



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of April 9, 2018 and April 16, 2018

KEY UPDATES

Project Timeline and Phases

As the restructuring design phase comes to an end, we would like to thank the many people who put in long hours and worked across institutions and functional areas to create a detailed and integrated project plan.

As outlined in the [Higher Learning Commission \(HLC\) application](#) that was submitted in January, implementation of the proposed restructuring will take place in two phases.

- Phase 1 (Year 1): July 1, 2018 to June 30, 2019
- Phase 2 (Year 2): July 1, 2019 to June 30, 2020

During Phase 1, the two-year branch campuses will continue to function largely as they do now, while preparing to internally integrate centralized administrative functions, such as IT, HR, and procurement with UW System services. Student support services, such as admissions and financial aid processing, will continue to be administered by the two-year campuses.

In Phase 2, the receiving four-year institutions will undertake operational planning and centralized services will be integrated into the two-year campuses.

Integrated Project Plan Meeting

On Thursday, April 12, the Project Management Office hosted an all-hands-on-deck meeting with functional team leads to review the integrated project plans and identify interdependencies between functional teams. The group was also tasked with identifying issues that require project sponsor decisions. The Project Management Office is now finalizing the integrated project plans based on Thursday's meeting and will share those plans with the receiving institutions later this month.

Restructuring Roadmap Roll-out

The Project Management Office will be reaching out to receiving institutions to schedule on-campus meetings in early May to go over the integrated project plan, or "Restructuring Roadmap" and support institutions in meeting the associated timeframes. The roadmap includes:

- Dates for key deliverables and decisions through July 2018
- Category of deliverable or decision (ex: student-facing, academic integration, etc.)
- Ownership responsibility for each deliverable or decision (ex: Regions, Project Sponsor, Project Management Office)

Decision Log

Project Decisions on AAS Online Student Assignments and Recruitment Assignments & Funding are now posted on the UW Restructuring website under Explore More → [Restructuring Project Decisions](#).

Clarification on U.S. Department of Education Naming Requirements

For reporting purposes, the U.S. Department of Education uses the following formula for branch campuses: University of Wisconsin X (receiving institution) - X (branch campus location). Example: University of Wisconsin Green Bay – Sheboygan. This clarification has been made in the *Guidance for Campus Naming Conventions* document, which is attached to this update.



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April Board of Regent Restructuring Presentation

UW System Administration Vice President of Administration, Rob Cramer, gave an update on the restructuring project during the April Board of Regents meeting. His presentation covered the project's current status, priorities, phased activities, and project framework. An updated copy of the presentation is attached for your reference.

PROJECT MILESTONES & DELIVERABLES

Completed

Friday, April 13

- Project Design Phase: completed project plans
- Final athletic recommendations report
- Visions for integrated campuses
- Plan to hire branch campus administrator

Upcoming

Friday, April 27

- Finalize Memoranda of Understanding

Monday, April 30

- Plan for oversight of instruction at branch campus(es)

Tuesday, May 1

- Draft shared governance model
- Draft regional organizational charts

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

- Delivered the Restructuring Roadmap
- Hosted Restructuring Roadmap workshop with all functional team leads
- Finalized integrated project plan in preparation for the same
- Finalized the agenda for the sixth Steering Committee meeting
- Began drafting the presentation for the sixth Steering Committee meeting
- Planning for visits to the regions and PMO staffing
- Continued MOU implementation and developing next steps, including a management and transition framework
- Reviewed finance transfer schedules

Project Communications Office (PCO)

- Conducted final interviews for PCO candidates
- Worked with HR, UW-Madison, and UWSA leadership on drafting employee letters
- Addressed communications issues and needs that came out of the April Board of Regents meeting
- Participated in regional identity planning meeting with UW-Green Bay
- Scheduled meetings for end of April and early May to develop external communications plan for post-HLC approval
- Continued work with UW-Milwaukee and UW Colleges on joint restructuring presentation to Milwaukee Urban League



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UW-Eau Claire: UW-Barron Country

- Reviewed 14 shared governance recommendations with Chancellor
- Met with regional healthcare leaders to discuss potential programming and partnerships
- Created a timeline for development
- Vetting and approval of naming options
- Graphic treatments and wordmarks
- Charged University Planning committee with development of a collaborative process to create vision and goals for UW-Barron County
- Reviewed MOU
- Review of naming survey results
- Development of shared governance timeline

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

- Requested resources to help plan Green Bay 2030, an effort to examine strategic issues, priorities, name changes, etc.
- 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
- Working on 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

- Convened Steering Team and provided an update
- Developed the process maps for Conference Centers to guide the transition on July 1
- Conducted shared planning exercise
- Working on status brief to Project Steering Committee
- Recommendation from IT working group regarding what UW-Madison IT tools UWEX IT staff need to access (e.g., Tableau)
- Outlining issues which will be aligned with dates by end of May

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

- Transmitted feedback on MOU
- Approved proposal to create the College of General Studies
- Held an open student forum at UW-Milwaukee and broadcast it to students at UW-Waukesha and UW-Washington County
- Met with Huron consultants regarding data integration
- Will review College of General Studies proposal by BOR
- Will review nominations from branch campuses of chairs of three new departments under College of General Studies
- Will determine tenure criteria for new College
- Conduct survey on segregated fees for two-year students
- Loading all UW-Waukesha and UW-Washington County email addresses into EMMA system
- Working on pro forma budget for the College of General Studies

