



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of May 21, 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 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
5/28	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:

- Presented critical needs assessments at UW-Oshkosh and UW-Green Bay
- Finalized priorities for regional support at UW-Oshkosh and UW-Green Bay
- Briefed SP Provost and CBO to develop an agenda for regional support kick-off week
- Developed UW-Green Bay’s SharePoint site
- Developed universal decision log for UW-Green Bay; created charter for UW-Oshkosh IT FT
- Set meetings with UW-Oshkosh team leads to develop charters
- Finalized end of academic year communication to the Lake Winnebago community
- Finalized MOU management plan
- Finalized the MOU
- Continued phased transition of PMO assignments

Upcoming:

- Developing charters for UW-Oshkosh and UW-Green Bay FTs
- Visits to branch campuses of GB and UW-Oshkosh



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- Publication of MOU and MOU management plan
- Review of existing project plans of UW-Oshkosh, UW-Green Bay, and UW-Stevens Point, with an eye to customizing their roadmaps

Project Communications Office (PCO)

Completed:

- Met with UW Colleges Marketing and Admissions Directors to discuss fall 2018 application fee waiver
- Drafted student-facing message for UW HELP newsletter on the upcoming restructuring
- Met with UWSA Office of University Relations to outline and discuss vision and goals for strategic communications in 2018-19
- Drafted detailed employee transition letter templates for use by the receiving institutions
- Drafted memo on the application fee structure
- Scheduled on-campus communications and marketing meeting with UW-Platteville
- Held weekly communications videoconference with receiving institutions
- Drafted and distributed Steering Committee post-meeting summary

Upcoming:

- Developing web content for restructuring website redesign
- Drafting deliverables for HLC decision communications plan
- Identifying key dates and topics for functional team communications during 2018-19
- Recruiting student assistant to help with communications functions

UW-Eau Claire: UW-Barron County

Completed:

- Chancellor selected the name and preferred wordmark for the Barron County campus
- A search committee for the Campus Director has been formed and charged
- The Provost accepted the recommendation of Barron County faculty and named the new academic chair
- Revisions to MOU forwarded to UW System
- The Chancellor and Provost met with the SIS task force to review the guiding principles for their work
- Provost attended the UW Barron County commencement ceremony

Upcoming:

- Applications for the Campus Director will begin to be reviewed, following the May 21 deadline
- Timeline and funding for campus signage changes continues
- Planning for July 2 and July 24 special events in Barron continues
- MOU will be finalized and signed
- The guiding principles for the SIS working group will be revised and finalized

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

Completed:

- Revamped SharePoint Site and information-sharing tools
- Held all-day Admissions meeting with SIS team
- Finalized Student Access and Enrollment Plan for 2018-2019
- Finalized Tenure and Rank Memo

Upcoming:



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

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

Completed:

- Completed mailing of letter from chancellor, FAQs and UW Panther mascot head flyer to UW-Waukesha and UW-Washington County students
- Completed follow up with recent chancellor meetings with county executive Paul Farrow
- Student Affairs FT had meeting with project managers from Huron and reviewed timeline for priority 1 issues

Upcoming:

- Two-year pro forma budget for College of General Studies (still in development)
- Gap analysis to assess how close UW-Milwaukee 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 its priorities for the regional support; began the process of refining certain FTs
- Drafted and sent end of academic year communication to the Lake Winnebago community

Upcoming:

- Continued work on charters
- Development of FT project plans
- Acknowledgement and honoring of 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:

- Built the prototype environment to test Academic Structure changes
- Began configuring the environment for testing
- Developed a list of integrated IT systems that data is pulled for
- Began weekly meetings between IT work group and consultants to discuss import of current UW Colleges students
- Held one-on-one meetings between consultants and functional area leads – Registrar, Admissions, Financial Aid
- Conference call with Huron analyst to discuss potential support for analytics, project planning, timeline development, etc.

Upcoming:

- Post the Campus Executive positions
- Set up enrollment management group meetings
- Update SharePoint site with functional team members, per leads request
- Coordinate meeting notes with Huron representatives
- Summer testing
- Bring in a Huron specialist this summer who is an expert in segregated fees



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Bursar

Completed:

- Held a conference call on May 14
- Agenda included tuition decision document, campus discussions on SF set-up in the SIS, and documenting any outstanding 1098T questions
- Received clarification on the tuition decision document from PMO
- Participated in May 11 SIS teleconference to discuss the Bursar Functional team recommendation for delinquent balance transfers

Upcoming:

- Follow-up with System Legal on any outstanding 1098T questions

Human Resources

Completed:

- Determined required components of next employee letter
- Drafted template letters for next employee letters and shared with HR Directors
- Convened HR Transactional team to prioritize activities

Upcoming:

- Next round of communications to Colleges and Extension employees
- Beginning to guide HR leaders at RIs for next round of communications

Information Technology

Completed:

- Reached a decision on UWC email addresses for RI staff members
- UW Colleges will grant administrative access to UWC webpages to receiving institution staff. RIs will need to provide UWC with the names of staff with web administration rights.
- Determined with Provost Schmitt that NODE program and ATS staff will remain under her aegis for AY18-19
- Underscored that network shares won't be provided to UW Colleges students as of this summer

Upcoming:

- Timeline for technology tied to business process changes (working with the PMO on this)
- Formation of the IT Strategy Task Force

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 SIS FT to better understand when student information will enter RI feeds and potentially library IAA feeds
- Met with Ex Libris at ELUNA to discuss process and development work to break up Colleges Alma IZ and migrate holdings and patron information into RIs

Upcoming:

- Track activities with Redmine and gather feedback from campuses and staff for restructuring activities



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- PMO will track status and report back when possible regarding the timeline for HRS data from branches making it into RIs IAA feeds
- Council of UW Libraries conferences

Procurement

Completed:

- Finalized recommendation for PO and contract review thresholds for RIs and shared with UWC/X
- Attended JAGGAER software demo
- Met to review auxiliary contracts

Upcoming:

- Setting clear priorities and timelines to ensure continued progress
- Analyzing UWSA/C/X contracts for legal issues related to transfer of contracts to RIs

Student Immigration

- Scheduled a meeting to discuss guidance to Designated School Officials

Upcoming:

- Feedback from SEVP (late May)
- Meeting to discuss guidance to DSOs

Student Recruitment

Completed:

- Created an admissions subgroup to address admissions work
- Briefed the Steering Committee on interdependencies between EPCS, EApp, and SIS
- Held day-long meeting to outline Phase 1 and refine application structure/questions

Veterans Services

Completed:

- Held third meeting with UW Colleges certifying officials to provide HR transition updates
- Reviewed the SIS data on Thursday and Friday to determine to what they'll require access

Upcoming:

- Continued to review the SIS data
- Review of project plan to ensure suitability past July 1