

DRAFT

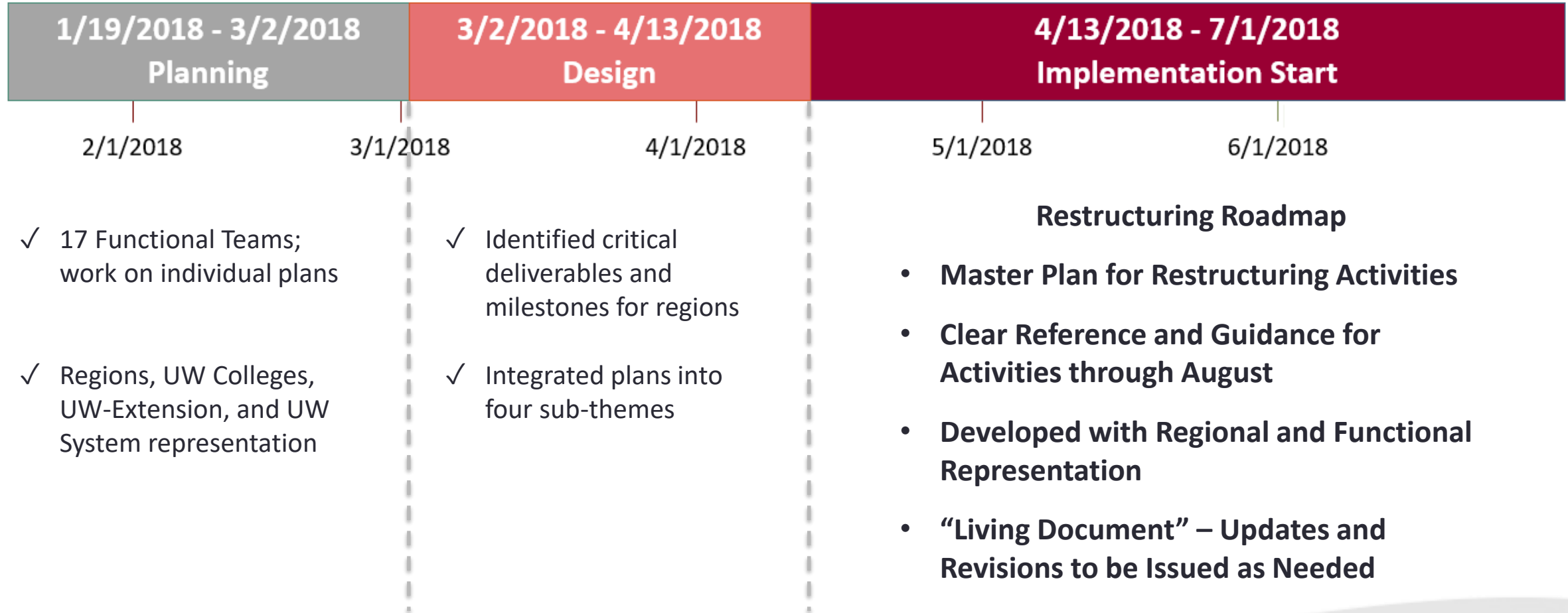
# UW Colleges and UW-Extension Restructuring Roadmap

