



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 18, 2018

KEY UPDATES

HLC Decision on 6/29

- Planning for HLC decision continues.
- UW cannot make any announcement before HLC provides their official, documented response by mail.
- Signed MOUs between UWSA and Receiving Institutions will go into effect upon receipt of the hardcopy HLC approval.

UDDS/DEPTID plan clarified

- Receiving Institutions should continue to use the UDDS structure currently in place for the 2018 fiscal year. All operations will officially transfer July 1, 2019 unless specifically approved by System Administration leadership prior to July 1, 2019.
- While operations will not fully transfer until 2019, the structure for beyond July 1, 2019 needs to be defined this year. In order to align resources across the institution, provide resource allocation, and perform accurate required reporting and analysis, a consistent and integrated structure must be adopted.
- The UDDS structure should be validated by each institution's CBO and entered by the Controller (or responsible campus designee) into the Shared Financial System (SFS) by Wednesday, August 15, 2018. This structure should be broadly shared on the receiving institution's campuses with all impacted users.

PROJECT MILESTONES

Completed

- All regions submitted Financial Aid Applications to the Department of Education
- The second employee communication was sent from RIs
- The Facilities Functional Team met in Fond du Lac

Upcoming

- Many Functional and Regional teams have 7/1 milestones
- HLC-related milestones on 7/1
 - Financial Aid will have plan in place to accept aid at Receiving Institutions for 2019-20
 - Regions will link academic oversight of instruction processes to RIs
 - Regions will join 2017-18 UW Colleges catalog with that of RIs
 - Regions will align institutional research structure
 - The Finance Functional Team will finalize two-year pro formas and 2018-19 Red Book
 - The IT Functional Team will merge CITS with UWSA Office of Information Services and begin provision of services to the branch campuses
 - System will distribute grant funding to branch campuses

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

Completed:

- Held Steering Committee Meeting 8 and Regional Team/Functional Team leads all-hands meetings
- Completed all eight visual project plans and checklists (roadmaps) for Lake Winnebago Working Groups
- Conducted Steering Committee meeting in Green Bay (June 11) to discuss key issues and review completed work
- Completed student lifecycle roadmap
- Validated System Roadmap and extended it to December 31, 2018



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 18, 2018

Upcoming:

- Finalizing System Roadmap through December 31, 2018
- Continuing MOU management SME meetings

Project Communications Office (PCO)

Completed:

- Drafted Student Population Critical Communications plan for financial aid
- Interviewed Ray Cross with UWSA Office of University Relations for video segments for website
- Drafted communications roadmap and conducted planning session at Functional Team Leads & Regional Representatives meeting to identify additional milestones
- Created design framework for updated restructuring website

Upcoming:

- Developing and updating web content for restructuring website redesign
- Drafting deliverables for HLC decision communications plan
- Finalize communications roadmap

UW-Eau Claire: UW-Barron County

Completed:

- Completed the UW-Barron County course audit (about half the courses are able to transfer)
- Collected guides for priority UW-Barron County courses in English and Math for department review
- Began set-up of SIS testing in a test environment in CampS
- Held planning meeting to finalize details for the July 2 reception to be hosted by the Foundation in Barron County

Upcoming:

- Continued testing of the SIS structure
- Review of priority courses to align with UW-Eau Claire
- Communication and marketing planning

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

Completed:

- Held Steering Committee on June 11 to discuss key issues and completed tasks
- Completed student lifecycle roadmap
- Began review of Administrative Services roadmap
- Developed a list of IT issues that require resolution
- Developed a project plan for community engagement strategy

Upcoming:

- Complete first draft of academics and student life roadmap
- Begin analyzing coursework and enrollment data
- Finalize community engagement project plan

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

Completed:



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 18, 2018

- Tiger teams prepared for Auxiliary Services transfer

Upcoming:

- Staff from Auxiliary Services will transfer in the next few weeks, as a prototype for subsequent staff transfers
- Building "Reverse MOUs" to outline Extension services that will continue for a time after July 1 (AR, CITS)

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

Completed:

- Determined alignment of physics courses
- Set June 13 meeting to address technical issues in the transfer of marketing to UW-Milwaukee on July 1, 2018, including a plan for social media account and asset transfer
- EMFT met 6/11/2018 and continued to map the student lifecycle through to student graduation

Upcoming:

- EMFT will meet June 22 at UW-Waukesha and June 27 at UW-Milwaukee
- Institutional and regional branding and marketing update
- Second focus group in Washington County scheduled for July 12

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) – No update

Completed:

- Met to discuss CEOEL budget
- Distributed President Cross's memo indicating that CEOEL will transition in its current state, and that further conversations about organizational 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
- Rob, Sean and Alex will look at space for CEOEL and all units
- Determine UWHELP budget and DoIT expenses
- A meeting to address priorities for the transition of the AAS Online to CEOEL

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

Completed:

- Completed visual project plans and roadmaps for four of eight Working Groups
- Updated decision log with most recent System and Lake Winnebago decisions

Upcoming:

- Roadmap workshop (June 20) to finalize Roadmaps
- Acknowledgement and honoring of new institution with all employees on Jul. 2



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 18, 2018

UW-Platteville: UW-Richland, UW-Baraboo/Sauk – No update

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:

- Provost Greg Summers presented course integration materials to steering committee meeting
- Academic affairs is inactive for summer
- Campus administrators are being interviewed
- Rolled out issue tracker and decision log
- Completed draft forms of finance, facilities, and IT roadmaps
- System HR functional team leads held office hours meetings on campus

