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<th>Presenter(s)</th>
<th>Time</th>
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<tr>
<td>Welcome/Introduction</td>
<td>Dan Langer</td>
<td>5 minutes</td>
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<tr>
<td>UW-Madison Policy Library</td>
<td>Charles Meyer/Jenny Faust</td>
<td>20 minutes</td>
</tr>
<tr>
<td>Non-Sponsored Project Request Form</td>
<td>Kayla Strohl/April Cook</td>
<td>15 minutes</td>
</tr>
<tr>
<td>ATP – Finance Vision Workshop</td>
<td>Susie Maloney</td>
<td>20 minutes</td>
</tr>
<tr>
<td>ShopUW+</td>
<td>Lori Voss/Hartley Murray</td>
<td>20 minutes</td>
</tr>
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<td>Dan Purcell/Liv Goff</td>
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<tr>
<td></td>
<td>Mari Ann Menager</td>
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Project Structure and Governance

- Executive Sponsors
  Provost & VC Legal Affairs

- Steering Committee
  Reps from VCLA, VP/APIR, VCFA, VCRGE

- Project Management
  Office of Strategic Consulting

- Working Group
  to draft guidelines
  Shared gov representation

- Project Team
  Wide cross-divisional representation

- Technical Team
  Defining requirements

Resources
Key Success Factors

- Broad, cross-campus participation.
- Strong, centralized project management dedicated to facilitating the process, listening and moving forward is critical.
- Have a structured plan AND be flexible.
Current State at UW—Madison (2018)

- Wisc.edu/policies
- UW’s policy front door.
- Inconsistent collection of random links to:
  - Sub-pages with more links.
  - Departmental pages.
  - Individual policies.
UW-Madison Policy Library Status

Currently, 98% of university-wide policies have been added to the UW-Madison Policy Library.

We value your feedback. If you have suggestions on the layout and functionality of this site, please send them to policylibrarycoordinator@wisc.edu.
Project “Loose Ends”

- 2% (16 policies) remain to be validated and published.
- Budget situation delaying hiring policy library coordinator.
- Some unit web pages still need cleanup/language changes/redirects.
- Full stakeholder engagement (“roll out”) still needs to occur.
Emerging Issues

- Increased awareness of policy content is driving policy change.
- Policy library highlighting policy issues.
- Need to reduce ambiguity about approval authority.
- “Judgment calls” about whether a change is substantive or editorial.
- In many cases, blurred lines between policy and procedure.
Guidelines for Policy Development at UW–Madison

This web page outlines the UW–Madison policy development, revision, approval, and retirement process for university-wide policies that apply generally to any member of the university community. Individual schools, colleges, divisions, departments, and units may have their own policies that apply to individuals working or studying in those entities; if the entity’s policy contradicts or is less restrictive than a university-wide policy, the university-wide policy supersedes the school, college, division, department, or unit policy.

Employees, students, and all other members of the UW–Madison community are also subject to federal and state laws, rules, and regulations, including policies of the University of Wisconsin Board of Regents and the University of Wisconsin System. If a UW–Madison policy conflicts with any Board of Regents or UW System policy, or with any state or federal law, rule, or regulation, the university policy is superseded.

Policy Development Tools
- Terms and Definitions
- Life Cycle
- Policy Template
- Policy Template Instructions
- Best Practices for Publishing Policy
UW-Madison Policy Life Cycle

The Policy Life Cycle illustrates the process for proposing new policy and for reviewing and modifying existing policy. The policy manager engages relevant stakeholder groups throughout this process. The Guidelines for Policy Development at UW-Madison provide further detail.

1. IDENTIFY NEED
   Need for a new policy could come from any source, external or internal.

2. DRAFT AND EDIT
   Policy manager drafts or edits policy using the policy drafting template.

3. REVIEW/REVISE
   Policy manager solicits appropriate stakeholder review for feedback and revises accordingly.

4. CONSULT
   Policy manager consults with appropriate committee(s) and/or advisory group(s) as needed to get feedback, suggestions, and concurring approval prior to routing to approval authority.

