



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 16, 2018

KEY UPDATES

The MOU Management Plan was sent out

- The MOU Management Plan has been sent to Provosts and CBOs
- MOUs will take effect once we receive HLC approval

HLC Decision on 6/29/2018

- Planning for HLC decision in early July continues
- UW cannot make any announcement before HLC provides their official, documented response by mail.

PROJECT MILESTONES

Completed

- Extended Restructuring Roadmap through December 2018

Upcoming

- Develop Communications Roadmap through December 2018
- Conduct MOU Management Subject Matter Expert meetings
- Begin drafting close out/sunset process for Functional Teams
- Map and align UDDS and budget codes at RIs with those of branch campuses

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

Completed:

- Completed and distributed draft of deck for Steering Committee 8
- Distributed Risk Assessment Survey to all Functional and Regional Leads
- Completed all eight visual project plans for Lake Winnebago Working Groups
- Completed four of eight Lake Winnebago Working Group roadmaps
- Held IT team meeting to build project plans and issues at UW-Green Bay
- Held student-facing team meetings to refine UW-Green Bay's roadmaps
- Finalized UW-Green Bay's student-facing roadmap and completed first draft of Administrative Services
- Met with operations and IT at UW-Stevens Point to begin roadmap development
- Rolled out UW-Stevens Point's issue tracker and began restructuring of its SharePoint site

Upcoming:

- Continue work on roadmaps in Lake Winnebago and Green Bay
- Work on tuition model for UW-Green Bay
- Conduct roadmap workshop at UW-Oshkosh
- Visit branch campuses of UW-Green Bay, UW-Oshkosh, and UW-Stevens Point
- Finalize System Roadmap through December 31, 2018

Project Communications Office (PCO)

Completed:

- Financial Aid communications planning
- UW Colleges Fall 2018 Application Fee Waiver announcement
- Concept, content, and approval for video with President Cross and RI Chancellors



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 16, 2018

- Content development for new Restructuring website
- Held meeting to assess website migration needs for UW-Extension to UWSA

Upcoming:

- Build test site for new Restructuring website
- Memos on UWC student email addresses in 2018-19 and HLC announcement process
- Facilitate functional communications planning exercise at the June 13 all-hands Functional Teams meeting

UW-Eau Claire: UW-Barron Country

Completed:

- Barron County board voted unanimously in support of new name: UW-Eau Claire – Barron County
- The SIS group has finalized its principles and is meeting with Barron County leaders to discuss the transition process
- The curriculum working group is mapping courses
- The academic policies committee has done a preliminary preview
- Chancellor Schmidt signed the UW-Eau Claire MOU
- UWEC police met with the Barron County Sheriff's department to discuss emergency procedures and notifications

Upcoming:

- Michelle Boernke and Jayant Anand will meet with UW-Eau Claire staff to review budget and employees
- Communication and training plan for Barron County employees will be developed as they transition to UWEC digital resources

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

Completed:

- Held IT team meeting to build project plans and issues
- Held student-facing team meetings to refine roadmaps
- Began meeting with administrative services to build project plans
- Finalized student-facing roadmap and completed first draft of Administrative Services
- Built materials for 6/11 Steering Committee meeting
- HR met with Jason Beier to discuss service under the MOU

Upcoming:

- Refining roadmap with HR, IT, and Finance teams
- Presenting roadmap drafts at June 11 Steering Committee meeting
- Developing roadmap for student life and academics teams
- Finalizing branch engagement project plan

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

Completed:

- MOUs for DLE, Co-op, Public Media nearing finalization
- Built tiger teams for 7/1 transfer
- Met with UW Foundation to start determining how to coordinate various foundation funds

Upcoming:

- On schedule for 7/1 transfer of conference centers
- MOUs with DLE, Co-op, Public Media, Auxiliary Services should be complete by mid-June
- Initiating a working group on risk management



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

Completed:

- Academic Advising Subcommittee developed language for recommendations to create new financial aid roles
- Facilities deliverable submitted to establish plan for UW-Milwaukee to assume responsibility of assets
- 2nd round of feedback for MOU
- Enrollment management continued to map student lifecycle

Upcoming:

- Office of UG Admissions and Accessibility Resource Center to discuss advising structure changes

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)
- 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 for all eight Working Groups
- Completed roadmaps for four of eight Working Groups
- Updated decision log with most recent System and Lake Winnebago decisions
- Sent names of faculty assigned to the eight Working Groups who will be authorized to work over the summer

Upcoming:

