KEY UPDATES

Financial Aid Guidance for AY2019-20

The Financial Aid Functional Team, in conjunction with the Project Communications Office, produced the attached one-page reference guide to address questions related to branch campus student applications for financial aid in academic year 2019-20. Financial Aid applications for AY2019-20 open on October 1, 2018. Guidance is being shared now to help address financial aid questions that come in during the admissions application process, which opened on August 1.

PROJECT MILESTONES

Upcoming (or unconfirmed as complete)

- Communication Roadmap milestones for August
  - New students welcome notification
  - New leadership team welcome by Chancellors
  - Communication of tuition structure and fees
  - Announcement of new faculty governance structure (August – September)
  - Completion of student recruitment/marketing plan and materials (August – September)
  - Distribution of faculty orientation details for branch campus faculty (August – November)
  - Confirmation of Campus name changes (August – December)
  - Confirmation of new FAFSA schools codes (August – December)

- 7/31: System - Distribute final 2018 budget transfer
- 7/31: Finance - UW-Extension Funding Crosswalk for BOR
- 7/31: Procurement - Initial deep dive into UW Colleges/UW-Extension contracts completed
- 8/2: RIs - Go/no-go validation for each region to process applications on 9/1
- 8/15: Registrars - Memo added to transcript for UWC, indicating accredited institutions
- 8/15: RIs - Peoplesoft catalog built for AY19-20
- 8/23: Registrars - Finalize UDDS structure for FY20; structure validated by CBO and entered in SFS
- 8/28: Finance/RIs - Biennial budget, official name changes to Board of Regents
- 8/30: Finance - UDDS Placement
- 8/31: SIS - Bio-demo testing complete
- 9/1: Fall 2019 admissions begin
- 9/12: Finance – Transfer outstanding PR/GPR debt to RIs

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

Completed:

- Continued intensive project management support to UW-Oshkosh, UW-Green Bay, UW-Stevens Point, and UW-Eau Claire
- Began the process of reviewing the service transition tracker with Regional Team leads to confirm progress
- Steering Committee preparation

Upcoming:

- Drafting a communication to brief RI teams on service transition and approval process
- Continuing meetings with Functional Team leads to determine the future of their teams
- Developing single-entry escalation process for issue resolution
**Project Communications Office (PCO)**

**Completed:**
- Provided process and timeline to RIs for updating branch campus names on UW Colleges, UW HELP, and UWSA websites
- Requested branch campus style guides from the RIs
- Met with the Course Exchange Leadership team to review initial communications plan for the 2019-20 Course Exchange project
- Drafted Service Transition Memo

**Upcoming:**
- Continue work on Course Exchange communications
- External communications for the fall workshops
- Draft article for Business Officer Magazine about the restructuring project’s planning phase

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**UW-Eau Claire: UW-Barron Country – Bi-weekly updates**

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

**Completed:**
- Scheduled a consultant to assist with Salesforce reconfiguration
- Worked with UW Colleges to receive HR SLAs
- Determined dual credit ECCP students will fall under continuing education
- Determined UW Colleges students prior to fall 2019-19 will be treated as transfer students
- Received CFI analysis briefing from Huron

**Upcoming:**
- Adjusting Roadmaps based on updates from the Steering Committee
- Determining which Working Groups to sunset

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**UW-Madison: UW-Extension Cooperative Extension, Public Media, and Conference Centers – Bi-weekly updates**

**Completed:**
- Formed transition teams to prepare for transition of Cooperative Extension and Public Media (transitioning June 2019)

**Upcoming:**
- Transition of Department of Labor Education in January 2019 (dependent on tenure decisions)
- Transition timeline should be finalized in October 2018
- The experienced and successful transition teams for Auxiliaries and Conference Centers will present at the next UW-Madison Steering Committee meeting about lessons learned

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**UW-Milwaukee: UW-Washington County, UW-Waukesha – Bi-weekly updates**