5. APPROVE/RETIRE
   Approval authority approves draft or modification(s), and it becomes policy. If policy manager recommends retiring a policy, approval results in removal of policy from the library.

6. PUBLISH
   Policy library coordinator publishes policy in the library and provides appropriate link to responsible office for communication.

Start here when proposing new policy

Start here when reviewing and modifying existing policy

Office of Strategic Consulting
Standardized Policy Template

Enter policy title. (required)

Rationale/Purpose of the Policy
Add a brief summary of the policy’s primary objectives. (optional)

Definitions
Add explanations of key terms or concepts specific to the policy. (optional)

Scope
Add a general statement about who and/or what the policy applies to. (optional)

Policy Details
Add the content of the policy. (required)

Related UW–Madison Policies
List and provide a link to any other UW–Madison policies that are closely related to the policy itself and may need to be known to users of the policy. (optional)

Related UW–Madison Documents
List and provide a link to any other UW–Madison related documents that provide relevant information and may be necessary to ensure compliance with the policy. (optional)

External References
List and provide a link to any federal/state laws or regulations or any Board of Regents or UW System policies that mandate, authorize, or otherwise affect this policy. (optional)

Policy Administration
Approval Authority
Indicate the position or office with the right to issue, approve, or enforce the policy. (required)

Policy Manager
Indicate the position (and by extension the incumbent in a position) responsible for the development and administration of the policy. (required)

Policy Contact(s)
Enter the information requested below for each individual who serves as a point of contact to answer questions on the policy and assist in interpretation of the policy. (At least one policy contact is required; all information is required for each policy contact listed)

Policy contact’s position title
Policy contact’s full name
Policy contact’s email address
Policy contact’s phone number

Policy History
Effective Date
Select the date the policy goes (or went) into effect. (required)

Date Issued
Select the original date the policy was released to the university as approved. (optional)

End Date
Select the date the policy is no longer in effect. (optional)

Next Review
Select the date the policy is next scheduled for review. (optional)

Revised Dates
List all the dates the policy was revised, using MM/DD/YYYY format. (optional)

Reviewed Dates
List all the dates the policy was reviewed, using MM/DD/YYYY format. (optional)
Publishing Policy

- Only policies in the UW-Madison Policy Library are official university-wide policies.

- Three ways to include policy content on your website:
  1. List policy number and title (only) with direct link to the policy in the policy library.
  2. List policy number and title with direct link plus a brief description of the policy, making it clear that “This is a summary of the [policy name] policy. View the official policy [link] in its entirety in the UW-Madison Policy Library.”
  3. Use the available API (Application Programming Interface) to display policy library content in real time on your website. Contact policylibrarycoordinator@wisc.edu for more information.
Best Practices

- Avoid “shadow” policies: Do not maintain a copy of a policy on your website (except if fed by API).

- Avoid using the term “policy” to refer to documents that aren’t, such as expectations, guidelines, procedures, rules, etc.

- Establish clarity on roles and responsibilities (policy manager, contacts, approval authority).
Best Practices

- Review the Guidelines for Policy Development at UW-Madison.
- Use the template for drafting new policies.
- For policy revisions:
  - Extract policy from the policy library using print layout, “print to pdf” and then convert pdf to Word.
  - Use “track changes” during your revision process.
  - Submit to policylibrarycoordinator@wisc.edu a Word mark-up showing tracked changes when submitting policy revisions. Copy the Approval Authority so we know the change is approved.
UW-MADISON POLICIES BY VC AREA

- Chancellor, 83, 11%
- Provost & VCAA, 153, 19%
- VCRGE, 130, 16%
- VCFA, 277, 35%
- VCLA, 43, 5%
- VCSA, 105, 13%
- VCUR, 5, 1%
Next steps going forward

For campus:
- Find policies more easily!
- Complete web cleanup
- Begin using the template for developing new and revised policies.
- Contact policylibrarycoordinator@wisc.edu for guidance, tools, and to publish new or revised policies in the library.

