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DATE: November 2, 2018

TO: Steering Committee Members

CC: Chancellors, Provosts, and CBOs

FROM: Robert G. Cramer, Vice President for Administration

A handwritten signature in blue ink, appearing to read "R. Cramer".

RE: Memo on the Process for Transitioning Remaining MOU Service Areas from UW Colleges to RIs

As the Transition Year progresses, we are beginning a coordinated approach to planning for the transition and close-out of the remaining MOU service areas. This approach is designed to ensure clear communication related to transition plans, as well as to ensure that the appropriate individuals from the RIs are involved in each of the service transition plans.

The MOU Management Plan divided the MOU areas into three categories: Academic Affairs, Administration & Finance, and Student Services/Enrollment Management. Each of these categories is being led by a Client Services Lead (CSL) from UW Colleges who will coordinate the UW Colleges efforts to transition that area. The CSLs for each of these areas are:

- Academic Affairs: Jackie Joseph-Silverstein
- Administration & Finance: Colleen Godfriaux
- Student Services/Enrollment Management: Melissa Stutz

The individuals who have been identified previously as Campus Relationship Leads (CRLs) for the RIs, will be asked to work with the CSLs in their respective areas to coordinate their RI's transition efforts. It is expected that each CRL will identify subject-matter experts to serve on specific MOU service area teams which will plan and implement the transition of each service area; CRLs will serve as the coordination point for this work.

The process going forward will rely on two levels of meetings, to be held in sequence:

- Overview Meetings for services that fall under each of the Client Service Lead areas
- Transitioning Service Workgroups, bringing CSLs and subject-matter experts together within each of the transitioning service areas

In the next month and a half, the PMO will convene an Overview meeting of the remaining services that fall under each Client Services Lead. Those remaining services are as follows:

Academic Affairs	Admin & Finance	Student Services/Enrollment Management
<ul style="list-style-type: none"> • Institutional Research • Records Management • Oversight of Instruction • Assessment • Library support services 	<ul style="list-style-type: none"> • Auxiliaries • Business Services 	<ul style="list-style-type: none"> • Financial Aid • Student Housing • Student Support Services • Veterans Services • Student Accessibility & Accommodations • Admissions • Registrar

At this meeting, they will bring together the CSL and CRLs for that area from each institution to discuss how the transition work will be approached and coordinated at a high level. They will also include UW System Administration personnel who will be responsible for closing out UW Colleges in the latter half of 2019, for situational awareness. At this meeting, each campus will be asked to name subject-matter experts as points of contact for transitioning each of the services on their campus, as well as who on their campus can verify that the service has officially transitioned.

Once the three overview meetings are complete, the CSLs will convene Transitioning Service Workgroups with CSLs and subject-matter experts from each campus. In addition, representatives from relevant Functional Teams, including HR, IT, and Procurement, will be invited as needed to provide input from their ongoing work, as well as to help identify needed tasks and interdependencies.

Transitioning Service Workgroups will review RI responsibilities, effective July 1, 2019. The workgroups will then identify what needs to be decided and completed by UWSA and UWCS in order for RIs to effectively take over service areas, as well as discuss next steps. The workgroups will also discuss interdependencies between services and uniform timelines where applicable.

Once guidelines have been developed in these meeting, the bulk of the transition work moves to the Receiving Institution campuses, as they develop and implement their detailed task lists. In some cases, further meetings with an individual campus and their subject-matter experts may need to take place.

This transition work is one of many Restructuring-related workstreams. In January 2019, the PMO will convene a meeting to bring high-level milestones from the MOU Service Area Transitions work into a single project Roadmap, along with milestones from UW-Extension transitions into

UW System Administration, UW Colleges and UW-Extension Closeout, and Functional Team activities. This master milestone list will be used to track project progress throughout 2019-2020.

As we approach the July 1, 2019, deadline for transitioning services, much of the work of the transition is also moving to the Receiving Institutions. UW Colleges and UW System Administration want to be supportive and believe this process will provide ongoing channels for communication to make that possible.