**Working Draft**

Version – June 1, 2018

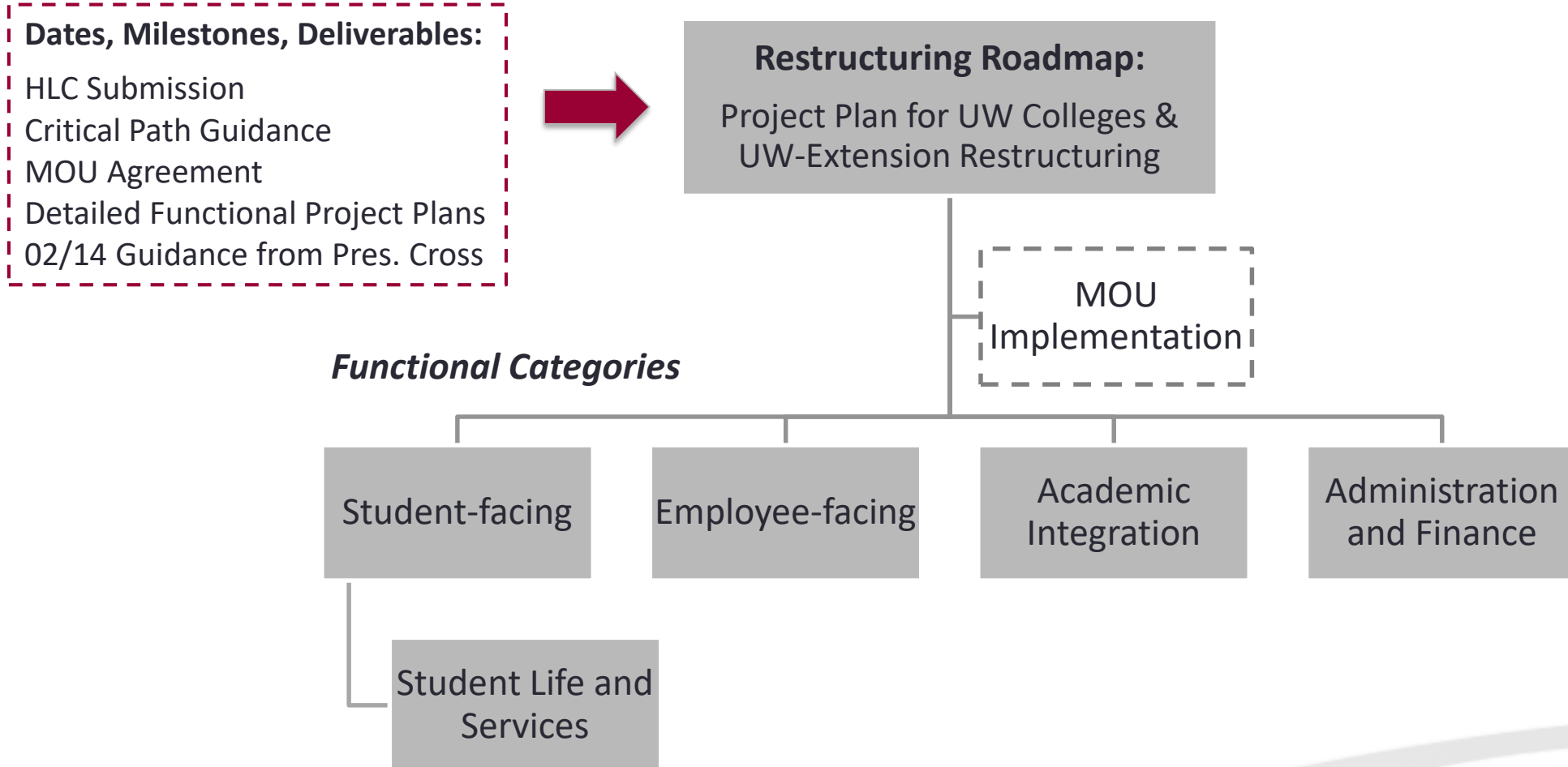
# Process

The Restructuring Roadmap is the summary output of the planning and design phases.



