



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of May 7, 2018

KEY UPDATES

MOU Management Plan

In the next week, the Project Management Office will be finalizing the draft MOU Management Plan and 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.

Budget Crosswalks and Updated Pro Formas

This week, updated crosswalks for branch campuses were distributed for review to Chief Business Officers at the Receiving Institutions. Receiving Institutions also received updated pro formas and have been asked to submit feedback by May 17.

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

PROJECT MILESTONES

Date	Milestone/Deliverable	Responsibility
5/14	Establish IT Strategy Team	IT Function Team
5/17	Return regional budgets to System	Regions
5/17	Issue completed pro forma budgets	Finance Function Team
5/18	Finalize workforce planning and needs analysis based on employee transition lists	Regions
5/18	Finalize MOU Management Plan	Project Sponsor
5/25	Issue completed pro forma budgets	Finance Function 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
- Addressed the NE Regional Leadership Team
- Attended Fond du Lac Collegium
- Attended Project Coastal steering committee meeting
- Met individually with nine Project Coastal steering committee members
- Conducted nine interviews with Lake Winnebago restructuring team members
- Scheduled on-campus interviews to assess critical needs UW-Oshkosh, UW- Green Bay, and UW-Platteville
- Continued to support 16 functional teams

Upcoming:

- Completion of critical needs assessments at the Receiving Institutions
- MOU implementation and next steps, including a management and transition framework



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- Help UW-Oshkosh and UW-Green Bay publish an end-of-academic year communication to their communities
- Help UW-Oshkosh and UW-Green Bay with foundational project management work

Project Communications Office (PCO)

Completed:

- Worked with leadership to develop the process for submitting campus name change requests to Board of Regents
- Traveled to UW-Green Bay to work with their Communications & Marketing Director and Admissions Director on communications strategies and timelines
- Drafted welcome letters for transitioning employees from UW-Extension to UWSA
- Held first weekly video conference with communications staff from all receiving institutions and UW Colleges and UW-Extension to discuss communications needs and strategies
- On boarded new Senior Communications Specialist
- Met with UW-Oshkosh on messaging for end of academic year communication to their communities

Upcoming:

- Work with web team to revamp the Restructuring Project website
- Work on student-facing communications for May
- Continue work on employee-facing communications

UW-Eau Claire: UW-Barron County

Completed:

- SIS team met with Huron to identify support needs for financial aid and student financials components
- Chancellor Schmidt and Associate Vice Chancellor Carney met by video with faculty and staff at the Barron campus to review the new administrative structure
- Posted new organization chart online
- SC chairperson is soliciting nominations to serve on the search committee for the Barron campus Director
- Barron County Executive Board met and unanimously approved the new name for the campus: UW-Eau Claire — Barron County
- Three graphic choices have been developed for the new name and are in review
- UWEC University Senate Executive Committee reviewed the Guidelines for UWEC+UWBC Shared Governance and Integration

Upcoming:

- Approval of design graphics for new name
- SIS progress and decision on tuition questions
- Selection of search committee for Campus Director and posting of position
- Plan for campus celebration on July 2

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

Completed:

- Held steering committee meeting
- Held all-day SIS workshop
- Sent tuition structure memo to VP for Finance
- Met with the Huron regional support to review outlook through July 1, 2018

Upcoming:

- Prioritize different work groups
- Hold all-day meeting with Admissions team to work through EApp and other systems related issues.



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- Determine levels of compensation for summer work
- Test the SIS
- Redesign SharePoint site and other project management tools

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

Completed:

- Worked on MOUs for each of the four UWEX divisions moving to Madison
- Began receiving inventory of the IT services they need to develop transition plans
- Continued discussions of central administrative FTE and budget
- Mapped all Conference Services finance work
- Successfully beta-tested Conference Services HRS and CATS system transfers
- Designated May 15 as the go/no-go date for Conference Centers transfer

Upcoming:

- Continue work on MOUs
- Review by Provost Brower of summary from the volunteer workgroup

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

Completed:

- Reviewed second draft of the MOU
- Began mapping 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
- Participate in draft MOU videoconference
- PMO to meet with UWM Functional Team Leads over next two weeks

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 org. structure will not happen before fall)

Upcoming:

- Further CEOEL budget review to determine how to support UWC Online and Collaboratives
- Will look at space for CEOEL and all units
- Determine UW HELP budget and DoIT expenses
- Meet to address priorities for the transition of the AAS Online to CEOEL
- Welcome letters to staff of transitioning units



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

Completed:

- Met with Huron partners to discuss critical needs among Shared Governance, Admin., Academic Affairs, IT, and Culture and Identity Working Groups
- Introduced Huron partners to Northeast Regional Leadership Team and FDL Collegium
- Discussed PMO's regional support plan for Lake Winnebago

