3 - 5 months. • The team leader will be able to dedicate at least 10 hours per week for a concentrated period of approximately 8 weeks, and then lesser amounts of additional time for an estimated period of 3 - 5 months.
Timeline	17 working weeks encompassing the following primary activities: • **Pre-Work** – Additional data collection: solicit local (department/division)

	policies and develop data requests and request additional data from vendors • **Week 1** – Hold first team meeting to discuss principles, scope and goals, roles and responsibilities of members, and to vet current data analysis and identify additional data needs. Collect additional data as necessary. • **Weeks 2 to 3** – Review and analyze additional data collected and update Phase 1 assessments; discuss potential configurations and assign working group members to create specification suites • **Weeks 4 to 5 –** Discuss alternate strategies and review and select options for computer bundles, assign roles for business case development, and provide guidance to AE and Huron on implementation strategies and necessary or desired policies; conduct analysis and build business case content • **Weeks 6 to 7** – Discuss business case content, identify gaps in analysis, and assign additional responsibilities for drafting business case and implementation plan; conduct additional analysis as required • **Weeks 8 to 9** – Finalize business case/implementation plan and present to Advisory Committee for initial review • **Week 10** – Adjust business case/plan based on Advisory Committee feedback • **Week 11** – Present business case/plan to Steering Committee • **Week 12** – Debrief Steering Committee meeting and determine next steps, if any • **Weeks 13 to 14** – Refine communication plan, stakeholder engagement, and step-by-step implementation plans, and policy language • **Weeks 15 to 16 –** Begin stakeholder engagement • **Week 17** – Present material to Steering Committee for go/no-go decision
Deliverables	• Completed Business Case in the appropriate template • Report on data • Communication plan coordinated with AE project staff • Stakeholder engagement plan • Step-by-step implementation plan • Weekly status updates in the appropriate template Additional interim deliverables may be required as the working team identifies additional needs for Advisory Committee and/or Steering Committee reviews.
Team Members	Team Leader – Brian Busby (DoIT) Team Member – Lori Voss (Business Services - Purchasing) Team Member – Brian Kishter (DoIT) Team Member – Eric Giefer (Law) Team Member – Mike Warren (Rec Sports) Team Member – Paul Jelle (CALS – Dell user) Team Member – Geoff Cohn (Student Representative) Subject Matter Expert - Dawn Ness (Business Services) Subject Matter Expert - Steve Carrola (Business Services) Subject Matter Expert - Mike Matschull (Business Services) Project Support – Dana Erf (Huron Consulting Group)

Project Roles & Responsibilities	Member Name	Member Role
	Team Member	Provide feedback for data collection and analysis activities; assist in data gathering; contribute to development of

		proposed solutions, business case and implementation plan; assist in communication effort and stakeholder engagement.
	Team Leader	In addition to the responsibilities of a team member, the team leader will be responsible for partnering with Huron and AE to develop agendas and facilitate team meetings; identify task owners and assign relevant tasks and responsibilities to the group; support deliverable creation.
	Administrative Excellence Project Staff	Provide overall project management and guidance through the development of agendas, tracking of team progress, and escalating issues as needed; build the communication plan, stakeholder engagement, and step-by-step implementation plans and policy language; support business case development process and presentation of deliverables to Advisory Committee and Steering Committee.
	Business Process Owners	Support data collection activities; vet proposed solutions, business cases, policy language, and initiative communication, stakeholder engagement, and step-by-step implementation plans.
	Huron Consulting Group	Contribute to data collection process and perform necessary data analysis; provide project management and guidance through the development of agendas, tracking of team progress, and escalating issues as needed; partner with AE project staff to build communication, stakeholder engagement, and step-by-step implementation plans and policy language; support business case development process and presentation of deliverables to Advisory Committee and Steering Committee.
	Advisory Committee	Perform initial review of business case and implementation plan and provide feedback.
	Steering Committee	Review business case and implementation plan and provide feedback; provide decision to implement.