

SFS Governance

The Shared Financial System (SFS) of the University of Wisconsin System is operated by the UW System Administration's Office of Financial Administration in partnership with the UW-Madison's Division of Information Technology (DOIT). Responsibility for daily operations and for project planning rests with these two offices functioning together as the **SFS Operations Group**.

The managers of the SFS Operations Group represent a subset of the **SFS Leadership Team** which includes additional campus, DOIT and UW System Administration staff representing the major stakeholder communities. The SFS Operations Group and Leadership Team are counseled by **an SFS Advisory Committee** made up of one representative from each UW System institution.

The **SFS Executive Committee** is the oversight body that decides major unresolved issues escalated by the Leadership Team and that represents resource need to the UW System's **Common Systems Review Group**. The four permanent members of the SFS Executive Committee also serve as members of the executive oversight group for the other major common administrative systems and as members of the Common Systems Review Group.

The responsibilities and membership of the Executive Committee, Leadership Team and Advisory Committee are listed on the three pages that follow. Ultimate executive sponsorship responsibility for SFS, along with all the UW System's common administrative systems, rests with the UW System's **Executive Senior Vice President**.

The SFS governance structure described above must work in concert with the administrative project management structure established by the UW-Madison not only because of the influence UW-Madison necessarily brings to bear in project prioritization and design but because of mutual reliance on UW-Madison's Division of Information Technology as technical service provider. Accordingly, there is an overlap in membership between the SFS Executive Committee and **UW-Madison's Executive Sponsor Group for Administrative Projects**. In addition, representatives from the affected UW System Administration offices are represented on UW-Madison's **Joint Project Managers Committee** and **Joint Project Steering Committee**.

A diagrammatic representation of the SFS governance structure is attached.

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SFS Executive Committee

Responsibilities:

- Approve long range strategies
- Approve major business process changes related to financial administration
- Review issues that may have a broad implication across the related modules (e.g., Commitment Control, Grants, Projects)
- Review and approve the annual budget
- Make decisions on unresolved issues escalated by the SFS Leadership Team
- Represent resource needs and necessary funding to the Common Systems Review Group

Membership:

- UW System Vice President of Finance, Chair (Debbie Durcan)
- UW System CIO (Ed Meachen)
- UW-Madison Vice Chancellor for Administration (Darrell Bazzell)
- UW-Madison CIO or designee (Jack Duwe)
- Two Chief Business Officers named by the VP of Finance:
 - o Andy Richards, UW Milwaukee
 - o Tom Sonnleitner, UW-Oshkosh

Ex Officio:

UW System Associate Vice President Financial Administration (Doug Hendrix)
UW System Assistant Vice President Administrative Services (Ruth Anderson)
UW System OLIT Project Director (Lorie Docken)
UW-Madison Assistant Vice Chancellor Business Services (Don Miner)
UW System Director or SFS Operations (Dwan Schuck)
UW-Madison DOIT Director of Applications Development, Co-Chair (Diane Mann)

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SFS Leadership Team

Responsibilities:

- Review ongoing operations and projects' status, budget, resources, timelines, issues and risks
- Address and resolve all issues and risks in a timely manner
- Provide guidance and advice to the SFS Project Manager
- Review any new functionality or changes to business processes requested by the Advisory Committee and provide guidance for the analysis of the associated recommendations
- Review and approve any significant changes to the functionality of SFS
- Allocate resources as needed
- Liaison to Executive Committee

Membership:

- UW System Associate Vice President Financial Admin., Co-Chair (Doug Hendrix)
- UW-Madison DOIT Director of Applications Development, Co-Chair (Diane Mann)
- UW System Assistant Vice President Administrative Services (Ruth Anderson)
- UW System Director of SFS Operations (Dwan Schuck)
- UW System Controller (Jeff Arnold)
- UW-Madison DOIT Assistant Director of Financial Applications (Carol Block)
- UW-Madison Controller (Al Benzschawel)
- UW-Madison Director of Research and Sponsored Programs (Kim Moreland)
- Controller named by Vice President of Finance (Laurie Grigg, UW Colleges)
- Purchasing Director named by Vice Pres. of Finance (Tom Weiss, UW-River Falls)

Ex Officio:

UW System OLIT Project Director (Lorie Docken)
UW-Madison DOIT Technical Project Manager (Katie Chase)

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SFS Advisory Committee

Responsibilities

- Advise the SFS Leadership Team and the SFS Executive Committee with input and recommendations for the ongoing effectiveness of the SFS System including but not limited to best business practices, identification and prioritization of proposed functionality changes, and service level expectations
- Review status reports on ongoing operations and projects and advise of impact to campuses or on other initiatives underway
- Ensure communication of SFS status among Controllers, Purchasing Directors, CBOs, CIOs, and other campus stakeholders
- Establish focus groups or other sources of input as needed
- Work with campus leadership on the resolution of any issues that impact campuses
- Work collaboratively with advisory committees for other closely related common systems (e.g., UWS Service Center, Student Administration System) to promote improvements across systems and identify the impact of any change within one system to another system to resolve competing priorities and requests
- Defer resource acquisition issues to the SFS Executive Committee

Membership:

- One representative from each UW institution nominated by the Chief Business Officer with the membership to be balanced by the Vice President of Finance to assure adequate representation of procurement officers and controllers:
 - o Jeff Arnold, UW System Controller (Co-chair)
 - o Lori Voss, UW System Director of Procurement (Co-chair)
 - o Don Miner, UW-Madison
 - o Ed Nieskes, UW-Milwaukee
 - o Jackie Kriesel, UW-Eeau Claire
 - o Kelly Franz, UW-Green Bay
 - o Sharon Radtke, UW-LaCrosse
 - o Shawn Kelly, UW-Oshkosh
 - o Robert Fink, UW-Parkside
 - o Tom Stodola, UW-Platteville
 - o Tom Weiss, UW-River Falls
 - o Katie Schroth, UW-Stevens Point
 - o Marilyn Mars, UW-Stout
 - o Jill Mellin, UW-Superior
 - o Mike Hirschfield, UW-Whitewater
 - o Laurie Grigg, UW Colleges
 - o Rhonda Loger / Mark Dorn, UW Extension

Ex Officio:

UW System Director of SFS Operations (Dwan Schuck)
UW System Associate Vice President Financial Admin. (Doug Hendrix)
UW System Assistant Vice President Admin. Services, (Ruth Anderson)
UW System OLIT Project Director (Lorie Docken)
UW System CIO or designee (Ed Meachen)
UW-Madison CIO or designee (Jack Duwe)