

## 2019-2020 JPB Committee

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Dept/Program  
Student Association (GRD)  
CSH  
Campus Climate  
CASSH  
SAA  
Student Association (UGRD)  
Student Affairs  
Chancellor  
Academic Affairs  
Residence Life  
IT  
CSH  
Financial Aid  
Admin & Finance  
Library  
CSH  
CASSH  
CASSH  
CBA  
Academic Affairs  
Student Association (UGRD)  
Student Association (UGRD)  
CBA  
Advancement  
Residence Life  
CSH  
IT  
Institutional Research  
Budget  
Diversity & Inclusion  
Academic Advising  
CASSH  
SOE

UWL Joint Planning & Budget Committee  
Meeting Minutes  
September 11, 2019  
325 Graff Main Hall  
Recorder: Reichert

Present: Abler, Blum, Clauss, Delgado, Elkins, Figueroa, Hansen, Harris, Hawkins, Kelly, Kovari, Kunkel, Milner, Morgan, Nielsen, Nowicki, Reichert, Richter, Sandheinrich, Schaller, Stindt, Thoen, Tuxen, Wycoff-Horn

Absent: Hetzel, Stewart

The meeting was called to order by Chair Delgado at 1:15 PM.

1. Committee member introductions were completed.
2. Election of chair: A motion was made by Clauss and seconded by Richter to nominate Delgado. Motion passed. Tuxen and Delgado abstained.
3. Election of executive committee:

<b>Group</b>	<b>Nominee</b>	<b>Motion</b>	<b>Second</b>
Faculty	Elkins	Hawkins	Clauss
Academic Staff	Richter	Clauss	Elkins
University Staff	Harris	Thoen	Clauss
Students	Nielsen	Morgan	Figueroa
Academic Dean	Sandheinrich	Milner	Harris

All passed. Appropriate abstentions were made.

4. Approval of Meeting Minutes from April 24, 2019: Morgan made a motion to approve the minutes with one correction for Grubivsieh. Richter seconded. Motion passed.
5. Approval of additional Fall 2019 and Spring 2020 Meeting Dates: Sandheinrich made a motion to approve the dates as presented in the agenda. Seconded by Stindt. Motion passed.
6. Chancellor's Update: Chancellor provided an update on the complexities of our current budget situation which will be detailed at a future meeting of the committee. Chancellor also provided a brief legislative update on pending bills in the legislature.
7. Provost's Update: Morgan mentioned two big initiatives: launch of Navigate which has been live for two weeks; and piloting 25 sessions of the first year seminar class.
8. CFO Update: no update was provided.
9. Strategic Planning Update: Morgan provided a brief update on the four pillars. Kate Parker will be distributing a campus-wide update very soon.
10. New Business: calendar of regular business was provided by Delgado.
11. Adjournment: Motion by Abler, seconded by Nowicki. Meeting adjourned at 1:48.

# Joint Planning and Budget

## Calendar of Regular Business

2019 – Establish Longstanding Structure for Strategic Planning

*IRAP – Institutional Research, Assessment, & Planning*

*CFO – Chief Financial Officer – Vice Chancellor for Administration and Finance*

### September

- Overview of State/System Budget Environment (CFO)
- Current/Projected Enrollment (IRAP)

### October

- Budget 101 (CFO)

### November

- University Advancement Activities (Vice Chancellor for Advancement)

### December

- UWL Compared to Other UW-System Comprehensives (IRAP)
  - o Large category and proportion comparisons (enrollment, budget, administrative)
  - o [UWSP, UWW, UWEC, UWSTOUT, UWO]

### January

- NA

### February

- Review of Capital Planning (CFO)

### March

- Report of Strategic Planning (SP) Metrics (IRAP/Provost) (*and SP activities? Or elsewhere, ongoing?*)

### April

- Promotion/Career Progression Budget Total (CFO)
- Common Systems Obligations (Obligations/Budget) (CFO)

### May

- NA

### Other Possible Items Dependent on When Data is Released

- IPEDS (Integrated Postsecondary Education Data System) comparisons (IRAP)
- CUPA comparisons (HR/CFO)



UWL Joint Planning & Budget Committee  
Meeting Minutes  
September 25, 2019  
325 Graff Main Hall  
Recorder: Sandheinrich

Present: Abler, Carlson (sub for Hansen), Clauss, Delgado, Elkins, Fiegel, Figueroa, Harris, Hawkins, Hayes, Kelly, Kunkel, Milner, Morgan, Myers, Nielsen, Nowicki, Sandheinrich, Smith, Stewart, Stindt, Thoen, Wycoff-Horn

Absent: Hansen, Hetzel, Kovari, Reichert, Richter

The meeting was called to order by Chair Delgado at 1:15 PM.

1. Approval of Meeting Minutes from September 11, 2019: Morgan made a motion to approve the minutes. Harris seconded. Motion passed.
2. Committee members introduced: Chris Stindt, Courtney Smith, Christina Hayes, Joshua Fiegel, Jake Myers
3. JPB Executive Committee – agenda items for this academic year:
  - i. What is the future of UWL's strategic plan and the position(s) associated with the plan? Longstanding Structure for Strategic Planning?
  - ii. What steps are being taken to plan for demographic changes and forecasted enrollment drops?
    - How does this impact what we wish to do on campus?
  - iii. How do our future funding decisions align with our strategic plan?
    - Does the Master plan align with the overall strategic plan?
  - iv. How much was spent last year in the Educational Assistance Program? If it was less than the original allotted amount (\$70-80K), what is being done with those funds?
  - v. What have the GQA reserves been used for in the past? Is there a policy as to how those funds are used/allocated? (e.g., focus on teaching/overloads, buildings, something else?)
  - vi. Is there a point in time, especially with the expected demographic decline, in which the budget is adjusted to fit past trends (i.e, international student and transfer student drop) and future projections (i.e., overall drop)?
4. Chancellor's Update: Chancellor discussed positive aspects of fall 2019 enrollment at UWL (record number of 1<sup>st</sup>-year students, increased diversity of student body) and challenges (decrease in number of international students, small reduction in retention, increased graduation)

that will affect FY21 budget. More detailed budget information will be presented by CFO Hetzel at a future meeting.

5. Provost's Update: Provost asked Vitaliano Figueroa to introduce Student Regent, Olivia Woodmansee. Strategic Planning update will be forthcoming from Kate Parker in a week or so.

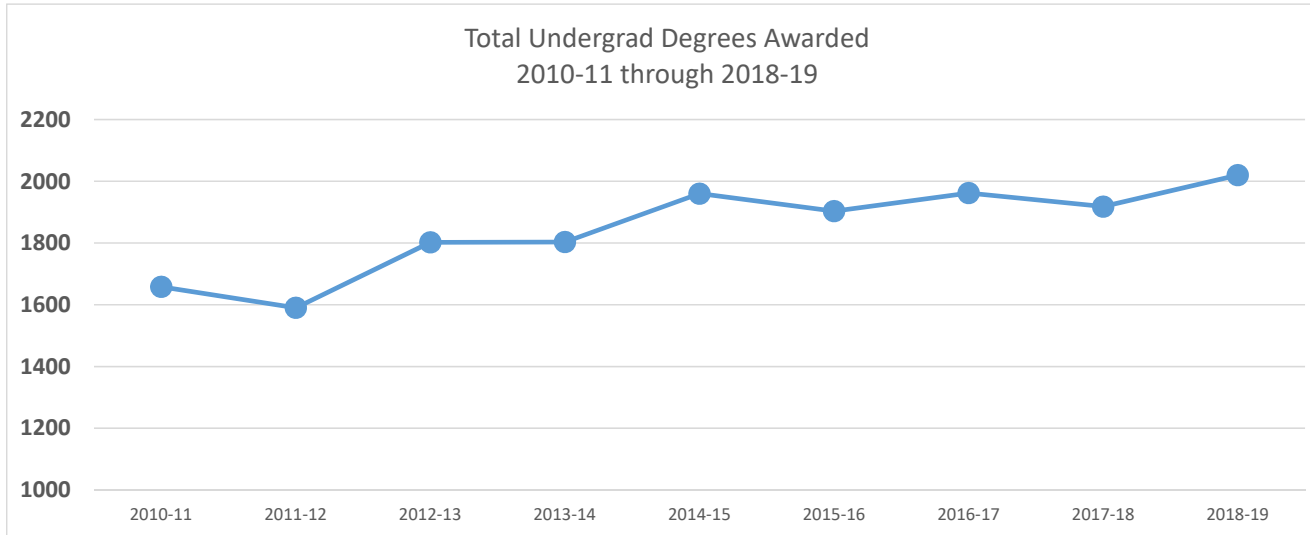
6. CFO's Update—N/A (Dr. Hetzel unable to attend)

7. New Business: Director of Institutional Research, Natalie Solverson, presented information on UWL enrollment trends (see attachments).

8. Regent Olivia Woodmansee announced the "All in Wisconsin" tour would be at UWL on October 2.

9. Meeting adjourned at 1:52 PM.

# UNIVERSITY *of* WISCONSIN LA CROSSE



Academic Year	Assoc Degrees Awarded	Bachelor Degree Awarded	Total Undergrad Degrees Awarded
2010-11	3	1655	1658
2011-12	3	1587	1590
2012-13	8	1794	1802
2013-14	21	1782	1803
2014-15	27	1933	1960
2015-16	17	1886	1903
2016-17	11	1951	1962
2017-18	14	1904	1918
2018-19	10	2010	2020

Source: UWL Student Information System, UWLIR\_ACAD\_DEGV and STDNT\_GRP5  
 Saved at: N:\IR\CAMPUS REQUESTS\Enrollment Management Activities\Degree Production Summer Analysis  
 ms

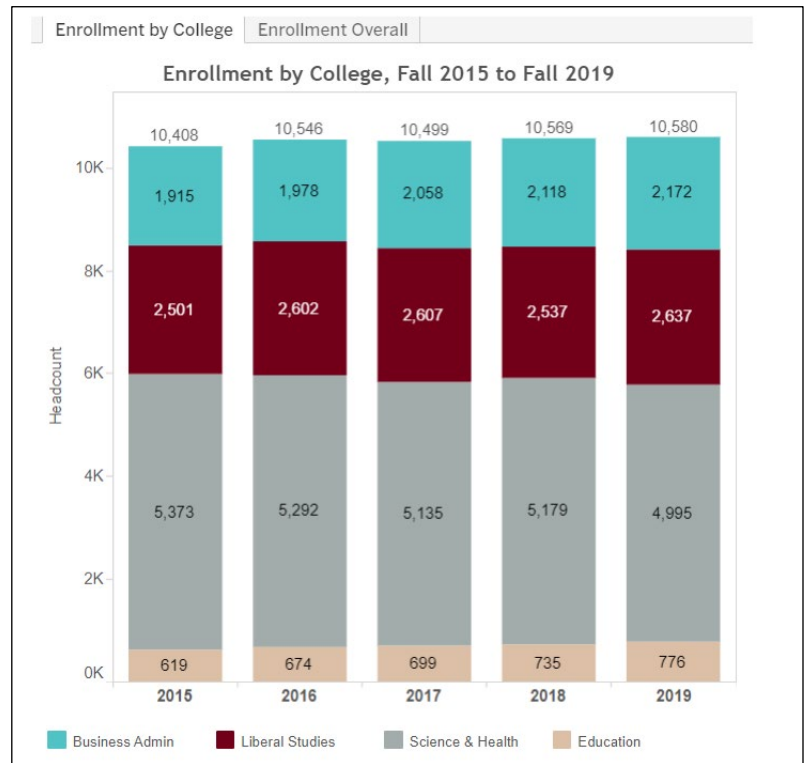
Office of Institutional Research, Assessment, and Planning  
**FALL 2019 ENROLLMENT SUMMARY – Sept 24, 2019**

As of Monday, September 16th, 10,580 students were enrolled at UWL for the fall semester. This is a record for locally-recorded enrollment.

We have a record incoming first-year class at 2,194 students, 44 students above the 2,150 target.

We also have record enrollment of U.S. students of color at 1,081, bringing us to just over 10% U.S. students of color as a campus.

We also are much closer to our aspirational goal of 1,000 graduate students enrolled at UWL, with a total this fall of 963 graduate students.



We awarded over 2,000 undergraduate degrees last year.

Some challenges:

- The growth in graduate education does not (generally) feed into the tuition pool and does not support GQA tuition. Graduate enrollment is up 96 students compared to fall 2018.
- Undergraduate enrollment is down 85 students compared to fall 2018.
- The summer/fall transfer target was 425, and we enrolled 392 summer/fall transfers. When this is taken into consideration with the first-year enrollment, we exceeded our targets by only 11 students.
- We graduated 102 more undergraduates in 2018-19 compared to 2017-18, which affects the subsequent fall enrollment.
- Retention of our fall 2018 first-year students was lower than last year; 83.7 percent compared to 86 percent for fall 2017 students. If we had retained students at the same rate as the prior year, we would have about 50 more degree-seeking undergraduates enrolled.
- Overall non-resident enrollments remain unchanged compared to last year (675 headcount), and international enrollments continue to decline. 116 international students are enrolled this fall, compared to 132 last fall, and 153 in fall 2017.

## UWL Full-Time Equivalent (FTE) by Fund Source and Residency, fall 2015 to fall 2019

### Undergraduate Fund Allocations

102 (includes the GQA 131 tuition): Tuition Pool, GQA, and Academic Initiatives obligations

128: Study Abroad

136: Remedial

189: online collaboratives, dual credit, ECCP

GRAD 131: Self-Supporting Programs

		2015	2016	2017	2018	2019	5 Year Change		
UGRD	102	WI Resident/MN Reciprocity	8,616.67	8,637.67	8,580.53	8,665.33	8,588.67	-0.3%	
		Non-Resident	480.33	450.87	433.73	420.67	434.67	-9.5%	
		<b>Total</b>	<b>9,097.00</b>	<b>9,088.53</b>	<b>9,014.27</b>	<b>9,086.00</b>	<b>9,023.33</b>	<b>-0.8%</b>	
	131	Non-Resident	0.80					-100.0%	
		<b>Total</b>	<b>0.80</b>					<b>-100.0%</b>	
	128, 136, 189	WI Resident/MN Reciprocity	135.60	127.60	113.93	109.13	93.07	-31.4%	
		Non-Resident	56.40	33.40	17.67	17.00	11.73	-79.2%	
		<b>Total</b>	<b>192.00</b>	<b>161.00</b>	<b>131.60</b>	<b>126.13</b>	<b>104.80</b>	<b>-45.4%</b>	
	<b>Total</b>		<b>9,289.80</b>	<b>9,249.53</b>	<b>9,145.87</b>	<b>9,212.13</b>	<b>9,128.13</b>	<b>-1.7%</b>	
	GRAD	102	WI Resident/MN Reciprocity	443.00	430.54	420.29	394.92	396.75	-10.4%
			Non-Resident	58.71	61.54	56.00	58.83	55.67	-5.2%
			<b>Total</b>	<b>501.71</b>	<b>492.08</b>	<b>476.29</b>	<b>453.75</b>	<b>452.42</b>	<b>-9.8%</b>
131		WI Resident/MN Reciprocity	57.42	64.58	67.17	94.92	116.17	102.3%	
		Non-Resident	53.33	50.83	75.50	68.25	69.08	29.5%	
		<b>Total</b>	<b>110.75</b>	<b>115.42</b>	<b>142.67</b>	<b>163.17</b>	<b>185.25</b>	<b>67.3%</b>	
128, 136, 189		WI Resident/MN Reciprocity	3.83	11.92	15.33	14.50	23.50	513.0%	
		Non-Resident	18.42	21.33	14.83	26.00	31.92	73.3%	
		<b>Total</b>	<b>22.25</b>	<b>33.25</b>	<b>30.17</b>	<b>40.50</b>	<b>55.42</b>	<b>149.1%</b>	
<b>Total</b>		<b>634.71</b>	<b>640.75</b>	<b>649.13</b>	<b>657.42</b>	<b>693.08</b>	<b>9.2%</b>		
<b>Total</b>		<b>9,924.51</b>	<b>9,890.28</b>	<b>9,794.99</b>	<b>9,869.55</b>	<b>9,821.22</b>	<b>-1.0%</b>		

UWL Office of Institutional Research, Assessment, and Planning, 24 Sept 2019; FTE here will not match FTE on DOR tables because some students have both undergrad and grad careers and due to truncating/rounding differences in Tableau. The underlying SCH production is the same on both worksheets.

## Student Credit Hours (SCH) by Fund Source and Residency, fall 2015 to fall 2019

		2015	2016	2017	2018	2019	5 Year Change		
<b>UGRD</b>	102	WI Resident/MN Reciprocity	129,250	129,565	128,708	129,980	128,830	-0.3%	
		Non-Resident	7,205	6,763	6,506	6,310	6,520	-9.5%	
		<b>Total</b>	<b>136,455</b>	<b>136,328</b>	<b>135,214</b>	<b>136,290</b>	<b>135,350</b>	<b>-0.8%</b>	
	128, 136, 189	WI Resident/MN Reciprocity	2,034	1,914	1,709	1,637	1,396	-31.4%	
		Non-Resident	846	501	265	255	176	-79.2%	
		<b>Total</b>	<b>2,880</b>	<b>2,415</b>	<b>1,974</b>	<b>1,892</b>	<b>1,572</b>	<b>-45.4%</b>	
	131	Non-Resident	12					-100.0%	
		<b>Total</b>	<b>12</b>					<b>-100.0%</b>	
	<b>Total</b>		<b>139,347</b>	<b>138,743</b>	<b>137,188</b>	<b>138,182</b>	<b>136,922</b>	<b>-1.7%</b>	
	<b>GRAD</b>	102	WI Resident/MN Reciprocity	5,316	5,167	5,044	4,739	4,761	-10.4%
			Non-Resident	705	739	672	706	668	-5.2%
			<b>Total</b>	<b>6,021</b>	<b>5,905</b>	<b>5,716</b>	<b>5,445</b>	<b>5,429</b>	<b>-9.8%</b>
128, 136, 189		WI Resident/MN Reciprocity	46	143	184	174	282	513.0%	
		Non-Resident	221	256	178	312	383	73.3%	
		<b>Total</b>	<b>267</b>	<b>399</b>	<b>362</b>	<b>486</b>	<b>665</b>	<b>149.1%</b>	
131		WI Resident/MN Reciprocity	689	775	806	1,139	1,394	102.3%	
		Non-Resident	640	610	906	819	829	29.5%	
		<b>Total</b>	<b>1,329</b>	<b>1,385</b>	<b>1,712</b>	<b>1,958</b>	<b>2,223</b>	<b>67.3%</b>	
<b>Total</b>		<b>7,617</b>	<b>7,689</b>	<b>7,790</b>	<b>7,889</b>	<b>8,317</b>	<b>9.2%</b>		
		<b>146,964</b>	<b>146,432</b>	<b>144,978</b>	<b>146,071</b>	<b>145,239</b>	<b>-1.2%</b>		

UWL Office of Institutional Research, Assessment, and Planning, 24 Sept 2019; FTE here will not match FTE on DOR tables because some students have both undergrad and grad careers and due to truncating/rounding differences in Tableau. The underlying SCH production is the same on both worksheets.

**UWL Joint Planning & Budget Committee**  
**Meeting Minutes**  
**October 9, 2019**  
**325 Graff Main Hall**  
**Recorder: Richter**

Present: Abellera, Abler, Clauss, Delgado, Dickmeyer (for Wycoff-Horn), Elkins, Fiegel, Grunwald (for Morgan), Hansen, Harris, Hawkins, Hayes, Hetzel, Kelly, Kovari, Kunkel, Milner, Myers, Nielsen, Nowicki, Reichert, Richter, Sandheinrich, Smith, Stewart, Stindt, Thoen

Absent: Figueroa, Morgan, Wycoff-Horn

The meeting was called to order by Chair Delgado at 1:15 PM.

1. Approval of Meeting Minutes from September 25, 2019: Harris made a motion to approve the minutes. Clauss seconded. Motion passed.

2. Announcements/Updates-

1. Budget 101 will be moved to November 20<sup>th</sup>

a. JBP Executive Committee – agenda items for this academic year:

- i. What is the future of UWL's strategic plan and the position(s) associated with the plan? Longstanding Structure for Strategic Planning?
- ii. What steps are being taken to plan for demographic changes and forecasted enrollment drops?
  - How does this impact what we wish to do on campus?
- iii. How do our future funding decisions align with our strategic plan?
  - Does the Master plan align with the overall strategic plan?
- iv. How much was spent last year in the Educational Assistance Program? If it was less than the original allotted amount (\$70-80K), what is being done with those funds?
- v. What have the GQA reserves been used for in the past? Is there a policy as to how those funds are used/allocated? (e.g., focus on teaching/overloads, buildings, something else?)
- vi. Is there a point in time, especially with the expected demographic decline, in which the budget is adjusted to fit past trends (i.e, international student and transfer student drop) and future projections (i.e., overall drop)?

2. Chancellor's Update – None (Chancellor at Regents meeting)

3. Provost's Update – None (Provost at Regents meeting)

4. CFO's Update –

- Dr. Hetzel shared that we would not be making decisions today, but he would be presenting some challenges for FY21
- Shared PowerPoint that included highlights, enrollment, financial challenges, and budget planning for FY21

5. Strategic Planning Update-None

6. New Business –

**FY21 Budget Planning Forecast**

- Tuition shortfall of \$700K to \$1M
- Seg Fees \$88.7K decrease
- Academic Initiatives \$14K decrease
- These are “not a crisis” and are “very manageable”
- Result of lower number of transfer students, increased summer credits, but lower summer revenue, and increased fringe benefits costs
- How do we adjust?
  - Gave some history of Growth, Quality, and Access
  - This level of adjustment is approximately 10 instructional positions and 2 non-instructional positions
  - See table for possible strategies (some possibilities include: increasing J Term and summer enrollment, improving retention, increasing First Year student target to 2200, reduce remissions for non-resident students, increase Extended Learning revenue, and reallocate Outcomes Based Funding)
  - Questions and debate about common systems costs, vacant position salary savings, the credit plateau, use of reserves or lapses.
    - Dr. Hetzel explained there are no lapses for this or next year and the use of reserves should only be used in current year, not for forecasted shortfalls.
    - Although we have \$32M in reserves, we will not do this as it is bad fiscal management. We cannot kick the can down the road. We will right size our budget.
  - This shortfall will be reviewed during the next 3 months by IR, Budget, Provost, and Deans.
  - Good discuss on the use of reserves.
  - Questions about increasing fees.
    - BOR must approve new fees. Concerns about affordability and access.
  - Budget Office is reviewing summer credit fees.
  - We will need to have a decision by 2/1/20.
  - We will continue a year long process for planning future budgets and enrollment.
  - Outcomes Based Funding may be adjusted.

**FY20 Soaring Eagle Scholarship Funding**

- Started 7 years ago to be more competitive.
- One time budget item using left over money
- Key element in the success of recruiting high achieving students
- \$1-3K scholarships depending on academic profile
- Other UW schools offering more (UWRF has a \$4K scholarship)



- Need to review 4 options presented (see table)
- Decision needed by the end of the semester.

Some additional discussion followed regarding the importance of JPB and other groups on campus to learn this information so that we can be strategic in our budget and planning. Chair Delgado referred back to the JPB Executive Committee's agenda items for the year.

