

# **UW Colleges and UW-Extension Restructuring**

## **Steering Committee Meeting 9**

Friday, July 20, 2018

*9:00 a.m. – 12:00 p.m.*

# Agenda

Topic	Time	Discussion Lead(s)
Welcome and Thank You	9:00 – 9:05	Rob Cramer
Higher Learning Commission Update	9:05 – 9:25	Carleen Vande Zande & Ben Passmore
Transfer Update	9:25 – 9:45	Chris Navia
Reporting Impacts	9:45 – 10:05	Ben Passmore
Receiving Institution Highlighted Practices <ul style="list-style-type: none"> <li>• Branch Campus Student Support</li> <li>• Branch Campus Outreach</li> </ul>	10:05 – 10:35	Gretel Stock-Kupperman, <i>UW-Stevens Point</i> Becky Dienger, <i>UW-Eau Claire</i>
Communications Roadmap	10:35 – 10:45	Project Communications Office
UW-Extension, Cooperative Extension Update	10:45 – 11:05	Heidi Zoerb
Student Information Systems Update	11:05 – 11:15	Huron
MOU Implementation Update	11:15 – 11:25	Stefan Fletcher
Project Evolution <ul style="list-style-type: none"> <li>• Steering Committee Meeting Protocols</li> <li>• Functional Team Transition</li> </ul>	11:25 – 11:50	Rob Cramer Stefan Fletcher
Next Steps	11:50 – 12:00	Rob Cramer

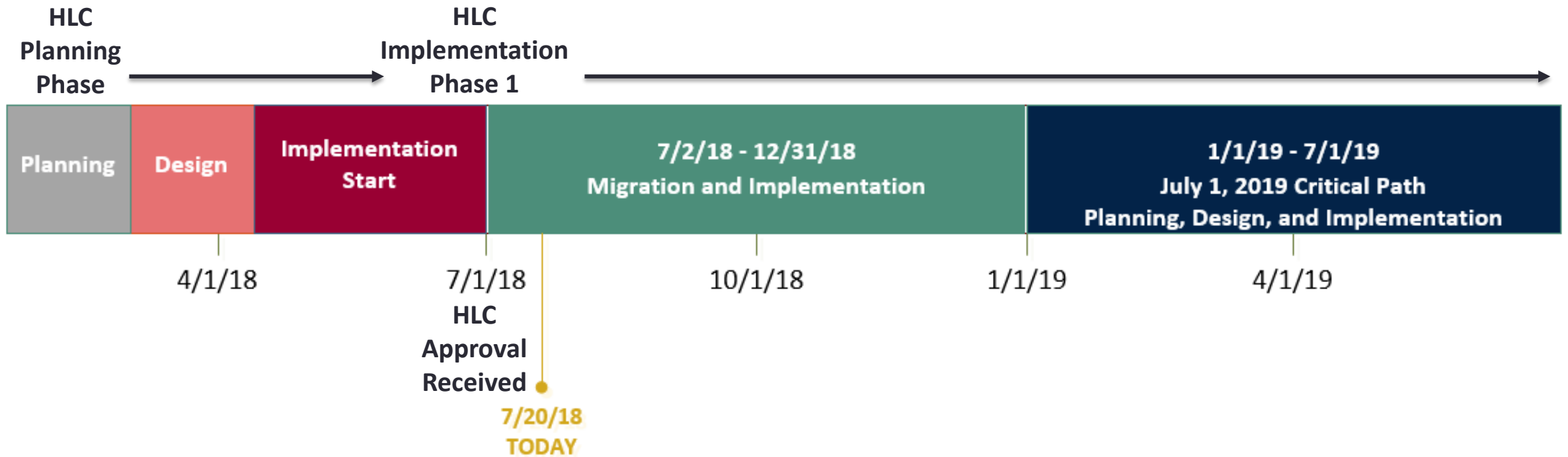
# Introduction and Meeting Purpose

## We are here today to:

1. Review HLC guidelines post-approval;
2. Discuss status of transfers and potential impacts of reporting on institutional rankings;
3. Outline the future of Functional Teams and Steering Committee meetings;
4. Highlight notable practices from Receiving Institutions; and
5. Receive key Restructuring updates.

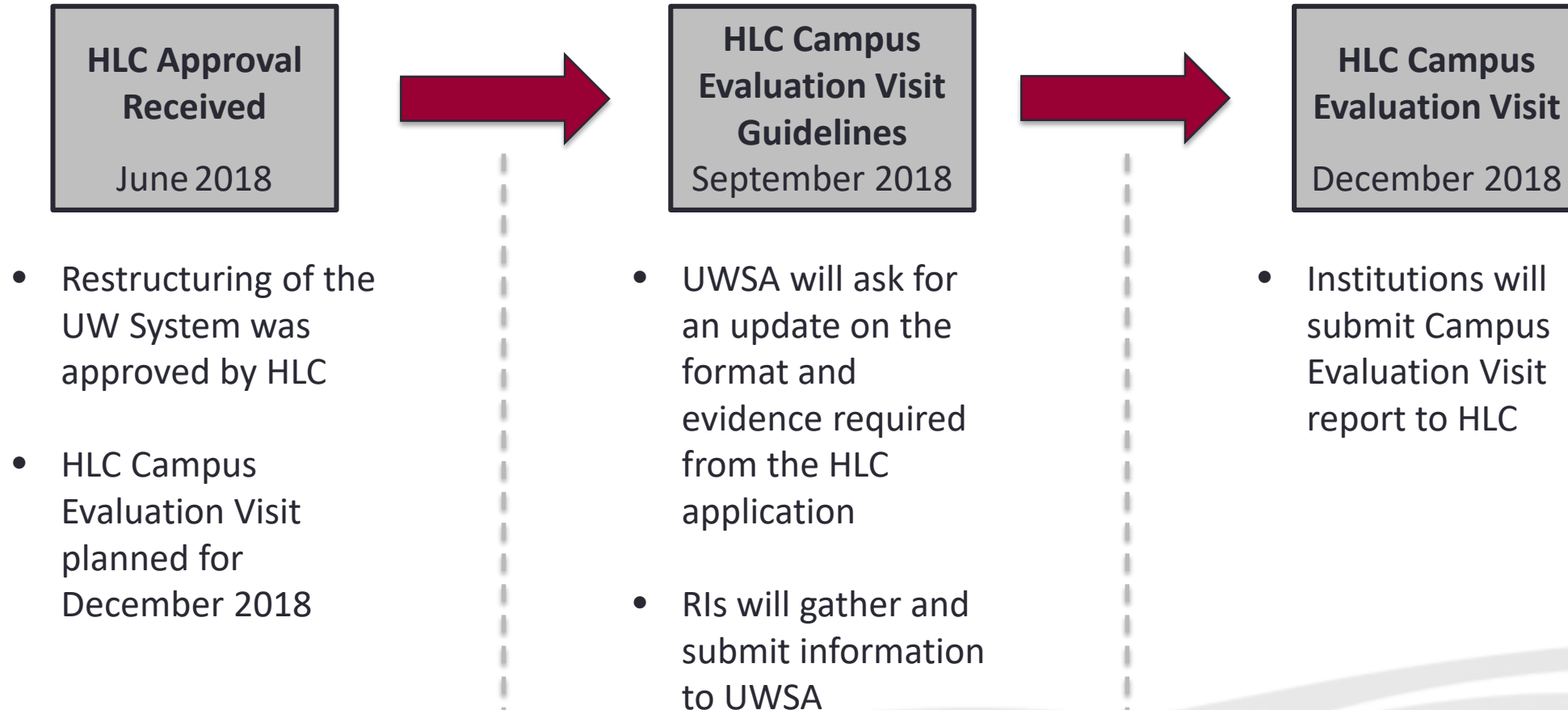
# Timeline

The Restructuring project entered the Migration and Implementation Stage when HLC approval was received on June 29, 2018.



# Higher Learning Commission – Timeline

The Higher Learning Commission (HLC) requested a 6-month Campus Evaluation Visit report, format yet to be determined.



# Higher Learning Commission – Guidelines

Below are the topics and points detailed in the HLC branch campus change request questions and responses.

