



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of March 12, 2018

KEY UPDATES

Guidance for Campus Naming Conventions

Attached is the final *Guidance for Campus Naming Conventions* document. Receiving institutions should use this document to help inform their discussions and process for considering branch campus name changes.

Regional Activity Checklist

Student Facing Actions:

- ✓ 04/15 – Finalize MOUs
- ✓ 05/03 – Determine format of EApp data for Receiving Institutions
- ✓ 06/01 – Finalize Department of Education institutional names for reporting purposes and OPEID configuration
- ✓ 06/15 – Finalize DoE application content

Employee Facing Actions:

- ✓ 04/15* – Develop recruitment plan for branch campus administrators, giving first consideration to UW Colleges regional executives
- ✓ 05/01* – Develop first draft of organizational charts reflecting the integrated campus structure and vision for July 1, 2018
- ✓ 05/01 – Identify shared governance model that will operate as of July 1, 2018
- ✓ 05/18* – Finalize workforce planning and needs analysis based on employee transition lists
- ✓ 06/18* – Finalize hiring plan to fill vacancies and functional gap

Other HLC Actions:

- ✓ 05/01 – Assign oversight of instruction at branch campus and link to Receiving Institution processes
- ✓ 06/15 – Link assessment of student learning outcomes to Receiving Institution
- ✓ 07/01 – Ensure that information about programs, requirements, and degrees is clear and published with processes linked to Receiving Institutions

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

- Created presentation for Steering Committee Meeting 5
- Facilitated March 12 Student Information Systems workshop
- On-boarded two new project analysts and a new engagement director from Huron
- Continued facilitating the drafting process of the MOU
- Drafted introduction and template for MOU presentation to Board of Regents
- Began drafts of EApp project timeline content and graphics
- Worked with functional team leads to refine milestones and team timelines

Project Communications Office (PCO)

- Created a template for functional team meeting summaries. Working to establish a process for sharing the information with the receiving institutions to help facilitate consistent reporting from the functional teams to the regional teams.
- Working with Office of University Relations on Board of Regent meeting materials related to the restructuring project
- Working with the PMO to develop “digestible” project plans/timelines for various levels of stakeholders
- Drafting high-level regional communications plan to help receiving institutions form their own restructuring project communications plan



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- Continuing work with the Human Resources Functional Team to guide employee-facing communications
- Continuing recruitment for two Senior Communications Specialists
- Post-meeting summary for the March 16 Steering Committee meeting

UW-Eau Claire: UW-Barron Country

- Held March 9 Steering Team meeting
- Presented for Chancellor's consideration policy recommendations on shared governance, personnel, resource allocations, and others—all of which have support of UWBC
- Conducted listening sessions with civic leaders and campus stakeholders

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

- Moving forward with shared governance
- Branch campuses are reviewing faculty integration structure and providing feedback
- Working on curricular alignment – responses due by April 2
- Began holding bi-weekly meetings with functional team representatives from UWGB to touch base on functional team activities and to share information across teams.

UW-Madison: UW-Extension Cooperative and Conference Centers

- Drafted public communication on July 1 transitions of employees and authorities
- Continued meetings of functional working groups
- Launched tenure working group, headed by Steve Ventura, UW-Madison, and Elmo Rawlings, UWEX

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

- Working through communications needs and SharePoint access
- Request for resources – specifically administrative support for the project

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

- Conducted community input sessions; sat for local radio interviews and TV interview
- Chief Business Officers met in Madison to discuss in-depth financial issues and differences in budget terminology across campuses
- Awaiting feedback regarding the draft mission statement included in HLC document; review of current UWC bylaws related to tenure and promotion

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

- Drafted branch campus administrator position description
- Preparing for regional steering committee meeting
- Preparing for visits by Platteville HR to branch campuses to gather personnel data needed to incorporate branch personnel into Platteville HR system
- Preparing for advertisement of branch campus administrator positions
- Drafting an MOU on Collaborative Engineering Program



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

- Project teams are established and meeting, including Academic, Enrollment, Student Support, Operations (has sub groups – finance, HR, facilities, etc.), Governance, IT, Communications and External Relations
- Regional Transition Group is meeting and includes members from UWSP, UW Colleges, and community members. Next meeting will discuss branding.
- PMO will send list of functional team members from UWSP so they can begin meeting and sharing information.