7. Adjournment- Motion by Abler. Seconded by Stint. Passed. Adjourned at XXXX
- 8.

**DRAFT FOR DISCUSSION ONLY**

**Table 1: FY21 Tuition & Segregated Fee Revenue Forecast**

Item	Amount
<b>FY21 Fund 131 GQA Tuition Revenue Adjustments</b>	
Fall & Spring Transfer Students Decrease	455,040
Summer Session Decrease	56,159
ESL Tuition Rate Adjustment	9,262
J-Term Decrease	81,722
2% Pay Plan - GQA Positions	212,553
Faculty Promotion & Career Progression - GQA Positions	60,000
Physician Assistant Program FTE	25,000
Fringe Benefit Increase	120,000
<b>Total</b>	<b>1,019,736</b>
<b>FY21 Segregated Fee Revenue Decrease</b>	
Fall & Spring Transfer Students Decrease	41,030
Graduate GPR Enrollment Decrease	32,824
Summer Session Decrease	7,104
J-Term Decrease	7,559
<b>Total</b>	<b>88,517</b>
<b>FY21 Academic Initiatives Tuition Revenue Adjustments</b>	<b>14,063</b>

**Table 2: FY21 Fund 131 GQA Budget Reduction Summary**

Item	Amount
<b>FY21 GQA Budget Reduction</b>	<b>1,019,736</b>
Instructional Positions and S&E (85%)	866,776
Non-Instructional Positions and S&E (15%)	152,960
<b>Total</b>	<b>1,019,736</b>
<b>FY21 GQA Instructional Position Reduction</b>	
Salary (Approx. 10 FTE)	619,125
Fringe Benefits	247,650
<b>Total</b>	<b>866,776</b>
<b>FY21 Non-Instructional Position Reduction</b>	
Salary (Approx. 2 FTE)	109,257
Fringe Benefits	43,703
<b>Total</b>	<b>152,960</b>

**Table 3: FY21 Budget Resource Offset Strategies**

Item	Amount
<b>FY21 Budget Resource Strategies</b>	
J-Term Enrollment	t/b/d
Summer Session Enrollment	t/b/d
Retention Initiatives (85% = 25 students)	189,600
Increase Fall '19 First Year student target by 25 to 2,200	189,600
Remissions Reduction for decrease in NR Undergraduate & Res/NR Graduate students	121,080
Extended Learning Collaborative Revenue	t/b/d
Outcomes Based Funding Reallocation	t/b/d
<b>Total</b>	<b>500,280</b>

**DRAFT FOR DISCUSSION ONLY**

**Table 1: FY19 Carryover Summary**

Item	Amount
<b>FY19 GPR Carryover to FY20</b>	<b>191,487</b>
<b>FY20 Carryover Obligations</b>	
UWS Employee Health Insurance	53,293
ADA Support Services (Interpreter 1 position)	42,500
Soaring Eagle Scholarships	250,000
<b>Total</b>	<b>345,793</b>
<b>FY20 Carryover Shortfall</b>	<b>(154,306)</b>

**Table 2: Soaring Eagle Scholarship Funding Options**

1. Reduce Soaring Eagle or OBF scholarship funding by \$154,306		
2. PR Balance Financial Aid Assessment 1.45%		
→ Balances > \$5,000 = \$10,621,456		
→ Account Exclusions: Allocable Seg Fees, IEE Exchange, Facility Projects, Special Course Fees & Start-up		
3. GPR Assessment to Divisions:		
<b>Division</b>	<b>Amount</b>	
Chancellor	783	
Academic Affairs	103,974	
Administration & Finance	41,421	
Diversity & Inclusion	2,507	
Student Affairs	3,134	
University Advancement	2,487	
<b>Total</b>	<b>154,306</b>	
4. Eliminate FY21 1% Lump Sum Payment		

# University of Wisconsin-La Crosse



## UWL Budget Overview Joint Planning & Budget

October 9, 2019



# Fall 2019 Highlights at UWL

- Record Enrollment → 10,580
- First-Year Students → 2,194
- Record for Students of Color → 1,081
- Graduate Students → 963
- Degrees Awarded → 2,020

# A Look at UWL Enrollment

- Undergrad → 85 Less
- International → 16 Less
- Transfer → 392 v. 425
- Retention → 86% to 84%

# Financial Challenges

- 10 Yr. Tuition Freeze
- UWS Restructuring
- WI Demographics
- Sustaining Enrollment
- Faculty/Staff Recruitment & Retention

# Budget Planning for FY21

- Tuition → \$700K to \$1M Shortfall
- Seg Fees → \$88,717 Decrease
- Academic Initiatives → \$14,063 Decrease



Fname	Lname	Email	Group	Dept/Program
Abbi AJ	Clauss	<a href="mailto:aclauss@uwlax.edu">aclauss@uwlax.edu</a>	A Staff	Campus Climate
Christina	Hayes	<a href="mailto:chayes@uwlax.edu">chayes@uwlax.edu</a>	A Staff	Financial Aid
Christophre	Stindt	<a href="mailto:cstindt@uwlax.edu">cstindt@uwlax.edu</a>	A Staff	Academic Advising
Courtney	Smith	<a href="mailto:csmith2@uwlax.edu">csmith2@uwlax.edu</a>	A Staff	IT
Tony	Hansen	<a href="mailto:thansen2@uwlax.edu">thansen2@uwlax.edu</a>	A Staff	Residence Life
Troy	Richter	<a href="mailto:trichter@uwlax.edu">trichter@uwlax.edu</a>	A Staff (Exec Cmte)	Residence Life
Barbara	Stewart	<a href="mailto:bstewart@uwlax.edu">bstewart@uwlax.edu</a>	Admin	Diversity & Inclusion
Betsy	Morgan	<a href="mailto:bmorgan@uwlax.edu">bmorgan@uwlax.edu</a>	Admin	Academic Affairs
Bob	Hetzel	<a href="mailto:bhetzel@uwlax.edu">bhetzel@uwlax.edu</a>	Admin	Admin & Finance
Greg	Reichert	<a href="mailto:greichert@uwlax.edu">greichert@uwlax.edu</a>	Admin	Advancement
Karl	Kunkel	<a href="mailto:kkunkel@uwlax.edu">kkunkel@uwlax.edu</a>	Admin	CASSH
Laura	Milner	<a href="mailto:lmilner@uwlax.edu">lmilner@uwlax.edu</a>	Admin	CBA
Marcie	Wycoff-Horn	<a href="mailto:mwycoff-horn@uwlax.edu">mwycoff-horn@uwlax.edu</a>	Admin	SOE
Vitaliano	Figueroa	<a href="mailto:vfigueroa@uwlax.edu">vfigueroa@uwlax.edu</a>	Admin	Student Affairs
Mark	Sandheinrich	<a href="mailto:msandheinrich@uwlax.edu">msandheinrich@uwlax.edu</a>	Admin (Exec Cmte)	CSH
Joe	Gow	<a href="mailto:jgow@uwlax.edu">jgow@uwlax.edu</a>	Chancellor	Chancellor
John	Kovari	<a href="mailto:jkovari@uwlax.edu">jkovari@uwlax.edu</a>	Faculty	CASSH
Kelly	Nowicki	<a href="mailto:knowicki@uwlax.edu">knowicki@uwlax.edu</a>	Faculty	CBA
Mike	Abler	<a href="mailto:mabler@uwlax.edu">mabler@uwlax.edu</a>	Faculty	CSH
Susan	Kelly	<a href="mailto:skelly@uwlax.edu">skelly@uwlax.edu</a>	Faculty	CSH
Tavarie	Hawkins	<a href="mailto:thawkins@uwlax.edu">thawkins@uwlax.edu</a>	Faculty	CSH
Enilda	Delgado	<a href="mailto:edelgado@uwlax.edu">edelgado@uwlax.edu</a>	Faculty (Chair)	CASSH
Becki	Elkins Nesheim	<a href="mailto:belkins@uwlax.edu">belkins@uwlax.edu</a>	Faculty (Exec Cmte)	SAA
Jake	Myers	<a href="mailto:myers2946@uwlax.edu">myers2946@uwlax.edu</a>	Student	Student Association (UGRD)
Joshua	Fiegel	<a href="mailto:fiegel.joshua@uwlax.edu">fiegel.joshua@uwlax.edu</a>	Student	Student Association (UGRD)
Dana	Nielsen	<a href="mailto:nielsen.dana@uwlax.edu">nielsen.dana@uwlax.edu</a>	Student (Exec Cmte)	Student Association (UGRD)
Laura	Abellera	<a href="mailto:abellera.laur@uwlax.edu">abellera.laur@uwlax.edu</a>	Student GRD	Student Association (GRD)
Kathy	Thoen	<a href="mailto:kthoen@uwlax.edu">kthoen@uwlax.edu</a>	U Staff	CASSH
Brandon	Harris	<a href="mailto:bharris@uwlax.edu">bharris@uwlax.edu</a>	U Staff (Exec Cmte)	IT
John	Jax	<a href="mailto:jjax@uwlax.edu">jjax@uwlax.edu</a>	Ex-officio	Library
Kristin	Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>	Ex-officio	Budget
Natalie	Solverson	<a href="mailto:nsolverson@uwlax.edu">nsolverson@uwlax.edu</a>	Ex-officio	Institutional Research
Sandy	Grunwald	<a href="mailto:sgrunwald@uwlax.edu">sgrunwald@uwlax.edu</a>	Ex-officio	Academic Affairs

## UWL Joint Planning and Budget Committee

### Meeting Minutes

October 23, 2019

325 Graff Main Hall

Recorder: K Buchholz & C Carlson

**Present:** L Abellera, M Ablar, AJ Clauss, E Delgado, B Elkins, J Fiegel, V Figueroa, K Buchholz (for T Hansen), B Harris, T Hawkins, C Hayes, S Kelly, J Kovari, K Kunkel, L Milner, B Morgan, J Myers, D Nielsen, K Nowicki, G Reichert, M Sandheinrich, C Carlson (for C Smith), B Stewart, C Stindt, K Thoen, M Wycoff-Horn.

**Absent:** B. Hetzel, T Richter.

**The meeting was called to order by Chair Delgado at 1:15 PM.**

**Last Meeting Minutes were presented.**

- Amendment suggested by Michael Ablar – the level of adjustment should be “8-10 instructional positions and 2 NIAS positions”.
- Motion to approve by K Nowicki, seconded by B Harris.

### Announcements/Updates

1. November 20<sup>th</sup> meeting will be Budget 101, Lisa Klein and Bob Hetzel are working to video the meeting for those who cannot attend.
2. Chancellor Update
  - a. Vice Chancellor Hetzel had hip surgery this past Monday and will likely be out for a month.
  - b. Although our first year student enrollment was a record high, core enrollment is down.
  - c. Tuition is not likely to go up anytime soon with the continuing tuition freeze, and state funding support probably will not increase, so we will need to collaborate on our own how to tackle the upcoming shortages at UWL.
3. Provost Update: How do we cut instructional lines? 131 vs 102 funded positions?
  - a. Enrollment Management Council met 10/13/19 and approved Fall 2020 targets
    - i. First year students: 2175 for Fall 2020
      1. This number does not include the FY21 Budget offset strategy option to increase first year enrollment by 25.
    - ii. Transfer students: 375 for Fall 2020
  - b. Cutting 8-10 Instructional Positions for FY21 GQA Budget Reduction
    - i. The approximately \$600,000 cut will be distributed throughout the five academic units. This number includes salary and fringe.
      1. The last time we had a cut like this, the distribution was based on Student credit hours.
      2. This time they are looking at student credit hours as well as the base budgets for each unit and their overall percentage of GQA funds.
      3. The goal is to make these cuts in a way that has the least impact to the students.
      4. When looking at workload based on student credit hours, we compare versus ourselves (department vs. department) as well as comparing against our peers (Delaware Data).
      5. See link for datalinks for UWL Workload Grid comparing Major/Minor to SCH productions and the Delaware Comparison:

<https://uwlax.sharepoint.com/sites/INSTITUTIONALRESEARCH/SitePages/Home.aspx>

6. With the cut in instructional positions, estimate a 10% increase in class sizes.
- ii. Where the cuts are made within the academic units will be a College/Dean level decision.
  1. Each of the five units/colleges received an amount or percent of base budget to cut and will decide what areas of their unit that it will come from and is best for them.
4. Kate Parker – Strategic Planning Update
  - a. New website for Strategic Plan. See attachment JPB Feedback Session.
  - b. Updates on each of the four pillars
    - i. Community Engagement
      1. New Community Engagement Coordinator position filled by Lisa Klein.
    - ii. Equity and Diversity
      1. Nearly every department on campus has an Equity Liaison.
      2. Diversity Training added to employee annual training requirements.
      3. Inclusive Teaching
    - iii. Transformational Education
      1. First Year Seminar is piloting this year.
      2. The General Education workgroup has finalized their proposal for revision of the General Education program.
      3. Internationalization of curriculum and campus
    - iv. Investing in Our People
      1. Employee Engagement Action Team
      2. Employee Engagement surveys should be continued regularly
  - c. May 2020 scenarios
    - i. Kate Parker’s position term ends May 2020.
    - ii. Options moving forward will need to be discussed.
  - d. Considerations for implementation phase
    - i. Continue focus on initiative that have started and are on-going
    - ii. Working workloads into departments and positions.
    - iii. Accountability
      1. Advisory boards for each pillar
      2. Continue to report
    - iv. Celebrate the success and keep the momentum
    - v. Monitor growth by tracking initiatives
  - e. Questions from Kate
    - i. Would campus like to see a Strategic Planning report?
    - ii. What type of feedback needs to be solicited?
    - iii. Additional things to improve the transition process in the spring
5. University Advancement Update with Greg Reichert. See attachment - JPB Advancement Update 2019.
  - a. UWL’s Foundation/University model is similar to our comprehensive peers.
  - b. Lisa Klein hired as new Community Engagement Coordinator.
  - c. Development Activities

- i. The “Share the La Crosse Experience” scholarship campaign ends 12/31/19.
        - 1. As of 8/31/19 total raised was \$17.6 Million, \$2.6 million over the \$15 million goal.
      - ii. The next campaign is already in the works and will be a comprehensive campaign with a likely goal near \$40 Million.
        - 1. \$7.5 million has already been committed toward the next campaign.
      - iii. Implementing a new database/financial software, Raiser’s Edge.
      - iv. \$27.2 million in investments , no debt, and \$1.2 million in scholarships in 2019
      - v. Working to find solutions to the VOIP phone system and website as neither is PCI Compliant and payments cannot be accepted on either.
      - vi. Received record gift from the Menard family for \$2.1 Million.
      - vii. Employee campaign being planned for Fall, 2020.
    - d. Alumni Association
      - i. Strategic Priorities
      - ii. The Alumni Association Big Birthday Bash is this weekend. In the association’s 50 years, we have only had three directors.
      - iii. Distinguished Alumni Award; new plaque in the Cleary Center
      - iv. Send out the Lantern twice a year, emails, and hold events.
6. Educational Assistance usage update with Kristin Stanley. See attachment - Budget 20 Educational Assistance FY19.
  - a. 25-30 individuals used Educational Assistance funds over the past year, totaling approximately \$85K.
7. Announcements
  - a. Any ideas for other options for budget offsets email Bob Hetzel or Enilda Delgado.
  - b. Executive Board working to develop a task force for anticipated demographic drop.
  - c. Bob Hetzel has developed a near term four year forecast budget that he will share during the December meeting.
  - d. OPAP Campus Growth Projections
    - i. OPAP came up with their own projections
    - ii. Used each campuses unique demographics
    - iii. System believes the nontraditional and equity increase in enrollment will be more robust than we project.
    - iv. UWL does not have the infrastructure to focus on growing our nontraditional student body.
    - v. Race in the Heartland – Equity study
    - vi. If Madison accepts more resident students, it would directly affect UW-La Crosse and UW-Oshkosh.
      - 1. We would need to relook at our target.
      - 2. We need to maintain or edge over the competition.
8. Motion to adjourn by E Delgado, seconded by Chris Stindt at 2:55 PM.

**Table 1: FY19 Educational Assistance Expenditures**

Employee Type	Division	Amount
<b>Summer 2018</b>		
University Staff	SOE	2,100.00
NIAS	SOE	2,100.00
NIAS	AA	1,427.79
University Staff	A&F	1,427.79
NIAS	AA	1,352.70
University Staff	A&F	948.09
NIAS	A&F	951.86
NIAS	AA	1,427.79
IAS	CSH	2,100.00
University Staff	AA	2,379.65
University Staff	CASSH	1,427.79
IAS	CSH	1,427.79
NIAS	AA	402.60
Faculty	CSH	1,714.38
University Staff	CASSH	1,427.79
NIAS	UA	1,427.79
<b>Subtotal</b>		<b>24,043.81</b>
<b>Fall 2018</b>		
NIAS	D&I	1,323.00
University Staff	SOE	2,100.00
NIAS	SOE	2,100.00
NIAS	AA	1,427.79
University Staff	AA	787.29
University Staff	A&F	1,427.79
NIAS	AA	1,352.00
NIAS	SA	1,011.00
University Staff	A&F	948.09
NIAS	A&F	1,427.79
NIAS	A&F	1,427.79
NIAS	AA	1,427.79
IAS	CSH	2,100.00
University Staff	CASSH	1,427.79
IAS	CSH	1,427.79
NIAS	D&I	3,500.00
University Staff	CASSH	1,427.79
NIAS	DI	1,324.89
NIAS	UA	1,427.79
NIAS	D&I	726.00
University Staff	AA	2,379.65
NIAS	AA	268.40
NIAS	AA	268.40
<b>Subtotal</b>		<b>33,038.83</b>
<b>Winter Session</b>		
University Staff	A&F	1,427.79
University Staff	A&F	948.09
NIAS	A&F	475.93
<b>Subtotal</b>		<b>2,851.81</b>
<b>Spring 2019</b>		
IAS	CSH	1,125.00
University Staff	SOE	2,100.00
NIAS	SOE	2,100.00
NIAS	AA	1,427.79
University Staff	AA	787.29
University Staff	A&F	1,427.79
NIAS	AA	1,352.70
NIAS	SA	1,011.00
University Staff	A&F	948.09
NIAS	A&F	1,903.72
NIAS	AA	1,427.79
IAS	CSH	2,100.00
NIAS	SA	2,100.00
University Staff	AA	2,379.65
University Staff	CASSH	1,427.79
IAS	CSH	1,427.79
University Staff	CASSH	1,427.79
<b>Subtotal</b>		<b>26,474.19</b>
<b>Total</b>		<b>86,408.64</b>

**Table 2: FY19 Educational Assistance Expenditures by Employee Classification**

Employee Type	Percentage	Amount
University Staff	38.29%	33,083.79
NIAS	46.18%	39,902.10
IAS	13.55%	11,708.37
Faculty	1.98%	1,714.38
<b>Total</b>	<b>100.00%</b>	<b>86,408.64</b>

**Table 3: Educational Assistance Budget**

Item	Amount
<b>Fiscal Year 2018</b>	
Budget	37,000.00
Less: Expenses	(15,080.87)
<b>FY19 Carryover Balance</b>	<b>21,919.13</b>
<b>Fiscal Year 2019</b>	
FY19 Carryover	21,919.13
Budget	85,607.22
Less: FY18 Expenses	(86,408.64)
<b>FY20 Carryover Balance</b>	<b>21,117.71</b>

**Table 4: Educational Assistance Budget Funding Sources**

Item	Fund No.	Amount
UWS FY15-17 Lapse Return Funds	102	74,000
Continuing Education	104/132/189	1,039
Auxiliary & Segregated Fee Units	128	8,172
General Operations	136	1,149
Financial Aid Overhead	144/147	650
Federal Indirect Cost Funds	150	304
Gift Funds	233	293
<b>Total</b>		<b>85,607</b>





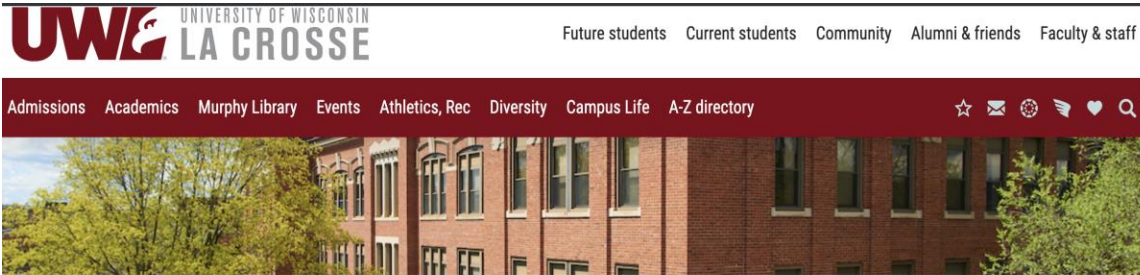
# Strategic Planning 2020

Kate Parker  
Special Assistant to the Provost-SP



# SP Update October 2019

An overview of activities since January 2019



## Sustaining Excellence

The UWL Strategic plan is comprised of 4 pillars which focus on students, community and employees.

See the latest update: [January 2019 PDF](#)

[VIEW THE REPORTS](#)

[GET THE UPDATES](#)

[LEARN ABOUT UWL](#)

INCREASING  
COMMUNITY  
ENGAGEMENT

UWL embraces

ACHIEVING  
EXCELLENCE  
THROUGH EQUITY  
& DIVERSITY

INVESTING IN OUR  
PEOPLE

UWL recognizes that  
our status as a high

ADVANCING  
TRANSFORMATIONAL  
EDUCATION

High-impact teaching &

### Community Engagement

Greg Reichert & Lisa Klein

#### New position: Community Engagement Coordinator

*Forthcoming in Fall 2019*

Managing data associated with community engagement (partnerships et al.)  
Collaboration with CATL and campus on service learning

### Equity & Diversity

Barbara Stewart & Roger Haro

#### Equity Liaison initiative

- near-complete roster
- first of two Gatherings (Oct 2019; Sp 2020)
- more robust communications

#### Inclusive Teaching Practices

- Inclusive Teaching/Supervisor/EQL Certificates
- Diversity Training (a collaboration with EEAT)
- Inclusive Teaching Institute (Summer 2019)

#### Restorative Justice

- Training scheduled for Sp 2020

### Transformational Education

Betsy Morgan & Tim Dale

#### General Education Reform

- FYS (~100 instructors trained or in training)
- GEWG (proposal vetted by SEC & GEC)
- Assessment (AAWG; proposal vetted by SEC & GEC)

#### International Ed

- Internationalization of the curriculum & campus (ACE Laboratory)

#### Graduate Studies

- Graduate Program Director Workload and Compensation Report
- Interdisciplinary Projects Grants
- Orientation and Resource Guide

#### Advising

- Eagle Advantage (core competencies)
- First year proactive student advising (Navigate)

### Investing in Our People

Bob Hetzel & John Acardo

#### EEAT (Employee Engagement Action Team)

Diversity trainings (see E&D)  
Supervisor resources  
Employee Engagement Survey (continue to create action items)  
**Employee Compensation**

# May 2020 Scenarios (Developed with JPB Exec November 2018)

#3

Office of Strategic Planning

Dedicated  
Strategic Planning  
position at  
Vice Chancellor level,  
reporting to Chancellor.

#2

Existing Resources (Plus+)

Make Different Use  
of Existing Positions and  
Offices

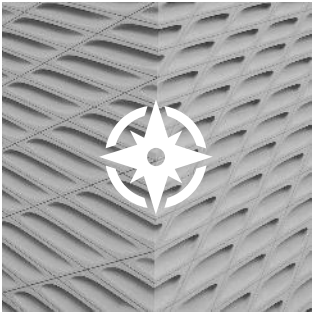
#1

SAP-SP

Continue  
Special Assistant to the  
Provost Position through  
2021, then reassess



# Considerations as we move into Implementation Phase (SP 2020-beyond)



## Focused progress

Prioritizing initiatives that are ongoing, well-developed, with clear structures and reporting lines.



## Workload

Recognizing that each initiative has a workload impact; staying within workload/position descriptions where possible.



## Accountability

Transparency & clarity in determining which person and/or unit is accountable for initiatives, and to whom.



## Celebration

Maintaining positivity for all that has been accomplished, and keeping the momentum going.



## Growth

Keeping track of action steps not completed so that the next phase of SP can build on the last.



# Pillars

Each pillar will be advised by a board (or series of boards) in order to ensure accountability, transparency, and regular updates on initiatives.

## Increasing Community Engagement



**Advisory: Community Engagement Council**



## Investing in our People



**Advisory: Joint Planning & Budget**



## Achieving Excellence through Equity & Diversity



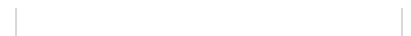
**Advisory: D&I Directors Council**



## Transformational Education



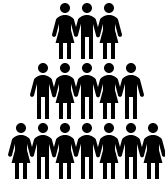
**Various advisory groups**





# Soliciting Feedback

Once plans are in place, visit various campus constituencies for feedback.



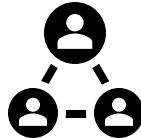
## Governance Groups

Visiting governance groups in early Spring 2020.



## Campus

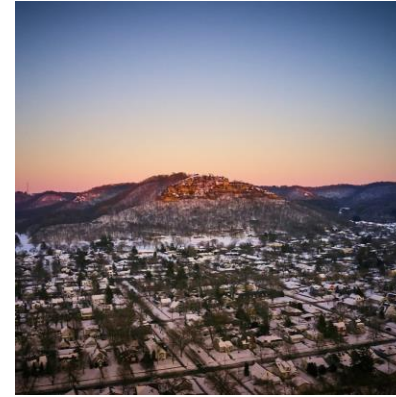
Distribute implementation plans & draft of 2020 *Sustaining Excellence* report to campus for feedback in March 2020



## Departments/Units

Visit campus units to discuss; encourage units to consider implementation plans in unit-specific strategic plans.





- What elements would you like to see in a final SP report?
- Is there any additional feedback I should be soliciting?
- What am I missing? What additional steps might improve the process in the spring?

# Questions



## University Relations

1700 Van Hise Hall, 1220 Linden Drive, Madison, WI 53706  
wisconsin.edu • facebook.com/uwsystem • twitter.com/uwsystem

[universityrelations@uwsa.edu](mailto:universityrelations@uwsa.edu) or 608-263-1700

FOR IMMEDIATE RELEASE

October 17, 2019

News Release

# UW System preliminary 2019 enrollment drops slightly in wake of demographic trends

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MADISON, Wis.—Reflecting state and national demographic trends, the University of Wisconsin System's preliminary enrollment for fall 2019 is 167,186 students, an overall 2.6 percent decline from last year.

Nationally, higher education enrollments are down. These modest enrollment reductions are not unique to the UW System amid trends of fewer high school graduates and low unemployment rates in a strong economy.

Despite the decline, the UW System share of overall higher education enrollment in Wisconsin has increased since 2010, from 48.6 percent to 50.8 percent in 2018.

"These preliminary enrollment numbers were not unexpected given the demographic trends," said UW System President Ray Cross. "It demonstrates more than ever the need for investing in student success and building the talent pipeline to deliver the graduates Wisconsin needs."

UW System produced a record 36,825 graduates in 2017-18.

"Our graduation numbers are a bright spot for employers and communities and provide a solution to the future career readiness challenges facing Wisconsin," said UW System Regent President Andrew S. Petersen. "As we engage with our business partners as part of the All In Wisconsin tour, we repeatedly hear that they are counting on our student graduates. Our success in retaining, recruiting, and graduating students is absolutely critical to all of us."

Overall, preliminary fall 2019 enrollment in the UW System declined by 4,450 students compared to 2018.

The data also shows:

- Preliminary overall enrollment at five four-year campuses increased;
- Graduate student enrollment increased by 1.6 percent, to 24,717, an increase of 395 students;
- New freshman headcount enrollment fell 0.8 percent, or 234 enrollments, to 28,319;
- Overall headcount enrollment across all UW System branch campuses dropped to 7,286, a decrease of 25.2 percent.

Following restructuring and full integration of campuses, UW System institutions are now including two-year student enrollments along with four-year student enrollments for the first time. Previously, UW Colleges reported two-year student enrollments.

"We undertook restructuring to enable two-year campuses to maintain a presence in communities around Wisconsin and to provide students expanded opportunities," Cross said. "Amid a strong jobs market, enrollment in colleges traditionally dips. However, we have succeeded in accreditation and a guaranteed transfer policy, which set these campuses up for future success. We continue our efforts to attract and retain students at all levels across the System."

[Find the 2019 preliminary enrollment figures here.](#)

###

*The University of Wisconsin System serves approximately 170,000 students. Awarding nearly 37,000 degrees annually, the UW System is Wisconsin's talent pipeline, putting graduates in position to increase their earning power, contribute to their communities, and make Wisconsin a better place to live. More than 80 percent of in-state UW System graduates stay in Wisconsin five years after earning a degree. The UW System provides a 23:1 return on state investment. UW System institutions also contribute to the richness of Wisconsin's culture and economy with groundbreaking research, new companies and patents, and boundless creative intellectual energy.*

**MEDIA CONTACT:**

Mark Pitsch, UW System  
608-265-3419, [mpitsch@uwsa.edu](mailto:mpitsch@uwsa.edu)  
[universityrelations@uwsa.edu](mailto:universityrelations@uwsa.edu)

## Fall Semester Enrollment Comparison with Prior Year

Preliminary

This table is a report of the Fall 2019 Preliminary Enrollment for the University of Wisconsin System. It includes enrollment for each campus and provides breakouts for main and branch campuses. All figures are preliminary and may be subject to some change as they are finalized.