Topic	Details
Administrative Oversight	<ul style="list-style-type: none"><li>• Each branch campus has identified a Campus Administrator, who will have autonomy in hiring, planning and budgeting at the branch campus, with authorities for these administrative functions delegated to them by the Receiving Institution</li></ul>
Oversight of Instruction (Two Models)	<ul style="list-style-type: none"><li>• Model 1: The branch campus administrator is granted oversight responsibilities for instruction at the branch campus that is equivalent to a college dean at that institution</li><li>• Model 2: The department chairperson and department faculty members across both the main and branch campuses to have oversight responsibilities for instruction offered at the branch campus. Faculty members hired at the branch campus will also have an appointment within the department at the RI</li></ul>
Planning and Budgeting	<ul style="list-style-type: none"><li>• Phase 1: All branch campus planning and budgeting will be the responsibility of the branch administrator, who will report to the Chancellor/Provost at the RI</li><li>• Phase 2: RIs will undertake operational planning to determine if they will keep the branch campus designation or move toward an additional location model</li></ul>

# Higher Learning Commission – Guidelines

Below are the topics and points detailed in the HLC branch campus change request questions and responses.

Topic	Details
Information about Degree and Program Requirements	<ul style="list-style-type: none"><li>• Phase 1: Faculty and staff from the branch campus and the Receiving Institution will collaborate to ensure integration of the two catalogs and curriculum, as well as the accuracy of the information about degree programs and requirements</li><li>• Phase 2: If RIs proceed to implement and/or integrate the reimagined AAS in Phase 2 of Restructuring, appropriate institutional curriculum change processes will be used to revise degree and program requirements</li></ul>
Faculty and Staff Qualifications	<ul style="list-style-type: none"><li>• Faculty hiring at the branch campus will be subject to both the institutional and UW System policies and procedures</li></ul>
Monitor Overall Effectiveness/Operations	<ul style="list-style-type: none"><li>• UW System measures will be developed collaboratively with the RIs to monitor the successful implementation of and accountability for the Restructuring</li></ul>
Assessment of Student Learning	<ul style="list-style-type: none"><li>• Phase 1: The degree program and course-level assessments policies, plans, and processes in place at the branch campuses prior to Restructuring will be integrated with those of the receiving institution using the assessment policies and practices of the RI</li></ul>

# Higher Learning Commission – Guidelines

Below are the topics and points detailed in the HLC branch campus change request questions and responses.

Topic	Details
Curriculum	<ul style="list-style-type: none"><li>• The AY18 (2017-2018) UW Colleges catalog’s curriculum will remain in place and has been transferred to the RI for all instruction offered by former UW Colleges faculty members on the branch campuses</li></ul>
Student Support Services	<ul style="list-style-type: none"><li>• Phase 1: UW Colleges structure for student support services to be provided at the campus, regional and centralized levels will remain in place. Supplemental support will be provided as determined by each RI</li></ul>



# Higher Learning Commission – Metrics

The following are metrics documented in the HLC submission:

## Strengthening the Educational Pipeline

- **Fall Total UW enrollments** by institution & branch campus
- **Student credit hours** for developmental, general education, and upper-level courses offered at branch campuses
- **Affordability** – Cost of tuition for courses taken on branch campuses
- **Average total loan debt** for associate degree graduates

## Meeting WI Need for More College Graduates

- **Transfer-out rate** – Rate at which branch campus students transfer to a four-year institution or to a WI technical college
- **Student credit hours** for developmental, general  
**Transfer-with-award rate** – Rate at which branch campus students earn an associate degree before transferring
- **Transfer bachelor's completion rate** — the rate at which transferred branch campus students earn a bachelor's degree
- **Total associate degrees awarded**
- **Total bachelor's completion degrees awarded**

# Higher Learning Commission – Metrics

The following are metrics documented in the HLC submission:

## CORE

- **CORE Expense Ratio** as measured for the UW System's outcomes-based funding model
- **Degree Production** based on degrees awarded per 100 FTE as measured for the UW System's outcomes-based funding model

## Accountability and Follow-up

- **Key Performance Indicators** for UW System Restructuring will be added to the UW System Accountability Dashboard for system, institutional, and campus reporting
  - 2020 FWD Initiative Measures
  - Additional Studies and Review

# Universal Credit Transfer Agreement (UCTA)

## Overview:

- Ensures the transferability of designated courses between UW System institutions and the Technical Colleges
- Upon transfer, the designated courses satisfy general education requirements or general degree requirements at the Receiving Institution
- Identifies courses totaling not fewer than 30 transferrable credits
- 14 designated course subject sets including Introduction to Written Communication/Composition I, Public Speaking, Introduction to Sociology, Intro to American Government and Politics, Introduction to Economics, Concepts of Biology, Introduction to Psychology, General Physics, Algebra and Trigonometry, Diversity Studies, Introductory Statistics, and Ethical/Moral Problems

## Review Schedule:

- Reviewed by UWSA and WTCS on a biannual basis
- 2018 UCTA review is currently in its final stages; to be completed at the end of this month

## Current Status:

- No major changes to the existing agreement for 2018-19
- UW Colleges' courses that are part of the UCTA still exist and will be offered with the same course numbers
- An updated agreement to be published with a notation: The administration and accreditation of the UW Colleges' courses have now been transferred to the four-year Receiving Institutions

## Next Steps:

- Survey of institutions in 2018-19 to gather feedback on potential inclusion of additional identified courses
- Extensive review scheduled for 2019; would be effective in 2020-22 agreement years

# UW Colleges' Guaranteed Transfer Program

## Overview:

- The Guaranteed Transfer Program allows students enrolled at a UW College campus to earn “guaranteed” admission to another UW System institution as a junior after fulfilling certain credit and grade point average requirements

## Process:

- Students need to declare their intent to participate in the Program prior to the start of their sophomore year at the UW Colleges (first 30 credits)
- Students also need to complete the number of credits required for junior status at the four-year institution

## Current Status:

- The Guaranteed Transfer Program will continue for 2018-19
- Latest longitudinal student data:

39% - UW System	2% - WI Privates
23% - WTCS	6% - Non-Wisconsin
25% - No transfer	1% - Other

## Recommendation:

- Establish a functional workgroup to determine how we might maintain this program in the future

# 2020FWD: Seamless Transfer

## Definition:

- Refers to a system of transfer in which credits earned at one institution in the UW System easily transfer to the other universities in the UW System
- Central focus is on the applicability of credits; credits are counted in the same way across all UW institutions fulfilling general education requirements
- Requires the continual evaluation of courses in the primary context of the student learning outcomes they produce
- Student-centered system of transfer; loss of credits or financial aid or an increase in time to degree are greatly minimized

## Goal:

- “The establishment of a transfer process that is seamless, smooth, and easily navigable for all students at every step of their educational journey.” –2020FWD Strategic Plan

## Latest Data:

- Transfers make up fully a third of all new students (37% most recently).
- New transfer enrollment each year is a larger group than the entire student body at any one of our comprehensive institutions.
- 2016-17 academic year: 15,142 students transferred into or within the UW System; 13,501 (89%) were new transfer students.
- Of the new transfer students, 4,815 (36%) were intra-UW System transfers, including transfers among four-year institutions (16%), from UW Colleges to UW four-year institutions (16%), and from UW four-year institutions to UW Colleges (4%).
- First gen. students, students of color, and nontraditional students comprise 48%, 16%, and 21% of new transfer students, respectively

## Current Status:

- Completed a review of UW System general education programs
- Researched other statewide models of general education transfer
- Examined shared learning goals and student learning outcomes
- Developed initial recommendations of guiding principles for seamless transfer

# Reporting Impacts

## External Perspectives Post-Restructuring

- Rankings and Representation
- Structure of internal/external reporting
  - Reporting Audiences (IPEDS, HLC, state agencies, ranking organizations)
- Key Issues
  - Reporting as a single institution or separate entities (parent/child relationship)
  - Denied students at Main application / admitted to Branch campus (**SAMs**)
  - Branch campus students transitioning / transferring to Main (**BAMs**)

# Reporting Impacts

## Rankings – Key Measures

- Admit rate
- Yield rate
- Enrollments
  - Diversity, race/ethnicity, age, first generation, preparation (ACT scores)
- Retention rate
- Graduation rate

	Historical 4-year rate	Separate 2-year Entity*	Combined Institution
Admit Rate	83.2%	99.6%	84.4%
Yield	42.4%	71.8%	45.0%
Retention	78.2%	55.3%	Same/ already separate
Graduation	62.5%	26.1%	Same/ already separate

# Reporting Impacts

## Considerations

- Consistently reflect the business processes and relationships
- BAMs
  - Subject to full transfer process?
  - Treated as transitioning / continuing student?
- Denied SAMs
  - Automatically admitted to 2-year campus?
  - New application at 2-year campus?