Bursars

- Finished activities timeline through February 2019
- Identified key questions

Facilities and Property

- Deputy Functional Team Lead Ellen Rosner met with UW Colleges Facilities Director Kate Sullivan to update the team's action plan. She is also examining current lease abstracts to identify information holes that need to be filled.
- Developing agenda for the first official team meeting.

Finance

- Met multiple times to discuss key issues related to budgets and employee transitions, including meetings with UW-Extension and UW-Madison staff to walk through budgets, as well as initial conversations about tuition considerations.

Financial Aid

- Created template for required resources
- Completing financial aid activities timeline

Human Resources

- Convened multiple times last week to develop the process for communicating employee transitions data, as well as a communications plan to employees.
- Drafted and distributed talking points to chancellors clarifying key points about information included in a February 14 memo from President Cross on recruitment and hiring. Campuses may continue both processes as needed/required, but are expected to give priority consideration to regional employees before considering external candidates.
- The April 1 deadline for receiving campuses to have organizational charts in place was the target goal; however, if constraints exist to accomplish that milestone, institutions should continue to move forward and communicate progress to achieve the milestone as close to the target date as possible.
- On Friday, Chancellors received a list of employees they are receiving from the branch campuses. Updates will be provided on a biweekly basis. Jason Beier, Assistant Vice Chancellor for Human Resources at UW Colleges, will conduct a series of town-hall teleconferences with employees the week of March 19 to give a high-level overview of the transition process and answer questions. Employees will receive individualized letters in the weeks following the teleconferences.
- Next key step is the drafting a hiring protocol to guide recruiting and hiring decisions for the campuses going forward.

Information Technology (IT)

- Scheduled a full-day face-to-face meeting for March 23 at the Pyle Center to continue discussions on the future of applications, programs, websites and other services, as well as to develop a timeline to meet the goals of the functional charter.



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- Working on an overall communication plan/timeline for the team.

Libraries

- Reviewed and agreed upon project plan
- Reviewing project milestone dates

Procurement

- Held a face-to-face meeting last week with purchasing directors to share the overarching themes of restructuring with the group and listen to/collect questions they have about the process.
- Looking at developing an internal website to house information about some of the major issues that will impact the team (automated procurement, transitions, etc.), as well as an FAQ for questions raised at last week's meeting.
- Reaching out to functional team members and developing an agenda for the first official team meeting.

Registrars

- Confirmed activities and timelines for Registrar-specific work
- Summarizing student-facing work group activities

Student Information Systems (SIS)

- SIS held an all-day meeting in Madison on Friday, March 9. Highlights from that meeting include:
 - Students must have "home" campus in the receiving institution's SIS (for reporting). This is a regional decision. Each region needs to examine this with their own configuration; it won't look the same from one region to another.
 - Needs to be standardized as much as possible for CDR
 - Need unduplicated student count, even if enrolled in two locations
 - Depending on model, campus reporting may be done by 'course' in PeopleSoft
 - Prior to July 2018, UW Colleges' students should be treated as transfer students, with course equivalencies determined
 - Keep PRISM running as an archive system maintained by UW Extension registrar
 - PRISM will export files. Receiving institutions need to determine what to do with the data (bio, course, and enrollment data) and how to import it.
 - Make a recommendation to HLC: 18-19 UW Colleges grads and continuing students' transcripts out of PRISM need to have a memo and key denoting the receiving institution. This should be a standard process across all regions.
 - Established a list of data needs.

Student Recruitment Functional Team (SRFT)

- The UW Journey College Fairs have been successful. Feedback includes:
 - Spread out the fairs over more time – more hours on campus, spread out over more days throughout the spring semester
 - Fold into plans with high school recruitment
 - Make it a standing spring event
- EApp Redesign Task Force met on Friday, March 9. They are moving forward with a centralized hub in two tiers. Priority for August 1, 2018 is unifying the way the app accepts documents. Goal is for students to be able to apply to multiple institutions using one set of materials.
- PMO is working on a recruiting plan template for use by the RIs in Fall 2019 to recruit 2-year students



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- Exploring setting up a CRM sub-group

Student Visa Functional Team (SVFT)

- Looking to reach out to recruiting agents for international students at UW Colleges to help facilitate contact between those agents and the receiving institutions.
- Beginning to think about student-facing communications needs.