	Total Headcount			
	2018 Final	2019 Prelim	2019 Prelim to 2018 Final	% Change
<b>UW-Madison</b>	44,116	44,995	879	2.0%
<b>UW-Milwaukee</b>	27,444	26,167	-1,277	-4.7%
<i>Milwaukee Campus</i>	24,933	24,021	-912	-3.7%
<i>Washington County Campus</i>	744	605	-139	-18.7%
<i>Waukesha Campus</i>	1,767	1,541	-226	-12.8%
<b>UW-Eau Claire</b>	11,547	11,201	-346	-3.0%
<i>Eau Claire Campus</i>	10,905	10,767	-138	-1.3%
<i>Barron County Campus</i>	642	434	-208	-32.4%
<b>UW-Green Bay</b>	8,581	8,873	292	3.4%
<i>Green Bay Campus</i>	7,383	8,098	715	9.7%
<i>Manitowoc Campus</i>	311	218	-93	-29.9%
<i>Marinette Campus</i>	306	198	-108	-35.3%
<i>Sheboygan Campus</i>	581	359	-222	-38.2%
<b>UW-La Crosse</b>	10,579	10,589	10	0.1%
<b>UW-Oshkosh</b>	16,424	15,299	-1,125	-6.8%
<i>Oshkosh Campus</i>	14,216	13,732	-484	-3.4%
<i>Fond du Lac Campus</i>	579	435	-144	-24.9%
<i>Fox Cities Campus</i>	1,629	1,132	-497	-30.5%
<b>UW-Parkside</b>	4,325	4,413	88	2.0%
<b>UW-Platteville</b>	8,966	8,100	-866	-9.7%
<i>Platteville Campus</i>	8,106	7,597	-509	-6.3%
<i>Baraboo Sauk County Campus</i>	494	348	-146	-29.6%
<i>Richland Campus</i>	366	155	-211	-57.7%

	<b>Total Headcount (continued)</b>			
	<b>2018 Final</b>	<b>2019 Prelim</b>	<b>2019 Prelim to 2018 Final</b>	<b>% Change</b>
<b>UW-River Falls</b>	6,139	6,006	-133	-2.2%
<b>UW-Stevens Point</b>	9,107	8,225	-882	-9.7%
<i>Stevens Point Campus</i>	7,760	7,229	-531	-6.8%
<i>Marshfield Campus</i>	545	421	-124	-22.8%
<i>Wausau Campus</i>	802	575	-227	-28.3%
<b>UW-Stout</b>	8,748	8,347	-401	-4.6%
<b>UW-Superior</b>	2,601	2,603	2	0.1%
<b>UW-Whitewater</b>	13,059	12,368	-691	-5.3%
<i>Whitewater Campus</i>	12,084	11,503	-581	-4.8%
<i>Rock County Campus</i>	975	865	-110	-11.3%
<b>System Total</b>	<b>171,636</b>	<b>167,186</b>	<b>-4,450</b>	<b>-2.6%</b>



# ENROLLMENT PROJECTIONS FOR UNIVERSITY OF WISCONSIN SYSTEM

Office of Policy Analysis and Research

September 19, 2019

Prepared by Daniel Younan, Andy LeBeau, and Mark Pioli



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## **Introduction**

The purpose of this new report is to provide leaders in the University of Wisconsin System (UWS) a consistent, evidence-based look at the prospects for future enrollment at University of Wisconsin institutions. To meet this goal, a set of UW system enrollment projections were generated using a nationally recognized and uniformly applied methodology. These projections are fundamentally rooted in history, demography, and mathematics, and assume that institutions will continue to have well-coordinated enrollment management and student success operations that support campus operations. The projections provided should not be interpreted as a UW System Administration plan for enrollment. The report also includes supplemental data including (in some cases) institutionally generated projections, information on student residency profiles, and regional demographic information. These sections are meant to further contextualize the base projection model for individual institutions.

In total, the UWS enrollment projections for the period from Fall 2018 through Fall 2025 predict that enrollment will be essentially flat, increasing by only 0.5% or 874 students. This will reverse recent declines as the demographic outlook improves, although this varies dramatically by institution. From 2025 through 2040, data and overall trends become less clear, but the modeling suggests two possible directions. One, the low outcome, results in a decline of around 3.3% with a loss of between 5,000-6,000 students. The high outcome would continue the trend that is predicted through 2025 and see an increase of around 1,000 students or 0.5%. The ultimate outcome of the 2025-2040 period will largely hinge on the ability of our institutions to enroll and succeed with populations that have not traditionally succeeded at high rates within the UWS. Both projections suggest that over the next twenty years growth in enrollment is likely to be modest at best.

## **Report Overview**

This report is divided into several sections:

- Section 1 – UWS Overall Projections and Context
  - UWS Enrollment Projection through 2025 with Institutional Breakouts
  - UWS Enrollment Projections, 2025-2040
  - Undergraduate Tuition Profile
  - Wisconsin Regional Demographic Trends
- Section 2 – UWS Institutional Enrollment Projections
- Section 3 -Appendices
  - Methodology and Technical Detail
  - Institutionally Provided Projection Assumptions and Details

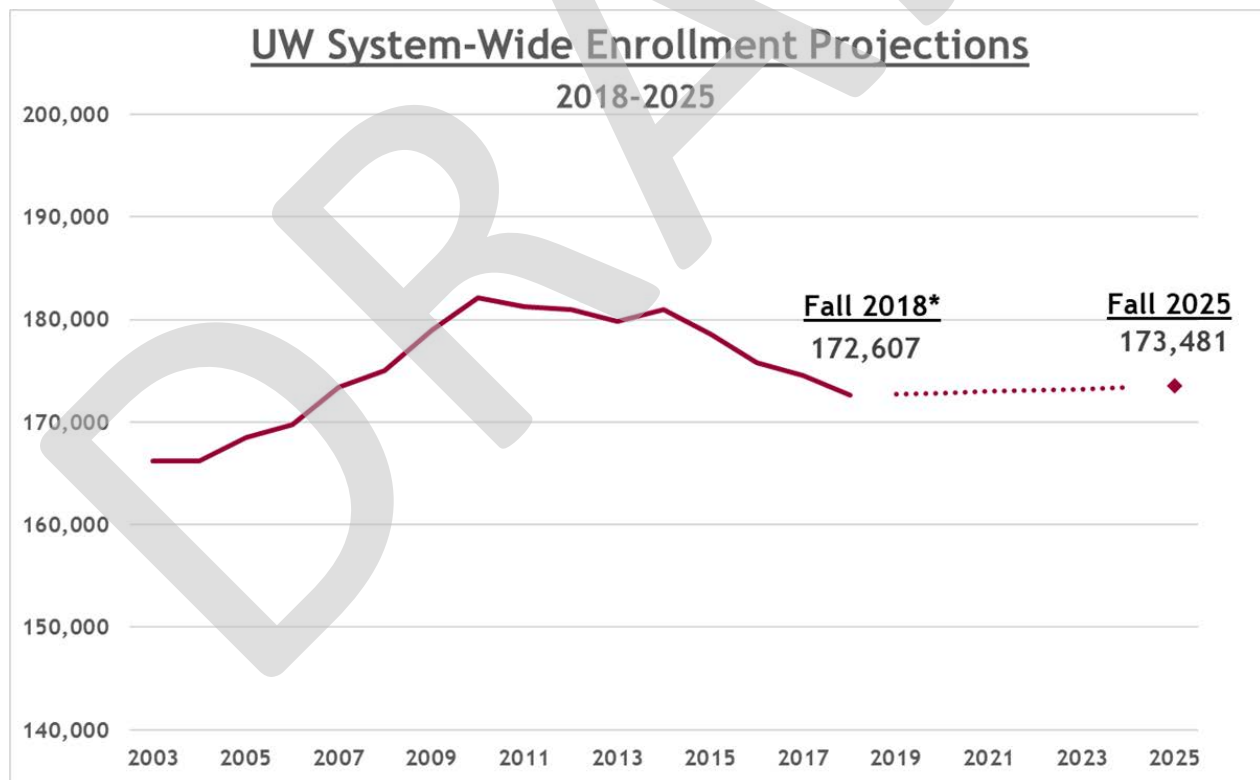
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## Section 1: UWS Overall Projections and Context

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## UW System Institutional Enrollment Projections 2018-2025

Institution	Fall 2018	Fall 2025 Projected	2018-2025 Percent Change	Institutional Projection Fall 2025 <sup>1</sup>	2018-2025 Percent Change
UW-Madison	44,116	47,223	7.0% Increase	Forthcoming <sup>2</sup>	-
UW-Milwaukee	24,933	23,843	4.4% Decrease	Forthcoming <sup>2</sup>	-
UW-Eau Claire	10,905	11,803	8.2% Increase	-	-
UW-Green Bay	7,383	8,127	10.1% Increase	9,080	23.0% Increase
UW-La Crosse	10,579	10,849	2.6% Increase	-	-
UW-Oshkosh	14,216	14,133	0.6% Decrease	15,397	8.3% Increase
UW-Parkside	4,325	4,177	3.4% Decrease	-	-
UW-Platteville	8,106	7,861	3.0% Decrease	-	-
UW-River Falls	6,139	6,188	0.8% Increase	-	-
UW-Stevens Point	7,760	7,475	3.7% Decrease	-	-
UW-Stout	8,748	8,763	0.2% Increase	-	-
UW-Superior	2,601	2,582	0.7% Decrease	-	-
UW-Whitewater	12,084	11,541	4.5% Decrease	-	-



1: Institutional projections were provided by some UW institutions. Additional details can be found in Appendix B.

2: UW-Madison is preparing a detailed enrollment plan for Fall 2019, UW-Milwaukee will provide additional detail during capital planning process

\*To maintain continuity with historical data, headcounts for fall 2018 forward include dual enrollment at restructured institutions.

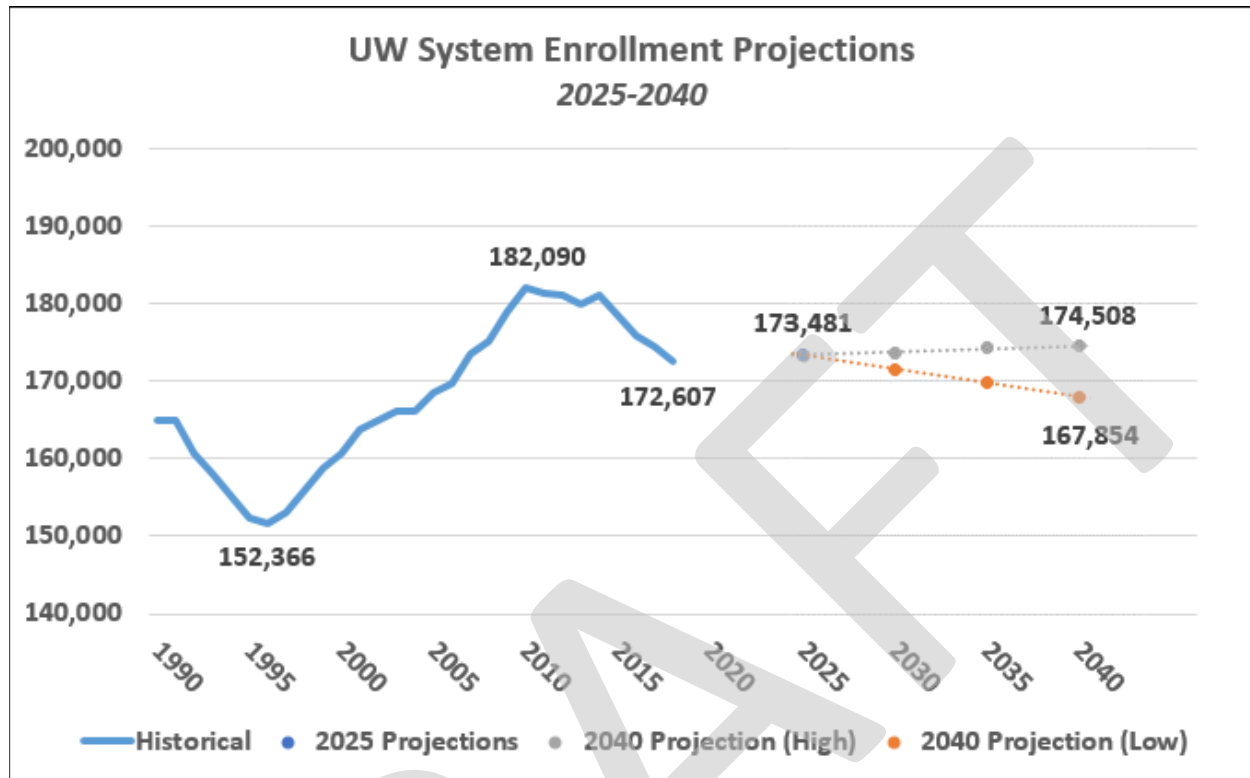
**Notes on 2025 Projections**

- Overall, UW System undergraduate enrollment numbers are projected to halt the declines observed over the past 7 years. Out-of-state enrollments are expected to continue to increase while Wisconsin resident enrollments will recover slightly as demographic trends improve out to 2025.
- Wisconsin resident UG enrollment numbers are expected to slow their decline as Wisconsin high school age populations grow over the next several years. However, potential gains will be limited by continued enrollment rate declines.
- Continued growth is projected in out-of-state enrollments; most 4-years have maintained consistent growth in this area and those trends are generally expected to continue.
- Graduate projections were not calculated but explicitly but inferred from each institution's most recent undergraduate-to-total enrollment ratio.

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## UW System System-wide Enrollment Projection 2025-2040



### Notes on 2040 Projections

- Due to the increased challenge and uncertainty surrounding a 20-year forecast we only provide a system-wide total and, in doing so, also impose the following additional assumptions—we hold the level of out-of-state undergraduates constant at its 2025 projected value and further assume that the ratio of undergraduate-to-total will maintain its 2018 level. Our results therefore rest primarily on the following key factors: the number of Wisconsin residents projected for 2040, their age distribution, and their likelihood of enrolling in higher education.
- The 15-19 age group is projected to grow 1.8% by 2040, from 397,510 to 404,610. Similarly, the 20-24 age group outlook is relatively modest, with 0.9% growth expected to take place out to 2040. Later in this section we touch on the Wisconsin Department of Administration's statewide population projections for 15-24 year-olds. Further detail can also be found on the Wisconsin Department of Administration's website:  
  
[https://doa.wi.gov/Pages/LocalGovtsGrants/Population\\_Projections.aspx](https://doa.wi.gov/Pages/LocalGovtsGrants/Population_Projections.aspx)
- The high enrollment projection rests on maintaining the projected 2025 enrollment rates by broad age group out to 2040. The lower projection assumes a continued decline in Wisconsin resident enrollment rates, similar to those projected from 2018 to 2025.

**Undergraduate Tuition Profile**

These supplemental data are provided to further contextualize the potential revenue profile of students in the following established program categories: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid. Furthermore, the make-up of these categories varies dramatically by institution and these data are included with each institutional projection.

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	82.4%	79.6%	75.9%
Out-of-State	7.9%	9.3%	11.3%
Out-of-State (Discounted)	0.6%	1.0%	1.2%
Out-of-State (Reciprocity)	9.0%	10.1%	11.7%

## **Regional Demographic Context and Considerations**

Primarily due to data availability, the NCES model is most effectively applied at the statewide level, where historical demographic and economic factors are reported and available annually. This approach, despite its considerable benefits, does however come with certain limitations. One of these limitations is the inability to explicitly factor in future differential growth within Wisconsin. For a difference in regional demographic outlook to be of significant import, two factors must be considered. Firstly, the future growth must be sufficiently or extraordinarily distinct, both from overall statewide trends and from recent past historical pattern. Secondly, an institution's draw must also be sufficiently concentrated in such areas of distinct future population change. The degree to which these conditions are met varies considerably by institution. In addition, we also provide the following regional population outlook summary for the total and 15-24 year-old populations to 2025.

The following section provides overview data at the county level to help provide regional context to improve the interpretation of the system-wide projections.

## **Summary of Wisconsin's Regional Population Outlook**

In terms of overall growth, the vast majority of Wisconsin counties are projected to see their populations grow from 2015—the latest historical estimate available at the county level in Wisconsin Department of Administration data—to 2025. Only 4 counties are expected to see declines greater than 1% through 2025.

There is significantly broader variability in population outlook when focusing on more traditional college-aged populations. The number of individuals aged from 15-24 are expected to decline in a number of rural Wisconsin counties, chiefly those in the northern sections of the state. Conversely, growth is projected for Wisconsin's more urban areas (Dane, Brown, Marathon, St. Croix, and Pierce counties) with Milwaukee, Racine and Douglas counties being the exceptions.

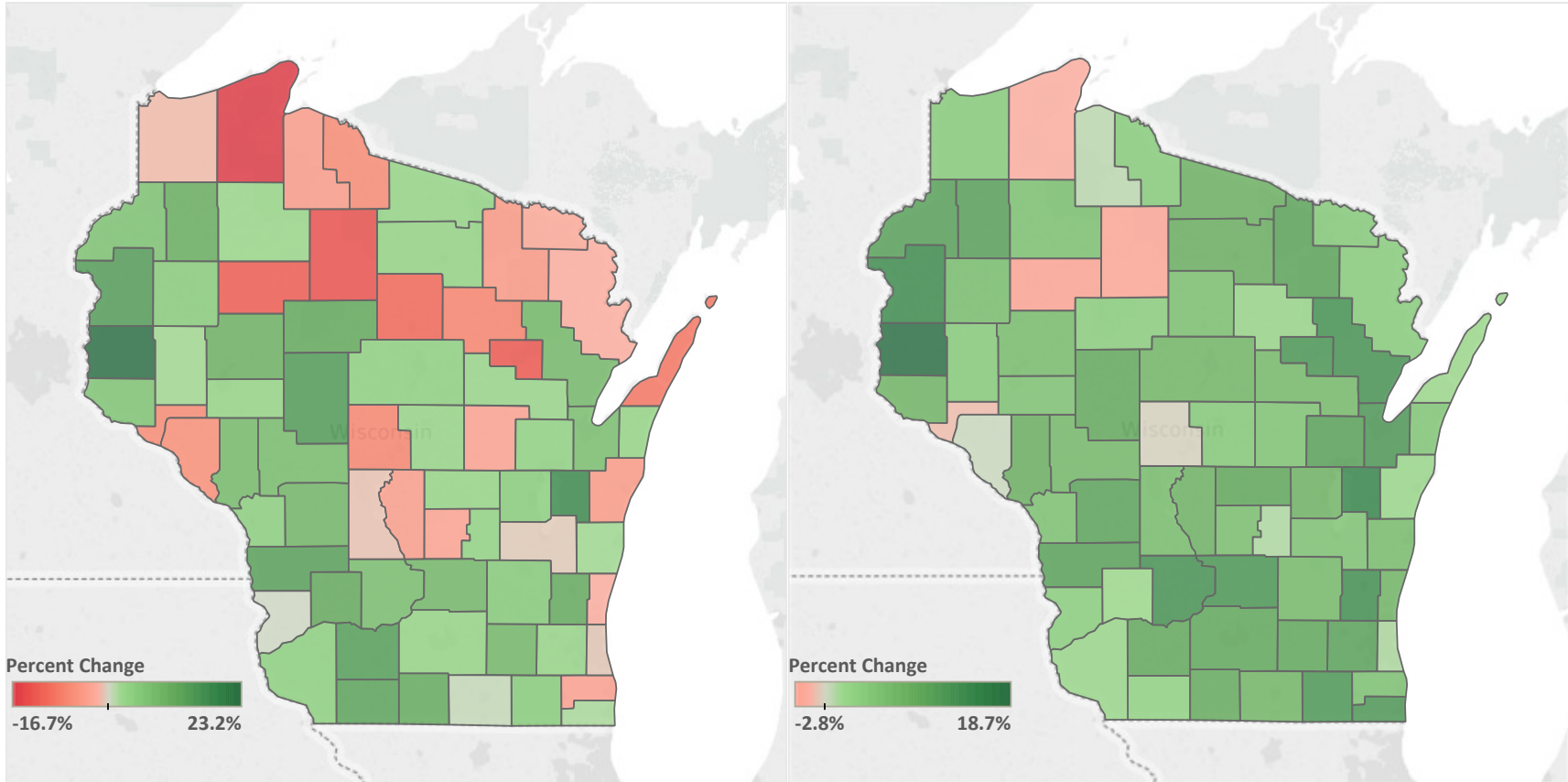
Further detail can be found on the Wisconsin Department of Administration's website:

[https://doa.wi.gov/Pages/LocalGovtsGrants/Population\\_Projections.aspx](https://doa.wi.gov/Pages/LocalGovtsGrants/Population_Projections.aspx)

# Population Projections by County

## Percent Change in 15-24 Population 2015 to 2025

## Percent Change in Total Population 2015 to 2025



Source: Wisconsin Department of Administration,  
County Age-Sex Population Projections

## Wisconsin County Population Projections Population aged 15-24, 2010-2040

### **WDA 1 - Southeast**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Kenosha	24,336	23,350	23,530	23,730	23,500	24,160	24,910
Racine	24,417	23,730	23,330	22,790	22,690	23,070	22,990
Walworth	16,272	15,510	15,600	16,310	16,470	16,320	16,570
<b>Total</b>	<b>65,025</b>	<b>62,590</b>	<b>62,460</b>	<b>62,830</b>	<b>62,660</b>	<b>63,550</b>	<b>64,470</b>

### **WDA 2 - Milwaukee County**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Milwaukee	147,869	141,200	142,000	140,000	135,700	136,900	136,600

### **WDA 3 - Washington-Ozaukee-Waukesha**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Ozaukee	10,404	10,410	10,450	10,180	9,760	9,850	10,070
Washington	14,410	15,180	16,140	16,930	16,930	17,030	17,400
Waukesha	44,813	46,370	48,550	47,750	46,010	47,000	48,240
<b>Total</b>	<b>69,627</b>	<b>71,960</b>	<b>75,140</b>	<b>74,860</b>	<b>72,700</b>	<b>73,880</b>	<b>75,710</b>

### **WDA 4 - Fox Valley**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Calumet	5,480	5,920	6,570	6,990	6,780	6,780	6,940
Fond du Lac	13,437	12,240	11,920	12,150	12,060	12,040	12,110
Green Lake	1,951	2,010	2,095	2,080	2,015	2,000	1,935
Waupaca	5,795	5,630	5,410	5,410	5,300	5,120	4,820
Waushara	2,447	2,420	2,490	2,495	2,525	2,630	2,600
Winnebago	26,220	25,100	25,240	26,350	27,370	27,700	27,750
<b>Total</b>	<b>55,330</b>	<b>53,320</b>	<b>53,725</b>	<b>55,475</b>	<b>56,050</b>	<b>56,270</b>	<b>56,155</b>

### **WDA 5 - Bay Area**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Brown	34,863	32,130	32,700	34,530	36,060	37,610	38,360
Door	2,592	2,460	2,215	2,220	2,225	2,185	2,125
Florence	407	350	310	340	340	330	305
Kewaunee	2,258	2,255	2,330	2,330	2,290	2,290	2,245
Manitowoc	9,517	8,980	8,470	8,540	8,420	8,280	8,060
Marinette	4,836	4,330	4,240	4,230	4,080	4,080	4,030
Menominee	683	600	555	520	520	555	525
Oconto	4,078	3,980	4,040	4,320	4,440	4,480	4,400
Outagamie	23,215	22,220	22,440	23,030	23,370	24,060	24,440
Shawano	4,736	4,570	4,590	4,700	4,600	4,550	4,540
Sheboygan	13,841	13,530	13,580	13,800	13,800	13,790	13,630
<b>Total</b>	<b>101,026</b>	<b>95,405</b>	<b>95,470</b>	<b>98,560</b>	<b>100,145</b>	<b>102,210</b>	<b>102,660</b>

Based on author's calculations of Wisconsin Department of Administration's County Age-Sex Population Projections

**Wisconsin County Population Projections**  
**Population aged 15-24, 2010-2040**

**WDA 6 - North Central**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Adams	1,899	1,780	1,665	1,700	1,645	1,550	1,485
Forest	1,227	1,085	1,040	1,030	1,075	1,155	1,135
Langlade	2,166	2,050	1,930	1,885	1,810	1,785	1,725
Lincoln	3,165	3,200	3,010	2,830	2,770	2,790	2,650
Marathon	16,405	16,170	15,960	16,820	17,530	17,760	17,760
Oneida	3,673	3,250	3,070	3,360	3,580	3,600	3,500
Portage	14,038	13,880	13,920	14,290	14,530	14,500	14,270
Vilas	1,922	1,830	1,795	1,890	1,960	1,940	1,850
Wood	8,862	8,320	7,670	7,670	7,650	7,470	7,180
<b>Total</b>	<b>53,357</b>	<b>51,565</b>	<b>50,060</b>	<b>51,475</b>	<b>52,550</b>	<b>52,550</b>	<b>51,555</b>

**WDA 7 - Northwest**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Ashland	2,257	1,925	1,830	1,835	1,770	1,705	1,620
Bayfield	1,314	1,320	1,160	1,100	1,060	995	910
Burnett	1,450	1,445	1,400	1,545	1,640	1,650	1,575
Douglas	6,231	5,290	4,950	5,210	5,440	5,520	5,550
Iron	507	490	465	455	460	465	440
Price	1,292	1,250	1,125	1,075	1,030	990	910
Rusk	1,579	1,575	1,425	1,375	1,320	1,270	1,195
Sawyer	1,707	1,560	1,500	1,600	1,575	1,510	1,455
Taylor	2,320	2,215	2,285	2,480	2,505	2,450	2,385
Washburn	1,487	1,425	1,450	1,580	1,615	1,615	1,555
<b>Total</b>	<b>20,144</b>	<b>18,495</b>	<b>17,590</b>	<b>18,255</b>	<b>18,415</b>	<b>18,170</b>	<b>17,595</b>

**WDA 8 - West Central**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Barron	5,229	4,800	4,730	5,040	5,240	5,230	5,030
Chippewa	7,249	7,020	7,110	7,730	7,930	7,870	7,870
Clark	4,284	4,390	4,640	5,030	5,460	5,730	5,780
Dunn	10,183	9,840	9,870	10,030	9,810	9,340	9,050
Eau Claire	20,657	20,090	20,140	20,750	20,920	20,530	20,620
Pepin	805	775	710	720	700	640	600
Pierce	8,495	8,110	8,150	8,640	8,770	8,460	8,450
Polk	4,877	4,850	5,050	5,550	5,660	5,740	5,810
Saint Croix	9,285	10,170	11,720	12,530	12,490	12,760	13,180
<b>Total</b>	<b>71,064</b>	<b>70,045</b>	<b>72,120</b>	<b>76,020</b>	<b>76,980</b>	<b>76,300</b>	<b>76,390</b>

**WDA 9 - Western**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Buffalo	1,495	1,460	1,355	1,365	1,360	1,325	1,280
Crawford	1,807	1,670	1,640	1,670	1,605	1,545	1,500
Jackson	2,313	2,190	2,240	2,365	2,430	2,430	2,380
Juneau	2,875	2,760	2,710	2,730	2,690	2,650	2,590
La Crosse	22,173	21,460	21,540	22,410	23,180	23,090	22,900
Monroe	5,251	5,300	5,470	5,780	5,990	6,110	6,170
Trempealeau	3,182	3,220	3,310	3,490	3,670	3,770	3,760
Vernon	3,268	3,450	3,760	3,920	4,040	4,210	4,310
<b>Total</b>	<b>42,364</b>	<b>41,510</b>	<b>42,025</b>	<b>43,730</b>	<b>44,965</b>	<b>45,130</b>	<b>44,890</b>

Based on author's calculations of Wisconsin Department of Administration's County Age-Sex Population Projections