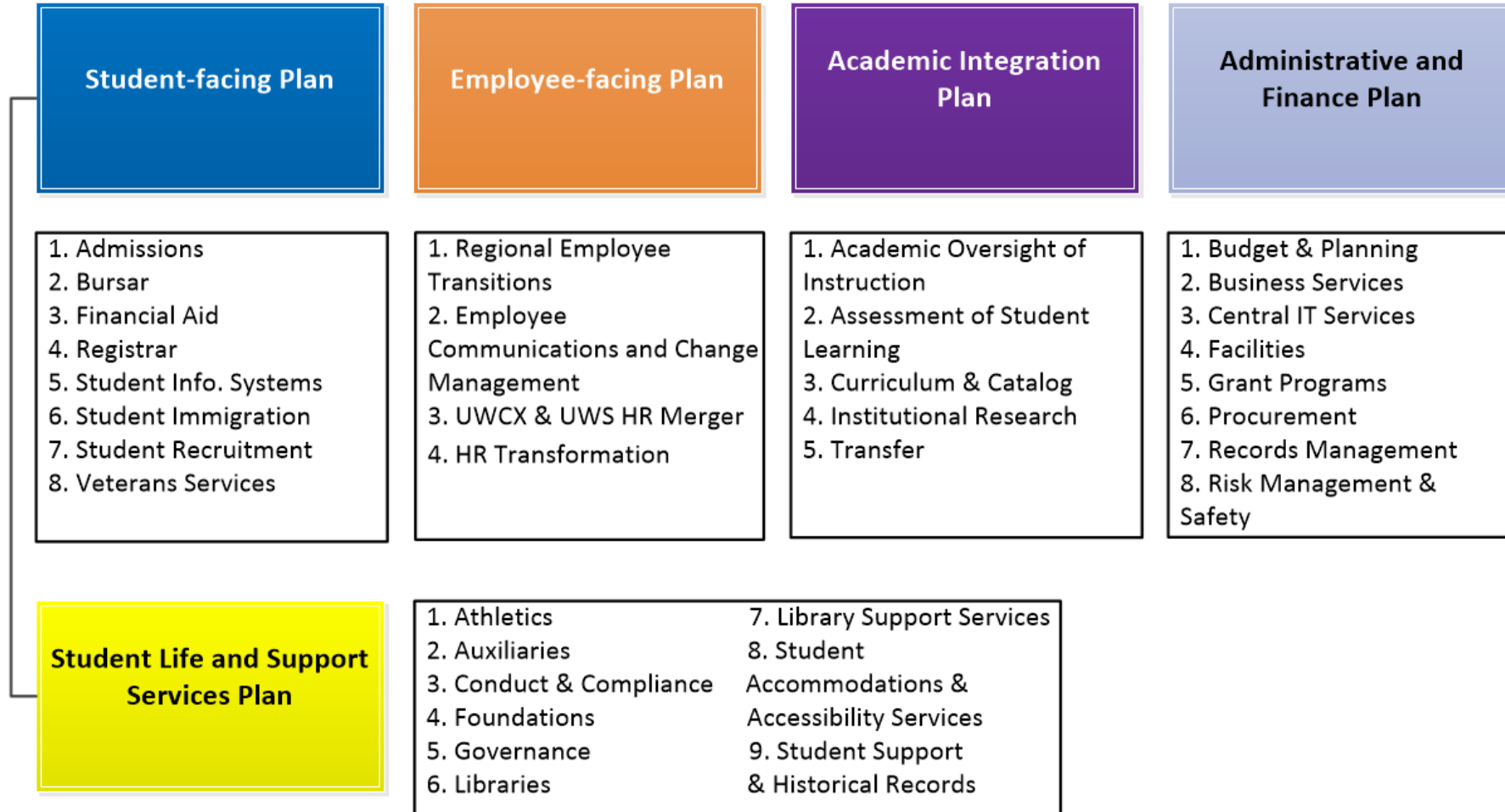
# Structure

The Roadmap integrates key submissions, detailed project plans, and planning documents into a consolidated plan that provides high-level guidance.



# Components

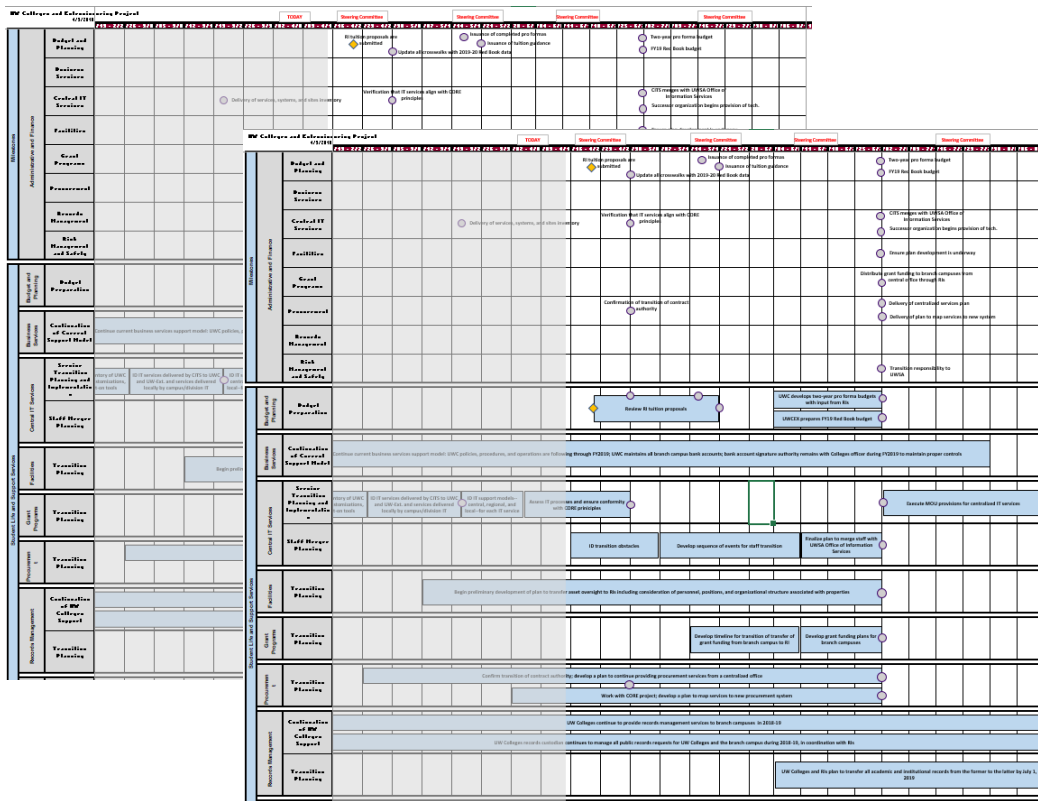
The Roadmap consists of over thirty components organized into five main functional categories.