**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) – monthly updates**

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

**Completed:**
- Adjusted Roadmap content for four of eight Working Groups
Weekly Project Update
Week of August 13, 2018

- Scheduled four of eight Roadmap follow-up meetings
- Reviewed service transition schedule with Huron
- Reviewed Communications Roadmap with Oshkosh HR, Oshkosh Marketing and Communications, and NE Regional Director of Communications
- Adjusted the communications schedule for late summer, fall, and winter
- Reviewed enrollment and tuition predictive model with Financial Services Working Group

**Upcoming:**
- Adjusted Roadmap content for remaining Working Groups
- Begin Roadmap follow-up meetings
- Continue to review service transition schedule, with the intent of providing an update to System on transition status
- Continue to customize Communications Roadmap with Oshkosh HR

**UW-Platteville:** UW-Richland, UW-Baraboo/Sauk - Bi-weekly updates

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

**Completed:**
- Reviewed MOU dashboard with RIs and campus functional team leaders

**Upcoming:**
- Meeting with Academic Deans on August 14

**UW-Whitewater:** UW-Rock County – Monthly updates

**Completed:**
- Finished agreement with campus catering to extend service to the Rock County campus
- Sent letters to current Rock County students, offering use of UW-Whitewater housing
- Confirmed transfer of the following MOU Service Areas: Administrative Oversight, Budget Planning, Foundations, HR – Employee Hiring, Marketing, Oversight of Instruction, Transfer, and Governance

**Upcoming:**
- All-student Welcome at the Rock County campus on 8/22, when students will get their UW-Whitewater ID and be oriented to services available
- New campus name up for approval at the August 23-24 Board of Regents meeting

**Bursars**

**Upcoming:** Expected to sunset in July 2019

**Facilities and Property**

**Upcoming:** Expected to sunset in September 2018

**Finance**

**Upcoming:** Expected to sunset in July 2019

**Financial Aid**

**Completed:**
- Distributed one-pager on financial aid guidance for AY2019-20 to financial aid offices at each RI
HLC

Completed:
- Continued to draft overview of HLC Campus Evaluation Visit process
- Continued to create on-site visit process/practices/examples
- Created the Update document-CVZ will outline an institutional response
- Identified supporting evidence to upload as a part of the review documentation
- Created an on-campus visit schedule
- Identified Restructuring documentation to provide update and context
- Identified a branch campus business plan template

Upcoming:
- Continuing group meetings via phone call
- Creating a common web-based folder for the group

Human Resources

Completed:
- Transformation Team has had final meeting and compiled recommendations.

Upcoming:
- Sunsetting meeting with PMO

Libraries

Completed:
- Completed library services plan, collection merging strategy, shared information services migration plan
- Provided central collection budget recommendation
- Held meeting with Ex Libris to discuss migration strategies
- Discussed HRS data feeds and submitted recommendation to UWSA to add HRS system flag for employees

Upcoming:
- Funding requests for Restructuring-related software updates
- PRIMO Subgroup recommendations
- Communication to institutions
- Review ALMA/PRIMO configuration options for branch campuses (due September 1)
- Expected to sunset in July 2019

Procurement

Completed:
- Met to review various UWCX contracts
- Reviewed UWC/X spend analysis
- Completed assessment of procurement automation future state
- Completed initial analysis and team discussion of UWC contract data

Upcoming:
- Identify the group of POs/contracts that should be supported with UWC/X/UWSA procurement services
- P-card spend analysis and review
- Analyze all UWSA/C/X contracts for legal issues related to transferring contracts to RIs
- Review the UWC Auxiliary contracts issued by UWSA
- Establish approach for contract review
- Auxiliary contracts informational piece
• Initial deep dive into UWC/Extension contracts (target by July 31)
• Bucket PO contracting work (due August 31)
• Expected to sunset in July 2019

Registrars
Upcoming: Expected to sunset in July 2019

Student Information Systems (SIS) – no update

Student Visa Functional Team (SVFT)
Upcoming:
• Waiting for Department of Homeland Security to approve I-17s.