**Wisconsin County Population Projections**  
**Population aged 15-24, 2010-2040**

**WDA 10 - South Central**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Columbia	6,226	6,370	6,700	6,930	7,020	7,140	7,200
Dane	80,121	77,250	77,450	79,800	81,900	83,400	85,350
Dodge	10,404	9,680	9,770	10,210	10,070	9,820	9,740
Jefferson	12,084	11,310	11,590	12,300	12,150	12,220	12,480
Marquette	1,541	1,470	1,415	1,415	1,440	1,415	1,320
Sauk	7,266	7,150	7,400	7,700	8,000	8,250	8,320
<b>Total</b>	<b>117,642</b>	<b>113,230</b>	<b>114,325</b>	<b>118,355</b>	<b>120,580</b>	<b>122,245</b>	<b>124,410</b>

**WDA 11 - Southwest**

<b>County</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Grant	10,655	10,000	10,050	10,430	10,430	9,960	9,690
Green	3,970	4,030	4,190	4,490	4,520	4,510	4,550
Iowa	2,477	2,455	2,610	2,800	2,830	2,840	2,810
Lafayette	2,106	2,030	2,040	2,295	2,375	2,360	2,400
Richland	2,115	1,975	2,000	2,205	2,160	2,085	2,065
Rock	20,990	20,500	20,430	20,600	20,420	20,720	21,050
<b>Total</b>	<b>42,313</b>	<b>40,990</b>	<b>41,320</b>	<b>42,820</b>	<b>42,735</b>	<b>42,475</b>	<b>42,565</b>

**Wisconsin**

<b>Wisconsin</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>
Statewide	785,761	760,310	766,235	782,380	783,480	789,680	793,000

Based on author's calculations of Wisconsin Department of Administration's County Age-Sex Population Projections



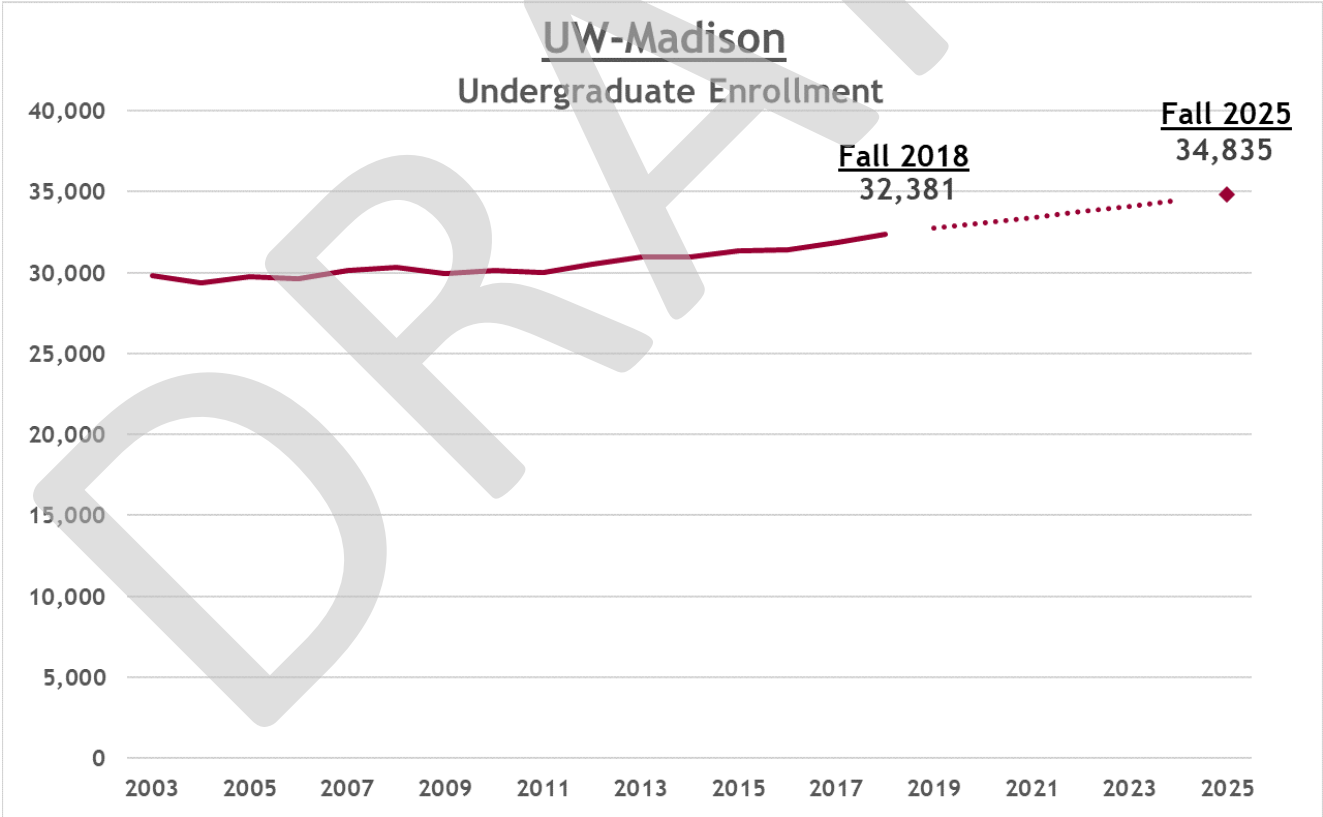
Section 2: Institutional Projections 2018-2025

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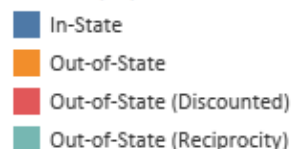
**Institutional Results: UW-Madison**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	19,413	19,017	19,035	2.0% Decrease or 396 Fewer Enrollments	0.1% Increase or 18 More Enrollments
Out-of-State Undergraduate	10,601	13,364	15,800	26.1% Increase or 2,763 More Enrollments	18.2% Increase or 2,436 More Enrollments
Total Undergraduate	30,014	32,381	34,835	7.9% Increase or 2,367 More Enrollments	7.6% Increase or 2,454 More Enrollments
Total Enrollment	42,065	44,116	47,223	4.9% Increase or 2,051 More Enrollments	7.0% Increase or 3,107 More Enrollments



### Undergraduate Tuition Profile\*

#### Residency by Tuition Assessed



	2008	2013	2018
In-State	65.3%	63.0%	58.7%
Out-of-State	24.3%	26.8%	32.7%
Out-of-State (Discounted)			0.2%
Out-of-State (Reciprocity)	10.4%	10.2%	8.4%

#### Notes

- UW-Madison is projected to continue to grow at a steady rate though with a slowdown in growth in out-of-state enrollment.
- Forecasts show Madison will continue to enroll a similar number of Wisconsin resident undergraduate students.

#### Institutionally Provided Context

UW-Madison remains committed to maintaining access for Wisconsin residents, committing to enroll at least 3,600 Wisconsin resident new freshmen each year. A few years ago they implemented a renewed recruiting focus on very high achieving WI high school graduates and especially intend to attract WI residents in the coming years through the expansion of their undergraduate online offerings.

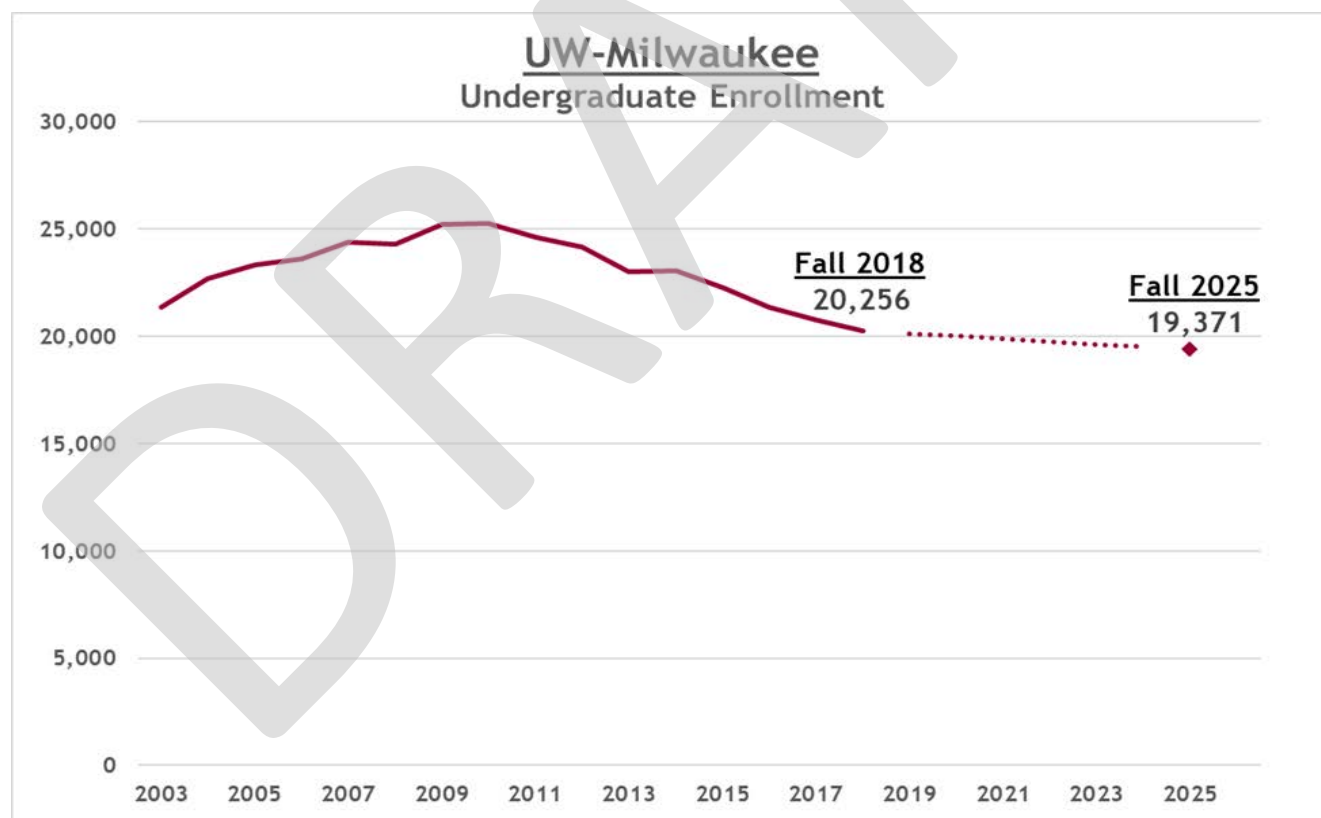
#### Institutionally Provided Projections

Further detail to be provided by UW-Madison at a later date.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville's tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans' Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

### Institutional Results: UW-Milwaukee

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	23,105	17,232	15,563	25.4% Decrease or 5,873 Fewer Enrollments	9.7% Decrease or 1,669 Fewer Enrollments
Out-of-State Undergraduate	1,534	3,024	3,808	97.1% Increase or 1,490 More Enrollments	25.9% Increase or 784 More Enrollments
Total Undergraduate	24,639	20,256	19,371	17.8% Decrease or 4,383 Fewer Enrollments	4.4% Decrease or 885 Fewer Enrollments
Total Enrollment	29,726	24,933	23,843	16.1% Decrease or 4,793 Fewer Enrollments	4.4% Decrease or 1,090 Fewer Enrollments



**Undergraduate Tuition Profile\***

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	95.4%	91.2%	85.1%
Out-of-State	3.1%	5.0%	5.2%
Out-of-State (Discounted)			0.3%
Out-of-State (Reciprocity)	1.4%	3.8%	9.5%

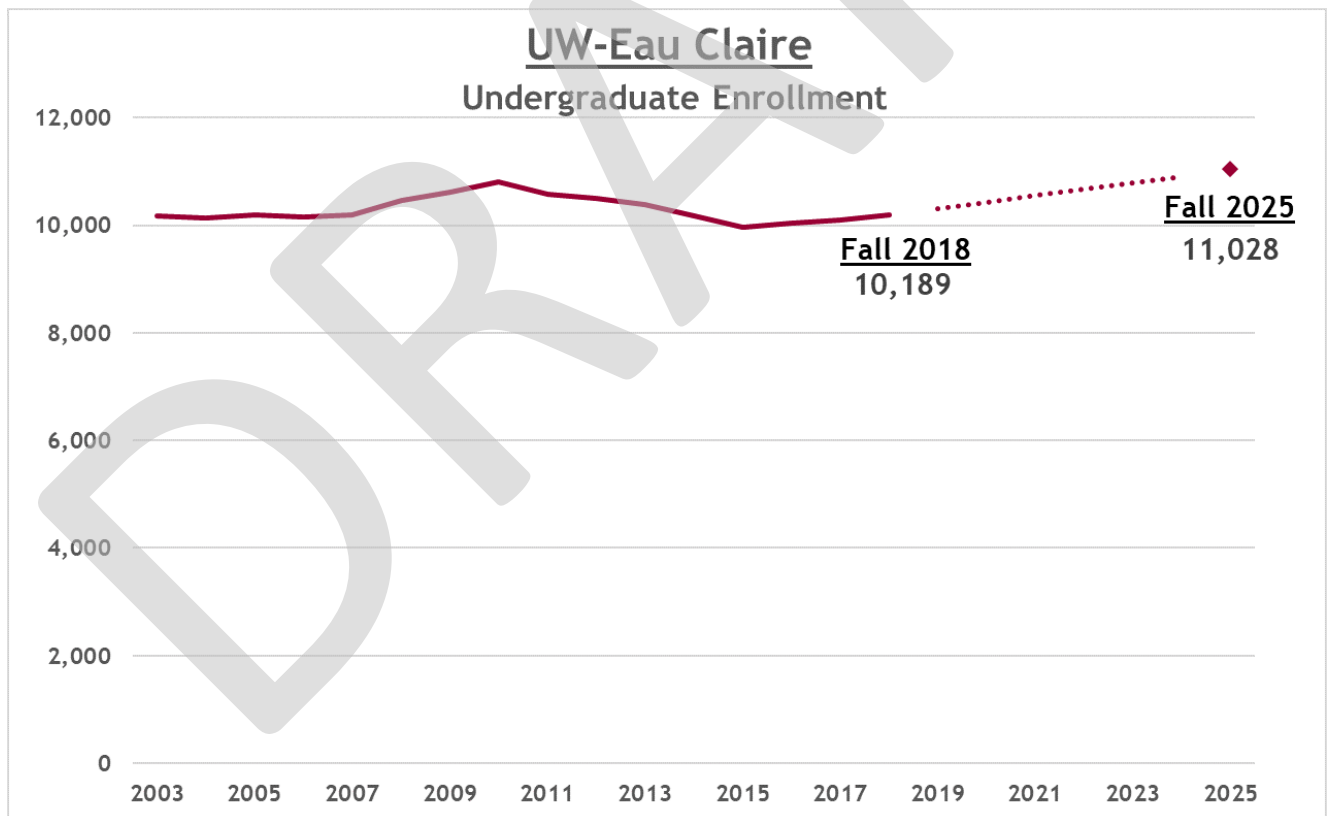
**Notes**

- UW-Milwaukee has seen significant declines in Wisconsin resident undergraduate enrollment. Though the 18-22 demographic is expected to grow 4.2% by 2025, declines in overall UG enrollment are projected to persist, but at a slower rate, due to a continued decrease in share of resident enrollment – UW Milwaukee enrolled 18.1% of UW System’s resident enrollees in 2011, 15.3% in 2018, and is projected to enroll 14.6% in 2025. More information on how resident shares were calculated can be found in Section 3.A.
- Out-of-state undergraduate enrollment is expected to increase, but at the more modest pace observed from 2015-2018, rather than the rapid pace observed from 2010-2015.
- Institutionally provided context and detail to be provided by UW-Milwaukee at a later date.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

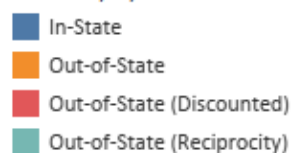
### Institutional Results: UW-Eau Claire

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
<b>In-State Undergraduate</b>	<b>7,949</b>	<b>6,865</b>	<b>6,536</b>	<b>13.6% Decrease</b> or <b>1,084 Fewer</b> Enrollments	<b>4.8% Decrease</b> or <b>329 Fewer</b> Enrollments
<b>Out-of-State Undergraduate</b>	<b>2,630</b>	<b>3,324</b>	<b>4,491</b>	<b>26.4% Increase</b> or <b>694 More</b> Enrollments	<b>35.1% Increase</b> or <b>1,167 More</b> Enrollments
<b>Total Undergraduate</b>	<b>10,579</b>	<b>10,189</b>	<b>11,028</b>	<b>3.7% Decrease</b> or <b>390 Fewer</b> Enrollments	<b>8.2% Increase</b> or <b>839 More</b> Enrollments
<b>Total Enrollment</b>	<b>11,234</b>	<b>10,905</b>	<b>11,803</b>	<b>2.9% Decrease</b> or <b>329 Fewer</b> Enrollments	<b>8.2% Increase</b> or <b>898 More</b> Enrollments



**Undergraduate Tuition Profile\***

## Residency by Tuition Assessed



	2008	2013	2018
In-State	77.7%	73.4%	67.4%
Out-of-State	2.1%	4.0%	3.7%
Out-of-State (Discounted)	0.0%	0.1%	0.2%
Out-of-State (Reciprocity)	20.1%	22.6%	28.7%

**Notes**

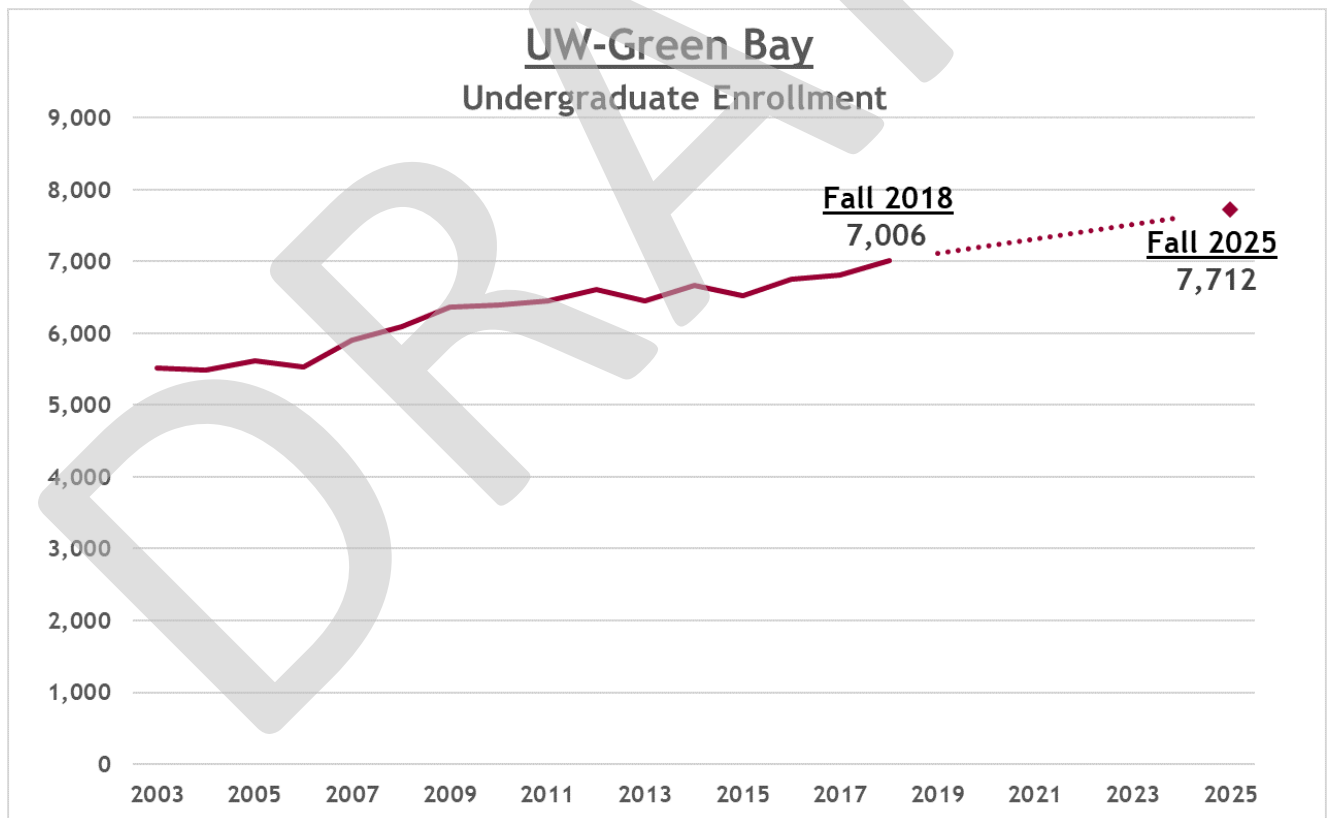
- UW-Eau Claire's Wisconsin resident undergraduate enrollments are projected to decline by 4.8% from 2018 to 2025. This projected decrease is similar to the 5.0% decline forecast at the system level.
- UW-Eau Claire's out-of-state enrollments are expected to grow at an accelerating pace, buoying their overall projection to 11,028 undergraduate enrollments. Should out-of-state enrollments grow at the slower 2011-to-2018 rate, UG enrollment would increase but at a slower rate, reaching 10,555 enrollments.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville's tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans' Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.



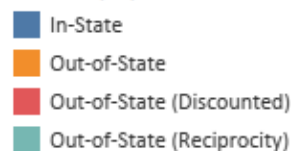
**Institutional Results: UW-Green Bay**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	5,986	6,403	7,010	7.0% Increase or 417 More Enrollments	9.5% Increase or 607 More Enrollments
Out-of-State Undergraduate	459	603	703	31.4% Increase or 144 More Enrollments	16.5% Increase or 100 More Enrollments
Total Undergraduate	6,445	7,006	7,712	8.7% Increase or 561 More Enrollments	10.1% Increase or 706 More Enrollments
Total Enrollment	6,665	7,383	8,127	10.8% Increase or 718 More Enrollments	10.1% Increase or 744 More Enrollments



### Undergraduate Tuition Profile\*

#### Residency by Tuition Assessed



	2008	2013	2018
In-State	94.0%	92.6%	91.4%
Out-of-State	3.4%	3.8%	4.3%
Out-of-State (Discounted)	0.0%	0.1%	0.2%
Out-of-State (Reciprocity)	2.6%	3.5%	4.1%

#### Notes

- UW-Green Bay's enrollment is projected to continue to grow in a manner similar to the trajectory observed in recent years.
- The increase in overall undergraduate enrollment is marked by increases in both Wisconsin resident and out-of-state enrollment, a pattern that differs from the UW System as a whole. In addition, UW-Green Bay's share of System Wisconsin resident enrollments is projected to increase from 5.7% in 2018 to 6.6% in 2025. More information on how Wisconsin resident shares were calculated can be found in Section 3.A.

#### Institutionally Provided Context

UW-Green Bay expects to grow at a considerably more rapid pace than OPAR-generated projections, citing favorable regional demographics, increased applications, and strong expected growth in certain strategic degree programs. Additional detail for Green Bay's institutionally-generated projections and their corresponding supplemental materials can be found in the Section 3.B. Similarly, county level population projections—created by the Wisconsin Department of Administration—can be found in Section 1.