# Objective

The Restructuring Roadmap supports regional actions and facilitates high-level decisions.

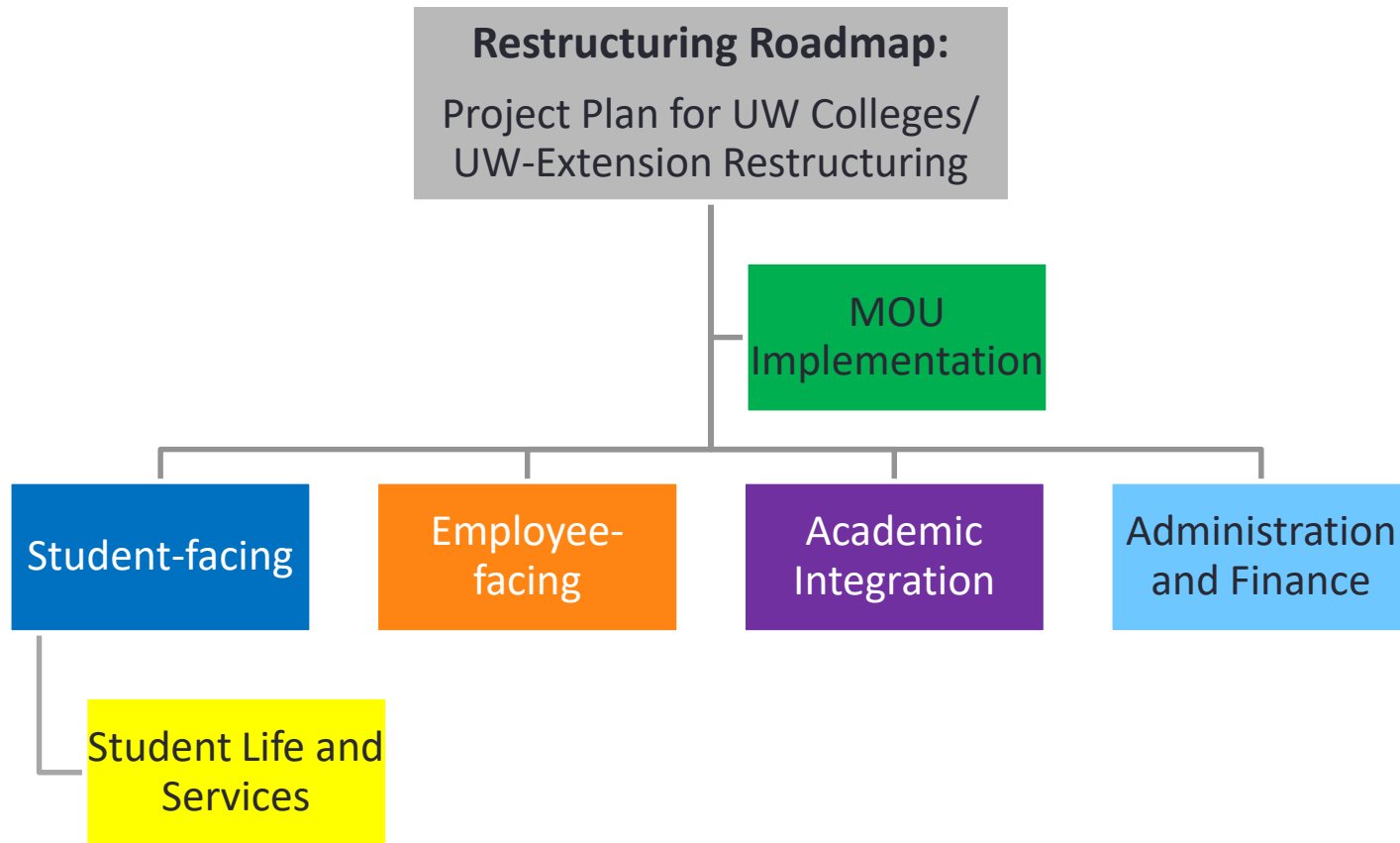
## Moving from Detailed Project Plans...