# Reporting Impacts

## BAMs – Internal Transfer / Transition

1. Formal Application to 4-year
  - New transfer application → impact on transfer apps/admits
  - New transfer entrance status → impact on transfer enrollment population
  
2. Guaranteed Transfer to 4-year
  - New transfer application
  - New transfer entrance status

*or:*

  - No application necessary
  - Automatically transition as continuing student at 4-year institution
  
3. Impact on Transfer Metrics
  - Transfer applications (not relevant in themselves)
  - Transfer enrollment population (OBF)
  - Transfer student success metrics
  - Consistent practice = consistent representation

# Reporting Impacts

## SAMs – Initial Application

1. Denied at 4-year institution
  - Automatically accepted at 2-year branch campus → impact on MAAD, reporting, admit rates
  - New Application to associated 2-year branch campus → impact on MAAD, reporting, admit rates
  - Redirect to other UW Institutions (future)
  
2. Impact on Admit Rate
  - Limited
  - Illogical Extreme
  - Consistent practice = consistent representation

# Reporting Impacts

## Decisions and Outcomes

- Limited impact on Receiving Institutions' public profile
- Decision Points
  - Single or separate entities for reporting and outcome assessment?
    - Admit Rates and Test scores
    - Enrollments and Representation of Student Populations
    - Student Success Measures
  - BAMs, are they transfers inside their own institutions?
  - Denied SAMs, will they be automatically be referred/admitted to 2-year campus?

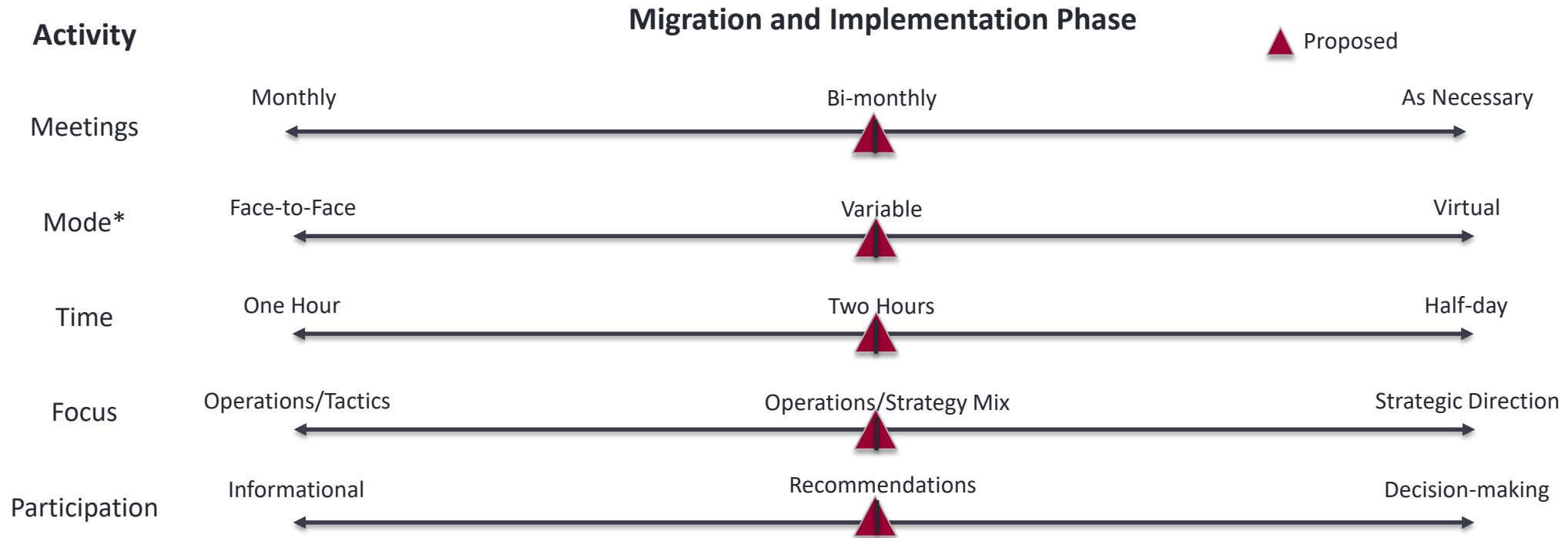
# Steering Committee – Critical Activities

A number of Restructuring milestones remain through the end of the year.

August	September	October	November	December
<ul style="list-style-type: none"> <li>• Applications open for Fall 2019</li> <li>• Go-No Go decision for RIs to process applications on 9/1</li> <li>• Bio-demo data completed</li> <li>• Transfer UW Colleges recruiters to RIs</li> <li>• Complete student learning outcomes evaluation</li> <li>• Biennial budget and name changes to BOR</li> <li>• Assessment of Student Learning</li> <li>• Governance</li> </ul>	<ul style="list-style-type: none"> <li>• Fall 2019 Admissions begins</li> <li>• Faculty finalize curriculum for 2019-20</li> <li>• Review employee placements</li> <li>• Complete orientation for all transitioning employees</li> <li>• Identify contacts eligible for amendment</li> <li>• Transition Admissions and Registration to RIs</li> <li>• Continue curriculum integration</li> <li>• Receive HLC Campus Evaluation Visit Report criteria</li> </ul>	<ul style="list-style-type: none"> <li>• FAFSA Available</li> <li>• Data migration phase 1 completed (SIS)</li> <li>• Negotiate with suppliers and amend contracts as applicable</li> <li>• Develop initial coursework file for 2019-20</li> <li>• Work with RIs on HLC Campus Evaluation Visit Report content</li> <li>• Spring 2019 SIS training for branch campus students and faculty</li> </ul>	<ul style="list-style-type: none"> <li>• Data migration phase 2 completed (Faculty, Buildings, Facilities)</li> <li>• UWCS creates 1098Ts for RIs</li> <li>• Faculty evaluations at branch campuses</li> <li>• Integrated spring registration</li> <li>• Post-transition budgets initialized</li> </ul>	<ul style="list-style-type: none"> <li>• Finalize risk management premium methodology</li> <li>• CORE Procurement and future technology structure</li> <li>• Develop plan to transfer asset oversight</li> <li>• Transition capital budget to RIs</li> <li>• HLC Campus Evaluation Visit Report due</li> <li>• National Student Clearinghouse development</li> </ul>

# Steering Committee – Future Meetings

With the shift of focus in the current phase, there is an opportunity to review the Steering Committee meeting approach to better meet project needs.



# Branch Campus Student Support

The transition process at UW-Stevens Point has occurred in three stages: Discover, Analyze, and Plan.

## Deep Learning Approach

### Discover

- ✓ Facilitate employee and student interviews and focus groups on campus
- ✓ Conduct anonymous survey on campuses

### Analyze

- ✓ Complete campus needs analysis using information derived from the Discover phase
  - Service Gaps
  - Resource Gaps
  - Leadership Gaps

### Plan

- ✓ Leverage data analysis to inform student services offerings and leadership decisions
- ✓ Empower department leaders to review findings and develop 'go-forward' plans for student service & student support integration

# Branch Campus Student Support

Among the existing factors for success at UW-Stevens Point are the student support structure, existing partnership between the Office of Students Affairs and Deans, and the integrative philosophy.

## Structure

- The University College
  - UW-Stevens Point unit for academic student support services, experiential learning, and curriculum support

## Collaborate

- Partnership between Vice VC for Student Affairs and Dean of University college

## Vision

- Philosophy to integrate UW-Marshfield & UW-Marathon County into the UW-Stevens Point operations and culture

### Student Services Transition at UW-Stevens Point

Assume management of all student services\* at Marshfield & Marathon County in Fall 2018

# Branch Campus Student Support

To actualize the Restructuring, UW-Stevens Point has developed an organizational strategy for Student Services to be implemented over the coming months.

## Branch Campus Organizational Structure

- Collaborative, dotted-line reporting
  - Branch Campus Executive: Primary reporting supervisor for non-teaching staff\*
  - Functional Area Supervisors: Responsible for setting service philosophy and directing overall work

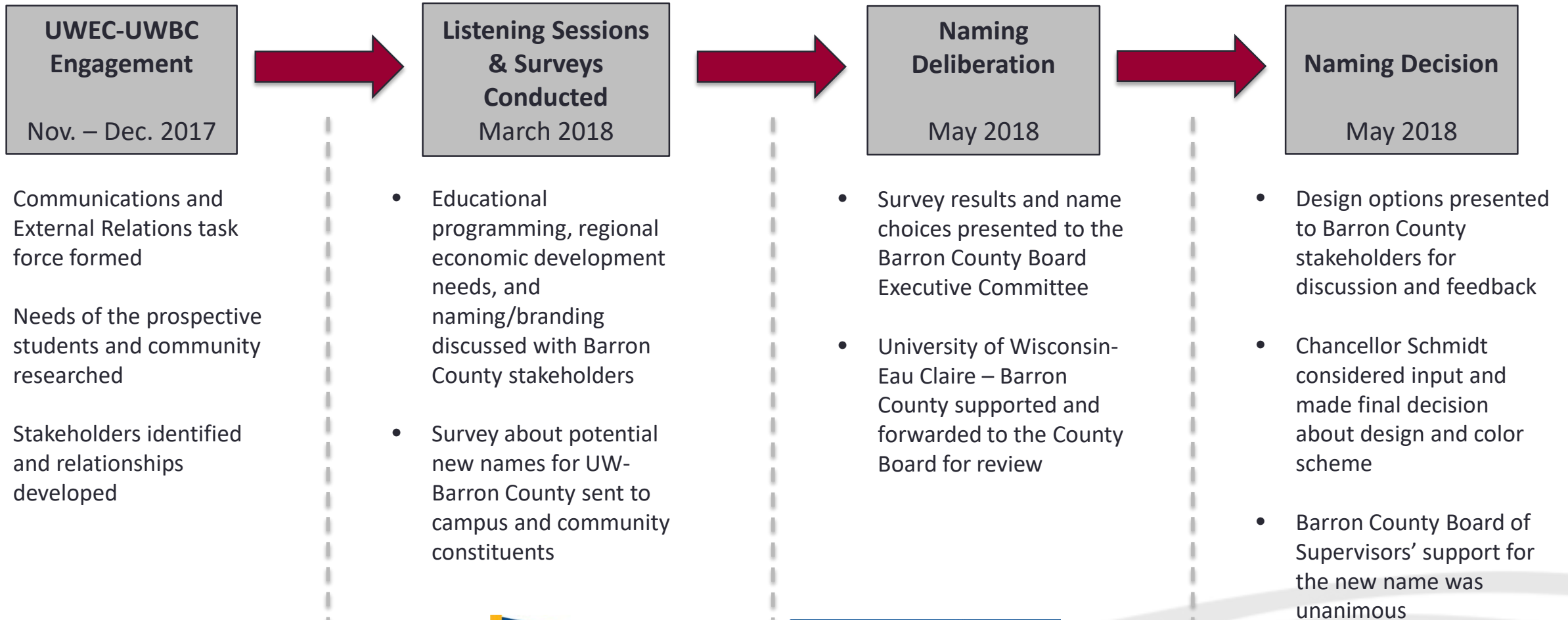
## Student Services Integration Timeline





# Branch Campus Outreach

UW-Eau Claire conducted an inclusive and iterative process to conduct outreach to the Barron County campus and community.



# Communications Roadmap

The Communications Roadmap offers a high-level overview of communication needs tied to Restructuring milestones.

## Functional Roadmap

- 6-month roadmap
- Reviews communications surrounding key milestones

## Student-facing Roadmap

- 12-month roadmap
- Reviews communications regarding student services milestones, application and financial aid deadlines, and other significant student dates

## Employee-facing Roadmap

- 12-month roadmap
- Reviews onboarding, benefits enrollment, and positional change communication timelines

**UW Colleges and UW-Extension Restructuring  
Functional Communications Roadmap: July - December 2018**

This roadmap is a high-level overview of communications needs identified by the Functional Teams. Receiving Institutions (RI) should use this as a guide for planning their own communications for each of the identified areas. UWSA will provide draft templates and guidance to RIs when appropriate. Dates are general and should be aligned with transitional activities at the RI. RIs should identify who from their institution is responsible for each communication. This roadmap is being provided to the Steering Committee, Chancellors, Provosts, CBOs, CIOs, Admissions Directors, Bursars, Financial Aid Officers, Human Resource Directors, PKOs, Registrar, SSACs, and Functional and Regional Team members.

Date	Milestone	Audience	Action Needed?	Responsibility
June 6	Publication of new governance frameworks for branch campus students	Current Students	No	RI's
June 29	Announcement of HLC decision	All Constituents	No	OUR, PCO, RI's
June 29	Updates to language on UW Colleges websites	All Constituents	No	RI's
June	Welcome letters to new employees from UW Colleges and UW-Extension	Employees	No	RI's
July-Dec	Distribution of Title and Total Compensation letters	Employees	No	UWSA
July	Distribution of appointment letters and contracts	Employees	Yes	UWSA, RI's
July	Notification of Graduation/diploma name change	Current Students	No	RI's
Aug. 1	Launch new iApp for fall 2019	Prospective and Current Students	No	UW HELP, RI's
Aug-Dec	Confirmation of Campus name changes (websites, marketing materials updated)	Prospective and Current Students/ Employees	No	UW HELP, RI's
Aug-Dec	Confirmation of new FAFSA schools codes	Prospective and Current Students/Consumers	No	UW HELP, RI's
Aug	New students welcome notification (include segregated fees, use of facilities, ID Cards)	Current Students	No	RI's
Aug	New leadership team welcome by Chancellors	Employees	No	RI's
Aug-Nov	Distribution of faculty orientation details for branch campus faculty	Employees	No	RI's
Aug-Sept	Announcement of new faculty governance structure	Employees	No	RI's
Aug-Sept	Completion of student recruitment/marketing plan and materials	Students	No	RI's
Aug	Communication of tuition structure and fees	Prospective and Current Students	No	RI
Oct	One-year Restructuring Status Report	Current Students/ Employees	No	UW HELP, RI's
Oct	Directive to complete 2019-20 FAFSA (note change in any codes)	Prospective and Current Students	Yes	UW HELP, RI's
Oct	Spring Registration Informational Newsletter - new campus names, course changes	Prospective and Current Students	Yes	UW HELP, RI's
Nov	Inform converted students of any identification changes	Converted Students	Yes	RI's
Dec	Confirmation of Student Services logistics	Current Students	No	RI's

Abbreviations:  
OUR-UWSA Office of University Relations    RI-Receiving Institution    PCO-UWSA Project Coordination Office    UW HELP- UW Higher Education Liaison Program

# UW-Extension, Cooperative Extension Update

- Heidi Zoerb, *Assistant Dean, External Relations and Advancement, College of Agricultural and Life Sciences, UW-Madison*

# Student Information Systems Update

Identified below are the key milestones of SIS-related Restructuring activities, reflecting UW Colleges Students who have been enrolled as of Fall 2018 and Fall 2019 Applicants.

Date	Milestone
August 1, 2018	EApp Opens for Fall 2019 Applicants
September 1, 2018	EApp integration into Receiving Institution for Fall 2019 Applicants
October 2018	Phase I Conversion Go-Live: Bio/Demo, Program Application, Test Results, Prior Earned Credit
November 2019	Phase II Conversion Go-Live: HRS Faculty Load, Buildings & Facilities
December 2018	Process Financial Aid Awards: Build Budgets and run Cost of Attendance Calculation
February 2019	Phase III Conversion Go-Live: Fall 2018 UWC Enrollment, Student Account Balances
March/April 2019	Fall 2019 Registration
July 2019	Tuition Calculation for Fall 2019 AAS students; Update UWC student data: credits, grades, account balances transferred for Spring 2019
September 2019	Update UWC student data: credits, grades, account balances transferred for Summer 2019

# MOU – Implementation Update

An update on MOU service transitions is provided below:

- Budget transfers complete by the end of July 2018 (marketing, recruiting, governance)
- SME information sessions continue
- Procurement approval process and routing testing underway
- PMO to extend support to UWCS to assist with service transitions

## Summary of Scheduled Service Transitions\*

### **July 1, 2018 - Complete**

10. Facilities
12. Foundations
13. Governance
15. HR – Employee Hiring
18. International Education (Recruitment, Partnership)
21. Marketing
22. Oversight of Instruction

### **August 1, 2018**

25. Recruitment

### **September 1, 2018:**

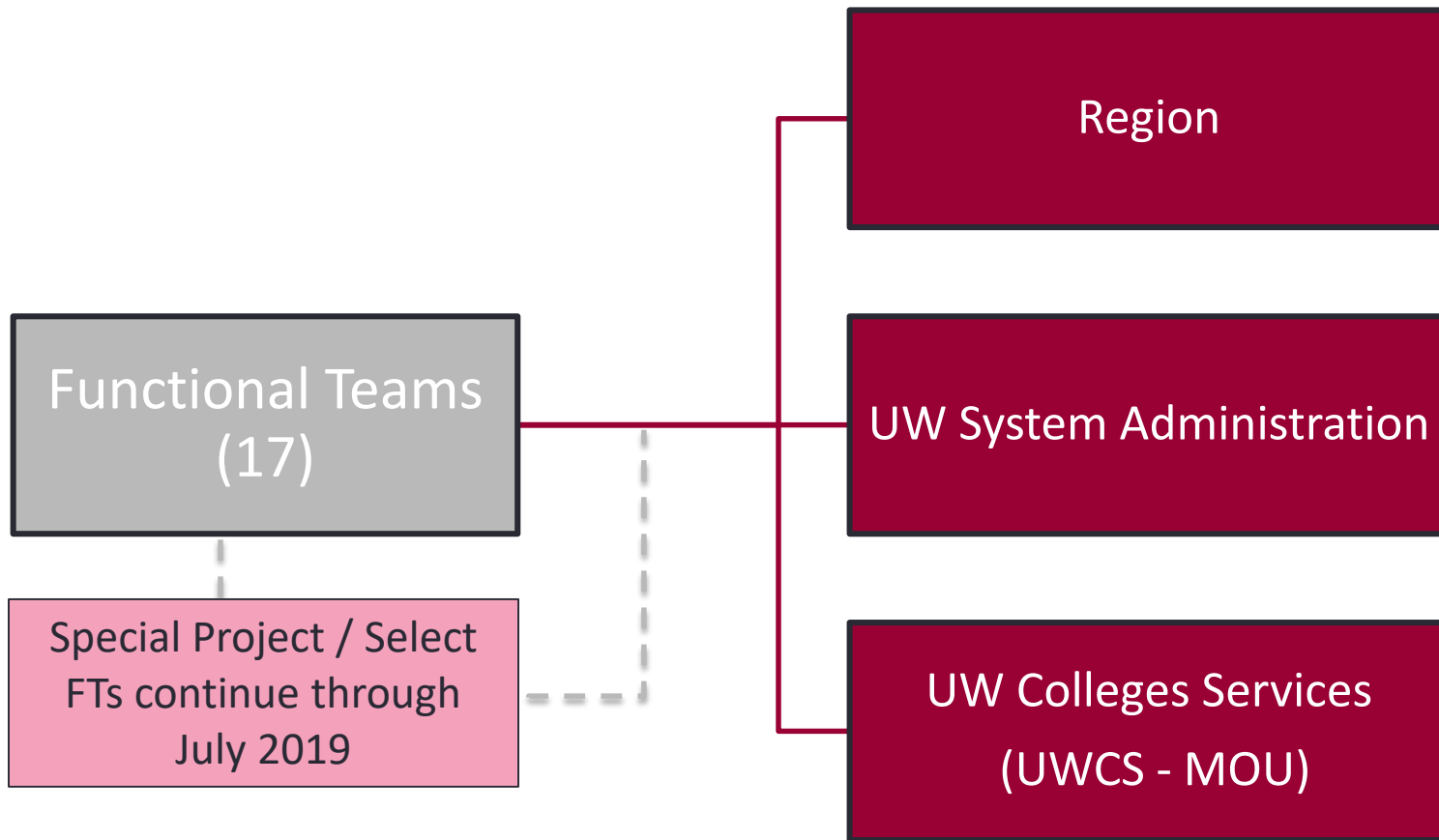
2. Admissions (Fall 2019 Cycle)
18. International Education (Visas)

### **Planning for Early Transition Underway:**

8. Student Conduct & Compliance
19. Law Enforcement & Emergency Planning
26. Risk Management & Safety

# Functional Team Transition

Over the next year, most functions will move out of Functional Team coordination and into one of three operational homes or a special project. Some Functional Teams will remain active through July 2019.



## Functional Team Transition

- Evaluate charter, milestones, and team status
- Close out teams with completed milestones and transitioned objectives

## Timeline (Targets)

- Wave 1: Complete by September 2018
- Wave 2: Complete by December 2018
- Wave 3: Complete by July 2019
- Wave 4: Complete beyond 2019

# Functional Team Transition – Timeline

The timeline for the transition of Functional Teams is outlined below:

## Functional Team Transition Strategy

**Evaluate Progress  
July 2018**

- Review team charter and milestones
- Assess progress toward objectives

**Recommend Path Forward  
July – August 2018**

- Determine path forward for transition
- Engage team lead to formalize recommendation and a sunsetting target for the Functional Team

**Manage Transition  
September 2018  
(Wave 1 Completion)**

- Complete close out process
- Distribute final recommendations and archive key documents
- Finalize transition

# Next Steps

Before the next Steering Committee meeting, migration and implementation will continue in the regions and transitions will progress.

- Move forward in milestone and Functional Team transitions
- Support MOU implementation
- Continue with planning and implementation efforts at Receiving Institutions

**The next Steering Committee Meeting is Friday, August 17, 2018, at the Pyle Center.**



# Appendix

# MOU Update

After scheduled transitions, the following services or subservices will remain with UWCS after July 1, 2019:

Individual Transition	Universal	Future Transition
<ul style="list-style-type: none"> <li>4. Auxiliaries – Food Services</li> <li>8. Conduct and Compliance (Student)</li> <li>17. Institutional Research</li> <li>19. Law Enforcement &amp; Emergency Planning</li> <li>24. Records Management – Non-Student (Follows Transitioning Functions)</li> <li>27. Student Accommodations and Accessibility Services</li> <li>28. Student Housing</li> <li>31. Veterans Services (Branch Campus Student Certification)</li> </ul>	<ul style="list-style-type: none"> <li>5. Budget/Planning (FY 2020 Planning)</li> <li>14. Grant Programs and Research (Accounting – New Grants)</li> <li>26. Risk Management and Safety</li> </ul>	<ul style="list-style-type: none"> <li>2. Admissions and Registrar (Fall 2018, Spring 2019, Summer 2019)</li> <li>3. Assessment of Student Learning</li> <li>4. Auxiliaries – Bookstore, Vending</li> <li>5. Budget/Planning (Maintenance)</li> <li>6. Business Services</li> <li>7. Central Information Technology Services (CITS)</li> <li>9. Curriculum/Catalog</li> <li>11. Financial Aid</li> <li>12. Foundations (Scholarship Processing)</li> <li>14. Grant Programs and Research (Accounting – Existing Grants)</li> <li>16. Human Resources</li> <li>20. Library Support Services</li> <li>23. Procurement</li> <li>24. Records Management - Student</li> <li>29. Student Support Services</li> <li>30. Transfers</li> </ul>

# UW Colleges and UW-Extension Restructuring

## Functional Communications Roadmap: July - December 2018

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Date	Milestone	Audience	Audience Action Needed?	Responsibility
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June	Welcome letters to new employees from UW Colleges and UW-Extension	Employees	No	RIs
July-Dec	Distribution of Title and Total Compensation letters	Employees	No	UWSA
July	Distribution of appointment letters and contracts	Employees	Yes	UWSA, RIs
July	Notification of Graduation/diploma name change	Current Students	No	RIs
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Aug-Dec	Confirmation of new FAFSA schools codes	Prospective and Current Students/Counselors	No	UW HELP, RIs
Aug	New students welcome notification (include segregated fees, use of facilities, ID Cards)	Current Students	No	RIs
Aug	New leadership team welcome by Chancellors	Employees	No	RIs
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### Abbreviations:

OUR-UWSA Office of University Relations

RIs-Receiving Institutions

PCO-UWSA Project Communications Office

UW HELP- UW Higher Education Location Program

Updated: 7/12/18

# UW Colleges and UW-Extension Restructuring

## Student Communications Roadmap: August 2018 - July 2019

This roadmap outlines key student-facing communications during the 2018-19 transition year. These milestones have been identified and vetted by participants at the Receiving Institutions (RIs). RIs should use this as a guide for planning their own communications for each of the milestones identified here. Dates are general and should be aligned with transitional activities at the RIs. RIs should identify who from their institution is responsible for each communication. This roadmap is being provided to the Steering Committee, Chancellors, Provosts, CBOs, CIOs, Admissions Directors, Bursars, Financial Aid Officers, Human Resource Directors, PIOs, Registrars, SSAOs, and Functional and Regional Team members.

Date (Month-Year)	Milestone	Audience	Audience Action Needed	Responsibility	Method	Objective
Aug-18	Welcome message to UW College students from RI	UWC FALL18 ADM and CURR	No	Provost EM	Email, website posting	Provide relevant information UW college students need regarding the restructure from the RI
Aug-18	Update notice about restructure	UW FALL18 ADM and CURR; UW SPR19 ADM	No	Provost EM	Email, website posting	Provide relevant information to RI students about restructure
Sep-18	18/19 and 19/20 FAFSA School Code Change	UWC-SPR19 ADM	Yes	FA	Email, website	Ensure students complete both the 18/19 FAFSA with college school code and prepare for the 19/20 FAFSA with the RI's school code
Sep-18	19/20 FAFSA Preparation	ALL	No	FA	Email, postcard, website updates	Get students prepared for FAFSA being available 10/1 and using the new school code
Sep-18	Admit letters	UWC-SPR19 ADM	Yes	EM ADMS	Email, mailed letter	Accept admission
Oct-18	19/20 FAFSA Now Available	ALL	Yes	FA	Email, website	Complete the FAFSA
Nov-18	Spring 2019 Registration- in PRISM	UWC FALL18 ADM and CURR; UWC-SPR19 ADM	Yes	RG	Email, website	Preparing students for registration and/or pushing them to register for Spring 19 in PRISM
Nov-18	Spring 2019 Registration	UW FALL18 ADM and CURR	Yes	RG	Email, website	Preparing students for registration and/or pushing them to register for Spring 19
Nov-18	Inform students of new ID, email, and sign in information at RIs (post bio data conversion)	UWC FALL18 ADM and CURR; UWC-SPR19 ADM	No	RG EM	Email	Introduce students to new RI systems
Nov-18	Admit letters	UW FALL19 PROS and ADM; UWC FALL19 PROS and ADM	Yes	EM ADMS	Email, mailed letter	Accept admissions

### Abbreviations:

UWC FALL18 ADM and CURR: UW Colleges Fall 2018 Admits and Current Students  
 UW FALL19 PROS and ADM: Receiving Institution Fall 2019 Prospects or Admits  
 UWC FALL19 PROS and ADM: Colleges Fall 2019 Prospects and Admits  
 UWC-SPR19 ADM: Colleges Spring 2019 Admits  
 UW SPR19 ADM: Receiving Institution Spring 2019 Admits  
 ALL: All groups above

EM: Enrollment Management  
 ADMS: Admissions  
 RG: Registrar  
 BSR: Bursar  
 FA: Financial Aid  
 Updated: 7/12/2018

# UW Colleges and UW-Extension Restructuring

## Student Communications Roadmap: August 2018 - July 2019

<b>Dec-18</b>	Logistics information to students	UWC FALL18 ADM and CURR; UWC-SPR19 ADM	No	EM Provost	Email, website	Inform students of important logistics information: Where do I go for help?
<b>Dec-18</b>	19/20 financial aid awards available	UW FALL19 PROS and ADM; UWC FALL19 PROS and ADM	Yes	FA	Email	Accept 19/20 financial aid award
<b>Jan-19</b>	Reminder to students about how to use RI systems	UWC FALL18 ADM and CURR; UWC-SPR19 ADM	No	RG EM	Email	Further introduction to new RI systems
<b>Jan-19</b>	FAFSA reminder	ALL	No	FA	Email	Remind students to complete FAFSA
<b>Feb-19</b>	Welcome to accepted students	UWC FALL19 PROS and ADM	No	EM ADMS	Email	Welcome letter to inform students about logistics of being a branch campus student
<b>Feb-19</b>	Summer 2019 registration	UWC FALL18 ADM and CURR; UWC-SPR19 ADM	Yes	RG	Email	Get students to register for the Summer 2019 semester
<b>Feb-19</b>	Fall 2019 registration information	UWC FALL18 ADM and CURR; UWC-SPR19 ADM	Yes	RG	Email	Get students to register for the Fall 19 semester in the RI's system
<b>Mar-19</b> <b>(TBD)</b>	Balance Transfer	UWC-FALL18 ADM and CURR; UWC-SPR19 ADM	No	BSR	Email	Inform students who have a balance transferring to RI how to make payment
<b>Mar-19</b>	19/20 financial aid awards	UW FALL18 ADM and CURR; UWC FALL18 ADM and CURR; UWC-SPR19 ADM	Yes	FA	Email	Accept/Decline financial aid awards on RIs system for 19/20
<b>Apr-19</b> <b>(TBD)</b>	Account Refund	ALL	No	BSR	Email	Inform students of refunds to be processed
<b>May-19</b>	Fall 19 orientation	UW FALL19 PROS and ADM; UWC FALL19 PROS and ADM	Yes	EM ADMS	Email, website, post card	Get students to register for orientation
<b>Jul-19</b>	Remind students of new ID, email, and login information	UWC FALL18 ADM and CURR; UWC-SPR19 ADM	No	RG EM	Email	Message to remind students how to access RIs systems and email
<b>Ongoing</b>	Recruiting messages about applying for RI	UW FALL19 PROS and ADM	No	EM ADMS	Email, phone, website	Recruit students to apply for the RI and inform students if they apply for RI and are denied, they may be admitted to a branch campus
<b>Ongoing</b>	Recruiting messages about applying for branch campus location	UWC FALL19 PROS and ADM	No	EM ADMS	Email, phone, website	Help students understand best practices when applying for the 19/20 school year and the difference between applying at the various campuses

### Abbreviations:

UWC FALL18 ADM and CURR: UW Colleges Fall 2018 Admits and Current Students  
 UW FALL19 PROS and ADM: Receiving Institution Fall 2019 Prospects or Admits  
 UWC FALL19 PROS and ADM: Colleges Fall 2019 Prospects and Admits  
 UWC-SPR19 ADM: Colleges Spring 2019 Admits  
 UW SPR19 ADM: Receiving Institution Spring 2019 Admits  
 ALL: All groups above

EM: Enrollment Management  
 ADMS: Admissions  
 RG: Registrar  
 BSR: Bursar  
 FA: Financial Aid  
 Updated: 7/12/2018

# UW Colleges and UW-Extension Restructuring

## Employee Communications Roadmap: July 2018 - July 2019

This roadmap outlines key employee-facing communications during the 2018-19 transition year. Receiving Institutions (RIs) should use this as a guide for planning their own communications for each of the identified areas. UWSA will provide draft messaging and guidance to RIs when appropriate. Dates are general and should be aligned with transitional activities at the RIs. RIs should identify who from their institution is responsible for each communication. This roadmap is being provided to the Steering Committee, Chancellors, Provosts, CBOs, CIOs, Admissions Directors, Bursars, Financial Aid Officers, Human Resource Directors, PIOs, Registrars, SSAOs, and Functional and Regional Team members.

Date (Month-Year)	Milestone	Audience	Audience Action Needed	Responsibility	Objective
July-18	HLC decision announcement to all UW employees	All Employees	No	PCO, RIs	Inform employees of HLC approval and RI implementation update
July-18	MyUW Portal changes and other provisioning changes impacted by HRS updates	UWSA	No	UWSA, RIs	Communicate changes to MyUW Portal
July-18	Welcome receptions hosted by each UWSA office to welcome the new units from UW-Extension and UW Colleges	UWEX, UWC	No	UWSA	Plan and invite employees to "Welcome to UWSA" event
July-18	UW Colleges Fall 2018 appointment letters to instructional academic staff	UWC	No	RI	Send Fall 2018 appointment letters to instructional academic staff
July-18	UW Colleges reappointment notices to probationary faculty	UWC	No	RI	Send reappointment notices to probationary faculty
July-18	Salary statement to all staff receiving pay plan increase	UWC	No	RI	Send Salary statement to all staff receiving pay plan increase
July-18	Connect@UWSA employee newsletter	UWEX	No	PCO	Include summary of HLC approval, welcome UWC/UWEX employees to UWSA family in employee newsletter
July-Dec	Title and Total Compensation study	All Employees	No	UWSA	UWSA CORE send updates of study
Aug-18	Onboarding plans completed	UWC	No	RIs	RIs complete onboarding plans for transitioning employees
Aug-18	BOR resolution on campus name change	All Employees	No	RIs	Notify employees of new campus name change following Board of Regent approval
Aug-18	Restructure website Faculty & Staff FAQs	All Employees	No	PCO	Update FAQs with new information
Aug-18	"What I Should Know" update	UWC	No	PCO, RIs	PCO create summary for RIs of future HR transition items and timetable
Sept-18	Onboarding activities	UWC	No	RIs	Welcome message from department chairs or others welcoming new faculty and staff from branch campuses, "What I Should Know" information, performance evaluation process
Sept-18	Open Enrollment activities	UWC	Yes	RIs	Invite employees to events on RI campuses

### Abbreviations:

UWC-UW Colleges transitioning employees  
PCO-UWSA Project Communications Office

UWEX-UW-Extension transitioning employees  
RI-Receiving Institutions

UWSA-UW System

Updated 7/12/18

# UW Colleges and UW-Extension Restructuring

## Employee Communications Roadmap: July 2018 - July 2019

<b>Oct-18</b>	Restructure website Faculty & Staff FAQs	All Employees	No	PCO	Update FAQs with new information
<b>April-19</b>	New appointment letters for FY 2019	UWC	No	RI	Draft new appointment letters for FY 2019
<b>May-19</b>	New IT Provisioning Details	UWC	No	RI	Send new IT Provision details
<b>June-19</b>	New HR contracts	UWC	No	RI	Send new contracts
<b>July-19</b>	UWC/UWEX staff position changes become effective	UWC, UWEX	No	UWSA, RI	Communicate new employee portal, email change

**Abbreviations:**  
 UWC-UW Colleges transitioning employees  
 PCO-UWSA Project Communications Office

UWEX-UW-Extension transitioning employees  
 RI-Receiving Institutions

UWSA-UW System



## Decision #25: Timeline for submitting request for change to campus structure

July 26, 2018

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**DECISION:** Receiving Institutions will not submit a request to the Higher Learning Commission (HLC) for a change to campus structure (i.e. branch campus to additional location model) until after HLC has completed its six-month review.