Upcoming:

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

Completed:

- Met with PMO and worked through Roadmap
- Chose branch dean finalists
- 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
- Project Planning Activities memo from Chancellor
- Review of application data transfer issues

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

Completed:

- Submitted proposed shared governance model
- Completed drafts of administrative vision for academic structure due May 7
- Held UWSP SIS workgroup meetings to review vision for academic structure due May 7
- Met with Huron consultants to review project plan template
- Met with Huron consultants for technical walkthrough of SIS integration and came up with two PeopleSoft options
- Initial meeting between IT work group and consultants to discuss import of current UW Colleges students

Upcoming:

- Compile list of questions that need to be answered by administration to proceed/complete SIS integration
- Meeting between student financials lead and VCs to discuss segregated fees
- Create IT prototype environment; a list of integrated IT systems that data is pulled from
- Regional steering committee meeting (May 10)
- Regional steering committee will look into working with a local marketing firm for an outside perspective on branch naming
- MOU review

UW-Whitewater: UW-Rock County

Completed:

- Approved organization structure of UW-Rock County
- Approved names for the campus and college
- Made progress on curricular crosswalk processes
- Reviewed MOUs and responded to PMO and Project Sponsor



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- Signed document of intent to hire Associate Dean

Upcoming:

- Distribute course lists to disciplines/departments on main campus
- Rock County Board to approve resolution to name branch campus as “University of Wisconsin – Whitewater at Rock County”
- UW-Whitewater Faculty Senate to accept offering of AAS and BAAS Degrees
- Submission of AAS and BAAS change application to HLC
- Submission of list of tenured faculty details to Board of Regents for transfer of tenure in June
- Hiring plan for dean for new college

Facilities and Property

Completed:

- Scheduled all-hands Facilities meeting at UW-Fond du Lac on June 11.
- Worked with SIS team to begin to work through coordinating UDDS codes of the RIs with the branch campuses.

Upcoming:

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

Finance

Completed:

- Finalized and distributed updated version of the crosswalks for branch campuses with detail by funds to CBOs
- Provided updated version of pro formas and requested RIs to return by Thursday May 17th
- Provided regional operating budget adjustments to RI CBOs
- Assembled and reviewed tuition proposals
- Issued initial tuition guidance

Upcoming:

- Finalized version of pro formas for inclusion in the operating budget at the June BOR
- Continued conversation with UW-Madison and UW-Extension staff to determine budget
- Crosswalk for UW-Extension and budget details

Human Resources

Completed:

- Began sending initial touchpoint letters to Colleges and Extension employees
- Continued review of all employee units affected by recent decision-making to ensure appropriate alignment with the MOU
- Continued to work with Colleges staff to clarify home institution assignments
- Held ongoing meetings of HR operational team

Upcoming:

- Begin planning for next touchpoint with Receiving Institutions
- Transmission of more employee letters
- Beginning to guide HR leaders at Receiving Institutions for next round of communications

Information Technology (IT)

Completed:



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- Finished Colleges website extract
- Received technical overview list from UW-Oshkosh
- Worked with VP Cramer and Steven Hopper to stand up the IT Strategy Task Force

Upcoming:

- Sharing Colleges website extract with the entire team (this week)
- Receive remaining technical overview lists
- Working with PMP on regional support model timeline and chart
- 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 Functional Team 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
- PMO will track status and report back when possible regarding the timeline for HRS data from branches making it into RIs IAA feeds

Procurement

Completed:

- Finalized recommendation for PO and contract review thresholds for RIs and shared with UW Colleges and UW-Extension
- Attend JAGGAER software demo
- Met to review various UW Colleges and UW-Extension contracts and identified data needs and strategies to complete review process

Upcoming:

- Develop final draft project plan based on any additional team comments
- Modify initial project milestone dates
- Complete contract identification, review, and analysis process
- Identify the group of Pos/contracts that should be supported by UWSA/UW Colleges and UW-Extension procurement services

Student Immigration

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

Student Information Systems (SIS)

- SIS design work is taking place at the Receiving Institutions with assistance from specialized SIS consultants
- Data Conversions and Admissions subgroups have been assembled and are actively working on their content areas



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Student Recruitment Functional Team (SRFT)

Completed:

- Held SRFT meeting on May 10

Upcoming:

- Working with ACT reps to establish how branch campuses are coded into tests, similar to FAFSA process
- Team will meet on May 14 to outline Phase 1 and refine application structure/questions Content

Veterans Services

Completed:

- Held a meeting with UW Colleges certifying officials to provide HR transition updates

Upcoming:

- Additional meetings with UW Colleges certifying officials to discuss operations following July 1