## ...to Decisions and Actions

- Restructuring Deliverables
- Timeline of Milestones, Interdependencies, and Deliverables
- Decisions or Guidance Reference

# Roadmap Outline



## Outline

1. Restructuring Deliverables
2. Timeline of Milestones, Interdependencies, and Deliverables
3. Points for Decisions or Guidance

# Restructuring Deliverables - Functional

Restructuring Deliverables		Category	Responsibility
<input checked="" type="checkbox"/> 06/07	<b>Annual Budget for BOR</b>	<b>Admin and Finance</b>	<b>Finance FT</b>
<input type="checkbox"/> 06/11	UW-Extension Funding Crosswalk for BOR	Admin and Finance	Finance FT
<input type="checkbox"/> 07/01	UW Colleges Conduct & Compliance Reporting Reqs.	Student Life	System
<input type="checkbox"/> 07/01	<b>Evaluation of Branch Campus Student Learning Outcomes</b>	<b>Student-facing</b>	<b>HLC FT</b>

# Student-facing Timeline

## June

M	T	W	TH	F
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
24	25	26	27	28

## July

M	T	W	TH	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

## June / July – Milestones, Interdependencies

		Responsibility
<input checked="" type="checkbox"/> 06/01	1. Open Student Recruitment EApp for testing	Student Recruitment FT
<input checked="" type="checkbox"/> 06/06	2. UWC application fee waiver becomes effective for Fall 2018 applications to two-year campuses, AAS Flex, and AAS Online	Student Recruitment FT
<input checked="" type="checkbox"/> 06/15	3. Issue formal guidance to Designated School Officials	Student Immigration FT
<input checked="" type="checkbox"/> 06/20	4. <b>Submit application to Department of Education</b>	<b>Regions</b>
<input type="checkbox"/> 07/01	5. <b>Put plan in place to accept aid at RIs for 2019-20</b>	<b>Fin. Aid FT</b>
<input checked="" type="checkbox"/> 07/01	6. Recommend optimal means of supporting transition of staff	Student Immigration FT
<input type="checkbox"/> 07/01	8. Evaluation of Branch Campus student learning outcomes	Regions



Notes: If a deadline occurs over a weekend, the following Monday is shaded. EApp tasks are generally listed under Admin/Finance.

Interdependency between teams

**Bold:** HLC Application



# Student-facing Timeline

July				
M	T	W	TH	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

August				
M	T	W	TH	F
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6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

July / August – Milestones, Interdependencies		Responsibility
<input type="checkbox"/> 07/06	1. Finalize course credit crosswalks to differentiate between branch campus and Receiving Institution courses	Regions
<input type="checkbox"/> 07/11	2. <b>Complete marketing plan and materials for 2019-20</b>	<b>Regions</b>
<input type="checkbox"/> 08/01	3. Applications open for Fall 2019, including EApp	Student Recruitment FT
<input type="checkbox"/> 08/01	4. Finalize I-17s with Department of Homeland Security	Student Immigration FT
<input type="checkbox"/> 08/02	5. Go-No go decision for each region to process applications on 9/01	Regions/SIS FT
<input type="checkbox"/> 08/13	6. Issue I-17 Template to Designated School Officials	Student Immigration FT
<input type="checkbox"/> 08/15	7. <b>Memo added to transcript for UWC, indicating accredited institutions</b>	<b>Registrar FT</b>
<input type="checkbox"/> 08/15	8. <i>PeopleSoft Catalog built for 19-20 year</i>	<i>Regional Registrars</i>
<input type="checkbox"/> 08/28	9. Diploma lists begin to be sent from PRISM to RIs.	Registrar FT



# Student-facing Timeline

August					August / September– Milestones, Interdependencies			Responsibility
M	T	W	TH	F				
		1	2	3	<input type="checkbox"/> 08/31	1. Bio-demo testing complete	SIS FT	
6	7	8	9	10	<input type="checkbox"/> 08/31	2. Changes finalized to accept Fall 2019 EApp applications for AAS students	SIS FT	
13	14	15	16	17	<input type="checkbox"/> 08/31	3. MILER extract for MAAD delivered to RIs	SIS FT	
20	21	22	23	24	<input type="checkbox"/> 09/04	<b>4. Fall 2019 admissions begin</b>	<b>Regional Registrars</b>	
27	28	29	30	31	<input type="checkbox"/> 09/04	5. Process applications and admit student for Fall 2019 into SIS	Regional SIS	
September					<input type="checkbox"/> 09/07	6. Application Fee Waiver ends for Fall 2018 applications to two-year campuses	Student Recruitment FT	
M	T	W	TH	F	<input type="checkbox"/> 09/28	7. Faculty finalize curriculum decisions for 19/20	Regional Registrars	
3	4	5	6	7	<input type="checkbox"/> 09/28	8. Data Conversion/Bio-Demo Application Load	SIS FT	
10	11	12	13	14				
17	18	19	20	21				
24	25	26	27	28				