Upcoming:

- Completion of operations roadmaps
- Completion of restructuring team charter
- Begin analyzing academic efficiencies data

UW-Whitewater: UW-Rock County - No update

Completed:

- Established Search Committee and began internal search process for two-year term Interim Dean for UW-Whitewater at Rock County
- Submitted tenured faculty ranks to Board of Regents for June meeting
- Conducted day-long SIS workshop with Huron consultants
- Approved name of campus at May 24 Rock County Board Meeting: University of Wisconsin – Whitewater at Rock County
- Forwarded approvals for campus name and college structure to President Cross and Board of Regents
- Met with foundation representatives from branch and main campuses to begin cooperative conversations

Upcoming:

- Branding work for branch campus
- Continued work on curricular equivalents for input and coding
- Continued work on SIS coding and development
- Searches for personnel at branch campus, including hiring Dean
- Approval of tenure transfer, college structure and campus name by Board of Regents
- Approval of MOU by all parties



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 18, 2018

Bursars – No update

Completed:

- Met with the Controllers and recorded their concerns
- PMO is now following up on the recommendation and requesting its endorsement by UWSA Finance
- Worked with Huron to develop a tuition model option based on the current tuition decisions

Upcoming:

- Working through the business process changes needed to ensure proper 1098T reporting in transition year
- Review by campus bursars of tuition model option (each Receiving Institution will determine what model it prefers and whether to modify it)

Facilities and Property

Completed:

- Attended Facilities meeting at UW-Fond du Lac on June 11
- Worked with SIS team to begin to work through coordinating UDDS codes of the Receiving Institutions with the branch campuses

Upcoming:

- Discussion of issues associated with regional employee transitions
- Planning meeting to discuss mapping of UDDS codes
- Finalizing project plan and milestone dates
- Distribution of legal contracts and facilities inventory to Receiving Institutions (July 1)
- Defining risk management responsibilities (July 1)

Finance – No update

Completed:

- Completed all pro formas for presentation at June BOR meeting
- Created template for UW-Extension and populated it with 2018-19 Budget
- Reviewed small work group materials for allocation of UW-Extension budget
- Compiled questions regarding tuition into consolidated FAQ Draft, outlined tuition solutions, and discussed tuition policy implications with various stakeholders

Upcoming:

- Issuing final clarification on tuition
- Continuing conversations for UW-Extension/UW-Madison/UWSA budget

Financial Aid – No update

Completed:

- Made campus-specific updates from each regional campus financial aid director to the campus-based reallocation letter that will be submitted to the Department of Education
- Forwarding of Receiving Institution-based reallocation letters to UW System to get signed by Chancellor Sandeen
- Financial Aid Functional Team meeting in Madison on (June 5)

Upcoming

- Receiving Institutions submit EApp to Department of Ed by June 20



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 18, 2018

Human Resources

Completed:

- Completed regional visits
- UW Colleges HR team has met with HR teams at receiving institutions to discuss the HR MOU
- HR Transformational team met and identified HR areas that can be provided in a centralized method

Upcoming:

- Finalizing regional employees job assignments this week
- HR Transactional Team is meeting next Thursday to confirm assumptions and timeline for the transitional year

Information Technology (IT)

Completed:

- Reviewed proposed timeline development process
- Reviewed questions from technical overview meeting
- Reviewed the status of the proposed UW System IT strategy team

Upcoming:

- Prepare the technical overview presentation
- Continue development of the IT Functional Team timeline

Libraries

Completed:

- Prepared and submitted list of recommendations and risks to PMO
- Submitted communications needs to PCO
- Attended Council of UW Libraries conference

Upcoming:

- Delivery of library services transition plan (July 1)
- Delivery of collection merging strategy, including electronic and print resources (July 1)
- Delivery of library shared information systems migration plan for transition year (July 1)

Procurement – No update

Completed:

- Review of spend analysis

Upcoming:

- Memo to other Functional and Regional Teams regarding contract-related information exchange
- Team review of contract review approach
- An informational report on auxiliary contracts
- Assessment of procurement automation future state (July 1)

Registrars – No update

Completed:



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 18, 2018

- Finalized Degree appearance for transition year AAS graduating students

Upcoming:

- Developing memo language for transition year transcripts from PRISM

Student Information Systems (SIS)

Completed:

- Access and authorizations to PRISM completed for Huron and Sierra-Cedar data conversion development team

Upcoming:

- Installation of conversion tools at RIs
- Configuration of database links between PRISM and each Campus SIS to facilitate transfer of data
- Receiving Institutions defining access managers for incoming test scores (ACT, AP, TOEFL/IELTS) and transcripts

Student Recruitment Functional Team (SRFT)

Completed:

- Constant conversation about applications work

Upcoming:

- Meeting to discuss transition of UW Colleges majors database and branch campus programs
- Defining requirements for MAAD reporting as it relates to managing admission decisions across branch and main campuses
- Admissions Work Group will review options for tracking academic interests in each of their Campus SIS

Student Visa Functional Team (SVFT)

Completed:

- Meeting 6/14 with UW Colleges Admissions, Tim U. and System legal to identify how to handle processing international student applications and paperwork during the transitional year

Upcoming:

- Feedback from SEVP (currently scheduled on the Roadmap for July 1)
- Draft language for communications to students
- Dissemination of guidance to DSOs

Veterans Services – No update

Upcoming:

- Resolved concern about UW Colleges's Veteran staff's organizational placement and reporting structure as of 7/1/2018