### Background

This decision is based on the recommendation, in consultation with the HLC Functional Team, of Carleen Vande Zande, Associate Vice President for Academic Programs and Educational Innovation. Carleen serves as the UWSA liaison to HLC. UWSA and receiving institutions are in the first months of implementing the MOUs and still have an HLC review in six months. During the first year of restructuring, the institutions will be implementing the required components of the MOU. A change in this implementation roll-out could risk missing critical components of the MOU to support students.

### Next Steps

Receiving Institutions will not implement a new campus structure until July 1, 2019 at the earliest. In preparation for HLC's six-month review, the institutions should gather information about the type, amount, and delivery of student services at the branch campus to determine how many services are utilized and needed.





# UW Colleges and UW-Extension Restructuring Steering Committee

Meeting Summary – July 20, 2018

## Overview

The key objectives of the July 20, 2018, Steering Committee meeting were to review HLC guidelines post-approval; discuss status of transfers and potential impacts of reporting on institutional rankings; outline the future of Functional Teams and Steering Committee meetings; highlight notable practices from Receiving Institutions; and receive key Restructuring updates.

The Restructuring project entered the Migration and Implementation Stage when notice of HLC approval was received on June 29, 2018.

## Major Areas of Discussion

### HLC Update and Guidelines Post-Approval

The restructuring of UW Colleges and UW-Extension was approved by the Higher Learning Commission (HLC) on June 28. In its approval letter to UWSA, HLC requested a 6-month Focused Visit, with a visit planned for December 2018.

Accreditation of UW Colleges has been withdrawn, but the catalog and courses of the former UW Colleges are in good standing and now accredited by the Receiving Institutions.

Focused Visits will be campus specific. HLC will reach out to the Chancellors' offices at each Receiving Institution to outline what they will need to provide to HLC during each visit. Visits will take place over two days. The HLC representative conducting the evaluation will walk the branch campus and familiarize themselves with the physical setup, meet with faculty, staff, and students, as well as spend time with the Branch Campus Administrator.

The following key topics were outlined in the HLC branch campus change request:

- Administrative Oversight
- Oversight of Instruction (Two Models)
- Planning and Budgeting
- Information about Degree and Program Requirements
- Faculty and Staff Qualifications
- Monitor Overall Effectiveness/Operations
- Assessment of Student Learning
- Curriculum
- Student Support Services

Per the HLC submission, baseline metrics will be documented at all institutions to measure our success and progress in the following areas:

- Strengthening the Educational Pipeline
  - **Fall Total UW enrollments** by institution & branch campus
  - **Student credit hours** for developmental, general education, and upper-level courses offered at branch campuses
  - **Affordability** – Cost of tuition for courses taken on branch campuses
  - **Average total loan debt** for associate degree graduates
- Meeting WI Need for More College Graduates
  - **Transfer-out rate** – Rate at which branch campus students transfer to a four-year institution or to a WI technical college



# UW Colleges and UW-Extension Restructuring Steering Committee

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- **Student credit hours** for developmental, general **Transfer-with-award rate** – Rate at which branch campus students earn an associate degree before transferring
- **Transfer bachelor's completion rate** – the rate at which transferred branch campus students earn a bachelor's degree
- Total associate degrees awarded
- Total bachelor's completion degrees awarded
- CORE
  - **CORE Expense Ratio** as measured for the UW System's outcomes-based funding model
    - **Note:** Two-year campuses will no longer be excluded from outcome based funding models because they are now part of four-year institutions that are part of the outcome based funding model.
  - **Degree Production** based on degrees awarded per 100 FTE as measured for the UW System's outcomes-based funding model
- Accountability and Follow-up
  - **Key Performance Indicators** for UW System Restructuring will be added to the UW System Accountability Dashboard for system, institutional, and campus reporting
  - 2020 FWD Initiative Measures
  - Additional Studies and Review

Receiving Institutions should use these metrics as a standard baseline. Additional metrics may be added for context and to better measure the changes taking place at their institution.

A recommendation was made by Dr. Vande Zande, in consultation with five of the seven Receiving Institutions' HLC liaisons, that Receiving Institutions wait until after the six month review period to apply for a change in status from branch campus to additional location, and not implement that change in structure until July 1, 2019 at the earliest. It may take several months following submission to receive approval on a change in structure.

## Transfer Update

Chris Navia presented on the Universal Credit Transfer Agreement (UCTA), UW Colleges' Guaranteed Transfer Program, and 2020FWD: Seamless Transfer.

The UCTA ensures the transferability of designated courses between UW System institutions and the Wisconsin Technical Colleges (WTCS). The designated courses satisfy general education requirements or general degree requirements at the Receiving Institution. UCTA is reviewed by UWSA and WTCS on a biennial basis. The 2018 UCTA review is currently in its final stages and will be completed at the end of this month. There are no major changes to the existing agreement for 2018-19. UW Colleges' courses that are part of the UCTA still exist and will be offered with the same course numbers. Former UWC courses will be annotated to acknowledge they now belong to a four-year comprehensive university. The agreement will remain in place and unchanged until 2020.

The UW Colleges' Guaranteed Transfer Program allows students enrolled at a UW College campus to earn "guaranteed" admission to another UW System institution as a junior after fulfilling certain credit and grade point average requirements. Students need to declare their intent to participate in the program prior to the start of their sophomore year at UW Colleges (first 30 credits). Additionally, students need to complete the number of credits required for junior status at the four-year institution. The Guaranteed Transfer Program will continue for 2018-19. It was recommended that a functional workgroup be established to determine how this program might be maintained in the future.



# UW Colleges and UW-Extension Restructuring Steering Committee

Meeting Summary – July 20, 2018

*2020FWD: Seamless Transfer* was introduced in the *2020FWD Strategic Plan* as “The establishment of a transfer process that is seamless, smooth, and easily navigable for all students at every step of their educational journey.” *Seamless Transfer* is defined as credits earned at one UW institution easily transfer to other UW institutions. Its central focus is on the applicability of credits, with credits counted in the same way across all UW institutions. It is a student-centered system of transfer, with loss of credits or financial aid or an increase in time to degree greatly minimized.

Transfers make up a third of all new students (37% most recently). New transfer enrollment each year is a larger group than the entire student body at any one of the UW System’s comprehensive institutions. In the 2016-17 academic year, 15,142 students transferred into or within the UW System; 13,501 (89%) were new transfer students. Of the new transfer students, 4,815 (36%) were intra-UW System transfers, including transfers among four-year institutions (16%), from UW Colleges to UW four-year institutions (16%), and from UW four-year institutions to UW Colleges (4%). First generation students, students of color, and nontraditional students comprise 48%, 16%, and 21% of new transfer students, respectively.

## Reporting Impacts on Institutional Rankings

Ben Passmore, Associate Vice President for Policy Analysis and Research, gave a presentation on potential impacts to institutional rankings. He reviewed key measures of institutional rankings (Admit rate, Yield rate, Enrollments, Retention rate, Graduation rate) and key considerations.

The branch campuses are comparatively small, so most metrics will only move slightly when factored in together with the larger main campus.

Three ways to treat BAMs (branch campus students applying to main campus):

1. New transfer applications, just as we do now
2. Guaranteed transfer to four-year main campus
  - a. Students would still considered transfer students for reporting purposes
3. Not regarded as transfer. Students move through transition process from one program to another.