# Student-facing Timeline

## October

M	T	W	TH	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30	31		

## November

M	T	W	TH	F
			1	2
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12	13	14	15	16
19	20	21	22	23
26	27	28	29	30

## October / November– Milestones, Interdependencies

		Responsibility
<input type="checkbox"/> 10/01	1. FAFSA available for 2019-20	Financial Aid
<input type="checkbox"/> 10/01	2. <b>Data Migration Phase 1 completed (bio-demo application, prior credit available in RI SIS)</b>	SIS FT
<input type="checkbox"/> 10/01	3. 1 <sup>st</sup> run of existing MILER MAAD extracts on all campuses for AY 2018-19	Regions
<input type="checkbox"/> 11/01	4. 1 <sup>st</sup> Production run of updated MAAD extract on all campuses	Regions
<input type="checkbox"/> 11/01	5. <b>Data Migration Phase 2 completed (Faculty, buildings, facilities, available in RI SIS)</b>	SIS FT
<input type="checkbox"/> 11/01	6. Application fee waiver ends for AAS FLEX and AAS Online	Student Recruitment FT
<input type="checkbox"/> 11/01	7. <i>Colleges create 2018-19 1098Ts for degree campuses</i>	Bursar FT
<input type="checkbox"/> 12/15	8. Special course fees added to course catalog	Bursar FT



# Student Life Timeline

## June

M	T	W	TH	F
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4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
24	25	26	27	28

## July

M	T	W	TH	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

## June / July – Milestones, Interdependencies

	Responsibility
<input type="checkbox"/> 06/06	<b>1. Publish new governance frameworks for branch campus students</b> Regions
<input checked="" type="checkbox"/> 07/01	2. Complete UW-Extension to Madison auxiliaries transition Regions
<input type="checkbox"/> 07/01	3. Publish UW Colleges conduct and compliance reporting requirements System
<input type="checkbox"/> 07/01	<b>4. Assimilate students in new branch campus governance frameworks</b> Regions
<input checked="" type="checkbox"/> 07/01	5. Identify all library shared info. system configuration changes Regions
<input checked="" type="checkbox"/> 07/01	6. Deliver library services transition plan Libraries FT
<input checked="" type="checkbox"/> 07/01	7. Develop collection merging strategy, including electronic and print resources Libraries FT
<input checked="" type="checkbox"/> 07/01	8. Develop library shared information systems migration plans for transition year Libraries FT
<input type="checkbox"/> 07/01	9. Deliver plan for UWSA to oversee historical records in 2019-20 System



# Student Life Timeline

## July

M	T	W	TH	F
2	3	4	5	6
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16	17	18	19	20
23	24	25	26	27
30	31			

## August

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13	14	15	16	17
20	21	22	23	24
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## July / August– Milestones, Interdependencies

		Responsibility
<input type="checkbox"/> 07/01	1. Have data on current student services/support and usage at branch campus(es) (rev. 5.31)	Regions
<input type="checkbox"/> 07/01	2. Put in place plans for management of auxiliary services at branch campus(es) (rev. 5.31)	Regions
<input type="checkbox"/> 07/01	3. Clarify mechanism for distributing central collective budgets to RIs	Finance VP
<input type="checkbox"/> 08/02	4. ID system-wide purchase recommendations for College perpetual access resources	Libraries FT
<input type="checkbox"/> 12/31	5. Plan to transition course specific guides to RIs that do not currently have LibGuides	Libraries FT

# Employee-facing Timeline

## June

M	T	W	TH	F
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4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
24	25	26	27	28

## July

M	T	W	TH	F
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9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30	31			

## June/July– Milestones, Interdependencies

		Responsibility
✓ 06/08	2. Create onboarding plan for transitioning employees	Regions
✓ 06/15	3. 2 <sup>nd</sup> Employee communication from RIs	HR FT/ Regions
✓ 06/20	4. Fill regional job vacancies	Regions
✓ 06/24	5. UW-Extension from conference centers and Auxiliaries mail services transfer	HR FT
✓ 07/01	6. Campus visits for MOU discussion complete	HR FT
✓ 07/01	7. Plan complete for UWC employees without new job assignments	HR FT