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

- Reviewed mission/vision statements with UW-Extension, UW Colleges Online, and UWSA leadership



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- Finalized mission/vision statements
- Reviewed budgets with UWEX central office, CEOEL, and UWSA
- Held meeting between VP Nelson and Humanities Council to discuss transition to UWSA Division of Finance

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

- Held initial financial aid meeting between UW-Oshkosh, UW-Fox Valley, UW-Fond du Lac
- Student Org Office toured UW-Fox Valley
- UW-Fox Valley Collegium passed a transitional resolution for University staff, academic staff, faculty
- The Naming Committee received the charge to develop a set of vetted recommendations for naming the three campus institutions. The goal is to evaluate options for marketing and branding to present to the Chancellor by October 1 and implement by January 1, 2019.

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

- Selected Branch Dean finalists
- Visited branch campuses to discuss residence life and human resources staffing
- Interviewing finalists for Branch Dean
- Developing policy for use of personnel and hiring
- Creating Project Planning Activities memo from Chancellor
- Naming options due to Chancellor in April

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

- Finalized and consolidated regional project plan
- Compiled themes in community focus groups and critical needs listening sessions
- Analyzed the results of the critical needs survey sent to all branch campuses
- Finalizing new SharePoint site for enhanced information sharing
- Reviewing assessment by a local marketing firm of options for branch naming
- Critical staffing needs assessment is due April 30

Athletics

- Finalized analytical report and shared with Chancellors
- Upcoming decision from Chancellors regarding club sport model vs. intercollegiate

Finance

- Facilitated initial budget walk-through with UW-Madison and UW-Extension staff
- Assembled list of needed changes to initial crosswalk assumptions
- Updated crosswalks from HLC submission to correct any errors
- Began working on version of crosswalk for timing transfers
- Working on alignment of MOU service provision assumptions with updated Colleges crosswalks
- Will hold meetings with cross-functional HR, Finance, and IT teams to understand logistics of budget changes and to align with HR assumptions
- Developing new version of crosswalk with budget transfer timing
- Need assessments of service delivery for UW-Extension



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Financial Aid

- Participated in April 12 roadmap workshop with Project Management Office
- Upcoming completion and submission of the U.S. Department of Education's E-App within 10 days of HLC approval
- Per approval from U.S. Department of Education, all campuses planning to submit between June 20-22, 2018

Higher Learning Commission (HLC)

- Mapped the sequence of steps that Receiving Institutions need to take to meet the branch campus accreditation criteria
- Discussed the contents of the AAS and BAAS change applications
- Upcoming formal documentation of suspension of concentrations at the Colleges
- Will attend upcoming HLC conference in Chicago

Human Resources

- Drafted org structure of UWSA/UW-Extension
- Drafted timeline for transactional team activities
- Drafted timeline for transformational team activities
- Drafting letters and other communications materials

Information Technology (IT)

- Completed the review of CITS services work list
- Reviewed Vice President Rob Cramer's comments from March 30 meeting and adjusted the team scope accordingly
- Met with UW Colleges Provost regarding the disposition of the UW Colleges non-traditional programs and the impact that it will have on ATS positions
- Discussed identifying tactical needs to support the restructuring during academic year 2018-19 and identified other functional team decisions that determine when tactical changes need to be implemented
- Requested that CITS schedule an architecture overview for the Receiving Institution technical teams
- Upcoming tactical work efforts to support functional team decisions and technical overview for Receiving Institution technicians (from CITS)

Libraries

- Met with Student Information System (SIS) team on April 4
- Discussed timing of SIS migration, IAA feeds, ID cards, emails, and student codes
- Attended OCLS and Atlas meetings
- PMO provided information on CASE employees and process for requesting system modifications
- Upcoming list of proposed systems modifications (e.g., ILLiad, Exlibris, etc.)
- Need clarity on how to handle resource renewals for transition year

Procurement

- Reviewed and finalized charter with the team
- Received and incorporated comments from team on project plan including priorities and timeline
- Will hold discussion of issues associated with employee transitions



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Student Information Systems (SIS)

- Received the go-ahead to have PRISM produce 2018-19 transcripts with text denoting the accredited institution
- Met with Milwaukee colleagues, 2 EPCS teams, and Libraries to discuss PeopleSoft restructuring options, data extraction and conversion options, and down-stream software that will be impacted by SIS changes
- Holding meeting of data working group to begin making decisions on how to extract and convert bio-demo data for current students, required in September of 2018 for FAFSA applications

Student Recruitment Functional Team (SRFT)

- Completed EApp project timeline
- Completed EApp benchmarking
- Established updated EApp core agreements
- Setup a timeline for EPCS version testing
- Meeting at La Crosse (April 17) to flesh out EApp core agreements

Student Visa Functional Team (SVFT)

- Reviewed team's segment of the integrated project plan
- Participated in the Project Management Office's April 12 workshop
- Upcoming submission of formal I-17 update to School Certification Unit at SEVP (March 31)
- Awaiting feedback from SEVP (April 30)

Veterans Services

- Participated in April 12 PMO workshop
- Talked to OPAR about classification codes for veterans certification after July 1
- Upcoming updates to Veterans Services section of the project roadmap