- Continued work on Working Group roadmaps
- Roadmap workshop (Jun. 20)
- Acknowledgement and honoring of new institution with all employees on Jul. 2

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

Completed:

- Met with PMO and worked through Roadmap
- Chose branch dean finalists
- Held Apr. 19 meeting with Baraboo/Sauk County commission members to discuss concerns

Upcoming:



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of June 16, 2018

- 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:

- Huron met with HR to determine areas of need
- Huron met with operations and IT to begin roadmap development
- Issue tracker rolled out
- Began restructuring of SharePoint site

Upcoming:

- Set up enrollment management group meetings
- Update SharePoint site with functional team members, per leads request
- Coordinate meeting notes with Huron
- Summer testing
- Greg Summers to speak at Steering Committee 8

UW-Whitewater: UW-Rock County

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
- Continued developing structure of SIS, conducting day-long SIS workshop with Huron consultants
- Continued work at branch campus in writing by-laws and personnel policies
- Approved name of campus: University of Wisconsin – Whitewater at Rock County at Rock County Board meeting (May 24)
- 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

Bursars

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



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Week of June 16, 2018

- Review by campus bursars of tuition model option (each RI will determine what model it prefers and whether to modify it)

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;
- Attended FT leads meeting May 31

Upcoming:

- Discussion of issues associated with regional employee transitions
- Planning meeting to discuss mapping of UDDS codes
- Finalizing project plan and milestone dates
- Facilities meeting at UW Fond du Lac on June 11
- Distribution of legal contracts and facilities inventory to RIs (July 1)
- Defining risk management responsibilities (July 1)

Finance

Completed:

- Completed all pro formas for presentation at June BOR meeting
- Created template for UWEXT and populated it with 2018-19 Budget
- Reviewed small work group materials for allocation of EXT 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 (June 9)

Financial Aid

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

- Regionals submit E-App to Department of Ed by June 20

Human Resources

Completed:

- UWC 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:

- RI sending second employee letter (June 15)



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Week of June 16, 2018

- UWC/UWEX sending pay plan letter to employees
- Coordinating with Provosts on both letters
- HR Transactional team going to have a half day meeting to resolve pain points for the transitional year and thereafter

Information Technology (IT)

Completed:

- Held second half of technical overview of the transition, reviewing elements of the new MOU during that meeting

Upcoming:

- Completion of the effort to stop provisioning network file shares for UWC students
- Project to move UWC faculty and staff network share data to the cloud

Libraries

Completed:

- Receiving Institution directors and Colleges LSS agreed that central system data (ex. Alma, ILLiad, IPEDS) would continue to be collected and reported by LSS
- Data that is unique to telling a campus story (ex. Gate counts, reference interactions) will be undertaken by the RIs as of July 1
- Prepared libraries website recommendation summary for distribution
- Prepared and submitted list of recommendations to PMO

Upcoming:

- Council of UW Libraries conference
- 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

Completed:

- Review of UWC/X 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

Completed:

- Finalized Degree appearance for transition year AAS graduating students

Upcoming:

- Developing memo. language for transition year transcripts from PRISM

Student Information Systems (SIS)

Completed:



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Week of June 16, 2018

- Analysis of branch campus programs (academic interests) on the eApp page;
- Defined requirements for application fee waiver for individual applying for Fall 2018 AAS Flex and AAS Online, which will be effective June 6 through November 1;
- EApp Redesign Task Force submitted initial recommendations to Pres Cross, VP Cramer, and VP Schmitt

Upcoming:

- Defining requirements for MAAD reporting as it relates to managing admission decisions across branch and main campuses;
- Receiving Institutions review options for tracking academic interests in each of their Campus SIS
- Receiving Institutions designate one person as an access manager to receiving test scores (ACT, SAT, AP, TOEFL/IELTS) and transcripts (Parchment, Credentials, Nat'l Student Clearinghouse, etc)

Student Recruitment Functional Team (SRFT)

Completed:

- Completed analysis of branch campus programs (academic interests) on the EApp page
- Defined requirements for application fee waiver for individual applying for AAS Flex, which will be effective June 6 through November 1
- EApp Redesign Task Force submitted initial recommendations to Pres Cross, VP Cramer, and VP Schmitt

Upcoming:

- Meeting to discuss transition of UWC 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:

- Contacted DHS (for a second time) to request a status report on submission of I-17 in mid-April; received a response but did not get a date of return from DHS
- Held a full team meeting to discuss our approach to the submissions (DHS assured us that it is viable)
- Discussed draft of guidance to DSOs

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

Upcoming:

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