# Employee-facing Timeline

July				
M	T	W	TH	F
2	3	4	5	6
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23	24	25	26	27
30	31			
August				
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13	14	15	16	17
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27	28	29	30	31

July / August – Milestones, Interdependencies		Responsibility
<input type="checkbox"/> 07/30	2. Deliver short- and long-term roadmap for HR service delivery transformation	HR FT
<input type="checkbox"/> 08/01	3. Transfer recruiters (HRS)	HR FT
<input type="checkbox"/> 08/27	4. Transformation summary report with recommendations	HR FT
<input type="checkbox"/> 08/30	5. Review employee placements	HR FT
<input type="checkbox"/> 09/30	6. Complete orientation of all new regional hires and transitioning employees	Regions
<input type="checkbox"/> 10/01	7. RIs create crosswalk between old and new UDDS by employee	Regions

# Academic Integration Timeline

## June

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## July

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16	17	18	19	20
23	24	25	26	27
30	31			

## June / July – Milestones, Interdependencies

	Milestones, Interdependencies	Responsibility
<input checked="" type="checkbox"/> 07/01	1. Link academic oversight of instruction processes to Receiving Institution	Regions
<input checked="" type="checkbox"/> 07/01	2. Begin plan for integration of curriculum and course scheduling for 2018-19	Regions
<input checked="" type="checkbox"/> 07/01	3. Join 2017-18 UW Colleges catalog with that of Receiving Institutions	Regions
<input checked="" type="checkbox"/> 07/01	4. Align institutional research structure	Regions
<input type="checkbox"/> 07/30	5. Complete student learning outcomes evaluation	Regions



# Administration and Finance Timeline

June				
M	T	W	TH	F
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11	12	13	14	15
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June – Milestones, Interdependencies		Responsibility
<input checked="" type="checkbox"/> 06/01	1. Technical overview mtg with campus staff	IT FT
<input checked="" type="checkbox"/> 06/07	2. Annual budget for BOR	Finance FT
<input checked="" type="checkbox"/> 06/07	3. UW Extension funding crosswalk for BOR	Finance FT
<input checked="" type="checkbox"/> 06/11	4. EApp development starts	IT FT
<input checked="" type="checkbox"/> 06/11	5. Facilities team meeting in Fond du Lac	Facilities FT
<input type="checkbox"/> 06/15	6. Receiving Institutions develop relationships with police	Regions
<input type="checkbox"/> 06/20	7. Hire to fill admin and finance vacancies at campuses	Regions
<input checked="" type="checkbox"/> 06/24	9. Extension conference center begins transfer to UW-Madison	IT FT
<input type="checkbox"/> 06/29	10. Talk with HLC about FYE reporting	Finance FT
<input checked="" type="checkbox"/> 06/30	11. Assess future state of procurement automation	Procurement FT

# Administration and Finance Timeline

July					July – Milestones, Interdependencies			Responsibility
M	T	W	TH	F				
2	3	4	5	6	<input type="checkbox"/> 07/01	<b>1. Finalize two-year pro formas and 2018-19 Red Book</b>	Finance FT	
					<input type="checkbox"/> 07/01	2. Distribute first budget transfers	System	
9	10	11	12	13	<input checked="" type="checkbox"/> 07/01	<b>3. Merge CITS with UWSA Office of Information Services and begin provision of services to the branch campuses</b>	<b>IT FT</b>	
16	17	18	19	20	<input checked="" type="checkbox"/> 07/01	4. Transition NODE/ATS to CITS	IT FT	
23	24	25	26	27	<input checked="" type="checkbox"/> 07/01	5. Distribute legal contracts and facilities inventory to RIs	Facilities FT	
30	31				<input type="checkbox"/> 07/01	<b>7. Distribute grant funding to branch campuses</b>	System	
					<input type="checkbox"/> 07/01	9. eApp needs to be available for RI testing	IT FT	
					<input checked="" type="checkbox"/> 07/01	12. MILER team transitions to CITS, UW-Madison unit	IT FT	
					<input checked="" type="checkbox"/> 07/01	13. Responsibility for mgmt moves from colleges to RIs	Facilities FT	
					<input checked="" type="checkbox"/> 07/01	14. Store legal docs from colleges on SharePoint	Facilities FT	



# Administration and Finance Timeline

July				
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30	31			
August				
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13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

