



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 9, 2018

KEY UPDATES

Communication Roadmaps for 2018-19

Communication Roadmaps identifying key communication needs during the 2018-19 transition year have been developed with input from each Functional Team. The communication milestones align with transitional activities and have been broken out into three categories: functional, student-facing, and employee-facing. The Communications Roadmap was distributed to a broad internal stakeholder group earlier today. Going forward, upcoming communication milestones will be included in the Project Milestones section of the Weekly Project Update.

Important Items for Functional/Regional Teams

- Please continue to submit regular updates to the Project Management Office (PMO) as you have been until your team finishes work. If you feel that your team's work is complete and there are no further updates to give, please let the PMO know so we can officially close the team out.
- Many milestones were scheduled for 7/1. If you completed items listed on the attached Restructuring Roadmap, please be sure to list them in your next status update so we can appropriately credit your work
- Some Regional and Functional teams have largely completed their work and will be dropped from this weekly update as they officially close out.

PROJECT MILESTONES

Completed

- Transition year officially began, with MOUs in force

Upcoming

- Communication milestones for July
 - UWSA distribution of Title and Total Compensation letters to employees (July – December)
 - RI distribution of appointment letters and contracts to employees
 - RI notification of Graduation/diploma name change to current students
- 7/16: EApp testing begins at all institutions
- 7/31: System will distribute final 2018 budget transfer
- 7/31: Initial deep dive into UW Colleges/UW-Extension contracts completed by Procurement team
- 8/1: Launch new EApp for Fall 2019

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

Completed:

- Facilitated communications for HLC announcement internally
- Continued MOU management plan Subject Matter Expert (SME) meetings

Upcoming:

- Steering Committee meeting on 7/20
- Functional Team All-Hands meeting on 7/26
- Prototyping Functional Team sunseting process
- Begin of MOU facilitation and reporting
- Begin planning for HLC follow up reporting



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Project Communications Office (PCO)

Completed:

- Sent UWSA VP welcome letters to UW-Extension employees
- Held meeting with UWSA and UW-Extension to develop plan for website migrations and management
- Finalized July - August marketing plan for app fee waiver

Upcoming:

- Materials for high school counselor fall workshops
- Video for launch of new EApp

UW-Eau Claire: UW-Barron County – No update since 6/18

Completed:

- Board of Regents approved the official name: University of Wisconsin-Eau Claire – Barron County
- The SIS functional team has been doing set-up and testing in a test environment in CampS
- Set an internal deadline of June 27th to finalize the structure that will be used in the SIS
- Admissions and Marketing are continuing mapping out the marketing and communication plan for 2018-19
- Marketing & Communications is working on the new website and strategies for social media

Upcoming:

- Continued testing of the SIS structure
- Review of priority courses to align with Eau Claire
- Communication and marketing planning with the new website, internal, and external communications
- Continuing planning for the July 24th “Family” Picnic Event
- Finalizing the search & screen process for the Campus Director Position

UW-Green Bay: UW-Marinette, UW-Manitowoc, UW-Sheboygan – No update since 6/25

Completed:

- Held final round on-site interviews for branch administrators
- Draft initial proposal for housing AAS students with the GB academic structure
- Refined IT list of issues needing resolution

Upcoming:

- Hold community engagement strategy rollout meeting
- Finalize proposal for housing AAS students

UW-Madison: UW-Extension Cooperative Extension, Public Media, and Conference Centers

Completed:

- Auxiliary Services transferred to UW-Madison
- MOUs finalized for DLE, Co-op, Public Media.
- Created new position: Vice Provost for Extension and Public Media, with Casey Nagy serving as Interim

Upcoming:

- Building “Reverse MOUs” to outline Extension services that will continue for a time after July 1 (AR, CITS)

UW-Milwaukee: UW-Washington County, UW-Waukesha – No update since 7/2

Completed:

- Had Enrollment management meeting 6/27
- Regional lead met with PMO to review any outstanding questions

Upcoming:



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- Preparing campus announcements for restructuring pending HLC approval
- Student affairs functional team meetings 7/13 and 8/9
- Enrollment management meeting 6/27 at Milwaukee
- PMO to visit campus 6/27

