



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of April 23, 2018

## KEY UPDATES

### HLC Guidelines on Communications

As institutions prepare for student and employee transitions on July 1, 2018, it is important that all communications continue to clearly state “Pending approval by the Higher Learning Commission.” We understand there is eagerness to communicate to students and employees in advance of HLC approval in order to prepare for the future transition, but it is important that communications and marketing efforts do not get ahead of HLC’s decision.

If you have questions about whether a planned communication or marketing strategy violates the HLC process, please contact [UWRestructuringInfo@uwsa.edu](mailto:UWRestructuringInfo@uwsa.edu). The Project Communications Office is happy to review materials and escalate items that may warrant further consideration.

### Project Management Office Campus Visits

Part of the Project Management Office has been on the road meeting with the Receiving Institutions. They are helping to assess resource needs and provide on-site project management. The Project Consultants are moving towards more on-site Regional Team support while the UWSA Project Analysts will continue to provide Functional Team support.

### Decision Log

The Project Sponsor Decision on [Athletics at Branch Campuses](#) is now posted on the UW Restructuring website under Explore More → [Restructuring Project Decisions](#).

### UW Colleges Institutional Research SharePoint

Requests to add authorized users from receiving institutions to the UW Colleges Institutional Research SharePoint site should be sent to Christine Lee ([clee@uwsa.edu](mailto:clee@uwsa.edu)) by the receiving institution’s Institutional Research Director (or equivalent). Requests will then be routed for processing.

## PROJECT MILESTONES

### Upcoming

- 4/30 – Final Memoranda of Understanding
- 4/30 – Plan for Oversight of Instruction at Branch Campus(es)
- 5/1 – Draft Shared Governance Model
- 5/1 – Final Regional Organizational Charts

## FUNCTIONAL AND REGIONAL TEAM UPDATES

### Project Management Office (PMO)

#### Completed:

- Produced final copy of the Restructuring Roadmap
- Adjusted Roadmap according to feedback received in April 12 All-hands workshop in Madison
- Completed and distributed presentation for the April 20 Steering Committee meeting
- Continued with MOU implementation next steps, with focus on management plan
- Communicated with Receiving Institutions (RIs) regarding the regional support phase of the project plan
- Began Student Information System campus visits (Oshkosh on April 18)

#### Upcoming:

- Critical needs assessments at the RIs



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of April 23, 2018

- Plan for visits to the regions and PMO staffing plan
- MOU implementation and next steps, including a management and transition framework
- Review finance transfer schedules

## Project Communications Office (PCO)

### Completed:

- Reviewed and edited Steering Committee meeting materials
- Drafted post-Steering Committee Meeting Summary
- Redrafted employee transition letters from UWSA with input from broad internal stakeholder group
- On-boarded 25-percent-time PCO member from UW HELP to assist with student-facing communications

### Upcoming:

- Employee welcome letters from UWSA VPs to UW-Extension employees
- Meeting with UW Colleges Southeast Regional Dean to assist with restructuring remarks
- Collaboration with Regent Hall and UW-Milwaukee on remarks for Milwaukee Urban League event
- Traveling to UW-Green Bay on May 2 to collaborate on post-HLC approval communications and marketing plans
- Offer letter to Senior Communications Specialist

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

### Completed:

- Held combined SIS meeting Friday with all stakeholders to begin to define how SIS should be restructured
- Requested the PMO's help in developing ideas to improve organization at the regional level, including how to develop a decision log, putting a regional project governance structure in place to delegate subject matter experts to make decisions, and developing a shared drive for all regional functional teams to store and share information

### Upcoming:

- Recruitment of students to help with the project and provide an experiential learning opportunity

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

### Completed:

- Conducted budget planning meeting with UWSA/UWEX/UW-Madison to review costs for services in the future
- Discussed services with Instructional Communications Systems transition to UWSA
- Finalized chart of accounts for Conference Centers
- Worked on MOUs for each of the four UWEX units moving to UW-Madison

### Upcoming:

- HR and Finance work groups continue to outline tactical plans for addressing transition steps that are interdependent, expect mapping to be complete in May
- Conference Centers develop plan for full transition by July 1
- Provost Brower reviews summary from the volunteer work group
- On July 1, organizational website pages for Cooperative Extension and Public Media will be live under UW-Madison Office of the Provost



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of April 23, 2018

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

### Completed:

- Sent regional planning materials to PMO for review by UWSA leadership
- Sent PMO a comprehensive, prioritized list of questions and issues
- Finalized email mailing lists in UWM's internal message system