For the project:
- Address outstanding issues
- Engage campus committees and other groups to seed strong policy management practices.
Discussion, questions or comments

UW-Madison Policy Library
policy.wisc.edu

Policy Library Coordinator
policylibrarycoordinator@wisc.edu
Policy Library Coordinator Role

- Play role of policy librarian and maintain the library.
- Act as friendly coordinator to shepherd policy development.
- Act as neutral party and impartial facilitator to implement consistent standards.
- Assist stakeholders in developing policy and navigating the process using appropriate tools, etc.
- Facilitate review processes, as appropriate.
- Train or educate constituents about good policy management practices.
PROVOST & VCAA POLICIES BY RESPONSIBLE OFFICE

- Graduate School: 49 (32%)
- DoIT: 22 (14%)
- Division of Continuing Studies: 9 (6%)
- Academic Planning and Institutional Research: 53 (35%)
- Office of the Provost & UW Libraries: 6 (4%)
- Enrollment Management: 14 (9%)
Non-Sponsored Project Form

Kayla Strohl and April Cook
Accounting Services
Division of Business Services
Updated Non-Sponsored Project Request Form

• New format designed to be more user friendly

• Added 233 project information

• Process remains the same for non 233 projects
  • Email completed form to sfssetup@bussvc.wisc.edu

Requesting New 233 Projects

• Updated form allows Divisions to request new 233 projects as needed

• Effective Immediately - Divisions are to obtain new 233 projects prior to sending gift fund payment requests to UW Foundation
  ✓ Will aid in improving internal controls for gift deposits
  ✓ Will ensure all fund 233 payments made by UW Foundation reference specific project number (no more “233NEW” in ARW)

• **Goal:** By end of June 2021 all 233 payments made by UWF reference a 233 project number
ATP - Finance Vision Workshop

Susie Maloney
Administrative Transformation Program
Future State Vision Workshop Key Objectives

- **What experience** will we create for our Finance professionals? What are the moments that matter?
- **What must the team uphold** in design to be successful?
- What are our **Finance transformation priorities**?
- **What key decisions** will Finance tackle in Planning, and **what information** do we need to know to decide?
Finance Future State Vision Workshop

Participants

David Murphy
Associate Vice Chancellor for Finance & Administration, UWMSN

Julie Gordon
Sr. Associate VP for Finance, UWSA

Ginger Hintz
Assistant VP & Controller, UWSA

Renee Stephenson
Assistant VP of Budget Planning & Dev, UWSA

Taryn Carothers
Interim Vice Chancellor for Admin Affairs, UW-Whitewater

Sean Nelson
VP for Finance, UWSA

Brent Tilton
Director of Procurement, UWSA

Cindy Kluge
Director for Budget & Planning, UW-Milwaukee

Drew Knab
Associate Vice Chancellor for Finance & Business Services, UW-Milwaukee

Nicki Burton
Director of Shared Financial Systems, UWSA

Natalie Feggestad
Associate Dean for Finance & Administration, SoHE, UWMSN

Jackie Kriesel
Controller, UW-Eau Claire

Jennifer Klippel
Director, Madison Budget Office, UWMSN

Erin Hintz
Budget Officer, UWSP

Ann Iverson
Controller/Director of Business Services, UW-Parkside

Ken Mount
Sr. Associate Dean for Finance, SMPH, UWMSN

Angela Seitler
Associate Dean for Finance & Administration, CALS, UWMSN
Leaders discussed the “moments that matter” in the finance lifecycle.