UW System Administration: UW-Extension Continuing Education, Outreach and E-Learning; Division of Business and Entrepreneurship; Instructional Communications Systems (ICS); Wisconsin Humanities Council; Wisconsin Institute for Public Policy and Service (WIPPS) – No update since 5/3

Completed:

- Met to discuss CEOEL budget
- Distributed President Cross's memo indicating that CEOEL will transition in its current state, and that further conversations about organizational structure will not happen before fall
- Disbanded UWSA regional team led by Jim Henderson
- Transferred responsibility to individual vice presidents

Upcoming:

- Further CEOEL budget review to determine how to support UWC Online and Collaboratives
- Rob, Sean and Alex will look at space for CEOEL and all units
- Determine UWHELP budget and DoIT expenses
- A meeting to address priorities for the transition of the AAS Online to CEOEL

UW-Oshkosh: UW-Fox Valley, UW-Fond du Lac

Completed:

- Adjusted the integrated timelines and roadmap checklists on the basis of feedback from Working Group leads
- Continued to work with PMO to check off items from Lake Winnebago Restructuring Roadmap
- Scheduled roadmap workshop for all Lake Winnebago functional team leads (July 31)
- Began draft of internal communication from Chancellor to UW-Fox Valley and UW-Fond du Lac employees (for transmission early next week)

Upcoming:

- Communicating an update to the Lake Winnebago community
- Roadmap workshop for Lake Winnebago functional team leads

UW-Platteville: UW-Richland, UW-Baraboo/Sauk – No update since 7/2

Completed:

- Met with PMO and worked through Roadmap
- Chose branch dean finalists
- Held April 19 meeting with Baraboo/Sauk County commission members to discuss concerns

Upcoming:

- Interviews of Branch Dean finalists
- Policy for use of personnel and hiring
- Project Planning Activities memo from Chancellor
- Review of application data transfer issues

UW-Stevens Point: UW-Marathon County, UW-Marshfield

Completed:



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- Offers for 2 branch campus administrator positions have been accepted

Upcoming:

- Continue analyzing academic efficiencies data
- Finalize IT roadmap

UW-Whitewater: UW-Rock County – No update since 6/25

Completed:

- Search and Screen for Interim Dean for UW-Whitewater at Rock County completed. Resulting documents forwarded to Provost and Chancellor
- Second meeting of Foundations of UW-Rock County and UW-Whitewater on 6/25/2018
- Drafting of letters inviting students denied admission to UW-Whitewater to apply for admission to UW-Whitewater at Rock County
- Drafting of letters to all students admitted to UW-Rock County inviting them to live in main campus residence halls and ride shuttles between the main and branch campuses
- Work between main and branch campuses student affairs staff to resolve issues such as ID cards, dining services, other student services to be offered
- Submission to HLC of AAS and BAAS Change Applications
- Applied to UW System for technical expertise assistance (4 full time annual employees to code and build software)
- Shift of project management responsibilities from Lois Smith to Seth Meisel and Kristin Fillhouer

Upcoming:

- Hiring of recruiter for UW-Whitewater at Rock County
- Celebration of HLC's acceptance of Restructuring Application
- Naming of Dean for UW-Whitewater at Rock County
- Mailings to faculty and staff at UW-Whitewater at Rock County welcoming them to UW-Whitewater (from Chancellor and HR)
- Mailings to Rock County and UW-Whitewater denied admission students with invitations to apply and live in residence halls
- Preparing wraps for signage at Rock County branch campus as well as communication plan for announcing joining of campuses
- Signing of MOU between UW-Whitewater and UW-Whitewater at Rock County

Bursars

Completed:

- Met in person on 6/25 and determined how to handle 1098T reporting in the transition year and have developed business processes to operationalize their account balance recommendation

Upcoming:

- Follow-up with Steve to determine when Excel spreadsheet for item type crosswalk work will be sent to RIs
- Creating RI Bursar contact list for Colleges to assist with communications during the transition year

Facilities and Property

Completed:

- Updated project plan
- UDDS plan finalized
- Registrars will continue with existing UDDS code even though Finance and Facilities will update Division code
- All RIs received access to OGC Real Estate Documents SharePoint site for their individual institutions



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- UW – Platteville held Skype meeting with branch campus deans, UW College management, and Platteville facilities
- DOT provided cost estimate to change names and inventory of highway signs for each college

Upcoming:

- Working on process for conversion of highway signage
- All RIs will receive access to OGC Real Estate Documents SharePoint site for their individual institution
- Researching county budget timelines to assist campus planners with their capital planning
- Individualized meetings with UW Colleges management, deans, and Facilities planners has begun and will continue for the next 4 weeks.

