



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 2, 2018

## KEY UPDATES

### UDDS/DEPTID

A plan for restructuring UDDS/DEPTID for 2018-19 and 2019-20 has been determined. For the purposes of reporting and operations, receiving institutions should use the 2017-18 UDDS structure for the 2018-19 fiscal year. All operations will officially transfer July 1, 2019 unless specifically approved by System Administration leadership prior to July 1, 2019.

The structure for beyond July 1, 2019 will be defined this year. In order to align resources across the institution, provide resource allocation, and perform accurate required reporting and analysis, a consistent and integrated structure must be adopted.

- Shared Financial and Budget systems, Human Resources, Facilities, and Academic departments should set up each “branch” campus as a distinct division within the Chart of Accounts for 2019-20. This will provide the flexibility needed to manage resources and systems, accurately respond to internal and external reporting requirements (including HLC and Federal), and generate meaningful analytical products (e.g. cost, workload, utilization).
- The 2019-20 unit for the branch campuses will be the unit of the receiving institution (for example UW-Rock (currently R) would be defined as a division of unit N (UW-Whitewater), and unit R would no longer exist).
- Department/sub-departments for 2019-20 can be set up according to campus practice and should also align across systems. The UDDS (Unit, Division, Department, Sub-department) structure should be validated by each institution’s CBO and entered by the Controller (or responsible campus designee) into the Shared Financial System (SFS) **by Wednesday, August 15th, 2018**. This structure should be broadly shared on the receiving institution’s campuses with all impacted users of the UDDS structure.

Data submissions and transfers reflecting 2019-20, need to use the new structure. Those processes begin this summer 2018. The full text of the decision is posted on the [Project Decisions webpage](#).

### Important Items for Functional/Regional Teams

- Please continue to submit regular updates to the PMO 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 July 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

- HLC approval received
- Branch campuses and Receiving Institutions officially linked
- Transition year officially began, with MOUs in force

### Upcoming

- 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



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 2, 2018

## FUNCTIONAL AND REGIONAL TEAM UPDATES

### Project Management Office (PMO)

#### Completed:

- Finalized System Roadmap through December 31, 2018
- Continued phased transition of PMO assignments
- Continued MOU management plan SME meetings
- Developed transition plans for Functional Teams
- Compiled results of risk assessment and developed presentation for Project Sponsor
- Reviewed outstanding FT/RT issues and resolved/elevated as needed

#### Upcoming:

- Adjusting roadmap content in Oshkosh
- Drafting communication to the Lake Winnebago community
- Completing first draft of academics and student life roadmap for Green Bay
- Analyzing coursework and enrollment data in Green Bay
- Finalizing Green Bay's community engagement project plan
- Continuing MOU management SME meetings

### Project Communications Office (PCO)

#### Completed:

- Received approval on the redesign of the restructuring website
- Finalized draft HLC announcement materials
- Finalized restructuring videos for HLC announcement
- Approved marketing plan for Fall 2018 app fee waiver
- Held videoconference with RIs and UWSA Office of University Relations to establish process and timeline for HLC announcement
- Provided communications roadmap to RIs for feedback by July 6
- Provided updated UWSA communications plan to RIs
- Worked with UWSA and UW Colleges on updating webpage content post-HLC approval

#### Upcoming:

- Continue work on UWSA/UW-Extension webpage updates
- Employee welcome letters from VPs post-HLC approval
- App fee waiver marketing
- Memos on student and employee email accounts during transition year

### UW-Eau Claire: UW-Barron Country – No updates submitted

#### Completed:

#### Upcoming:

### UW-Green Bay: UW-Marinette, UW-Manitowoc, UW-Sheboygan

#### Completed:

- Held final round on-site interviews for branch administrators



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 2, 2018

- 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 – No updates submitted

## Completed:

## Upcoming:

UW-Milwaukee: UW-Washington County, UW-Waukesha

## Completed:

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

## Upcoming:

- 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 updates submitted

## Completed:

## Upcoming:

UW-Oshkosh: UW-Fox Valley, UW-Fond du Lac – No updates submitted

## Completed:

## Upcoming:

UW-Platteville: UW-Richland, UW-Baraboo/Sauk – No updates submitted

## Completed:

## Upcoming:

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

## Completed:

- Completed Regional Steering Committee charter
- Facilitated Operations workshop



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 2, 2018

## Upcoming:

- Continue analyzing academic efficiencies data
- Finalize IT roadmap

## UW-Whitewater: UW-Rock County

### Completed:

- Search and Screen for Interim Dean for UW-W at Rock County completed. Resulting documents forwarded to Provost and Chancellor
- Second meeting of Foundations of UW-Rock County and UW-Whitewater 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-W at Rock County
- Celebration of HLC's acceptance of Restructuring Application
- Naming of Dean for UW-W at Rock County
- Mailings to faculty and staff at UW-Rock County welcoming them to UW-Whitewater (from Chancellor and HR)
- Mailings to Rock County and UW-W 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-Rock County

## Bursars

### Completed:

- Held June 25th Bursar in-person meeting
- Identified questions for data conversion team related to account balance transfers
- Confirmed team meetings for July and August

### 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



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 2, 2018

- 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 RI's 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 updates submitted

### Completed:

### Upcoming:

## Financial Aid

### Completed:

- Submission of EAPP and all supporting documentation by the seven regional campuses to ED
- Each Receiving Institution submitted application for recertification to U.S. Department of Education

### Upcoming:

- On-going, address follow-up questions and requests related to the EAPP from ED
- 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:

- Employee welcome letters were sent by RIs. Pending confirmation from Whitewater and UWSA.
- RI's have developed onboarding plans
- All campus HR MOU meetings are complete and Dave Young is creating service level agreements based on those conversations and in collaboration with the RI client service lead
- The HR Transactional Team created and shared a "HR Transactional Timeline" and "HR Transitional Year Guide" which include useful tools, dates, references and is a central source of truth of decisions made for all HR teams to use during the transitional year
- All campuses have identified a Branch Administrator

### Upcoming:

- Two pending MOU's to be finalized and shared
- HR Functional team members will share feedback and inquires related to the Transitional timeline and guide provided to them in order to finalize a collaborative draft

## Information Technology (IT) - No updates submitted

### Completed:



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 2, 2018

## Upcoming:

### Libraries

#### Completed:

- Explored and researched solutions associated with Online student access for students assigned to branch campuses
- Individualized meetings with UW Colleges management, deans, and Libraries planners has begun and will continue for the next 4 weeks

#### Upcoming:

- Redmine will be used to track activities and gather feedback
- Delivery of library services transition plan (July 1)
- Delivery of collection merging strategy, including electronic and print resources (July 1)
- Delivery of library shared information systems migration plan for transition year (July 1)

### Procurement

#### Completed:

- Review of spend analysis
- Completed assessment of procurement automation future state

#### 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 UWC/Extension contracts completed (July 31<sup>st</sup>)

### Registrars – No updates submitted

#### Completed:

#### Upcoming:

### Student Information Systems (SIS)

#### 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

### Student Recruitment Functional Team (SRFT)

#### Completed:

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

#### Upcoming:



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of July 2, 2018

- Chris is going to talk with President Cross about the team's milestone of "Statewide Recruitment Plan" and where to place this to ensure completion

## 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:

- DHS approval of I-17
- Team will meet in August to map out the transitional year deadlines to be aware of and discuss how the team will function moving forward

## Veterans Services – No updates submitted

### Upcoming: