



UW Colleges and UW-Extension Restructuring Weekly Project Update

Week of August 6, 2018

KEY UPDATES

Revision to Travel Reimbursement for Mileage Expenses related to Restructuring

- The travel reimbursement policy has been revised. For more information, please see the attached memo.

Functional/Regional Team Notes

- Please continue to submit regular updates to the Project Management Office (PMO) as you have been until your team finishes work. If you feel that your team's work is complete and there are no further updates to give, please let the PMO know so we can officially close the team out.
- Some Regional and Functional teams have largely completed their work and will be dropped from this weekly update as they officially close out. Those that are in the process of sunseting are noted.
- Some Functional Teams have asked to be On Hiatus for a defined period, to reflect that they are not working toward Restructuring milestones for a few months; when On Hiatus, regular updates are not expected.
- The "Upcoming" section of the Project Milestones will contain all the milestones from the Restructuring Roadmap or Communications Roadmap with a target date in the next month. When that target date passes, Functional Team milestones will be moved to "Completed" as the PMO hears that they are complete. Regional milestones will be dropped from the "Upcoming" section as the target date passes but marked as completed in the Regional Team Updates as RIs report them completed, since different Receiving Institutions will complete them at different times.

PROJECT MILESTONES

Completed

- 8/1: Transfer recruiters (HRS)

Upcoming (or unconfirmed as complete)

- Communication Roadmap milestones for July - August
 - UWSA distribution of Title and Total Compensation letters to employees (July – December)
 - RI distribution of appointment letters and contracts to employees
 - RI notification of Graduation/diploma name change to current students
 - New students welcome notification
 - New leadership team welcome by Chancellors
 - Communication of tuition structure and fees
 - Announcement of new faculty governance structure (August – September)
 - Completion of student recruitment/marketing plan and materials (August – September)
 - Distribution of faculty orientation details for branch campus faculty (August – November)
 - Confirmation of Campus name changes (August – December)
 - Confirmation of new FAFSA schools codes (August – December)
- 7/31: System will distribute final 2018 budget transfer
- 7/31: UW-Extension Funding Crosswalk for BOR
- 7/31: Initial deep dive into UW Colleges/UW-Extension contracts completed by Procurement team
- 8/2: Go/no-go validation for each region to process applications on 9/1
- 8/15: Memo added to transcript for UWC, indicating accredited institutions
- 8/15: Peoplesoft catalog built for AY19-20
- 8/15: RIs finalize UDDS structure for FY20; structure validated by CBO and entered in SFS
- 8/23: Biennial budget, official name changes to BOR
- 8/28: Diploma lists begin to be sent from PRISM to RIs



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- 8/30: UDDS Placement
- 8/31: Bio-demo testing complete
- 9/1: Fall 2019 admissions begin

FUNCTIONAL AND REGIONAL TEAM UPDATES

Project Management Office (PMO)

Completed:

- Continued focused support to Oshkosh, Green Bay, Stevens Point, and Eau Claire
- Developed MOU Management Plan guides for each RI
- Held July 31 roadmap workshop in Oshkosh
- Continued work on the service transition process and approval processes, including finalizing the process with the Client Service Leads and PMO team
- Worked with the Client Service Leads to create an assessment of the status of the services in their portfolios; started process of using our regional analysts to facilitate a service transition dashboard for each
- Met with 8 Functional Team leads to discuss team status and sunseting timelines; four teams are confirmed to close in Wave 1: Athletics, Veterans, IT, and Student Recruitment, with HR and SIS moving to new structures
- Met with System principals to outline the impact of the Restructuring on CFI

Upcoming:

- Drafting a communication to brief RI teams on service transition and approval process
- Continuing meetings with Functional Team leads to determine the future of their teams
- Organizing the Steering Committee meeting agenda

Project Communications Office (PCO)

Completed:

- Confirmed process and timeline for updating UWC, UW HELP, and UWSA websites post-BOR approval of branch campus name changes
- Requested branch campus style guides from RIs
- Met with Karen Schmitt about involvement with Course Exchange project team, drafted service transition memo

Upcoming:

- Incorporate updates to Communications Roadmap and redistribute
- Draft recommendation on timeline for updating print materials and digital applications
- Finalize service transition memo
- Work with OUR on video for BOR meeting
- Update FAQs

UW-Eau Claire: UW-Barron County – Bi-weekly updates

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

Completed:

- Reviewed tuition model developed by Huron
- Developed timeline for continued work of GB functional teams

UW-Madison: UW-Extension Cooperative Extension, Public Media, and Conference Centers – Bi-weekly updates



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

Completed:

- Conducted planning and issue mapping for UWM phase 2 (now through Dec. 2018) and phase 3 (Jan. through Dec. 2019)
- Discussed seg. fees across campuses and impact on services
- Worked on integrating Waukesha and Washington County students into the UWM community
- Met with business leaders in Waukesha and Washington County to glean their perception of UW Colleges and opportunity for degree completion programs

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) – monthly updates

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

Completed:

- Held July 31 Lake Winnebago Roadmap workshop
- Vetted eight Working Group project planning timelines and associated checklists with over 45 participants, including representatives of all 35 functional teams
- Gathered recommended changes from participants
- EM and campus relationship leads for EM and SS met with Huron to discuss customization of the student segment of the Communications Roadmap
- Marketing and Communications leads met with Huron to discuss customization of the employee segment Communications Roadmap
- Scheduled follow-up meetings to determine gaps in information to be communicated in fall and winter communications
- Reviewed presentation on December HLC visits with Huron chart to facilitate the completion of chart of accounts

Upcoming:

- Review service transition schedule, with the intent of providing an update on transition status
- Review of Communications Roadmap with Oshkosh HR
- Review enrollment and tuition predictive model with Huron
- Begin determining the status of communications within Communications Roadmap

UW-Platteville: UW-Richland, UW-Baraboo/Sauk- Bi-weekly updates

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

Completed:

- Hosted a meeting with RI leadership to discuss progress of HR, Facilities, and Finance Functions
- Determined new process for tracking staffing and ability to provide services at the colleges level to determine if early transition to RI is necessary

Upcoming:

- Meet with RI leads to discuss updates to current milestone; review communications roadmap with UWSP communications office



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UW-Whitewater: UW-Rock County – Monthly updates

Bursars – On Hiatus, no reporting expected until October

Facilities and Property – No update since 7/30

Finance – No update since 7/23

Financial Aid – No update since 7/2

Human Resources – No update since 7/30

Libraries

Completed:

- Completed library services plan, collection merging strategy, shared information services migration plan
- Provided central collection budget recommendation
- Added four new milestones to roadmap
- Meeting held with Ex Libris July 15th to discuss migration strategies

Upcoming:

- Funding requests for Restructuring-related software updates
- PRIMO Subgroup recommendations
- Communication to institutions
- ID system-wide purchase recommendations for Colleges perpetual access resources (due August 2)
- Review ALMA/PRIMO configuration options for branch campuses (due September 1)

Procurement

Completed:

- Met to review various UWCX contracts
- Reviewed UWC/X spend analysis
- Completed assessment of procurement automation future state
- Completed initial analysis and team discussion of UWC contract date

Upcoming:

- Identify the group of POs/contracts that should be supported with UWC/X/UWSA procurement services
- P-card spend analysis and review
- Analyze all UWSA/C/X contracts for legal issues related to transferring contracts to RIS
- Review the UWC Auxiliary contracts issued by UWSA
- Establish approach for contract review
- Auxiliary contracts informational piece
- Initial deep dive into UWC/Extension contracts (target by July 31)
- Bucket PO contracting work (due August 31)

Registrars

Completed:



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- Held annual AO/RO conference

Upcoming:

- Working on standardizing catalogue language
- Discussing lessons learned from Mock 1 tests including how to handle duplicate records and grade changes
- Starting meeting on a regular bi-weekly meeting schedule

Student Information Systems (SIS)

Completed:

- Completed Mock 1 testing at most RIs (all except Whitewater)

Upcoming:

- Working to get better PRISM access to understand the data better
- Working to improve the conversion tool based on lessons learned from Mock 1

Student Recruitment Functional Team (SRFT) – has sunset, no further reporting

Student Visa Functional Team (SVFT) – No update since 7/30