



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of May 14, 2018

KEY UPDATES

MOU Management Plan

The Project Management Office is finalizing the draft MOU Management Plan and will be requesting feedback from the Receiving Institutions. The MOU Management Plan will provide detail on how the regional MOUs will be implemented and more fully outline the responsibilities of the functional areas impacted by the MOU.

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 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. The Project Communications Office is happy to review materials and escalate items that may warrant further consideration.

PROJECT MILESTONES

Date	Milestone/Deliverable	Responsibility
5/21	Identify optimal PRISM date transfer method for receiving institutions	Registrar/Admissions
5/25	Issue completed pro forma budgets	Finance Functional Team
5/28	Publish Department of Education reporting names	Financial Aid Functional Team
5/28	Complete preparation to receive veterans at the Receiving Institutions from the branch campuses	Regions
5/28	Put in place plans for management of auxiliary services at branch campus(es)	Regions
5/30	Grant access to veterans certifying officials to campus SIS	Veterans/SIS
5/30	Make decision regarding expenditure transfers	Finance Functional Team
5/30	MOU Communication to Regions Completed	Project Sponsor
6/1	Finalize I-17s with Department of Homeland Security	Student Immigration Functional Team
6/1	Open Student Recruitment EApp for testing	Student Recruitment Functional Team

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

Completed:

- Worked with UW-Oshkosh, UW-Green Bay, and UW-Platteville to flesh out and reconcile project plans
- Created charters for UW-Oshkosh and UW-Green Bay restructuring teams
- Drafted content for end-of-academic-year communication to the Lake Winnebago community
- Briefed Lake Winnebago steering committee meeting on our regional support objectives, planned assistance, and recommendations
- Conducted over 15 interviews with Lake Winnebago and Project Coastal restructuring team members
- Completed critical needs assessments at UW-Oshkosh and UW-Green Bay
- Held conversations with UW-Milwaukee Function Team leads to work through issues and concerns



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- Submitted MOU management plan for review
- Began phased transition of PMO assignments

Upcoming:

- Briefing critical needs assessments at the receiving institutions
- MOU implementation and next steps, including a finalized management and transition framework
- Review of existing project plans of UW-Oshkosh, UW-Green Bay, with an eye to customizing their roadmaps

Project Communications Office (PCO)

Completed:

- Met with the web team to mock up a redesign of the UWSA restructuring website
- Updated the Project Communications Plan for May – September
- Hosted videoconference with communications staff from receiving institutions, UW Colleges and UW-Extension, and UWSA
- Drafted welcome letters from UWSA Vice Presidents to their future units from UW-Extension
- Drafted end-of-year email to current UW Colleges students – receiving institutions opted to send the communication themselves
- Started conversation about transitioning UW Colleges websites and social media accounts to receiving institutions
- Offered on-campus visits to receiving institutions to walk through communications and marketing plans

Upcoming:

- Create content for website redesign
- Draft communications materials for HLC decision rollout
- Begin planning for transition year narrative and opportunities for storytelling
- Schedule on-campus visits with interested receiving institutions

UW-Eau Claire: UW-Barron Country

Completed:

- Held meetings on both campuses and in Barron County to provide feedback on three designs for the new branch campus name and wordmark
- Received nominations for the search committee for the Campus Director position
- Assistance Vice Chancellor Mike Carney met with Barron County faculty and instructional staff to discuss the new academic chair position
- Chancellor Schmidt distributed end-of-semester emails to all faculty, staff, and students at both campuses, looking forward to the July 1 joining
- Began assessment of physical plant signage changes in Barron County
- Reviewed the MOU

Upcoming:

- Select and meet with the search committee for Campus Director to begin the search
- Begin the process for selection of an academic chair
- Post the campus director position
- Finalize and sign MOU

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

Completed:

- Revamped SharePoint Site and information-sharing tools



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- Held all-day Admissions meeting with SIS team
- Finalized Student Access and Enrollment Plan for 2018-2019
- Finalized Tenure and Rank Memo Test the SIS

Upcoming:

- Prioritizing different work groups
- Determining levels of compensation for summer work
- Testing the SIS

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

Completed:

- Worked on MOUs for each of the four UW-Extension divisions moving to Madison
- Began receiving inventory of the IT services they need and use so transition plans can be developed
- Continued discussions of central administrative FTE and budget
- Mapped all Conference Services finance work
- Successfully beta-tested Conference Services HRS and CATS system transfers
- Currently has strong roadmap
- Sent out letters to most Extension and Colleges staff
- Completed chart of accounts for Conference Centers

