**Team Name** | Strategic Purchasing – Scientific Supplies
---|---
**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 scientific supplies area within the strategic purchasing (aka demand management) opportunities identified in Phase I of the Administrative Excellence (AE) initiative.

Team members will refine data, propose solutions and develop a business case and implementation plan for scientific supplies purchasing at UW-Madison.

**Goal**

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.

**Scope**

The scope of work for this project work team includes:

- further data collection and analysis, and review of current policies and operations to support and enhance scientific supplies purchasing.
- developing detailed business cases to support implementation of proposed solutions.
- assisting in the development of strategies and plans for communication, stakeholder engagement, and step-by-step implementation.

The scope of this work will be limited to the development of necessary implementation planning deliverables related to scientific supplies 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 7 weeks, and then lesser amounts of additional time for an estimated period of 3 - 5 months.

**Timeline**

18 working weeks encompassing the following primary activities:

- **Pre-Work**— 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;
- **Weeks 1 to 2** - 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 3 to 4** – Review and analyze additional data collected and update Phase 1 assessments
- **Weeks 5 to 6** – 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
- **Weeks 7 to 8** – 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 9 to 10** – Finalize business case/implementation plan and present to Advisory Committee for initial review
- **Week 11** – Adjust business case/plan based on Advisory Committee feedback
- **Week 12** – Present business case/plan to Steering Committee
- **Week 13** – Debrief Steering Committee meeting and to determine next steps, if any
- **Weeks 14 to 15** – Refine communication plan, stakeholder engagement, and step-by-step implementation plans, and policy language
- **Week 16 to 17** – Begin stakeholder engagement
- **Week 18** – Present material to Steering Committee for go/no-go decision

### Deliverables

- Completed Business Case in the appropriate template
- 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 Group identifies additional needs for Advisory Committee and/or Steering Committee review during the course of the project.

### Team Members

- **Team Leader** – Mike Hardiman (Business Services)
- **Team Member** – Mike Matschull (Business Services)
- **Team Member** – Janet Bresnahan (Business Services)
- **Team Member** – Kathy Jaglin (WI State Laboratory of Hygiene)
- **Team Member** – Aimee Lefkow (College of Letters & Science)
- **Team Member** – Catherine Carter (CALS – Great Lakes Bioenergy Research)
- **Team Member** – Ziqi Dai (Student Representative)
- **Subject Matter Expert** - Dawn Ness (Business Services)
- **Subject Matter Expert** - Steve Carroll (Business Services)
- **Project Support** – Dana Erf (Huron Consulting Group)

### Project Members

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working Team Member</td>
<td>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</td>
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<tr>
<td>Role</td>
<td>Responsibilities</td>
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<tr>
<td>Working Team Leader</td>
<td>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.</td>
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<tr>
<td>Administrative Excellence Project Staff</td>
<td>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.</td>
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<tr>
<td>Business Process Owners</td>
<td>Support data collection activities; vet proposed solutions, business cases, policy language, and initiative communication, stakeholder engagement, and step-by-step implementation plans.</td>
</tr>
<tr>
<td>Huron Consulting Group</td>
<td>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.</td>
</tr>
<tr>
<td>Advisory Committee</td>
<td>Perform initial review of business case and implementation plan and provide feedback</td>
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<tr>
<td>Steering Committee</td>
<td>Review business case and implementation plan and provide feedback; provide decision to implement</td>
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