July / August – Milestones, Interdependencies		Responsibility
<input type="checkbox"/> 07/16	1. EApp testing begins at all institutions	IT FT
<input type="checkbox"/> 07/31	2. Distribute final 2018 budget transfer	System
<input type="checkbox"/> 07/31	3. Initial deep dive into UWC/Extension contracts completed	Procurement FT
<input type="checkbox"/> 08/15	4. UDDS structure validated by CBO and entered into Shared Financial System	Regions
<input type="checkbox"/> 08/15	6. RIs finalize UDDS structure for FY20	Regions and Facilities FT
<input type="checkbox"/> 08/15	7. UDDS code conversion	Finance FT
<input type="checkbox"/> 08/23	5. Biennial budget to BOR	Finance FT
<input type="checkbox"/> 08/23	6. Official name changes to BOR	Regions
<input type="checkbox"/> 08/30	7. UDDS Placement	Finance FT
<input type="checkbox"/> 08/31	8. Bucket PO Contracting work completed	Procurement FT



# Administration and Finance Timeline

## September

M	T	W	TH	F
3	4	5	6	7
10	11	12	13	14
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24	25	26	27	28

## October

M	T	W	TH	F
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30	31		

## September / October– Milestones, Interdependencies

		Responsibility
<input type="checkbox"/> 09/04	1. Create plan for integration of parking and transportation services with RIs, including managing enterprise/fleet vehicles	Facilities FT
<input type="checkbox"/> 09/12	2. Transfer outstanding PR/GPR debt to RI	Finance FT
<input type="checkbox"/> 09/12	3. Transfer PR debt	Facilities FT
<input type="checkbox"/> 09/28	4. ID a funding stream for leased properties	Facilities FT
<input type="checkbox"/> 09/30	5. ID contracts that need to be amended to reflect new metrics	Procurement FT
<input type="checkbox"/> 10/31	8. Negotiate with suppliers and amend contracts, identify cots impacts	Procurement FT
<input type="checkbox"/> 10/31	9. CDR transition	Facilities FT

# Administration and Finance Timeline

## November

M	T	W	TH	F
			1	2
5	6	7	8	9
12	13	14	15	16
19	20	21	22	23
26	27	28	29	30

## December

M	T	W	TH	F
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31				

## November / December– Milestones, Interdependencies

		Responsibility
<input type="checkbox"/> 11/05	1. Have revised premium methodologies ready for review by campuses	Risk Management
<input type="checkbox"/> 12/03	2. Budget initialized (Employees in CAT)	Finance FT
<input type="checkbox"/> 12/05	3. Finalized risk mgmt. premium method	Risk Management
<input type="checkbox"/> 12/31	4. Work with CORE project on procurement to understand future technology infrastructure	Procurement FT
<input type="checkbox"/> 12/31	5. Develop plan to transfer asset oversight	Facilities FT
<input type="checkbox"/> 12/31	6. Transition 6-year capitol budget to RIs	Facilities FT
<input type="checkbox"/> 12/31	7. Provide guidance for risk management in terms of claim processes, premiums, security, and environmental safety	Facilities FT
<input type="checkbox"/> 12/31	8. Develop plan to determine who is responsible for funding maintenance upgrades, purchase of new land and property	Facilities FT
<input type="checkbox"/> 12/31	9. ID transition timelines to IP ranges and EZ Proxy servers	Libraries FT
<input type="checkbox"/> 12/31	10. Data to transition course specific guides, topical guides specific to RIs.	Libraries FT

# Glossary of Acronyms

- ATS – Academic Technical Specialist
- BOR – Board of Regents
- CAT – Compensation Administration Tool
- CORE – Commitment to Operational Reform and Effectiveness
- CDR – Center for Dairy Research
- CITS – Central Information Technology Services, IT help located in UW Colleges/Extension
- FAFSA – Free Application for Federal Student Aid, the primary application for financial aid
- FT – Functional Team
- FYE – Fiscal Year End
- GPR – General program revenue, State funding
- HLC – Higher Learning Commission, our accrediting body
- HR – Human Resources
- HRS – Human Resources System, the primary employee database
- ICS – Instructional Communications Systems, technical support for teaching at UW Colleges/Extension
- MAAD – Multiple Applications & Admissions Data extract, generated out of SIS
- MILER – IT contracting firm
- MOU – Memorandum of Understanding
- NODE – Non-online distance education
- PO – Purchase order
- PR – Program revenue, revenue generated by a program
- RIs – Receiving Institutions
- SIS – Student Information System, the primary student database
- UDDS – Number sequence that uniquely identifies a specific campus department, program, or entity (The acronym stands for Unit, Division, Department, Subdepartment)
- UWC – University of Wisconsin Colleges