Upcoming:

- Continued work on MOUs with the goal of having three "signable" MOUs by the end of the month
- May 15 decision on whether to transition HRS data
- On track to transition all 65 people on July 1

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

Completed:

- Began process of printing and mailing of "meeting with the Chancellor day"
- UW-Milwaukee attended end-of-year faculty gathering at UW-Waukesha
- Sent additional documents requested by HLC
- Reviewed second draft of the MOU
- Began mapping of student lifecycle with Enrollment Management FT
- Received access to UW Colleges Conduct and Compliance SharePoint site
- Established a plan for UW-Milwaukee to assume responsibility for UW-Waukesha and UW-Washington County facilities assets
- Met with PMO to review Roadmap

Upcoming:

- Two-year pro forma budget for College of General Studies (still in development)
- Gap analysis to assess how close UWM is to be able to offer the full online AAS

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

Completed:

- Met with Huron partners to discuss critical needs among Financial Aid, External Affairs, Foundations, Sponsored Research, Registrar, Financial Services, Admin Services, Branding and Communications
- Created and verified IT charter
- Completed campus needs assessment



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- Attended Lake Winnebago restructuring leadership committee meeting

Upcoming:

- Acknowledging and honoring new institution with all employees on July 2
- Communication to the Lake Winnebago community about the restructuring effort at the end of the academic year

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

Completed:

- Academic affairs faculty integration team finalized the matching UW Colleges faculty and IAS with UW-Stevens Point depts to meet (May 9 due date)
- Vision statement was drafted to guide work of functional and tech teams
- Met with Huron reps for technical walkthrough
- Compiled list of questions to be answered by administration to proceed SIS integration
- Bursar met with Huron

Upcoming:

- Additional functional areas to meet with Huron
- Determine assistance needed from consultants
- Meeting between student financials lead and vice chancellors to discuss seg fees
- Creation of an IT prototype environment
- A list of integrated IT systems that data is pulled from
- Regional steering committee will investigate working with a local marketing firm for an outside perspective on branch naming
- MOU review

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)

Completed:

- Met to discuss CEOEL budget
- Distributed President Cross's memo indicating that CEOEL will transition in its current state (further conversations about the organization structure will not happen before fall)
- Disbanded UWSA regional team led by Jim Henderson
- Transferred responsibility to individual vice presidents

Upcoming:

- Further CEOEL budget review to determine how to support UWC Online and Collaboratives
- Vic Presidents Cramer and Nelson will look at space for CEOEL and all units
- Determine UW HELP budget and DoIT expenses
- A meeting to address priorities for the transition of the AAS Online to CEOEL

Facilities and Property

Completed:

- Finalized project plan and milestones

Upcoming:

- Discussion of issues associated with regional employee transitions
- Planning meeting to discuss mapping of UDDS codes



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- Scheduling in-person meeting at UW-Fond du Lac

Finance

Completed:

- Finalized tuition guidance for MOU year
- Updated crosswalks and distributed to receiving institutions
- Updated pro forma templates and sent to receiving institutions, with completion deadline of May 17

Upcoming:

- Work on updated pro formas from receiving institutions for inclusion in the annual budget
- Continue conversations for UW-Extension/UW-Madison/UWSA budget
- Prepare UW-Extension crosswalk

Financial Aid

Completed:

- Finalized Colleges campus-based reallocation (three-year average) and provided draft letter for team members response

Upcoming:

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

Human Resources

Completed:

- Sent initial touchpoint letters to Colleges and Extension employees
- Established timeline for next round of communications
- Held ongoing meetings of HR operational team

Upcoming:

- Next round of communications to Colleges and Extension employees
- Guiding HR leaders at receiving institutions for next round of communications

Student Immigration

Currently in a holding pattern until the team hears back from Student and Exchange Visitor Program; remains on track.

Student Recruitment

Completed:

- Met in Madison on May 11 to refine application questions on the EApp
- Worked with ACT reps to establish how branch campuses are coded into tests, similar to FAFSA process

Upcoming:

- Day-long meeting May 14 to outline Phase 1 and refine application structure/questions

Veterans Services

Upcoming:

- Additional meetings with UW Colleges certifying officials to discuss operations following July 1
- Review of project plan to ensure suitability past July 1