<table>
<thead>
<tr>
<th>Planning (Budget)</th>
<th>Accounting (Actuals)</th>
<th>Reporting</th>
<th>Analysis</th>
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<tbody>
<tr>
<td>Integration of HR / Payroll information into projections</td>
<td>Consistency in use of accounts</td>
<td>Single source of truth</td>
<td>Trend analysis</td>
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<tr>
<td>Align budgeting with accounting practices</td>
<td>Simplicity and timeliness</td>
<td>Consistent data, flexible reporting to meet campus needs</td>
<td>Drill-down functionality</td>
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<tr>
<td>Projections throughout the year</td>
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<td>Ease of data access</td>
<td>Forecasting</td>
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<tr>
<td></td>
<td></td>
<td>Budget to actual reporting</td>
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</tr>
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</table>
**Design Guardrails**

Leaders worked together to define design guardrails, or the boundaries and goals for reimagining business processes

<table>
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<tr>
<th>Minimize customization</th>
<th>Standardize processes across the System</th>
<th>Maximize Workday functionality</th>
<th>Eliminate need for ancillary systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don't let striving for perfection hinder progress</td>
<td>Think outside the box</td>
<td>Keep user experience in mind</td>
<td>Comprehensive user training from start to finish</td>
</tr>
<tr>
<td>Easy to use, not complex</td>
<td>Do it right without being in a hurry</td>
<td>Design with reporting in mind</td>
<td>Consider changing policy rather than accommodating</td>
</tr>
</tbody>
</table>
Business Process Transformation

The following transformation activities will take place throughout Planning and Design:
Preliminary Business Process Design

We will have 3 functional design approaches depending on the level of transformation:

- **Operating Model Transformation**
  - Design new service delivery models and structures

- **Business Transformation**
  - Create new processes or fundamentally change how an existing process works to improve outcomes, including use of machine learning and AI

- **Process Optimization**
  - Streamline how processes are executed to improve quality and timeliness
TYPES OF OPERATING MODELS

The right operating model optimizes the delivery of cost-effective, flexible, quality service to all customers across the University

Service and Responsiveness

Decentralized
- Autonomous departments
- Focus on responsiveness
- Different systems and nonstandard processes
- Separate functional staff

Enterprise (Standardized)
- Departments, divisions, or sites run similarly
- Typically some common sub-systems
- Common processes
- Separate functional staff with some duplication

Centralized
- Single department, division, or site that performs the function
- Focus on efficiency and control
- Typically some common sub-systems
- No service level agreements or performance targets

Shared Services
- Separate organization but linked to customers through governance model
- Managed service delivery through clear SLAs
- Customer-driven transactions
- Performance-driven culture through measurement and feedback
- Process ownership end-to-end

Scale and Efficiency
Transformation Opportunities

Leaders* sorted 11 key Finance processes according to priority and opportunity for transformation

Operating Model Transformation
Design new service delivery models and structures

Business Transformation
Create new processes or fundamentally change how an existing process works to improve outcomes, including use of machine learning and AI

Process Optimization
Streamline how processes are executed to improve quality and timeliness

*Includes data from UW-Madison’s FSMWG and UW-Milwaukee
Key Decisions
Leaders discussed and made two program decisions

1. Will we **standardize the recording of revenue** across all funds?

2. Will we move to a **composite fringe rate**?
How many different funds exist within each fund type?
Art of the Possible

Potential Future State

• Spend our most restricted funds first
• Improved internal controls
• More realistic and meaningful forecasts, financial reports
• Better understanding of financial health across all funds and revenue growth needs / opportunities
  • Closer to GAAP reporting on a day-to-day basis vs. annual
  • Reliable data
  • Improved reporting
• Financial reports show all funds in the same way
  • Accruals for Revenue, Revenue Recognition using the same methodology
• Reduced financial services staff labor - effort spent on resolving allocation differences is changed to more value-added work
  • Reduced cost transfers
• More transparent, consistent, and clean accounting for FTE
Decision:
Will we standardize the recording of revenue across all funds?