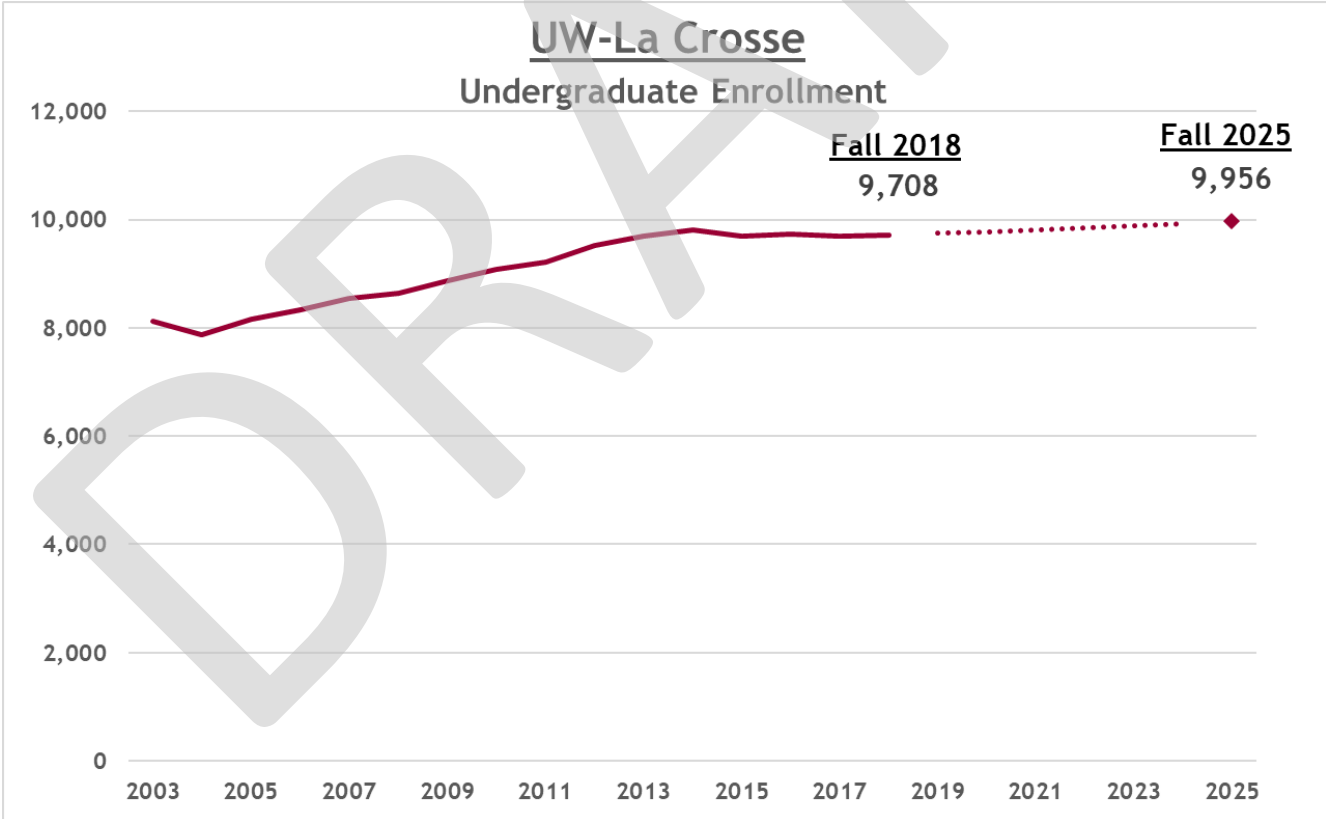
#### Institutionally Provided Projections

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
<b>Total Undergraduate</b>	<b>6,445</b>	<b>7,006</b>	<b>8,616</b>	<b>8.7% Increase or 561 More Enrollments</b>	<b>23.0% Increase or 1,610 More Enrollments</b>

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville's tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans' Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

**Institutional Results: UW-La Crosse**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	7,446	7,945	8,263	6.7% Increase or 499 More Enrollments	4.0% Increase or 318 More Enrollments
Out-of-State Undergraduate	1,765	1,763	1,693	0.1% Decrease or 2 Fewer Enrollments	4.0% Decrease or 70 Fewer Enrollments
Total Undergraduate	9,211	9,708	9,956	5.4% Increase or 497 More Enrollments	2.6% Increase or 248 More Enrollments
Total Enrollment	10,258	10,579	10,849	3.1% Increase or 321 More Enrollments	2.6% Increase or 270 More Enrollments



**Undergraduate Tuition Profile\***

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	81.7%	80.4%	81.8%
Out-of-State	5.8%	5.9%	4.3%
Out-of-State (Discounted)	0.2%	0.2%	0.2%
Out-of-State (Reciprocity)	12.3%	13.5%	13.6%

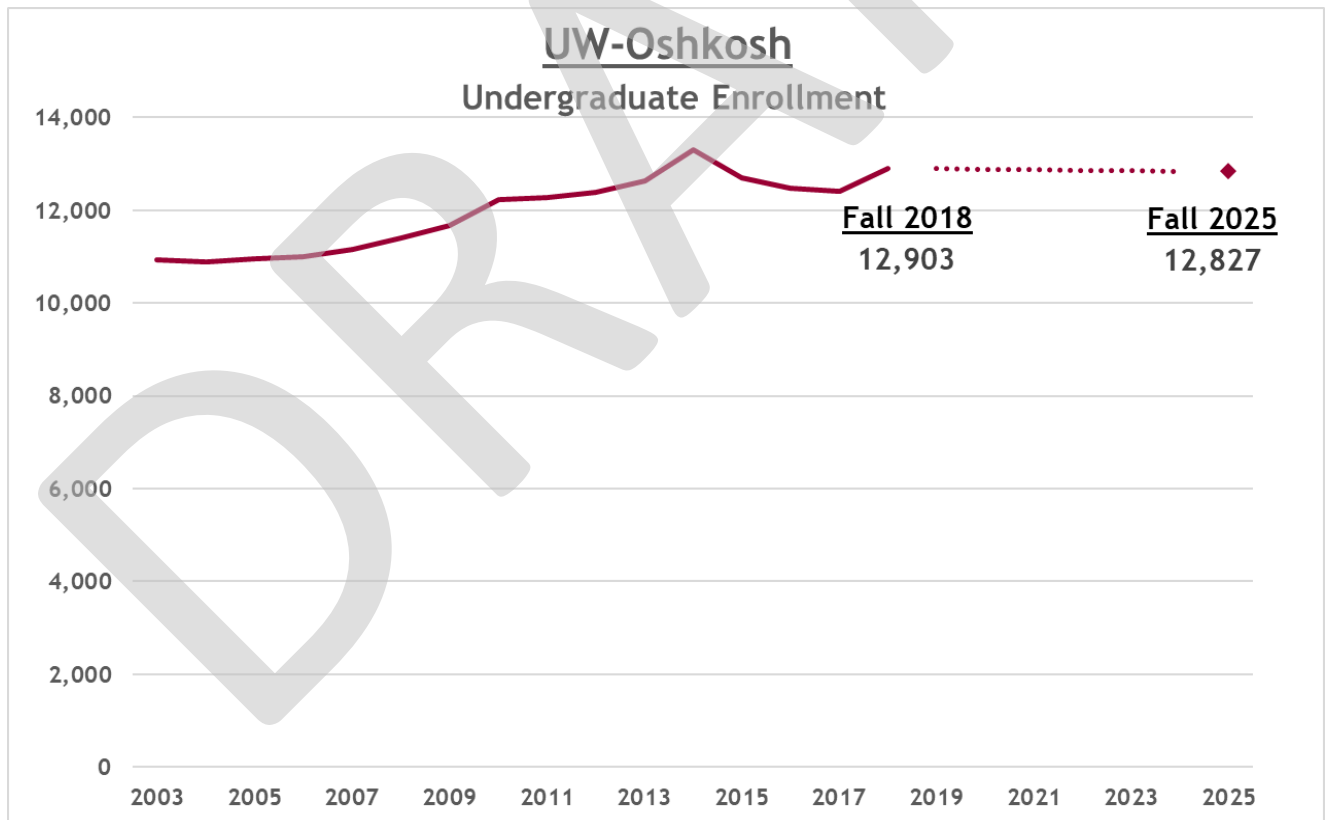
**Notes**

- UW-La Crosse’s enrollment is projected to grow at a moderate rate. This modest projected increase in overall undergraduate enrollment is driven by continued growth in Wisconsin resident enrollment; out-of-state enrollments are projected to decrease.
- This pattern is in contrast to UW System as a whole, whose projected decline in Wisconsin resident enrollment will be offset by an increase in out-of-state enrollment.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

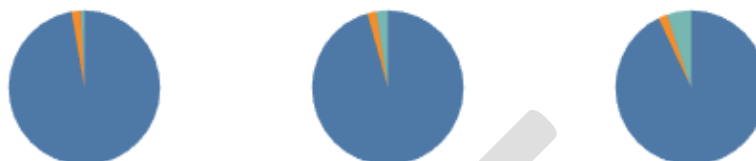
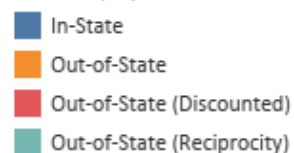
### Institutional Results: UW-Oshkosh

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
<b>In-State Undergraduate</b>	<b>11,863</b>	<b>11,982</b>	<b>11,391</b>	<b>1.0%</b> Increase or <b>119</b> More Enrollments	<b>4.9%</b> Decrease or <b>591</b> Fewer Enrollments
<b>Out-of-State Undergraduate</b>	<b>410</b>	<b>921</b>	<b>1,436</b>	<b>124.6%</b> Increase or <b>511</b> More Enrollments	<b>55.9%</b> Increase or <b>515</b> More Enrollments
<b>Total Undergraduate</b>	<b>12,273</b>	<b>12,903</b>	<b>12,827</b>	<b>5.1%</b> Increase or <b>630</b> More Enrollments	<b>0.6%</b> Decrease or <b>76</b> Fewer Enrollments
<b>Total Enrollment</b>	<b>13,513</b>	<b>14,216</b>	<b>14,133</b>	<b>5.2%</b> Increase or <b>703</b> More Enrollments	<b>0.6%</b> Decrease or <b>83</b> Fewer Enrollments



### Undergraduate Tuition Profile\*

#### Residency by Tuition Assessed



	2008	2013	2018
In-State	97.3%	95.6%	92.9%
Out-of-State	1.9%	1.9%	1.9%
Out-of-State (Discounted)	0.1%	0.0%	0.0%
Out-of-State (Reciprocity)	0.7%	2.5%	5.2%

#### Notes

- UW-Oshkosh's enrollment is projected to remain virtually unchanged. Moderate decreases in Wisconsin resident enrollments are projected to be nearly offset by large increases in out-of-state enrollments in the 2018-2025 time period.
- UW-Oshkosh's share of System enrollments is also projected to remain flat at 10.7% through 2025. For more information on how resident shares were calculated, see Section 3.A.

### Institutionally Provided Context

Internal enrollment expectations were developed as part of a recent two-year strategic enrollment planning process (guided by Ruffalo Noel Levitz Consulting) undertaken from 9/2017 – 7/2019. This planning and implementation process resulted in an ongoing strategic enrollment plan, encompassing several targeted enrollment actions strategies, which are now rolling into effect with the 2019-2020 AY (FA2020 recruitment cycle) for the Oshkosh Campus of UWO. After taking into account the implementation of the strategic enrollment plan, internal expectations are now 13,975 for FA2025, an 8.3% increase over Fall 2018 enrollment. For further detail, including supplemental materials provided by UW-Oshkosh, see Section 3.B.

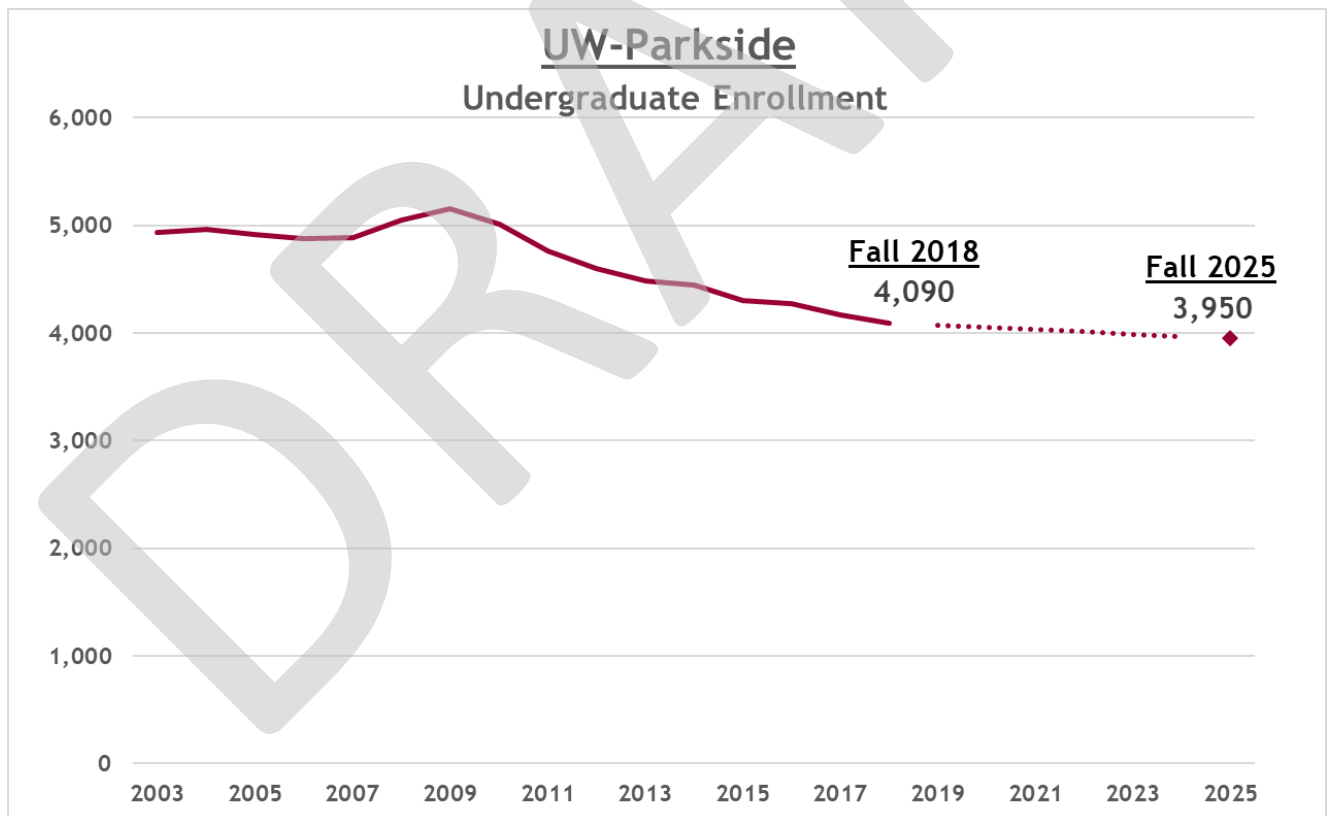
### Institutionally Provided Projections

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
<b>Total Undergraduate</b>	<b>12,273</b>	<b>12,903</b>	<b>13,975</b>	<b>5.1% Increase or 630 More Enrollments</b>	<b>8.3% Increase or 1,072 More Enrollments</b>

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville's tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans' Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

**Institutional Results: UW-Parkside**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	4,215	3,302	3,103	21.7% Decrease or 913 Fewer Enrollments	6.0% Decrease or 199 Fewer Enrollments
Out-of-State Undergraduate	551	788	847	43.0% Increase or 237 More Enrollments	7.5% Increase or 59 More Enrollments
Total Undergraduate	4,766	4,090	3,950	14.2% Decrease or 676 Fewer Enrollments	3.4% Decrease or 140 Fewer Enrollments
Total Enrollment	4,887	4,325	4,177	11.5% Decrease or 562 Fewer Enrollments	3.4% Decrease or 148 Fewer Enrollments



### Undergraduate Tuition Profile\*

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	90.6%	85.6%	80.7%
Out-of-State	9.1%	6.0%	4.3%
Out-of-State (Discounted)	0.0%		0.5%
Out-of-State (Reciprocity)	0.2%	8.4%	14.4%

### Notes

- UW-Parkside’s enrollment is projected to decrease 3.4% from 2018 to 2025, but at a more moderate rate than in the preceding period, 2011-2018. The mild decrease in Wisconsin resident enrollments is projected to be partially offset.
- UW-Parkside’s share of System enrollments is projected to remain stable at 2.9% through 2025. For more information on how resident shares were calculated, see Section 3.A.

### Institutionally Provided Context

### Institutionally Provided Projections

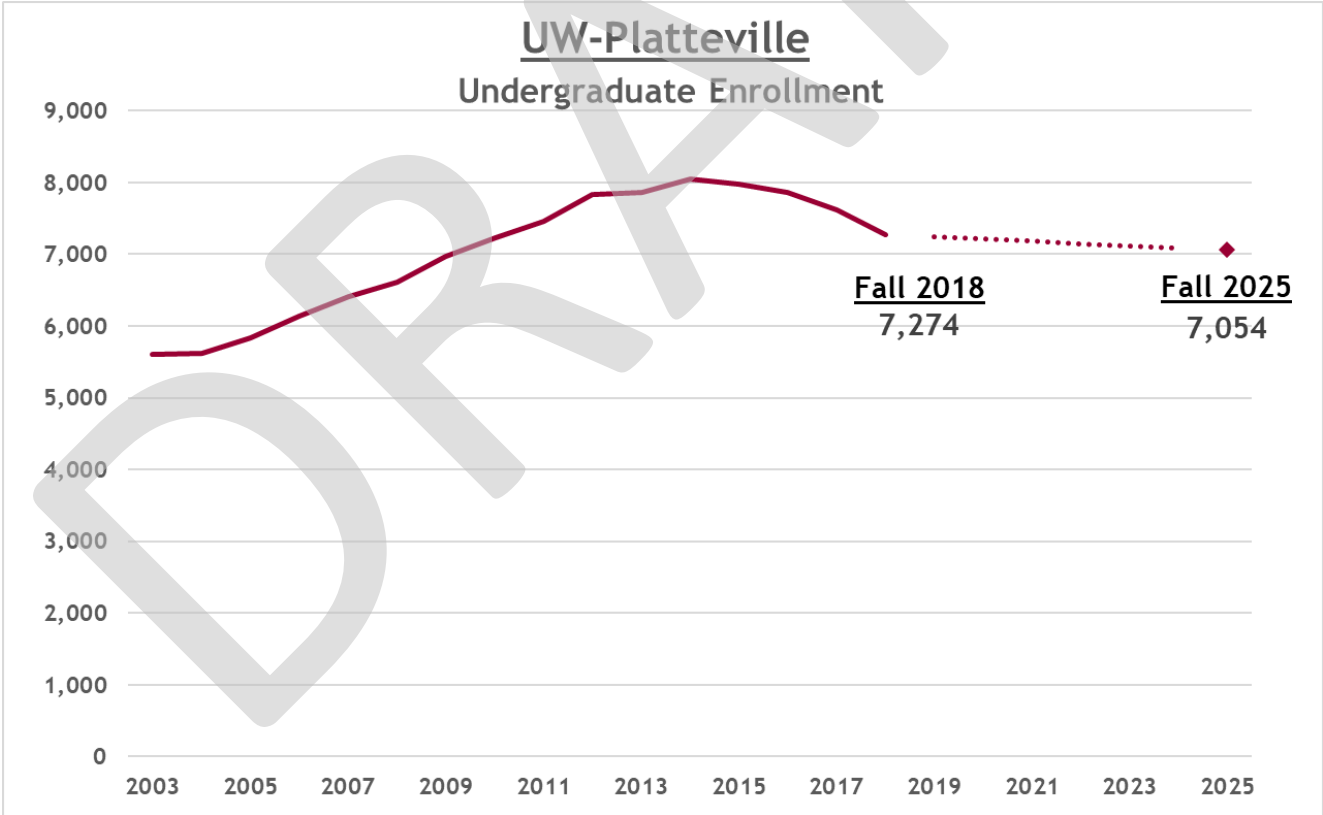
Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
<b>Total Undergraduate</b>					

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.



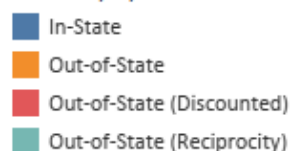
**Institutional Results: UW-Platteville**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	5,837	5,494	5,202	5.9% Decrease or 343 Fewer Enrollments	5.3% Decrease or 292 Fewer Enrollments
Out-of-State Undergraduate	1,623	1,780	1,852	9.7% Increase or 157 More Enrollments	4.0% Increase or 72 More Enrollments
Total Undergraduate	7,460	7,274	7,054	2.5% Decrease or 186 Fewer Enrollments	3.0% Decrease or 220 Fewer Enrollments
Total Enrollment	8,262	8,106	7,861	1.9% Decrease or 156 Fewer Enrollments	3.0% Decrease or 245 Fewer Enrollments



**Undergraduate Tuition Profile\***

## Residency by Tuition Assessed



	2008	2013	2018
In-State	82.0%	76.3%	75.5%
Out-of-State	3.3%	2.8%	3.4%
Out-of-State (Discounted)	13.0%	19.3%	19.5%
Out-of-State (Reciprocity)	1.6%	1.6%	1.6%

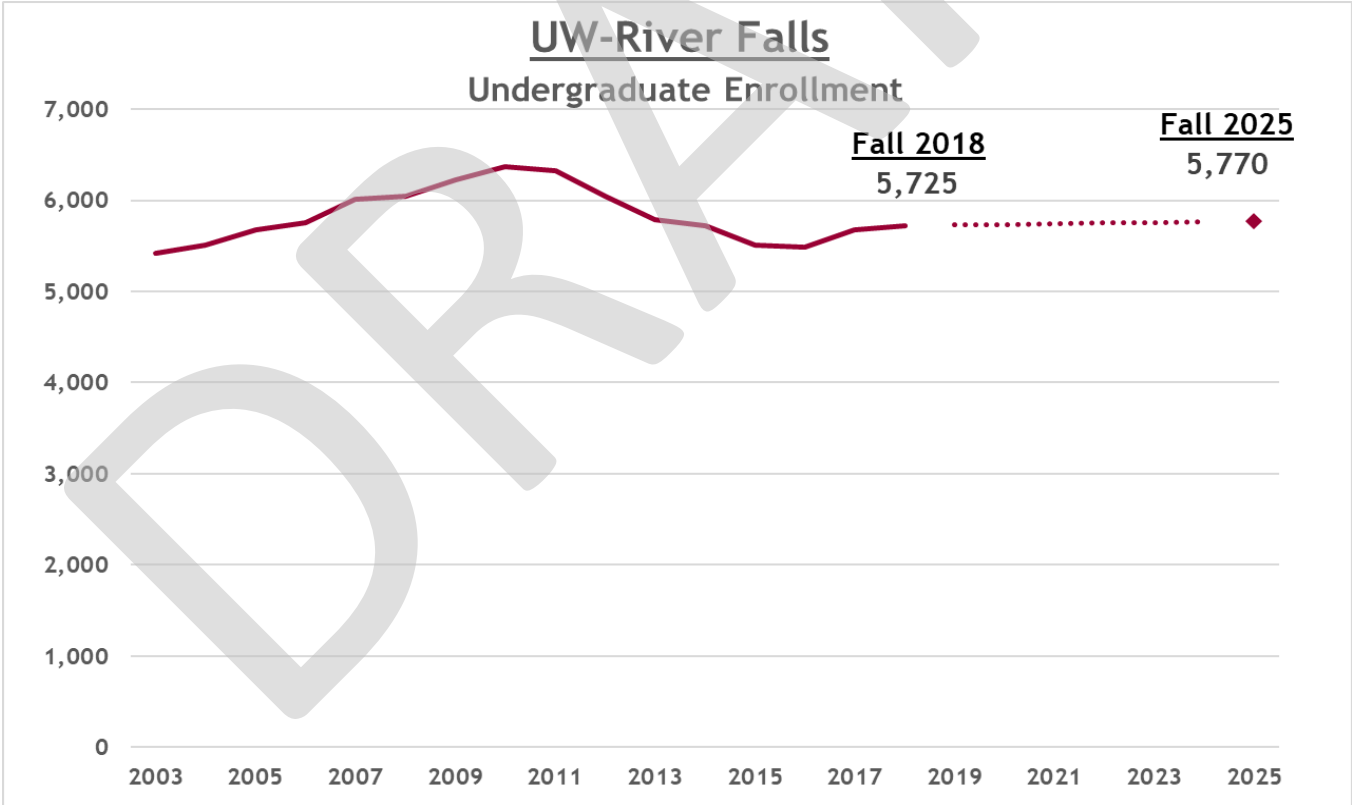
**Notes**

- UW-Platteville's enrollment is projected to decrease 3.0% from 2018 to 2025; a moderate decrease in Wisconsin resident enrollments is projected to be partially offset by a small increase in out-of-state enrollments in the 2018-2025 time period.
- UW-Platteville's share of System-wide Wisconsin resident enrollments is projected to remain at 4.9% through 2025. For more information on how resident shares were calculated, see Section 3.A.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville's tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans' Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

**Institutional Results: UW-River Falls**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	3,065	2,721	2,439	11.2% Decrease or 344 Fewer Enrollments	10.4% Decrease or 282 Fewer Enrollments
Out-of-State Undergraduate	3,259	3,004	3,331	7.8% Decrease or 255 Fewer Enrollments	10.9% Increase or 327 More Enrollments
Total Undergraduate	6,324	5,725	5,770	9.5% Decrease or 599 Fewer Enrollments	0.8% Increase or 45 More Enrollments
Total Enrollment	6,788	6,139	6,188	9.6% Decrease or 649 Fewer Enrollments	0.8% Increase or 49 More Enrollments



**Undergraduate Tuition Profile\***

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	50.9%	48.2%	47.5%
Out-of-State	3.1%	4.1%	3.7%
Out-of-State (Discounted)	0.0%	0.0%	0.3%
Out-of-State (Reciprocity)	45.9%	47.7%	48.5%

**Notes**

- River Falls is projected to maintain similar enrollment levels over the next 7 years. While their Wisconsin resident undergraduate enrollments are set to decline at a similar rate as the past 7 years, their out-of-state enrollments are projected to continue their historically broader positive trend and offset those losses.

**Institutionally Provided Context**

River Falls feels that they will likely outperform these projections due to extremely favorable demographics in the surrounding Wisconsin counties and the Twin Cities metropolitan area, where they draw most of their students. More information on Wisconsin regional demographic projections can be found in Section 1.

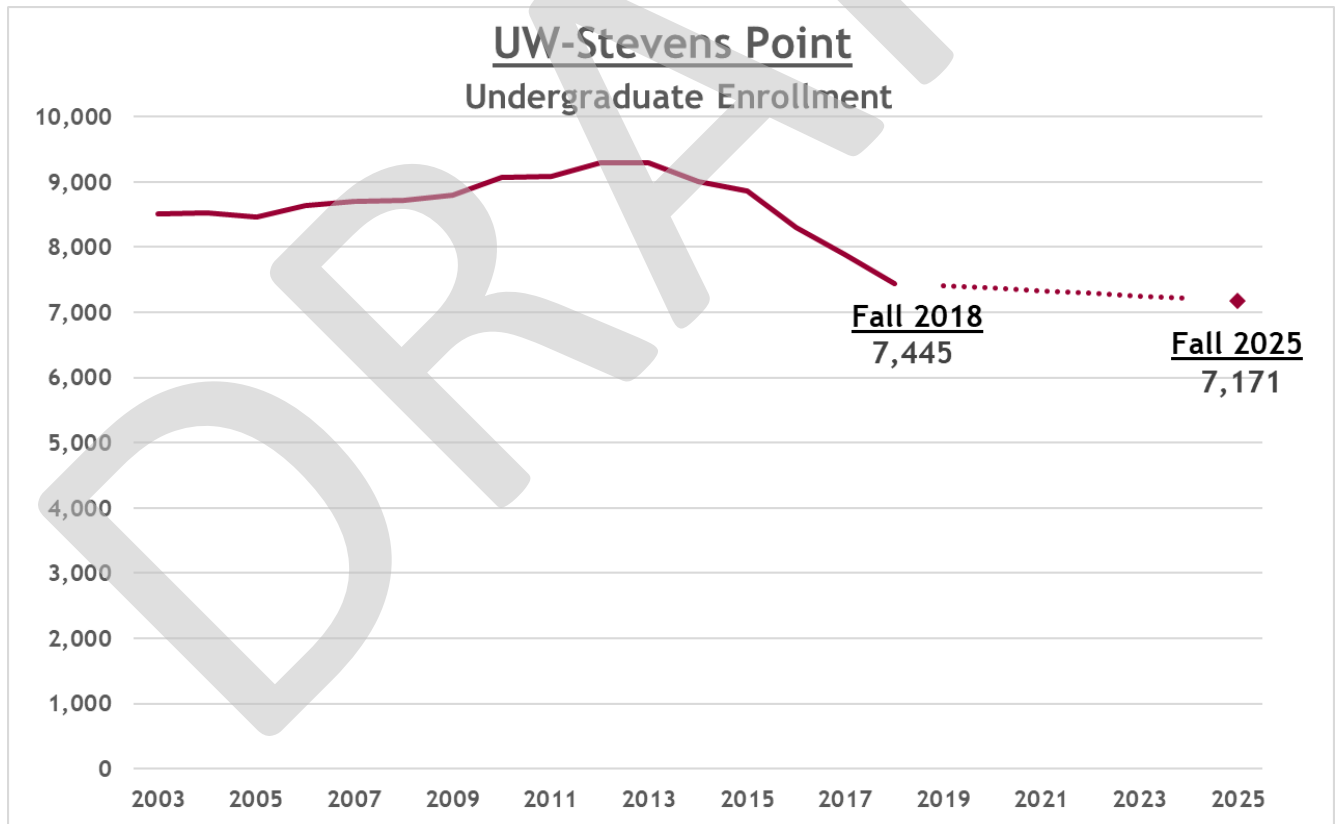
**Institutionally Provided Projections**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
Total Undergraduate					

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

### Institutional Results: UW-Stevens Point

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	8,227	6,429	6,051	21.9% Decrease or 1,798 Fewer Enrollments	5.9% Decrease or 378 Fewer Enrollments
Out-of-State Undergraduate	858	1,016	1,120	18.4% Increase or 158 More Enrollments	10.3% Increase or 104 More Enrollments
Total Undergraduate	9,085	7,445	7,171	18.1% Decrease or 1,640 Fewer Enrollments	3.7% Decrease or 274 Fewer Enrollments
Total Enrollment	9,477	7,760	7,475	18.1% Decrease or 1,717 Fewer Enrollments	3.7% Decrease or 285 Fewer Enrollments



### Undergraduate Tuition Profile\*

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	91.1%	88.6%	86.4%
Out-of-State	4.4%	3.2%	3.1%
Out-of-State (Discounted)	0.2%	0.1%	0.3%
Out-of-State (Reciprocity)	4.3%	8.1%	10.3%

#### Notes

- Stevens Point is one of the institutions with the sharpest declines over the past 7 years, and while those trends are projected to slow down over the next 7 years, they are not expected to turn around.
- In terms of Wisconsin resident enrollment, Stevens Point is not expected to do much worse than the UW System overall (5.0% percent decrease at the system level, 5.9% decrease at UWSP) largely due to resident share modelling predicting, perhaps optimistically, that Stevens Point’s share of UWS resident enrollment will bottom out at its current level, 5.7%. More information on how resident enrollment shares were calculated is available in Section 3.A.
- Out-of-state populations are projected to continue to increase but, since these populations are not large, the impact will be limited.

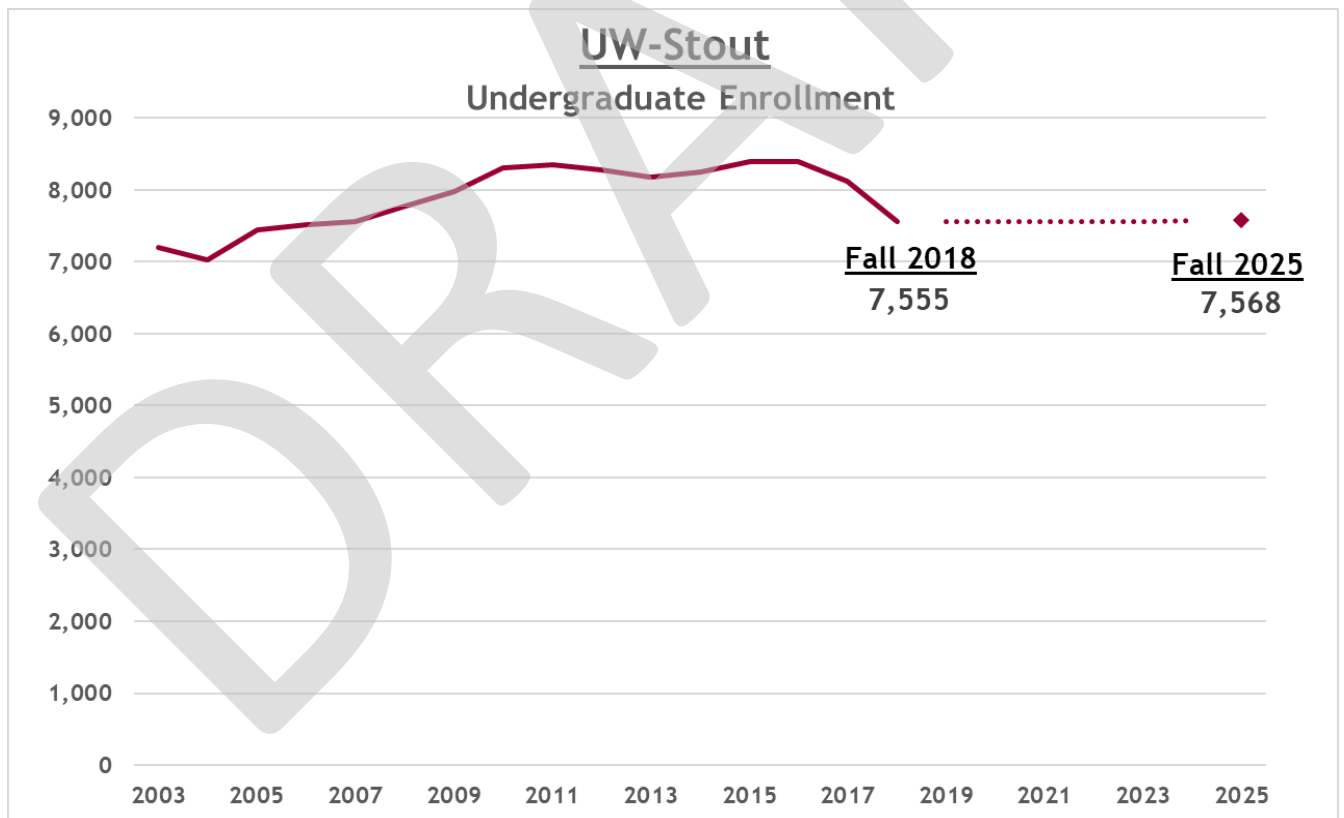
#### Institutionally Provided Context

Due to projected poor regional demographics in central Wisconsin to 2025, Stevens Point feels like they will likely underperform these numbers as they draw heavily from nearby counties. More information on the regional demographics of Wisconsin is available in Section 1.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

**Institutional Results: UW-Stout**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	5,748	4,948	4,677	13.9% Decrease or 800 Fewer Enrollments	5.5% Decrease or 271 Fewer Enrollments
Out-of-State Undergraduate	2,605	2,607	2,891	0.1% Increase or 2 More Enrollments	10.9% Increase or 284 More Enrollments
Total Undergraduate	8,353	7,555	7,568	9.6% Decrease or 798 Fewer Enrollments	0.2% Increase or 13 More Enrollments
Total Enrollment	9,356	8,748	8,763	6.5% Decrease or 608 Fewer Enrollments	0.2% Increase or 15 More Enrollments



**Undergraduate Tuition Profile\***

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	68.1%	66.8%	65.5%
Out-of-State	3.3%	4.4%	4.9%
Out-of-State (Discounted)		0.0%	0.4%
Out-of-State (Reciprocity)	28.5%	28.8%	29.2%

**Notes**

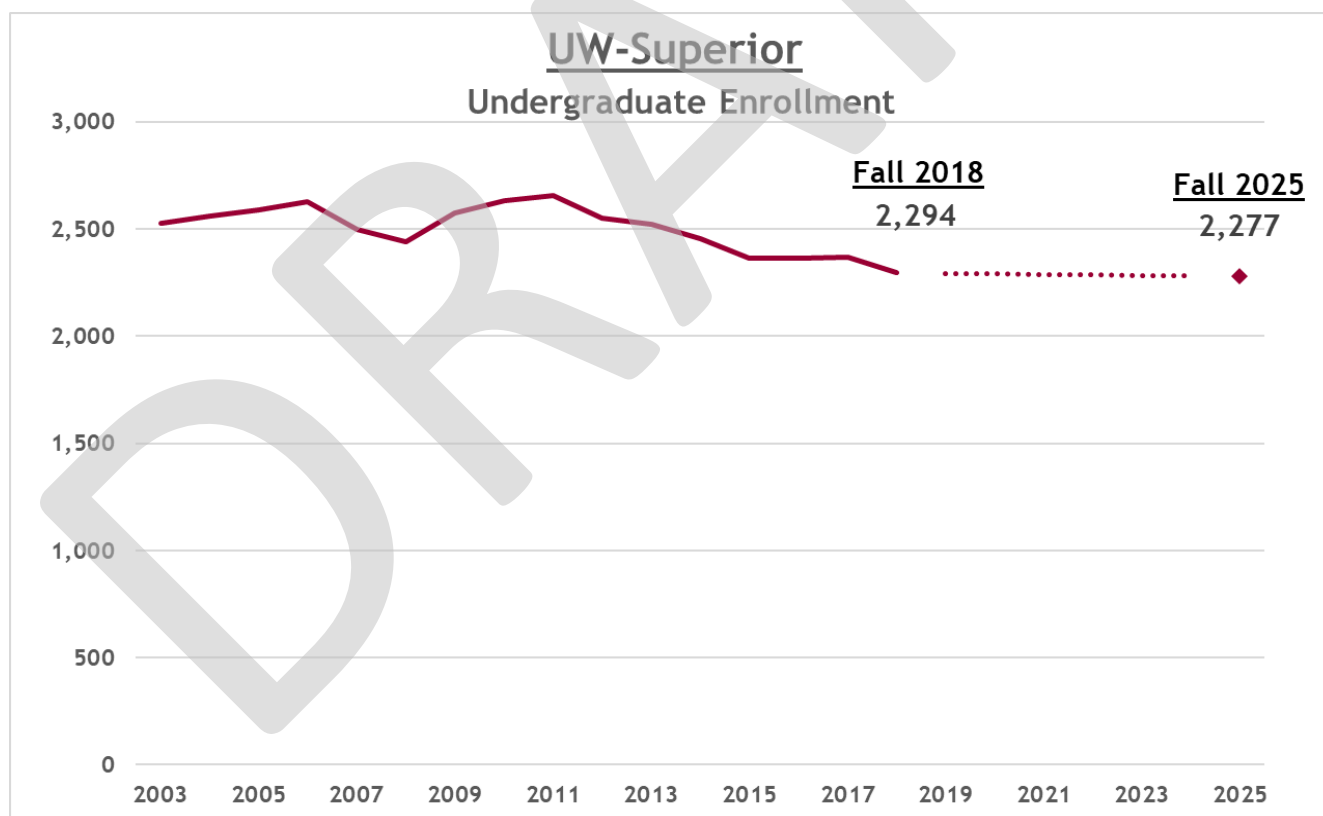
- Overall, undergraduate enrollment at UW-Stout is expected to remain flat, with a gain of only 13 students projected over the next 7 years.
- The number of Wisconsin resident undergraduates attending the UW System is expected to decrease around 5% over the next 7 years; Stout’s projections fit right in line with this.
- Stout is also projected to continue the longer-term trend of gaining out-of-state enrollments, a pattern that will offset the projected decrease in resident numbers.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.



### Institutional Results: UW-Superior

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	1,380	1,088	1,024	<b>21.2%</b> Decrease or <b>292</b> Fewer Enrollments	<b>5.9%</b> Decrease or <b>64</b> Fewer Enrollments
Out-of-State Undergraduate	1,275	1,206	1,253	<b>5.4%</b> Decrease or <b>69</b> Fewer Enrollments	<b>3.9%</b> Increase or <b>47</b> More Enrollments
Total Undergraduate	2,655	2,294	2,277	<b>13.6%</b> Decrease or <b>361</b> Fewer Enrollments	<b>0.7%</b> Decrease or <b>17</b> Fewer Enrollments
Total Enrollment	2,825	2,601	2,582	<b>7.9%</b> Decrease or <b>224</b> Fewer Enrollments	<b>0.7%</b> Decrease or <b>19</b> Fewer Enrollments



**Undergraduate Tuition Profile\***

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	53.0%	51.3%	47.4%
Out-of-State	7.5%	10.7%	15.0%
Out-of-State (Discounted)			0.3%
Out-of-State (Reciprocity)	39.5%	38.0%	37.3%

**Notes**

- Overall undergraduate enrollments are expected to remain flat for UW-Superior, with a decline of 17 students (0.7%) over the next 7 years.
- Slight growth in out-of-state undergraduates is projected. This, combined with a slowing in the decline in Wisconsin resident numbers, lead to UW-Superior’s neutral outcome over the next seven years.

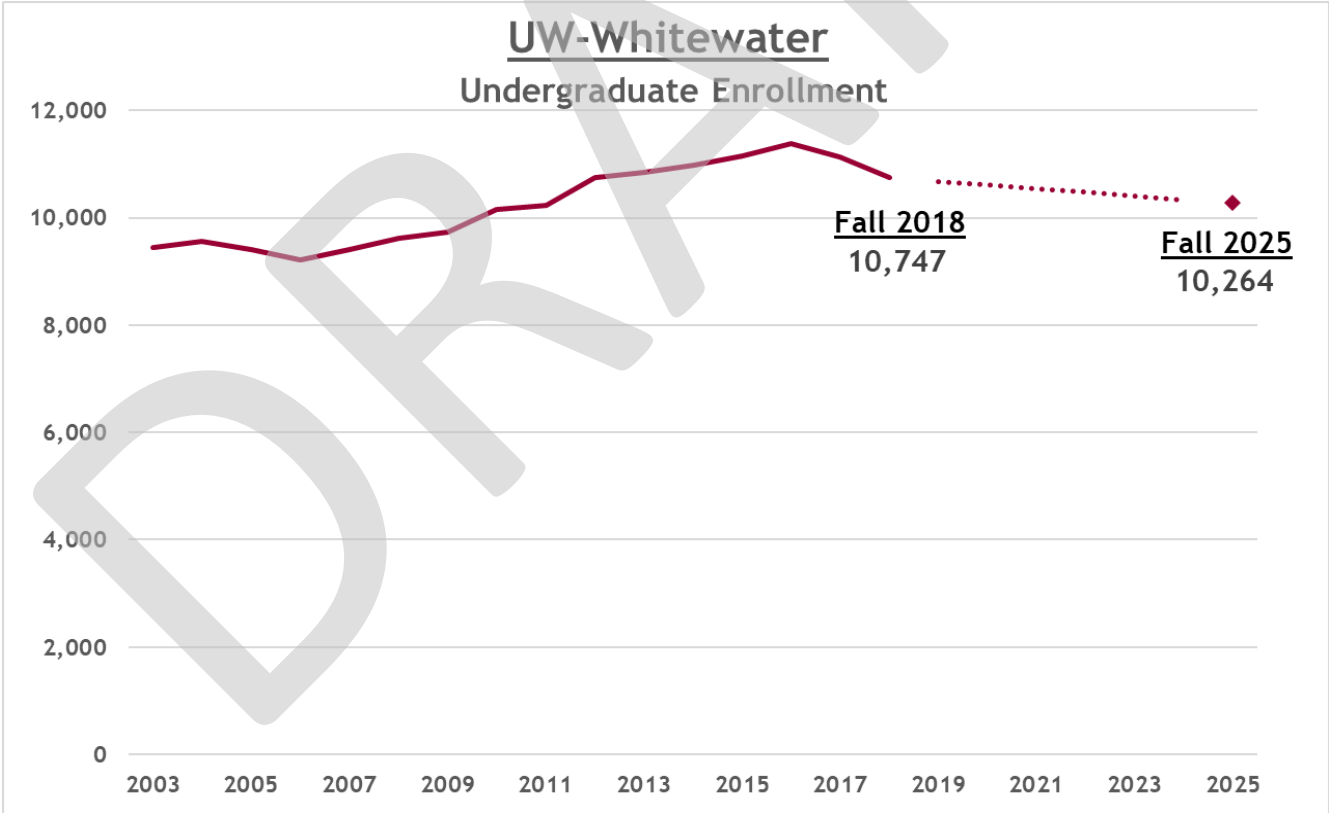
**Institutionally Provided Context**

Superior feels that while the projected enrollments line up fairly well with their own projections, there is more room to fall below these numbers than there is to exceed them due to the demographic trends in the local counties. As a result, Superior feels that if they are to make enrollment gains, it will be by improving retention rates (especially for their Minnesota students) as opposed to attracting a larger freshman cohort. More information on regional demographics can be found in Section 1.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

**Institutional Results: UW-Whitewater**

Category	Fall 2011 Enrollment	Fall 2018 Enrollment	Fall 2025 Projected Enrollment	Prior Performance 2011-2018	Projected Performance 2018 - 2025
In-State Undergraduate	9,039	8,941	8,310	1.1% Decrease or 98 Fewer Enrollments	7.1% Decrease or 631 Fewer Enrollments
Out-of-State Undergraduate	1,189	1,806	1,954	51.9% Increase or 617 More Enrollments	8.2% Increase or 148 More Enrollments
Total Undergraduate	10,228	10,747	10,264	5.1% Increase or 519 More Enrollments	4.5% Decrease or 483 Fewer Enrollments
Total Enrollment	11,643	12,084	11,541	3.6% Increase or 441 More Enrollments	4.5% Decrease or 543 Fewer Enrollments



**Undergraduate Tuition Profile\***

Residency by Tuition Assessed

- In-State
- Out-of-State
- Out-of-State (Discounted)
- Out-of-State (Reciprocity)



	2008	2013	2018
In-State	92.0%	85.3%	83.2%
Out-of-State	6.9%	13.6%	15.5%
Out-of-State (Discounted)	0.4%	0.4%	0.8%
Out-of-State (Reciprocity)	0.7%	0.6%	0.5%

**Notes**

- Whitewater’s recent trend of declining undergraduate enrollments is expected to continue; while they had significant gains since 2010, there have been sizable declines more recently.
- The historical and projected decline is accounted for almost entirely by their recent decrease in Wisconsin resident undergraduate numbers; this trend is also expected to continue into 2025.
- Whitewater’s out-of-state undergraduate numbers are expected to increase slightly in accordance with longer term trends, but a recent declines have led to a slower rate of projected growth.

\*Residency by tuition profiles solely reflect differential tuition rates due to the following established programs: Minnesota Tuition Reciprocity, Midwest Student Exchange Program, UW-Platteville’s tri-state regional workforce initiative, Return to Wisconsin programs, and the Veterans’ Choice Act. These profiles do not otherwise include any other tuition remissions/waivers, nor do they factor in any institutional grant aid.

## Section 3A: Methodology and Technical Detail

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## Methodology

### **Step 1: Generate historical resident undergraduate enrollment rates for each of the 56 distinct subsets of the UW system student population.**

Wisconsin Department of Administration data, which provide single-year, gender-specific population counts for 2010-2025, were combined with annual 2000-2009 Wisconsin Intercensal data from the US Census to create an annual time series (2000-2025) of historical and projected population counts. Since the 2000-2009 Intercensal data was reported for age groups that spanned 5 years (e.g., 15 to 19, 20 to 24), the 2000 decennial census data was introduced to assist in more finely breaking out the age/gender groups such that they conformed with those present in the NCES model. Single-age, single-year shares for male and female 14-to-24-year olds were derived for 2001-2009 using interpolation.

Thus, a time series was established for each of the following age groups from 2000-2025 for each gender: single years for 14-24, 25-29, 30-34, and 35 and over.

These population counts were then combined with UW System CDR fall-term enrollment data to generate a historical time series of enrollment rates from 2000-2018. For each age/gender group above, two time series were generated, one for full-time students and another for part-time students, to arrive at 56 distinct subsets of the UW System resident undergraduate population.

### **Step 2: Produce projected enrollment rates for each of the 56 resident undergraduate subpopulations.**

The primary model for generating these rates was pooled seemingly unrelated regression (SUR) with first-order autocorrelation, the same model that was used in the NCES's "Enrollment in Degree-Granting Institutions Projection Model" (*NCES Projections of Education Statistics to 2026*). Equations for traditionally aged (18-24) UWS students were pooled by age and included age-group dummy variables. For each gender and attendance status (full-time or part-time) equation, the relationship between age, gender, attendance status, and economic conditions was estimated using SUR methodology.

For students under 17 and over 25 years old, a range of exponential smoothing models (linear, simple, double, and damp-trend) were employed to determine best fit using a suite of metrics that included R-squared and Mean Average Percent Error (MAPE).

#### **More detail on the SUR model.**

Economic conditions were captured using state-level age-specific annual unemployment rates and Wisconsin annual per capita income. To properly adhere to requisite conditions for SUR modeling, the part-time male and female rates differed from their full-time counterparts and used the overall unemployment rate in lieu of the age/gender specific calculations, thus mirroring the differentiation method used by NCES.

Unemployment rate data was from the Bureau of Labor Statistics' "Employment Status of the Civilian Noninstitutional Population by Sex, Race, Hispanic or Latino Ethnicity, and Detailed Age, Annual Averages" report. To align with the publicly available age breakouts, the following many-to-one associations were used in the enrollment rate estimation:

For Enrollment Rates for the following group	. . . This BLS unemployment rate was used
18, 19	16-19 Year-old Unemployment Rate
20, 21, 22, 23, 24	20-24 Year-old Unemployment Rate
25-29, 30-34	25-34 Year-old Unemployment Rate
35 and Over	35 and Over

Annual averages for 2018 are preliminary. The 2025 Wisconsin unemployment rate projection produced by the Office of Economic Advisors in the Wisconsin Department of Workforce Development was used to generate the 2025 projected enrollment rates. Age-specific unemployment rates for 2025 were then aligned to follow the trend displayed in the DWD/OEA statewide projection.

Wisconsin Annual Per Capita Income (WI PCI) data, from the U.S. Bureau of Economic Analysis, were adjusted into 2017 dollars using the “Personal Consumption Expenditures excluding Food and Energy Chain-Type Price Index.” The 2025 WI PCI was determined through simple linear forecast of inflation adjusted PCI values.

Only independent variables that were significant at or near  $\alpha=.10$  were maintained in the models used to generate the 2025 projection.

In some instances, a second autoregressive term was introduced to deal with remaining serial autocorrelation.

### **Step 3: Derive institution-level resident undergraduate enrollment projections from system-level projections.**

Analysis of historical data revealed institutions have either a static share, static rate of change, or a cyclical rate of change. Regardless of pattern, historical shares were found to be a good predictor of an institution’s future resident undergraduate share.

In light of this, each institution’s resident undergraduate share was independently estimated using an autoregressive integrated moving average model (ARIMA) with order (3,1,1). The autoregressive and moving average specifications were selected via diagnostic methods and tested against historical data, while the first-order term circumvented the invalid assumption of static underlying proportions for every institution. Once estimated, shares were then standardized to sum to 100%.

### **Step 4: Independently estimate each institutions non-Wisconsin Undergraduate Enrollments.**

To reflect differences in the non-Wisconsin populations UW system institutions enroll (and their desire and ability to attract them), nonresident enrollment was estimated independently for each UW campus by selecting among exponential smoothing and simple linear forecasting models.

### **Step 5: Scale up to total enrollment using each institution’s current UG/Total Enrollment Ratio.**

To arrive at total enrollment, undergraduate enrollment was scaled up based on each institution’s current ratio of undergraduate to total enrollment. While this omits directly estimating the graduate population, it is a reasonable method to estimate total enrollment, as these undergraduate-to-total ratios are generally very stable and evolve slowly, if at all, over similar time periods.



### **Limitations of the Methodology**

Given the parameters of the task at hand—making enrollment projections for all UW System campuses using a common methodology—we believe that the NCES-based model which was selected is the most appropriate choice. There are, however, certain caveats that should be kept in mind in interpreting our results. As with all projections, the model is limited by the nature and availability of relevant quantitative data. Some data, like detailed race/ethnicity data by age and year, is not available at the required unit of analysis. Moreover, unanticipated changes or errors in future forecasts of independent variables—unemployment rate for example—will cause actual enrollments to deviate from these projected values. Secondly, this model is best applied on the detailed population and economic estimates available at the state-level. As such, regional variations in population trends are not explicitly taken into account. Further detail and context on regional population trends within Wisconsin can be found in the appendix. Finally, forthcoming changes in program, recruitment and retention strategies whose impacts have yet to be captured in historical data were not integrated into the model.

See the following pages for estimated enrollment rates, equations and model statistics.

**Historical and Projected Enrollment Rates by Age, Gender, and Full-Time/Part-Time Status**  
**UW System**

Age	Male					
	Full Time			Part Time		
	Fall 2011	Fall 2018	Fall 2025 Projected	Fall 2011	Fall 2018	Fall 2025 Projected
18	19.8	18.2	17.8	0.8	1.4	1.6
19	22.4	20.6	19.8	0.9	1.1	1.4
20	21.6	19.3	17.6	1.2	1.5	1.7
21	20.9	18.9	16.7	1.4	1.7	1.8
22	15.5	12.1	10.6	2.2	2.1	2.2
23	7.5	5.4	3.7	1.9	1.7	1.9
24	4.0	2.6	0.5	1.5	1.2	1.5
25-29	1.8	1.0	0.3	0.9	0.8	0.8
30-34	0.6	0.3	0.1	0.5	0.4	0.2
35+	0.3	0.1	< 0.1	0.6	0.6	0.6

Age	Female					
	Full Time			Part Time		
	Fall 2011	Fall 2018	Fall 2025 Projected	Fall 2011	Fall 2018	Fall 2025 Projected
18	26.4	24.4	23.8	1.3	1.9	2.1
19	26.9	26.1	24.3	1.5	1.9	2.1
20	25.3	24.5	23.6	1.6	1.9	2.1
21	24.2	23.1	21.7	1.8	1.9	2.1
22	15.7	11.8	11.8	2.4	2.3	2.3
23	6.4	4.6	3.9	1.8	1.7	2.0
24	3.0	2.2	1.1	1.5	1.3	1.7
25-29	1.3	0.8	0.4	1.1	0.8	0.5
30-34	0.5	0.3	0.2	0.7	0.5	0.2
35+	0.3	0.2	0.1	0.8	0.8	0.7

## Seemingly Unrelated Regression Model Estimated Equation and Model Statistics

### Coefficients for Part-Time Female

Variable	Coefficient	Standard Error	t-statistic	p-value
Intercept	-7.78	2.37	-3.28	0.0014
AR(1) Term	0.89	0.03	27.55	<.0001
Log of three-period moving average of WI Real Per Capita Income	0.73	0.22	3.31	0.0012
Log of Wisconsin Unemployment Rate	0.11	0.04	2.40	0.0179

### Coefficients for Full-Time Female Equation

Variable	Coefficient	Standard Error	t-statistic	p-value
Intercept	21.66	8.24	2.63	0.0098
Dummy Term for 21 Year Olds	-0.34	0.16	-2.06	0.0413
Dummy Term for 22 Year Olds	-1.84	0.52	-3.54	0.0006
Dummy Term for 23 Year Olds	-3.16	0.95	-3.32	0.0012
Dummy Term for 24 Year Olds	-3.63	1.11	-3.26	0.0015
AR(1) Term	0.84	0.05	17.08	<.0001
Log of three-period moving average of WI Real Per Capita Income	-1.69	0.75	-2.24	0.0268
Log Wisconsin Age/Gender specific Unemployment Rate	0.25	0.13	2.01	0.0468

System Weighted R-Squared = .99

Durbin Watson Part-Time Female Equation = 2.4

Durbin Watson Full-Time Female Equation = 2.4

For more information on the model or particular data sources please refer to technical notes found in Appendix

## Seemingly Unrelated Regression Model Estimated Equation and Model Statistics

### Coefficients for Part-Time Male Equation

Variable	Coefficient	Standard Error	t-statistic	p-value
Intercept	-5.99	2.05	-2.92	0.0043
AR(1) Term	0.95	0.03	37.46	<.0001
Log of three-period moving average of WI Real Per Capita Income	0.55	0.19	2.88	0.0048
Log of Wisconsin Unemployment Rate	0.12	0.04	3.28	0.0014

### Coefficients for Full-Time Male Equation

Variable	Coefficient	Standard Error	t-statistic	p-value
Intercept	17.03	8.31	2.05	0.043
Dummy Term for 19 Year Olds	0.34	0.17	2.04	0.0442
Dummy Term for 20 Year Olds	0.38	0.16	2.37	0.0196
Dummy Term for 21 Year Olds	0.20	0.16	1.31	0.1936
Dummy Term for 22 Year Olds	-0.83	0.24	-3.51	0.0006
Dummy Term for 23 Year Olds	-2.06	0.55	-3.76	0.0003
Dummy Term for 24 Year Olds	-2.66	0.72	-3.7	0.0003
AR(1) Term	0.85	0.05	15.64	<.0001
AR(2) Term*	-0.03	0.02	-1.36	0.1763
Log of three-period moving average of WI Real Per Capita Income	-1.39	0.79	-1.75	0.083
Log Wisconsin Age/Gender specific Unemployment Rate	0.45	0.15	3.08	0.0026

System Weighted R-Squared = .99

Durbin Watson Part-Time Male Equation = 1.5

Durbin Watson Full-Time Male Equation = 2.6

For more information on the model or particular data sources please refer to technical notes found in Appendix

\*AR(2) term introduced and maintained to reduce autocorrelation

## Section 3B: Materials Provided by Institutions

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Materials Provided by UW-Green Bay

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## UW-GREEN BAY ENROLLMENT PROJECTIONS Undergraduate Enrollment Headcount

UW-Green Bay projects we will grow by an average of 3%, each year until 2025. This projection is based on steady growth over the last three years, the fact that our region has a growing demographic, we have a mission to provide access to students to complete an undergraduate education, and that our applications continue to rise. While we have calculated detailed enrollment projections by program and it is possible that we will grow faster than this, we believe 3% is a safe estimate. At this time, we are on pace for a fourth straight year of enrollment increases for 2019-20 due to strong enrollment of new freshmen and retention rates. In addition, we have added strategic degree programs in each of our four Colleges that will see rapid growth. These include, but are not limited to, Mechanical Engineering, a new B.S. in Nursing, a restructured Business Administration degree that is now also offered online, and Psychology. Should Electrical Engineering be approved, we expect similar growth to what is happening currently in Mechanical.