Decisions that need to be made about SAMs (student denied admission to main campus):

1. Denied at four-year institution
  - a. Automatically accepted at a two-year branch campus → Impact on MAAD, reporting, and admit rates
  - b. New application to associated two-year branch campus → impact MAAD, reporting, admit rates
  - c. Redirect to other UW institutions
2. Impact on Admit Rate
  - a. Limited impact
  - b. Illogical extreme
  - c. Consistent practice = consistent representation

His conclusion is that there will be limited impact on Receiving Institutions’ public profile by just combining the campuses and that there are three main decision points to consider:

1. Single or separate entities for reporting and outcome assessment?
2. BAMs, are they transfers inside their own institutions?
3. Denied SAMs, will they be automatically be referred/admitted to 2-year campus?



# UW Colleges and UW-Extension Restructuring Steering Committee

Meeting Summary – July 20, 2018

## Project Evolution

Rob Cramer presented an update on the current and future state of the project, starting with an overview of project milestones in August through December.

With the shift of focus in the current phase, there is an opportunity to review the Steering Committee meeting approach to better meet project needs. Discussion was had on the frequency, mode, focus, and participation needs of future meetings. For now, meetings will continue to be calendared for each month, but may be cancelled in favor of bimonthly meetings as we move forward. After September, meetings may move to a virtual format lasting two hours. Frequency, mode, and duration will be evaluated as we move forward.

Additionally, over the next year, most functions will move out of Functional Team coordination and into one of three operational homes (region, UWSA, UW Colleges Services) or a special project. Some Functional Teams will remain active through July 2019, when the Project Management Office (PMO) will evaluate their progress in meeting their charter and outlined milestones. In August, the PMO will determine a path forward and begin working with the Functional Team Leads to formalize the sunsetting of the team. The PMO will work with the Functional Team Leads to complete the close out process, distribute final recommendations, archive key documents, and finalize the transition.

## Receiving Institution Highlighted Practices

Gretel Stock-Kupperman, Dean of University College at UW-Stevens Point, presented on Branch Campus Student Support. The transition process at UW-Stevens Point occurred in three stages: Discover, Analyze, and Plan.

- Discover
  - Facilitated employee and student interviews and focus groups on campus
  - Conduct anonymous survey on campuses
    - Formal needs analysis with over 300 responses, more than 200 coming from the branch campuses.
- Analyze
  - Complete campus needs analysis using information derived from the Discover phase
    - Service Gaps
    - Resource Gaps
    - Leadership Gaps
- Plan
  - Leverage data analysis to inform student services offerings and leadership decisions
    - Took the data and created plans for moving the transition of services forward
  - Empower department leaders to review findings and develop 'go-forward' plans for student service & student support integration

Among the existing factors for success at UW-Stevens Point are the student support structure, existing partnership between the Office of Students Affairs and Deans, and the integrative philosophy. This is being implemented in the new structure as well.

- The University College
  - UW-Stevens Point unit for academic student support services, experiential learning, and curriculum support
- Partnership between Vice VC for Student Affairs and Dean of University college
- Philosophy to integrate UW-Marshfield & UW-Marathon County into the UW-Stevens Point operations and culture

To actualize the Restructuring, UW-Stevens Point has developed an organizational strategy for Student Services to be



# UW Colleges and UW-Extension Restructuring Steering Committee

Meeting Summary – July 20, 2018

implemented over the coming months.

- Branch Campus Organizational Structure
  - Collaborative, dotted-line reporting
    - Branch Campus Executive: Primary reporting supervisor for non-teaching staff\*. Handles general, day-to-day functions of the branch campuses and reports to the Dean of the University College.
    - Functional Area Supervisors: Responsible for setting service philosophy and directing overall work

Student services will be integrated over the next several months, beginning with Conduct and Compliance in July, followed by Accommodations in September, and the Solution Center in October.

Becky Dienger presented on UW-Eau Claire's inclusive and iterative process to conduct outreach to the Barron County campus and community. Engagement began in November 2017 with the establishment of an External Relations Task Force, followed by listening sessions and community surveys on topics ranging from educational programming, economic development, and naming and branding. UW-Eau Claire compiled the results of their listening sessions and surveys and presented them to the Barron County Board Executive Committee in May of this year. Design options for the new brand were presented to Barron County stakeholders for discussion and feedback before final decisions were made. The Barron County Board of Supervisors support for the new campus name was unanimous.

## Communications Roadmap

Last week, the Project Communications Office distributed the Restructuring Communications Roadmap to a broad group of internal stakeholders. The roadmap outlines key communications needs associated with project milestones and identifies the timeline, audience, whether action is needed, and the party responsible for the communication.

Communication milestones were identified by the functional teams during the most recent all-hands functional team meeting and then circulated for review. Receiving Institutions should use this as a guide for their own communications planning. The Project Communications Office will provide draft templates and guidance for communication items that are consistent throughout the system (e.g. financial aid). Receiving Institutions will be responsible for producing institution specific communications.

Upcoming communication milestones will be included in the Weekly Project Update, communicated on the weekly restructuring communications call, and addressed by Project Management Office analysts in regional and functional team meetings. As needed, updated roadmaps will be redistributed as new milestones are identified or timelines are adjusted.

## UW-Extension, Cooperative Extension Update

UW-Madison has finalized MOUs for all four transitioning units – Conference Centers/Mail Services, Public Media, the Division of Labor Education, and Cooperative Extension. On July 1, 2018, Conference Centers and Mail Services fully transitioned and are now on payroll of UW-Madison. This was the smallest population to transition – 68 employees in total.

UW-Madison created a new division to hold UW-Extension and Public Media, called the Division of Extension and Public Media. They will hire a new Vice Provost to lead the division, with a formal search taking place later this fall. Casey Nagy has been named Interim Vice Provost. Additionally, Gene Purcell has been hired as the new Director of Wisconsin Public Media, effective August 1, following the retirement of longtime director, Malcom Brett, later this summer.

Discussion was had on the configuration of new, interim governance groups that will be in effect until a final governance structure is in place beginning in January 2020.



# UW Colleges and UW-Extension Restructuring Steering Committee

Meeting Summary – July 20, 2018

## Student Information Systems Update

An overview of key milestones of SIS-related Restructuring activities was given, reflecting UW Colleges Students who have been enrolled as of Fall 2018 and Fall 2019 Applicants.

- **August 2018:** EApp Opens for Fall 2019 Applicants
- **September 2018:** EApp integration into Receiving Institution for Fall 2019 Applicants
- **October 2018:** Phase I Conversion Go-Live: Bio/Demo, Program Application, Test Results, Prior Earned Credit
- **November 2018:** Phase II Conversion Go-Live: HRS Faculty Load, Buildings & Facilities
- **December 2018:** Process Financial Aid Awards: Build Budgets and run Cost of Attendance Calculation
- **February 2019:** Phase III Conversion Go-Live: Fall 2018 UWC Enrollment, Student Account Balances
- **March/April 2019:** Fall 2019 Registration
- **July 2019:** Tuition Calculation for Fall 2019 AAS students; Update UWC student data: credits, grades, account balances transferred for Spring 2019
- **September 2019:** Update UWC student data: credits, grades, account balances transferred for Summer 2019

Mock I, Mock II, Mock III stages of testing. Mock I is underway now for conversion of programs. Next step is to run programs and then validate functionality.

## MOU Implementation Update

All seven RIs have signed MOUs in place that outline the delivery of services in 2018-19. RIs have MOU Management Plans that underpin the delivery of services during the transition year.

Budget transfers for marketing, recruiting, and governance are complete as is distribution and prior UW Colleges regional level funding. Subject Matter Expert information sessions continue to take place. Procurement approval process and routing testing are underway. The Project Management Office will extend support to UW Colleges Services to assist with service transitions.

A summary of scheduled service transitions was provided.

## Project Decisions

### Chartered Workgroup for Transfer Programs

Steering Committee Chair Rob Cramer approved the creation of a chartered workgroup related to guaranteed transfer.

## Next Steps

Before the next Steering Committee meeting, migration and implementation will continue in the regions and transitions will progress.

- Move forward in milestone and Functional Team transitions
- Support MOU implementation
- Continue with planning and implementation efforts at Receiving Institutions
- Form a chartered workgroup to address transfer programs



# UW Colleges and UW-Extension Restructuring Steering Committee

Meeting Summary – July 20, 2018

**The next Steering Committee meeting is on Friday, August 17 at the Pyle Center.**

Please note the meeting on Friday, September 14 will be held at the Dejope Residence Hall (640 Elm Drive, Madison) in the Lake Mendota Room.