Tier: 1 – Executive Sponsors

Key Decision:
Seeking Recommendation Next Steps, If Decided

Decision Outcome
Standardize the recording of revenue across all funds using GAAP, based on when it's earned.

Recommendation
Standardize the recording of revenue across all funds using GAAP, based on when it's earned.

Next Steps, If Decided
- What flexibilities can we explore/negotiate with DOA*?
- What will be built in the interface?
- Consider timing of state appropriation recognition.

Recommendation to take to Executive Sponsors
RECOMMENDATION: 3/17
What percentage of employees are tied to each fund type?

*Denotes % salary funding type by funding line count. 1 employee could have multiple lines of funding - PR, GPR, and Sponsored funding.
How many employees have multiple types of fund types?
Art of the Possible

Potential Future State

- Eliminate inequities between GPR and PR funded divisions
- Equal treatment of employees
- Equal treatment across funds
- Easier to forecast by using the same rate regardless of fund
- Impacts of benefit changes are treated the same and can be smoothed by allocated rate
- Less time spent managing fringe costs (budgeting/forecasting, reconciliation, cost transfers)
- Allows decision-makers and stakeholders to understand true costs of activities and performance
- Low complexity in technical implementation
Key Decision: Will we move to a composite fringe rate?

Tier: 1 – Executive Sponsors

Recommendation
Move to a composite fringe rate

Next Steps, If Decided
• Considerations of actuals vs. pooled rates
• Smoothing year-to-year swings
• How will we pull GPR actuals to request supplement from the state?

Decision Outcome
Move to a composite fringe rate, with guardrails in place to understand consequences
What’s Next?

Vision workshops are the first step to prepare for Planning and Design

• Conduct Functional Vision Workshops
  • Reporting and Analytics (June 2021)

• Outcomes will be used to develop design teams and resource needs

• Begin Transformation Planning Effort (July 2021)

Tell us what you think.
Visit our website (atp.wisconsin.edu) to ask questions or share your feedback.
Presenters:
Lori Voss/Hartley Murray
Dan Purcell
Liv Goff
Mari Ann Menager
CORs – New Process Launch

April
New process development and testing by Purchasing Services

May
Begin review & renewal. User’s orders will be available in their ShopUW+ Dashboard Work Basket

June
Users continue review and renewal of their orders in ShopUW+

Fiscal Year 22
Year 2
Users run their own report and take action
Airgas Cylinder Rental - New Process Launch

Existing Cylinders
- We will continue to utilize the current process for all cylinders ordered through Shop@UW. This means:
  - MDS will create invoices against MD#’s and load them into PAT for reallocation.
  - MDS will use a JET entry to bill the end users funding string on the 6th business day of each month.

New Cylinders
- For new cylinders ordered in ShopUW+, we will also bill at the beginning of each new month (Feb rental billed at beginning of Mar); however:
  - We will direct bill the same funding string that was used for the initial purchase of the gas with the exception of the account code (account code will be hardcoded to 2360).
  - PAT will not be used so there will not be an opportunity to reallocate cylinder rental charges before they are billed.

PAT
PAT will remain open for a few months after go live to accommodate Airgas Cylinder Rental for cylinders that are already on campus, MDS storage, and for any invoices received that relate to orders placed in the old system (Shop@UW). The PAT deadline will remain the same (6th business day of the month) until PAT is shut-down completely.
Time Sensitive Payments

**Purchase Orders**
Purchase requisitions can be submitted through the ShopUW+ Requisition Wizard as a “Pre-payment” so full or partial payment will be made at the time the purchase order is created.

**Direct Payments (DP) and Payment to Individuals (PIR)**
For an **extreme emergency** a DP or PIR that needs to be paid by the next business day can be created in ShopUW+. Do not use for special handling payments, such as those with processing deadlines, unique mailing instructions, documents with list of payees, wires, foreign drafts, etc. These would be items formerly paid using an ET form.