YEAR	STUDENTS	INCREASE
Fall 2018	7,006	
Fall 2019	7,216	3.0%
Fall 2020	7,433	3.0%
Fall 2021	7,656	3.0%
Fall 2022	7,885	3.0%
Fall 2023	8,121	3.0%
Fall 2024	8,366	3.0%
Fall 2025	8,616	3.0%



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**GREEN BAY**

<b>Degree</b>	2019	2020	2021	2022	2023	2024	2025
Mechanical Engineering	100	150	200	250	250	300	300
Biology/Human Biology	725	745	765	785	815	830	850
Nursing	0	48	92	132	132	150	150
Computer Science	210	230	250	275	300	315	330
Business Administration	1214	1339	1405	1473	1550	1600	1650
Psychology	550	572	575	587	600	615	630

Materials Provided by UW-Oshkosh

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## UWO ENROLLMENT MANAGEMENT MEMORANDUM

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**TO:** BEN PASSMORE, ASSOCIATE VICE PRESIDENT, UWSA  
**FROM:** CHERYL GREEN, AVC-STUDENT AFFAIRS; AGGIE HANNI, AVC-ENROLLMENT; CHAD COTTI  
**SUBJECT:** UW-OSHKOSH: ENROLLMENT EXPECTATIONS SUMMARY  
**DATE:** AUGUST 26, 2019

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**Summary:** On 8/22/2019, UWSA held a conference call with UWO leadership regarding the newly developed UWSA enrollment projections model. At the conclusion of the call there was an expectation that UWO would “provide any projections that they have developed locally to supplement or add context to the projection UWS developed” in due course. Below we provide UWO’s internal enrollment expectations that were developed as part of a recent two-year strategic enrollment planning (SEP) process (guided by Ruffalo Noel Levitz Consulting) undertaken from 9/2017 – 7/2019. This planning and implementation process has now resulted in an ongoing strategic enrollment plan, encompassing several targeted enrollment actions strategies, which are now rolling into effect with the 2019-2020 AY (FA2020 recruitment cycle) for the Oshkosh Campus of UWO. The subsequent undergraduate enrollment projections provided are built off of baseline (non-SEP) expectations and then augmented by the aggregated enrollment expectations of the SEP.<sup>1</sup> Overall, UWO baseline enrollment expectations for FA2025 total undergraduate enrollment are very similar to those produced by the UWSA enrollment model (13,115 vs 12,827), however, after taking into account the implementation of the strategic enrollment plan, internal expectations are now 13,975 for FA2025, or 8.9% higher than the UWSA projections (which are built on historical data that cannot be informed by the presence of the newly implemented UWO-SEP. Hence, we feel our Fall 2025 forecast should be characterized as “likely to exceed forecast” at this time.

**UWO Enrollment Projections:** Baseline estimates are built off of historical enrollment outcomes and trends at UWO in the undergraduate enrollment of first-year students, transfer students, continuing students (based on graduation, retention, and persistence rates), and CAPP students, and, similar to the UWSA modeling, will only be accurate to the extent that past is a good predictor of the future. Augmentation to baseline projections is based on the aggregation of the enrollment expectations from nine approved strategic enrollment action plans that are currently funded and rolling into place this year (AY2020). The aggregation of the enrollment effects of these individual action plans accounts for reasonable expectation of duplication and overlap of enrollment impact (all expectations reviewed and modified by RNL Consulting). Further strategic enrollment action plans are slated for review and implementation in the near future (one currently undergoing RFP). These plans should further augment enrollment expectation, but are not currently included in the below enrollment projections. Each strategic

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<sup>1</sup> The SEP pre-dates UWSA restructuring and, as is the case with the UWSA projections, are only pertinent to the UWO Oshkosh Campus, proper.

enrollment plan targets a set or sub-set of the UWO Oshkosh Campus population (e.g.; first-year students, transfer students, retention, etc.) and, as such, augments the baseline projection in the corresponding student subset accordingly. Overall final (SEP-augmented) undergraduate enrollment expectations are provided below. Enrollment numbers were internally only extrapolated out FA 2023, but they have been held constant after that point through FA 2025 to align with the timeframe of the UWSA enrollment projections.<sup>2</sup>

<b>UWO Total UG Enrollment Expectations</b>				
<b>Fall 2021</b>	<b>Fall 2022</b>	<b>Fall 2023</b>	<b>Fall 2024</b>	<b>Fall 2025</b>
12969	13381	13975	13975	13975

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<sup>2</sup> UWO also produced graduate enrollment expectations, which indicate a very stable (flat) enrollment pattern. This is independently consistent with the UWSA projections/assumptions for graduate enrollment as well.

Materials Provided by UW-Parkside

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## UW-Parkside Graduate Program Enrollment Fall 2014 - Fall 2019

Degree	Program	Fall 2014	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019*
MS	Applied Biotechnology (Collaborative)**						
MS	Applied Molecular Biology/Biological Sciences	7	6	4	3	5	7
MA	Applied Professional Studies					6	9
MBA	Business Administration	90	87	85	71	73	89
MBA	Business Administration (Online)					44	213
MS	Clinical Mental Health Counseling					20	31
MS	Computer And Information Systems	14	12	13	17	22	8
MS	Health & Wellness Management (Collaborative)			2	13	18	12
MS	Healthcare Administration (Collaborative)						4
MS	Information Technology Mgt (Collaborative)**						
MS	Sport Management				7	26	21
MS	Sport Management (Online)						5
MS	Sustainable Management (Collaborative)	12	13	18	26	21	20
NDEG	Grad Special	13	25	1	3	0	0
<b>Total</b>		<b>136</b>	<b>143</b>	<b>123</b>	<b>140</b>	<b>235</b>	<b>419</b>

\*Fall 2019 enrollment as of 8/18/2019

\*\*Enrollment begins in Spring 2020

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Materials Provided by UW-River Falls

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1

**New  
Freshman  
Enrollment  
Growth  
2014-17**

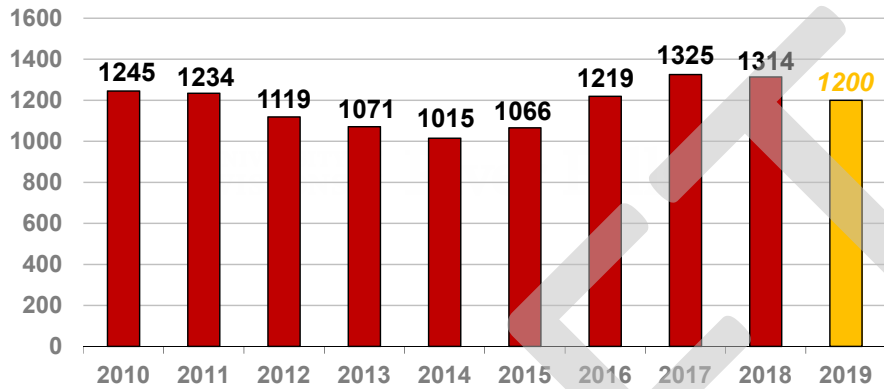
UW-River Falls	31%
UW-Green Bay	27%
UW-Parkside	13%
UW-Eau Claire	12%
UW-La Crosse	7%
UW-Madison	6%
UW-Superior	5%
UW-Stout	4%
UW-Stevens Point	-4%
UW-Whitewater	-6%
UW-Milwaukee	-6%
UW-Oshkosh	-11%
UW-Platteville	-16%
<b>UW System</b>	<b>0%</b>

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2

## Number of New Freshmen Fall Semester

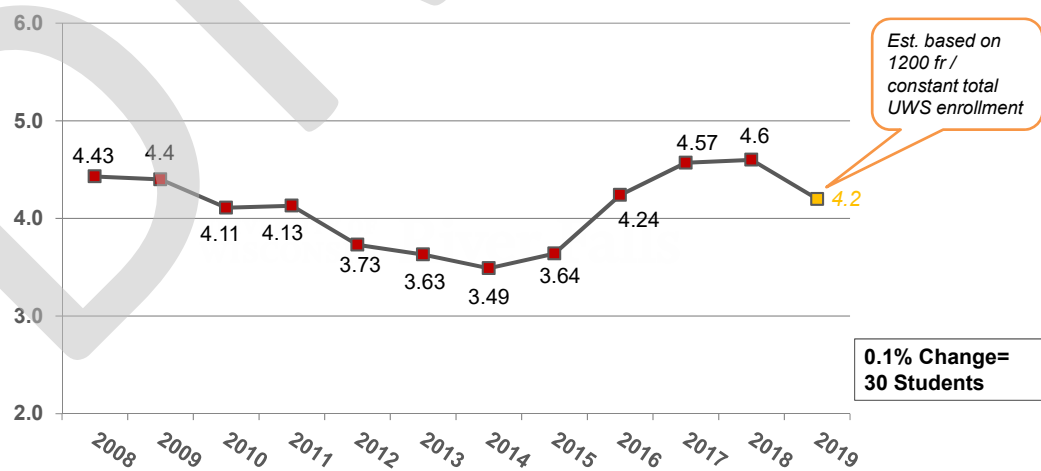


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3

## UWRF New Freshmen: % Market Share



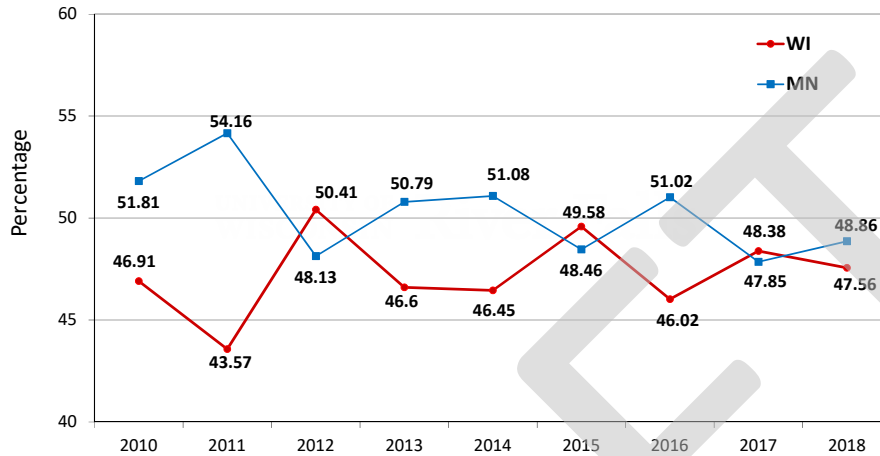
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4

## New Freshmen as a Percentage

by State



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5

## Enrollment in New Programs (since 2015)

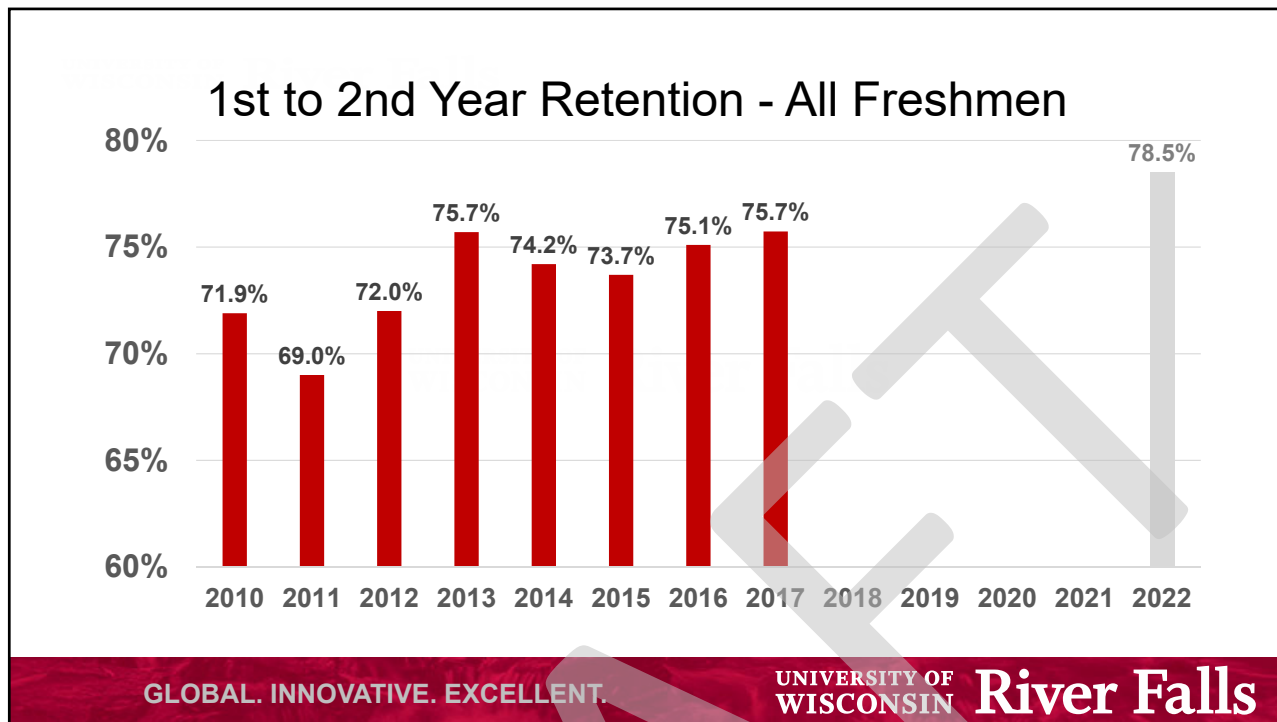
Total Enrollment: 0 → 276

Program	Launched	Fall 2018 enrollment	Projected 5 <sup>th</sup> year enrollment
Criminology	fall 2015	135 (year 4)	118
Agricultural Engineering	fall 2016	32 (year 3)	73
Data Science	fall 2016	55 (year 3)	100
Neuroscience	fall 2017	54 (year 2)	84

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6



7

### Reinvigorated Focus on Student Success

- Build upon student-centered culture.
- More integrated and intentional approach to educating the whole student, better supporting them for successful careers and lives of engaged citizenship.
- Increase collaboration throughout the institution, while also rethinking structures and processes.

Opportunities:

- EAB Navigate software
- \$15.1 million renovation of Rodli Hall Student Success Center (Jan. 2020)

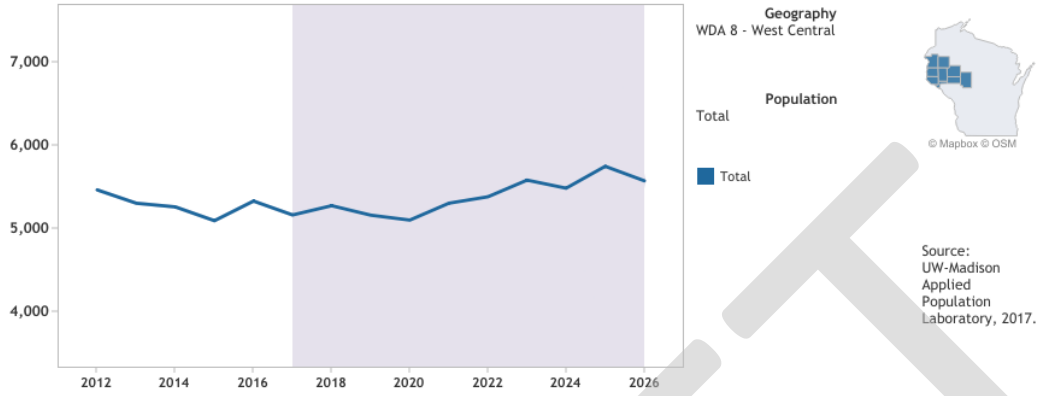
Read more:  
<https://www.uwrf.edu/Administration/Provost/Transforming-Student-Success.cfm>

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### WISCONSIN HIGH SCHOOL GRADUATE PROJECTIONS 2017-2026



Geography  
WDA 8 - West Central

Population  
Total

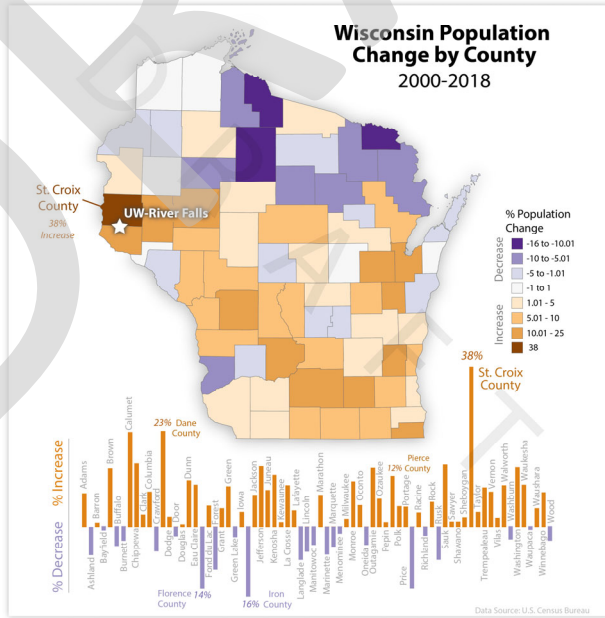
© Mapbox © OSM

Source:  
UW-Madison  
Applied  
Population  
Laboratory, 2017.

Population	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Total	5,465	5,305	5,261	5,096	5,331	5,165	5,276	5,162	5,103	5,305	5,383	5,582	5,485	5,748	5,574
Total - Public	5,333	5,175	5,119	4,960	5,182	5,028	5,162	5,046	4,978	5,174	5,249	5,450	5,359	5,610	5,448
African American - Public	62	68	67	84	87	89	83	90	88	80	74	79	81	92	70
Asian/Pacific Isl. - Public	158	173	154	126	144	131	127	146	153	134	140	114	148	154	150
Hispanic/Latino(a) - Public	107	103	140	130	201	149	187	186	166	192	202	245	276	275	269
Two or More Races - Public	61	74	73	80	74	107	91	112	135	130	186	239	202	270	253
White - Public	4,905	4,717	4,651	4,510	4,651	4,515	4,650	4,483	4,405	4,620	4,623	4,749	4,628	4,798	4,683
Total - Private	132	130	142	136	149	137	113	116	126	131	133	133	127	138	127

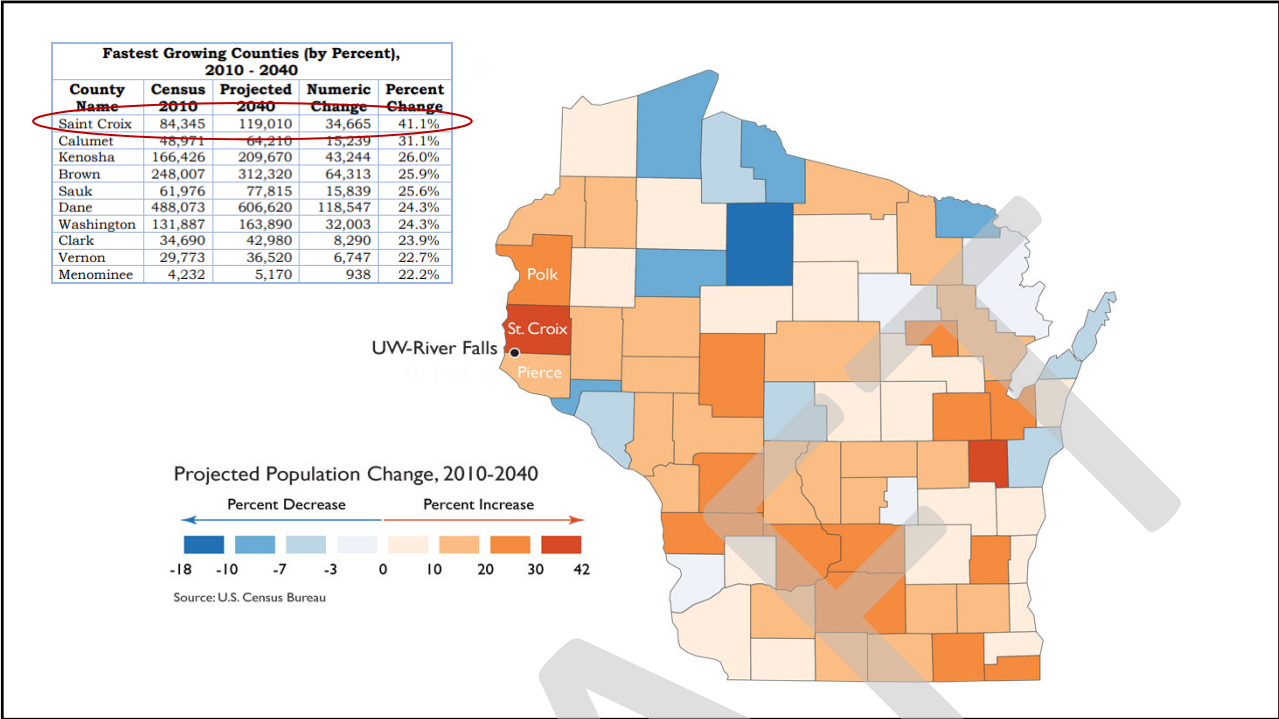
9

### Wisconsin Population Change by County 2000-2018



Map courtesy of the UW-River Falls Department of Geography and Geographic Information Systems.  
Data source: <http://www.usa.com/rank/wisconsin-state-population-growth-rate-county-rank.htm>

10



11

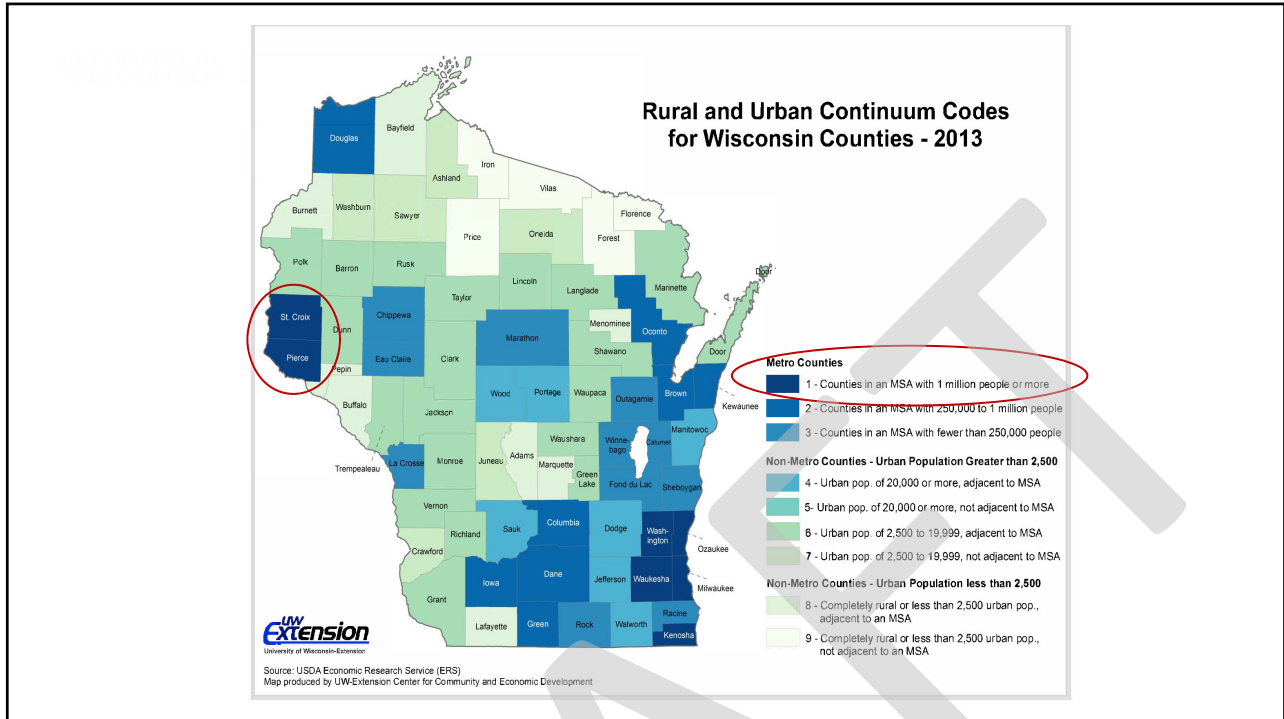
**Fact: UW-River Falls is in a metropolitan area that is home to:**

- **3.6 million** inhabitants
- **18** Fortune 500 companies
- **2<sup>nd</sup>** largest economy in the Midwest
- **15<sup>th</sup>** largest economy in the US

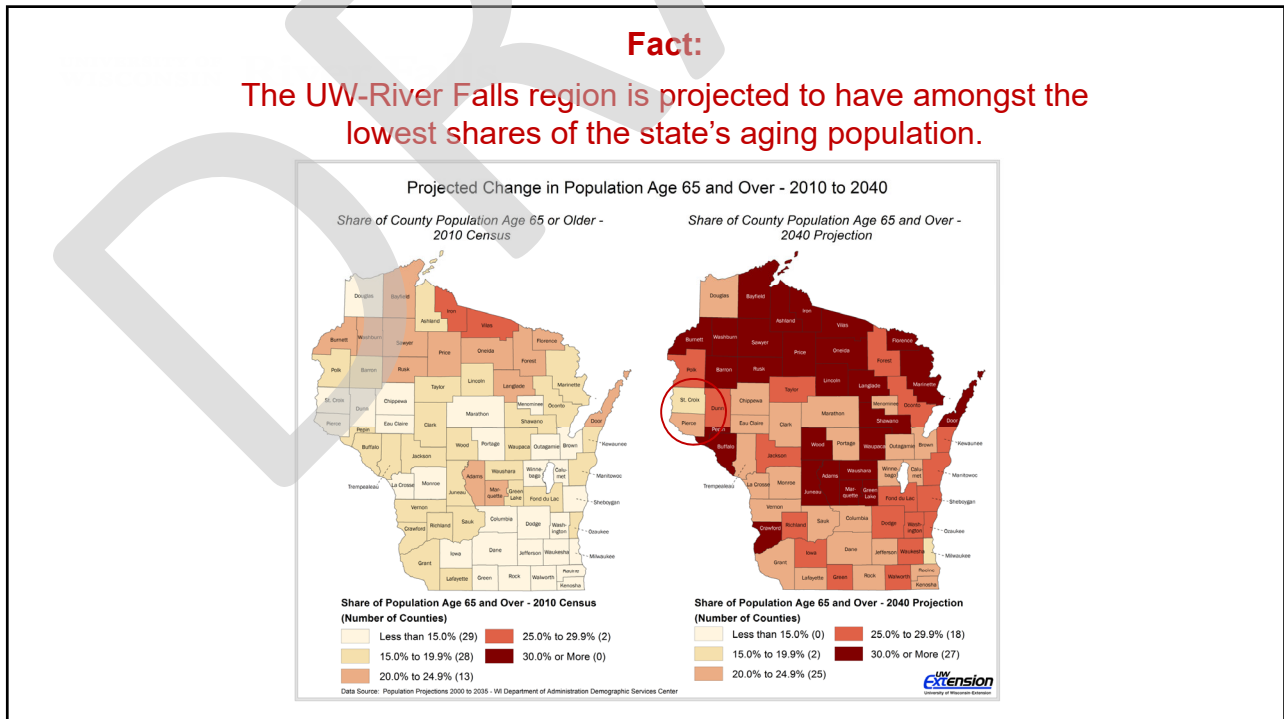
<https://www.bea.gov/data/gdp/gdp-metropolitan-area>

<https://worldview.earthdata.nasa.gov/>

12



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14





# COWS

Equity  
Sustainability  
Democracy

# Race in the Heartland

## Wisconsin's Extreme Racial Disparity

OCTOBER 2019

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**WISCONSIN'S EXTREME RACIAL DISPARITY** uses data from *Race in the Heartland*, written by Colin Gordon. *Race in the Heartland* is a joint project of the Iowa Policy Project, Policy Matters Ohio, COWS, and the Economic Policy Institute that reviews the racial inequality in the Midwest. It is an update of COWS' series on the disparities between white and black Wisconsinites.

