



**UW-Madison**  
**Administrative Excellence – Shaping Our Future**  
**Phase II Work Team Project Charter**  
**Strategic Purchasing - MRO Supplies**

February 27, 2012 v2.6 dgk  
Approved by Steering Committee November 23, 2011 (v2)  
Reviewed by Advisory Committee December 1, 2011 (v2)

<b>Team Name</b>	Strategic Purchasing – MRO Supplies
<b>Business Process Owner</b>	UW-Madison Purchasing
<b>Objective</b>	<p>The objective of this project, as prioritized by the Advisory Committee and approved by the Steering Committee, is to build out the MRO supplies area within the strategic purchasing (a.k.a. demand management) opportunities identified in Phase I of the Administrative Excellence (AE) initiative.</p> <p>Team members will refine data, propose solutions and develop a business case and implementation plan for MRO supplies purchasing at UW-Madison.</p>
<b>Goal</b>	Maximize institution-wide savings through implementation of strategies to consolidate vendors, leverage university scale, and substitute purchases for commoditized options when possible, without sacrificing service levels.
<b>Scope</b>	<p>The scope of work for this project work team includes:</p> <ul style="list-style-type: none"> <li>• further data collection and analysis, and review of current policies and operations to support and enhance MRO supplies purchasing.</li> <li>• developing detailed business cases to support implementation of proposed solutions.</li> <li>• assisting in the development of strategies and plans for communication, stakeholder engagement, and step-by-step implementation.</li> </ul> <p>The scope of this work will be limited to the development of necessary implementation planning deliverables related to MRO supplies purchasing and will not include negotiation of new contracts and/or pricing with vendors.</p>
<b>Critical Assumptions</b>	<ul style="list-style-type: none"> <li>• Team members and leadership will have the knowledge and skills to be able to contribute to necessary policy requirements, solutions and implementation strategies</li> <li>• 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.</li> <li>• The team leader will be able to dedicate at least 10 hours per week for a concentrated period of approximately 7 weeks, and then lesser amounts of additional time for an estimated period of 3 - 5 months.</li> </ul>
<b>Timeline</b>	<p>18 working weeks encompassing the following primary activities:</p> <ul style="list-style-type: none"> <li>• <b>Pre-Work</b>– Additional data collection: gather information from the Department of Administration (DOA), understand DOA flexibilities, solicit local (department/division) policies, and develop data requests and request additional data from vendors;</li> <li>• <b>Weeks 1 to 2</b> - Hold first team meeting to discuss principles, scope and goals, roles and responsibilities of members, and to vet current data analysis</li> </ul>



	<p>and identify additional data needs. Collect additional data as necessary.</p> <ul style="list-style-type: none"> <li>• <b>Weeks 3 to 4</b> –Review and analyze additional data collected and update Phase 1 assessments</li> <li>• <b>Weeks 5 to 6</b> - Discuss alternate strategies and review and select options for the scientific supplies commodity area, 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</li> <li>• <b>Weeks 7 to 8</b> – Discuss business case content, identify gaps in analysis, and assign additional responsibilities for drafting business case and implementation plan; conduct additional analysis as required</li> <li>• <b>Weeks 9 to 10</b> –Finalize business case/implementation plan and present to Advisory Committee for initial review</li> <li>• <b>Week 11</b> – Adjust business case/plan based on Advisory Committee feedback</li> <li>• <b>Week 12</b> – Present business case/plan to Steering Committee</li> <li>• <b>Week 13</b> –Debrief Steering Committee meeting and to determine next steps, if any</li> <li>• <b>Weeks 14 to 15</b> – Refine communication plan, stakeholder engagement, and step-by-step implementation plans, and policy language</li> <li>• <b>Week 16 to 17</b> – Begin stakeholder engagement</li> <li>• <b>Week 18</b> – Present material to Steering Committee for go/no-go decision</li> </ul>					
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Completed Business Case in the appropriate template</li> <li>• Communication plan coordinated with AE project staff</li> <li>• Stakeholder engagement plan</li> <li>• Step-by-step implementation plan</li> <li>• Weekly status updates in the appropriate template</li> </ul> <p>Additional interim deliverables may be required as the Working Group identifies additional needs for Advisory Committee and/or Steering Committee review during the course of the project.</p>					
<b>Team Members</b>	<p>Team Leader – Paul Broadhead (WI Union)          Team Member - Hartley Murray (Business Services)          Team Member - Vint Quamme (Business Services)          Team Member – Charlie Simonson (tentative - FP&amp;M)          Team Member – Steve Heitz (FP&amp;M)          Team Member – Kris Ackerbauer (FP&amp;M)          Team Member – Jodi Krause (University Housing)          Team Member – Bill Miller (University Health Services)          Team Member – Kay Coleman (Athletics)          Team Member – Ed Molter (Athletics)          Team Member – Daniel Statter          Subject Matter Expert - Dawn Ness (Business Services)          Subject Matter Expert - Steve Carrola (Business Services)          Subject Matter Expert - Mike Matschull (Business Services)          Project Support – Laura Cox (Huron Consulting Group)</p>					
<b>Project Members</b>	<table border="1"> <thead> <tr> <th data-bbox="440 1728 927 1791">Member Name</th> <th data-bbox="927 1728 1476 1791">Member Role</th> </tr> </thead> <tbody> <tr> <td data-bbox="440 1791 927 1938">Working Team Member</td> <td data-bbox="927 1791 1476 1938">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</td> </tr> </tbody> </table>	Member Name	Member Role	Working 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	
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## Administrative Excellence

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		communication effort and stakeholder engagement
	Working Team Leader	In addition to the responsibilities of a working team member, the team leader will be responsible for partnering with Huron and AE to develop agendas and facilitating 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