Once all **department approvals have been completed**, an email request may be submitted to uwmsnap@bussvc.wisc.edu. The email must include the voucher number from ShopUW+, the vendor name and the amount of the payment. The email reference line should include “ET” and the vendor name (i.e.” ET for Jane Doe”).

The DP or PIR approvals must be completed, and the email request received in the uwmsnap@bussvc.wisc.edu email box by 9:00 am to be processed by the next business day.
Our Journey Together

Oct
- Configuration Focus Groups
- Project updates via email & P2P website ongoing

Nov
- Configuration Focus Groups
- Roles Identification

Dec
- Friday Drop-in Sessions
- ShopUW+ User Review

Jan
- Configuration Focus Groups
- Roles Identification

Feb
- Friday Drop-in Sessions
- ShopUW+ User Review

Mar
- Training Pilot
- ShopUW+ Essentials Launch

Apr
- ShopUW+ Go-live
- Friday Drop-in Sessions
- ShopUW+ Training Launch
- ShopUW+ Essentials Launch
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<th>Name</th>
<th>Role</th>
<th>Dept/Unit</th>
<th>Email Address</th>
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</thead>
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<tr>
<td>1</td>
<td>General Education Administration</td>
<td>Dan Jonas</td>
<td>Budget and Finance Manager</td>
<td>Chancellor's Office</td>
<td><a href="mailto:DANIELJONAS@WISC.EDU">DANIELJONAS@WISC.EDU</a></td>
<td>(608) 890-4247</td>
</tr>
<tr>
<td>2</td>
<td>General Services - Support Services</td>
<td>Dan Jonas</td>
<td>Budget and Finance Manager</td>
<td>SUPPORT SERVCIES</td>
<td><a href="mailto:DANIELJONAS@WISC.EDU">DANIELJONAS@WISC.EDU</a></td>
<td>(608) 890-4247</td>
</tr>
<tr>
<td>3</td>
<td>Gen Educational Admin ASU</td>
<td>Lindsay Blang</td>
<td>budget &amp; finance for OHR</td>
<td>ASU-AIMS, VCF, OHR, Payroll, DoBS</td>
<td><a href="mailto:lkblang@wisc.edu">lkblang@wisc.edu</a></td>
<td>no phone listed</td>
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<tr>
<td>4</td>
<td>Division of Student Life</td>
<td>Sue Duhr</td>
<td>SR BUDGET PLANNER/S</td>
<td>VCSA ADMINISTRATION</td>
<td><a href="mailto:SUE.DUHR@WISC.EDU">SUE.DUHR@WISC.EDU</a></td>
<td>(608) 263-5707</td>
</tr>
<tr>
<td>5</td>
<td>Division of Enrollment Management</td>
<td>Mallory Oller</td>
<td>Financial Specialist Senior</td>
<td>Office of Admissions-General Ops</td>
<td><a href="mailto:mallory.oller@wisc.edu">mallory.oller@wisc.edu</a></td>
<td>no phone listed</td>
</tr>
<tr>
<td>6</td>
<td>Division of Information Technology</td>
<td>Colleen Reilly</td>
<td>Financial Progr Mgr</td>
<td>Purchasing</td>
<td><a href="mailto:colleen.reilly@wisc.edu">colleen.reilly@wisc.edu</a></td>
<td>(608) 262-5674</td>
</tr>
<tr>
<td>7</td>
<td>College of Agricultural &amp; Life Sciences</td>
<td>Sandra Fowler</td>
<td>Assistant Dean</td>
<td>CALS Business Services</td>
<td><a href="mailto:sandy.fowler@wisc.edu">sandy.fowler@wisc.edu</a></td>
<td>(608) 262-3947</td>
</tr>
<tr>
<td>8</td>
<td>Division of International Studies</td>
<td>Hylsi</td>
<td>Budget Manager</td>
<td>Dean’s Office</td>
<td><a href="mailto:poli.hysen@wisc.edu">poli.hysen@wisc.edu</a></td>