### Upcoming:

- Two-year pro-forma budget for College of General Studies
- Gap analysis to assess how close UWM is to being able to offer the full online AAS

## UW System Administration: UW-Extension Continuing Education, Outreach and E-Learning, and Division of Business and Entrepreneurship

### Completed:

- Finalized future home offices of UW-Extension units transferring to UWSA
- Issued unit assignment memo from President Cross
- Convened group to review the CEOEL budget and financial information

### Upcoming:

- Review budgets with UWEX central office, CEOEL, and UWSA
- Meeting between Vice President Sean Nelson and Humanities Council division to discuss logistics of transition to UWSA Division of Finance
- Convening group to review the CEOEL budget and financial information
- Review questions and issues raised from other regional and functional teams on AAS Online

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

### Completed:

- Visit from UWSA PMO with subject matter experts for an overview of SIS Project Plan
- Letters of intent sent to Regional leadership
- UW-Fox Valley Board of Trustee approved additional funding for replacement boilers
- Resolution for transition year from Student Government is out for votes

### Upcoming:

- Business units continue to work with PMO on refining SIS Project Plan
- Naming group will modify recommendations based on clarification from U.S. Department of Education and UWSA
- Acknowledgement and honoring of new institution with all employees on July 2 and UWO Convocation on September 4

## UW-Platteville: UW-Richland, UW-Baraboo/Sauk

### Completed:

- Chose finalists for Branch Dean
- 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



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of April 23, 2018

- Project Planning Activities memo. from Chancellor
- Review of application data transfer issues

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

### Completed:

- Set up distribution lists for each work group and communicated to all groups
- Completed all project planning activities and submitted by due date
- Conducted project team meeting with functional team members (April 17)

### Upcoming:

- MOU review
- Update distribution lists assessment by a local marketing firm of options for branch naming
- Critical staffing needs assessment (April 30)

## Athletics

### Completed:

- Shared decision paper with Chancellors

## Facilities and Property

### Completed:

- Finalized project plan and milestones

### Upcoming:

- Discussion of issues associated with regional employee transitions

## Finance

### Completed:

- Began regional meetings to review budget and answer questions
- Met with UW-Madison budget staff to explore estimated resources for transferring units
- Began updating crosswalks with Colleges 2018-19 Redbook budget information

### Upcoming:

Work on finalizing updated crosswalks for distribution to regions

## Financial Aid

### Completed:

- Updated Steering Committee on team activities
- Determined campus-based allocation scenarios based on a three-year average

### Upcoming:

- Further refinement of resource requirements on campuses
- Completion and submission of the U.S. Department of Education's (ED) E-App within 10 days of HLC approval
- Per approval from ED, all campuses planning to submit between June 20-22, 2018



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of April 23, 2018

## Human Resources

### Completed:

- Reviewed all employee units affected by recent decision-making to ensure appropriate alignment with the MOU
- Worked with UW Colleges staff to clarify home institution assignments
- Held initial meetings of HR operational team
- Prepared additional letter templates to recruitment employees

### Upcoming:

- Sending employee transition letters from President Cross to all transitioning employees

## Libraries

### Completed:

- Met with OCLC to understand process and cost to eliminate branch campus symbols and migrate holdings
- Met with ATLAS to understand options and processes to merge ILLiad instances on branches
- Met with Student Information System team to better understand when student information will enter RI feeds and potentially library IAA feeds

### Upcoming:

- Exlibris meeting at ELUNA in early May to discuss process and development work to break up Colleges Alma IZ and migrate holdings and patron information into RIs
- Track activities with Redmine and gather feedback from campuses and staff for restructuring activities
- Follow-up on process to request funding from Steering Committee for custom work necessary for our software vendors to execute
- Follow-up on the timeline for HRS data from branches making it into RIs IAA feeds

## Procurement

### Completed:

- Developed, distributed, and reviewed the project plan
- Finalized team charter and project plan

### Upcoming:

- Collect any additional comments on charter and finalize
- Develop final draft project plan based on any additional team comments
- Modify the initial project milestone dates and based on feedback
- Procurement conference at UWGB on April 26-27

## Student Recruitment Functional Team (SRFT)

### Completed:

- Met at UW-La Crosse to finalize Core Agreements
- Finalized 24 Core Agreements on application standardization, fees, and materials

### Upcoming:

- Continued work on EApp development
- Refinement of purpose of EApp redesign and how to streamline the application
- CRM meeting in Madison on April 23



# UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of April 23, 2018

## Veterans Services

### Completed:

- Adjusted project plan following April 12 workshop
- Described critical needs to PMO for follow-up

### Upcoming:

- Meetings with UW Colleges certifying officials