Finance – No update since 6/4

Completed:

- Completed all pro formas for presentation at June BOR meeting
- Created template for UW-Extension and populated it with 2018-19 Budget
- Reviewed small work group materials for allocation of UW-Extension budget
- Compiled questions regarding tuition into consolidated FAQ Draft, outlined tuition solutions, and discussed tuition policy implications with various stakeholders

Upcoming:

- Issuing final clarification on tuition
- Continuing conversations for UW-Extension/UW-Madison/UWSA budget

Financial Aid – No update since 7/2

Completed:

- Submission of EAPP and all supporting documentation by the seven regional campuses to US Department of Education (DoE)
- Each Receiving Institution submitted application for recertification to DoE

Upcoming:

- On-going, address follow-up questions and requests related to the EAPP from DoE
- On-going, work on a communication plan to address the following three items:
 - 1) Submitting 2019-20 FAFSA with correct school code
 - 2) Communication to returning students to update 2019-20 FAFSA with the correct school code and
 - 3) A communication to students who submit the 2019-20 FAFSA with an incorrect school code, redirecting to resubmit with regional institutions school code

Human Resources

Completed:

Upcoming:

- Pending clarification on when funds transfer for employees who were offered a letter of intent
- Pending finalized MOUs
- HR Transformational meeting next week
- Branch Administrator searches nearing completion for the campuses with interims
- Collaboration between Amy Kiska, Jason Beier, Mike Cogan, Jo Carter and Quin Knutson to complete a risk assessment for employee turnover

Information Technology (IT) - No update since 6/11

Completed:



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- Reviewed proposed timeline development process
- Reviewed questions from technical overview meeting
- Reviewed the status of the proposed UW System IT strategy team

Upcoming:

- Prepare the technical overview presentation
- Continue development of the IT Functional Team timeline

Libraries

Completed:

- Explored and researched solutions associated with Online student access for students assigned to branch campuses
- Library services plan, collection merging strategy, shared information services migration plan completed

Upcoming:

- Redmine will be used to track activities and gather feedback from campuses and staff for restructuring activities
- PMO will track status and report back when possible regarding the timeline for HRS data from branches making it into RIs IAA feeds
- PRIMO Subgroup recommendations
- Purchase recommendation for perpetual access resources
- Communication to institutions

Procurement

Completed:

- Review of UW Colleges and UW-Extension spend analysis
- Attended Functional Team leads meeting May 31st
- Completed assessment of procurement automation future state
- Completed initial review of contract data and shared with team

Upcoming:

- Memo to other Functional and Regional Teams regarding contract-related information exchange
- Team review of contract review approach
- An informational report on auxiliary contracts
- Initial deep dive into UW Colleges/Extension contracts (July 31st)

Registrars

Completed:

- Language for transcripts produced by UW Colleges in the transition year has been approved and will go out with each transcript starting 7/1/2018

Upcoming:

- Need to discuss transfer of 2018-19 student records with the UW Colleges Historical Data Registrar once that person/office has been determined

Student Information Systems (SIS) – No update since 7/2

Completed:

Upcoming:

- Upon HLC approval: Allocation of UW Colleges Online students to the appropriate branch campus based on their zip code
- Access to UWC Majors database and branch campus data to be established for the Receiving Institutions



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Student Recruitment Functional Team (SRFT) – No update since 7/2

Completed:

- Team has completed work, is no longer holding regular meetings, and is awaiting sunsetting

Upcoming:

Student Visa Functional Team (SVFT)

Completed:

- Identified a PDSO plan for the upcoming transitional year. Danielle Clarizio will assist with DSO responsibilities until DHS approves the I-17 application.

Upcoming:

Veterans Services – No update since 6/4

Upcoming:

- Resolved concern about UW Colleges' Veteran staff's organizational placement and reporting structure as of 7/1/2018