<td>(608) 262-9511</td>
</tr>
<tr>
<td>9</td>
<td>School of Business</td>
<td>Katie Austin</td>
<td>Director of Business Services</td>
<td>Financial Management Office</td>
<td><a href="mailto:katie.austin@wisc.edu">katie.austin@wisc.edu</a></td>
<td>(608) 263-3322</td>
</tr>
<tr>
<td>10</td>
<td>School of Education</td>
<td>Toby Schellhase</td>
<td>ACCOUNTANT - JOURNEY</td>
<td>DEANS OFFICE</td>
<td><a href="mailto:toby.schellhase@wisc.edu">toby.schellhase@wisc.edu</a></td>
<td>(608) 262-1765</td>
</tr>
<tr>
<td>11</td>
<td>Arts Institute</td>
<td>Dan Jonas</td>
<td>Budget and Finance Manager</td>
<td>Administration</td>
<td><a href="mailto:dan.jonas@wisc.edu">dan.jonas@wisc.edu</a></td>
<td>(608) 890-4247</td>
</tr>
<tr>
<td>12</td>
<td>College of Engineering</td>
<td>Lori Snyder</td>
<td>Accountant</td>
<td>Fiscal Affairs</td>
<td><a href="mailto:lori.snyder@wisc.edu">lori.snyder@wisc.edu</a></td>
<td>(608) 262-4081</td>
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<tr>
<td>13</td>
<td>School of Human Ecology</td>
<td>Michael Kukula</td>
<td>Senior Financial Specialist</td>
<td>School of Human Ecology Business Office</td>
<td><a href="mailto:kukula@wisc.edu">kukula@wisc.edu</a></td>
<td>(608) 890-2195</td>
</tr>
<tr>
<td>14</td>
<td>VCRGE</td>
<td>Russell Schwabel</td>
<td>Asst Vice Chancellor</td>
<td>Accounting</td>
<td><a href="mailto:russell.schwabel@wisc.edu">russell.schwabel@wisc.edu</a></td>
<td>(608) 262-8386</td>
</tr>
<tr>
<td>15</td>
<td>Collabo for Adv Learning &amp; Teaching</td>
<td>Jessica Belcher</td>
<td>Admin Director/Finance &amp; HR Mgr</td>
<td>WISCIENCE/Collabo for Adv L&amp;T</td>
<td><a href="mailto:jbelcher2@wisc.edu">jbelcher2@wisc.edu</a></td>
<td>(608) 263-0478</td>
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<td>16</td>
<td>Nelson Institute</td>
<td>Colleen Godfrieda</td>
<td>Associate Dean</td>
<td>Administration</td>
<td><a href="mailto:clgodfrieda@wisc.edu">clgodfrieda@wisc.edu</a></td>
<td>(608) 262-6435</td>
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<td>17</td>
<td>Athletics</td>
<td>Marcel DuBois</td>
<td>Senior Procurement Specialist</td>
<td>ATHLETIC BUSINESS OFFICE</td>
<td><a href="mailto:mcd@athletics.wisc.edu">mcd@athletics.wisc.edu</a></td>
<td>(608) 262-0354</td>
</tr>
<tr>
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Resources & Training

The ShopUW+ Essential Website is your hub for information on training, resources and support

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Customer Support

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In preparation for transitioning to ShopUW+, encourage your staff to:

- Screenshot Shop@UW favorites, funding strings, carts to recreate in ShopUW+ by 4/13
- Set-up profile, defaults, favorites, upon launch of ShopUW+ on 4/16
- Visit the ShopUW+ Essentials website
- Bookmark ShopUW+ Essentials
- Pin the ShopUW+ tile to MyUW Dashboard
- Take Training – all courses available by 4/14
Thank you for joining!

Future Meeting Dates:
- Tuesday, June 8, 2021
- Tuesday, August 10, 2021
- Tuesday, October 12, 2021
- Tuesday, December 14, 2021