## Introduction

Together with regional and national partners, COWS is releasing, *Race in the Heartland*, which provides critical regional, historical, and political context to help draw a more complete picture of the brutal racial inequality of the Midwest. The report highlights the distinct Midwestern structure of racial inequality:

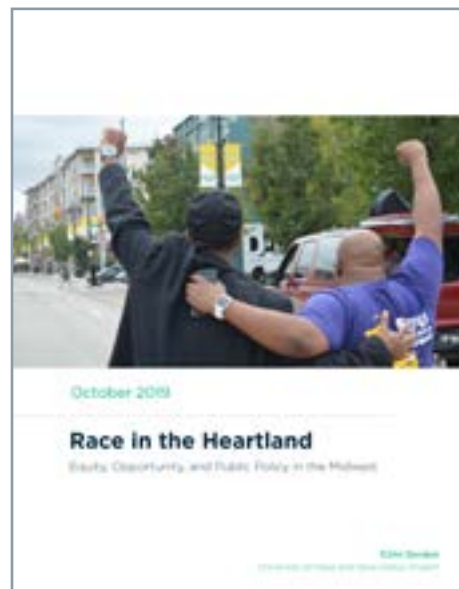
*"...the Midwest is among the starkest settings for racial disparity or inequality. The result is a jarring juxtaposition: While Mid-western metros (Des Moines, Madison, Minneapolis) typically crowd the "best places to live" lists, they are also among the very worst places to live for African-Americans. In one recent analysis, ranking the states on an index of racial inequality, the twelve states of the Midwest census region (Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin) claimed eight of the bottom ten slots and swept the bottom five."*

With this report, we focus on Wisconsin data from *Race in the Heartland* to focus in on and update our understanding of Wisconsin's racial inequality. On many measures, Wisconsin has the regrettable distinction of ranking among the worst states in the nation for racial inequality. Disparities among black and white residents of our state – spanning poverty, unemployment, educational attainment, and incarceration – have been documented consistently for more than a decade. Although activists and policymakers have increasingly focused on addressing these issues, they remain pressing.

This paper serves as a distillation of the Wisconsin data and policy ideas from *Race in the Heartland*. It also serves to update the data we have provided in our series on the state's racial inequality.

But more importantly, *Race in the Heartland* provides a careful historical context and a broadly informed policy framework that are critical to winning greater racial equity throughout this region. We encourage you to read the longer report and to be informed and, we hope, inspired by the information in it.

Read the full report at <https://www.epi.org/publication/race-in-the-heartland>.



## The bottom line: Wisconsin's racial disparities are extreme.

Relatively good outcomes for Wisconsin's white population and worse-than-national outcomes for the African American population create a large divide. Extreme disparities are evident across a broad range of indicators. The gap between outcomes for white and African American residents is not isolated to any one area. Closing the gap will likewise require a broad focus and multifaceted approach.

Racial disparity in Wisconsin is not inevitable. Thirty years ago the state generated much better economic outcomes for blacks who, on average, did better in Wisconsin than the national average. But

across the last 40 years, opportunity and outcomes for black residents in the state have fallen below national averages and the racial divide has grown. (See COWS' State of Working Wisconsin, 2018 for data on wages by race over the last 40 years.)

We hope that Race in the Heartland and this Wisconsin report contribute to a sense of urgency and increased attention to the pressing issue of racial disparity. In particular, we hope to support and fuel the efforts of so many who are organizing, strategizing, and working to close Wisconsin's extreme gap. (See the text box on Resources.)

## Resources on Racial Inequality in Wisconsin

Recent reports on racial disparity in Wisconsin have continued to highlight the severity of racial inequities as well as potential solutions for the state and localities within it.

**The Roadmap to Equity: A Two Generation Approach to Reducing Racial Disparities in Dane County**  
by the Race to Equity Project, 2016.

<http://racetoequity.net/uploads/Roadmap-to-Equity.pdf>.

**How Wisconsin Became the Home of Black Incarceration**

by George Joseph for City Lab, 2016.

<https://www.citylab.com/equity/2016/08/how-wisconsin-became-the-home-of-black-incarceration/496130/>.

**Race for Results: Wisconsin's Need to Reduce Racial Disparities**

by the Wisconsin Council on Children and Families, 2014.

<http://kidsforward.net/assets/RaceForResults.pdf>.

**The Wisconsin Racial Disparities Project**

by Pamela E. Oliver – Professor of Sociology at UW-Madison, 2016.

<https://www.ssc.wisc.edu/soc/racepoliticsjustice/>.



## From Birth to the Ballot Box: Wisconsin's Racial Disparities Across the Lifespan

In Wisconsin, racial disparity is evident in any life stage. From birth through schools and into the labor market, voting booth, and criminal justice system, extreme racial disparity is evident. We look across the life course in the data below.



### INFANT MORTALITY: 4TH WORST

In Wisconsin, black babies in the state are three times more likely to die than white babies. The white infant mortality rate is 5.2 per 1000 births, compared to a rate of 15.7 for black babies. This is the fourth most disparity outcome among states. Further, at 15.7 per 1000 births, the mortality rate of black babies is the worst in the nation. (See Race in the Heartland, Figure 16)

### CHILD POVERTY: 4TH WORST

The federal poverty line provides a consistent benchmark to identify families living with insufficient resources to meet basic needs. The poverty line is adjusted for family size, and in 2017 it was set at \$24,600 for a family of four (two adults and two children).

One of every three black children in Wisconsin live in poverty, a rate that is 3.5 times higher than that of white children. Wisconsin's disparity of child poverty by race is the fourth worst in the nation. (Source: American Community Survey 2017)

### 8TH GRADE MATH SCORES: WORST

Wisconsin's 8th grade white students' average scores on math skills assessments are well above the national average. Black students in the state score well below the national average. The distance between black and white outcomes on the test is the highest in the nation. (See Race in the Heartland, Figure 4)

### OUT-OF-SCHOOL SUSPENSIONS: 2ND WORST

In Wisconsin, black students are 7.5 times more likely than white students to face out-of-school suspension. That difference is second worst in the nation; only Illinois has higher disparity. (See Race in the Heartland, Figure 5)

### BACHELORS DEGREES: WORST

In Wisconsin, 14 percent of black adults hold a Bachelors Degree while 30 percent of whites do. With whites more than twice as likely as blacks to hold this level of education, Wisconsin posts the highest racial disparity in the nation. (See Race in the Heartland, Figure 6)

### INCARCERATION: 2ND WORST

Stark racial disparity in the US criminal justice system is well-known. But in this nation of extreme disparity, Wisconsin's racial disparity is nearly unmatched. Black Wisconsinites are more than 11 times more likely to be incarcerated than are their white neighbors. Only in New Jersey is incarceration disparity more extreme. (See Race in the Heartland, Figure 15)



## From Birth to the Ballot Box, continued



### EMPLOYMENT: WORST

One measure of economic opportunity is the employment to population ratio for workers ages 25-54 (often called “prime age” workers). This measure helps measure the opportunity and engagement of groups of workers.

In Wisconsin, 85 percent of prime age whites are employed, compared to 61 percent of blacks of the same age. Thus, the state’s racial disparity employment of prime age workers is the worst in the nation. (See Race in the Heartland, Figure 9)

### UNEMPLOYMENT: WORST

Adults actively seeking work but without a job are “unemployed.” In 2017, nearly 9 percent of Wisconsin’s African Americans were unemployed compared to just 3.3 percent of whites. Black Wisconsinites were nearly three times more likely to be unemployed than white Wisconsinites, giving our state the worst unemployment disparity in the country. (See Race in the Heartland, Figure 10)

### INCOME: 3RD WORST

The median white household has annual income of just over \$59,500 in Wisconsin. The median African American household annual income, \$29,000, is a bit less than half the white level. Only two states post greater black/white inequality in household income. (See Race in the Heartland, Figure 12)

### HOME OWNERSHIP: 8TH WORST

In Wisconsin, more than 70 percent of white families own their homes. At the same time, just 27 percent of black families do. That difference is the 8th largest disparity in home ownership rates by race in the nation. (See Race in the Heartland Figure 14)

### VOTER PARTICIPATION: 3RD WORST

Even at the voting booth, disparity is evident and extreme in Wisconsin. In the 2016 election, 74 percent of eligible white voters showed up to the polls. That same year, just 47 percent of eligible black voters cast their ballots. The gap between white and black voter participation in Wisconsin was exceeded only by North and South Dakota. (See Race in the Heartland Figure 18)

# Policy Recommendations

“Race in the Heartland” provides a full suite of detailed policy recommendations to address these disparities. We offer a very brief overview here:

## Equal Opportunity in Education

Equal opportunity requires strong and equitable care and learning. High quality child care and strong public investment in education from 4K to the college degree is essential to closing racial disparity. In addition to a strong system, the public education system should close racial disparities. Within schools, school assignment and school boundary policies, training and retaining a diverse teaching workforce, and implementing alternative discipline models aimed at more preventative and positive interventions are all strategies to close help the gap.

## Pay Equity

Closing the racial wage gap requires interventions on at least three fronts. First, we need to close the opportunity gap and the benefits of addressing educational disparities will ripple forward. Second, we need to raise the wage floor for all workers. And third, we need to address deep and pervasive patterns of labor market discrimination and racism.

## Making Work Possible

Work-life balance—the ability to meet both employment and family obligations or expectations—depends upon an array of private and public resources and policies, including paid family leave, affordable high quality childcare, and fair scheduling of work hours. Supporting work-life balance is critical especially for lower-wage workers who do not generally have access to strong leave or other benefits.

## Restraining the Safety Net

While the leanest public assistance is still in the South, Midwestern states have made deep cuts to our programs of support. We need a more robust and generous safety net, with fiercer attention to racial equity.

## Combatting Discrimination

Ongoing patterns of discrimination in housing, employment, criminal justice, voting, and other areas need to be both addressed with strong attention to differential racial impact of policies.

## Saving Places

Overcoming racial disparity requires focusing resources and supports on specific places. A first step is investment in policies that improve neighborhoods: inclusionary zoning, focused subsidies on transit-accessible, mixed-skill employment opportunities; or investment in public goods in those areas. We also need to make it easier—for those who choose—to get out of troubled or failing neighborhoods.

## Equity & Security

We need to put in place mechanisms that will enable African Americans to build wealth through savings and assets. It is also important not just to help families build savings but also to remove the obstacles and penalties faced by many low-income families. Finally, we need to address the disproportionate advantages accrued by white families (especially wealthy white families) under current tax law.

## Conclusion

Race in the Heartland, and this focus on Wisconsin data from it, make absolutely clear the extent to which racial inequality is a defining feature of Wisconsin. However, racial inequality in Wisconsin is neither natural nor inevitable. There are many steps that states can do take to begin to close the gap; these steps will by necessity be a mix of universal and targeted approaches.

Race in the Heartland lays out an ambitious state program for greater racial equity which “views racial equity as a fundamental goal.” The approach focuses on the political and policy roots of insecurity and inequality that shape the lives of most working families – policies that can help raise all working people’s wages. At the same time, the agenda attends to policies that are focused on reducing and addressing the discrimination and racism that have isolated Wisconsin’s black community.



## About COWS

COWS is a nonprofit think-and-do tank, based at the University of Wisconsin-Madison, that promotes “high road” solutions to social problems. These treat shared growth and opportunity, environmental sustainability, and resilient democratic institutions as necessary and achievable complements in human development. Through our various projects, we work with cities around the country to promote innovation and the implementation of high road policy. COWS is nonpartisan but values-based. We seek a world of equal opportunity and security for all.

**UW-L Joint Planning and Budget Committee**  
**1:15 PM, November 6, 2019**  
**325 Graff Main Hall**  
**Minutes**

Recorder: Stewart

Alternate Recorder: Stindt

Present: M Abler, C Carlson (for AJ Clauss), E Delgado, B Elkins, J Fiegel, V Figueroa, T Hansen, B Harris, C Hayes, B Hetzel, S Kelly, J Kovari, L Milner, S. Grunwald (for B Morgan) J Meyers, D Nielsen, K Nowicki, G Reichert, T Richter, M Sandheinrich, C Smith, B Stewart, K Thoen

Absent: L Abellera, T Hawkins, K Kunkel, C Stindt, M Wycoff-Horn

Meeting called to order by Chair Delgado at 1:15 p.m.

1. Approval of Meeting Minutes from October 23, 2019  
Motion to approve by M Abler, seconded by B Harris
2. Announcements/Updates-
  - a. Budget 101 will be on November 20<sup>th</sup> Room 260 GMH
  - b. JBP Executive Committee – agenda items for this academic year:
    - i. What steps are being taken to plan for demographic changes and forecasted enrollment drops?
      - See attached Taskforce Request Memo to Chancellor Gow from the Joint Planning and Budget Executive Committee (11/1/19).
    - ii. What is the future of UWL's strategic plan and the position(s) associated with the plan? Longstanding Structure for Strategic Planning?
    - iii. How do our future funding decisions align with our strategic plan?
      - Does the Master plan align with the overall strategic plan?
    - iv. What have the GQA reserves been used for in the past? Is there a policy as to how those funds are used/allocated? (e.g., focus on teaching/overloads, buildings, something else?)  
– Addressed sufficiently at 10/9/19 meeting?
3. Chancellor's Update  
Chancellor Gow responded to the request for Taskforce memo. It was his opinion that the Taskforce was not necessary and that the feedback could come from a group within Joint Planning and Budget if necessary. Chancellor Gow looks forward to continuing to discuss this in the future with JPB.
4. Provost's Update  
No report
5. CFO's Update
  - a. Budget Planning Forecast FY21-24  
Vice Chancellor Bob Hetzel provided an overview of Differential Tuition, including the history, Funding model, implementation, program summary, fiscal challenges of Growth, Quality and Access. Vice Chancellor Hetzel also gave an update on overall fiscal challenges coming with the next two biennia.
6. Strategic Planning Update  
No report

7. New Business –

a. Listening session:

***Given the current budget shortfall – as well as anticipated future shortfalls – what budget resource offset strategies do you suggest?***

B Harris forwarded highlights from this discussion under separate email to JPB Committee.

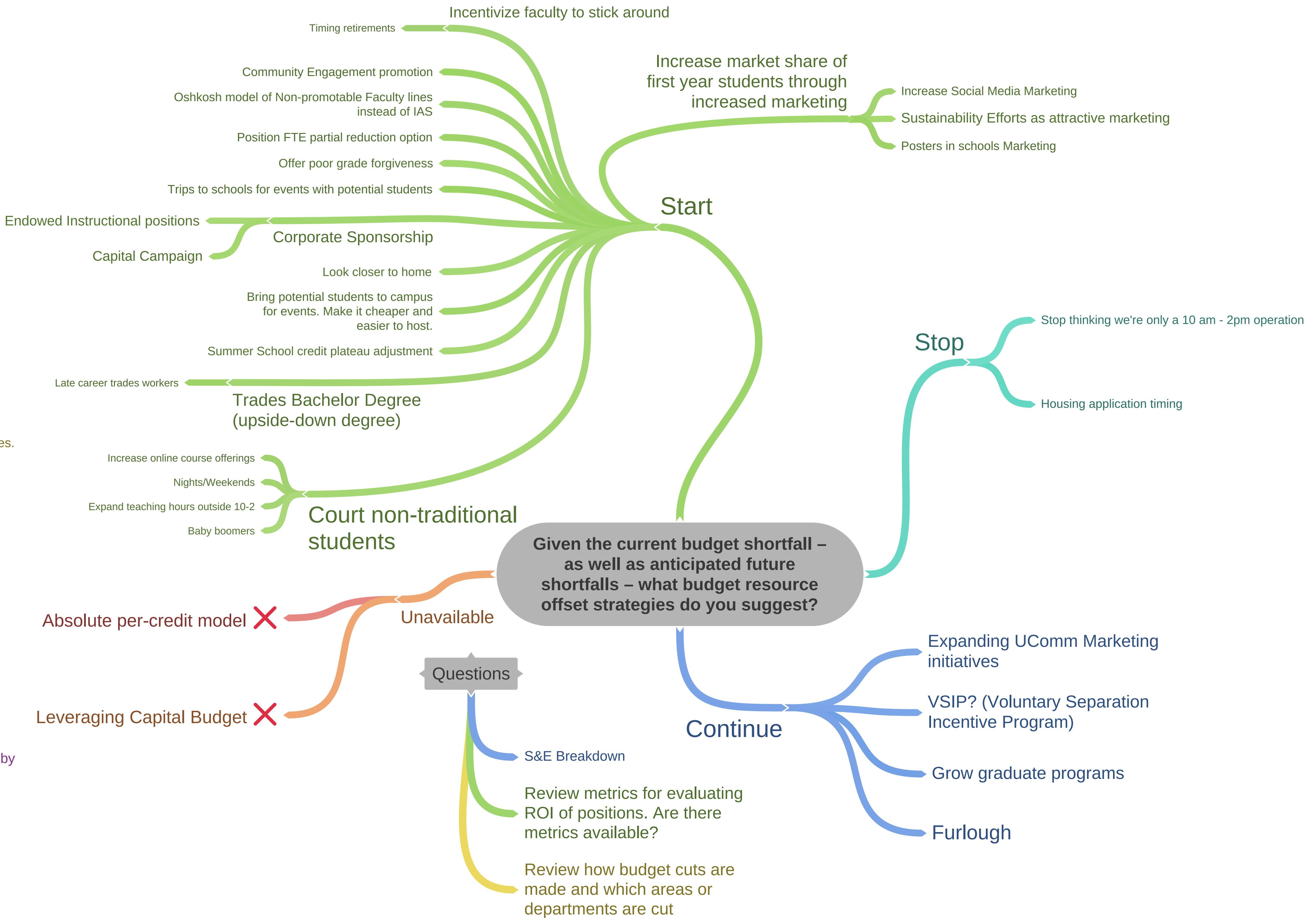
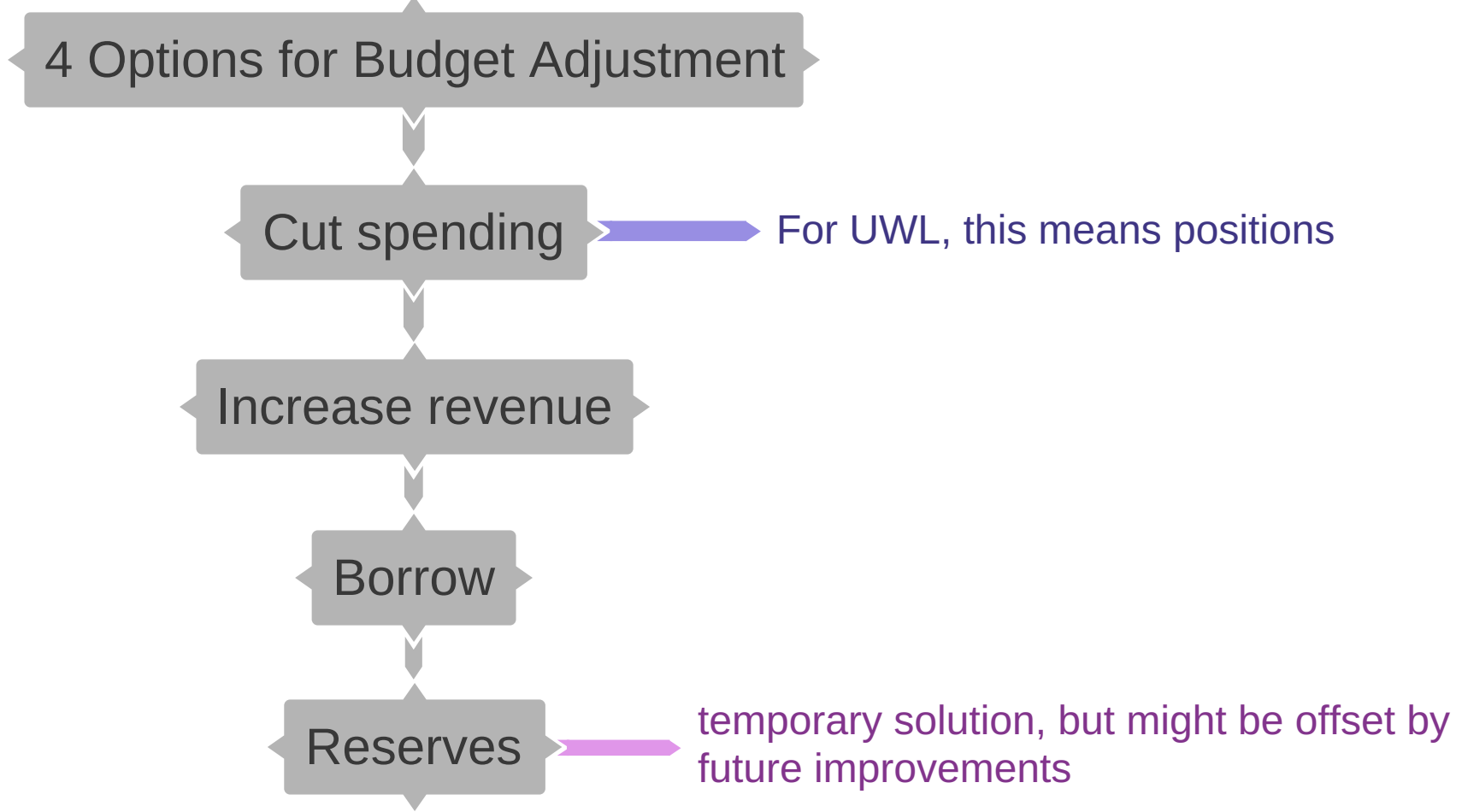
8. Adjournment

Meeting was adjourned 2:45 p.m.

### Ground Rules

We aim to have a positive, open, and constructive discussion. Recognizing that these difficult conversations often feel personal, we'd ask that we all approach the conversation with respect for one another and that we come prepared to listen as well as share. To that end, we'd like to offer some ground rules for a positive meeting with good working relationships and open brainstorming of budget shortfall ideas:

- Treat each other with respect.
- Have patience with one another.
- Recognize that it is okay to disagree with one another.
- Acknowledge and respect each other's viewpoints and differences.



November 1, 2019

Dear Chancellor Gow,

The Executive Committee of JPB is requesting the creation of a taskforce to identify and articulate the potential impact of demographic changes in the upper Midwest on UWL enrollment, budget, and human resources. JPB appreciates the fiscal management associated with UWL's processes and Vice Chancellor Hetzel's forecasting for the next several years. Our request more specifically focuses on the projected marked decline in national college enrollment, beginning in approximately 2025, as a result of declining birth rates and subsequent numbers of high school graduates. One expert estimates that the demand for a college degree from four-year comprehensive institutions in Wisconsin will decline 15% or more relative to 2012.

We think it would be helpful for the campus (via JPB) to have a better sense of the impact of these potential changes in enrollment as well as an opportunity to develop additional strategies to remain a leader in the changing landscape of higher education in the Midwest region. A guiding question may be something such as "Accounting for internal and external forces and circumstances, what are the optimistic, realistic, and pessimistic enrollment targets for UWL starting in 2025 and what are the implications for these scenarios on the campus in terms of recommended preparation and changes needed to position UWL as a top competitive choice for students?" The recommendations would extend to admission requirements, attracting "new" types of students through programming, staffing implications, and other areas affected by enrollment fluctuation. Such models could provide a better understanding of the staffing changes required to meet budgetary restrictions and the development of priorities to guide those changes.

We do not envision this taskforce to be charged with making decisions. Rather, the goal is for the taskforce to compile and present data to JPB and other shared governance groups as well as suggest options for moving forward. We recommend the taskforce be comprised of no more than ten members with an ideal size between six and eight people. The taskforce should include a representative from JPB, Student Association, A&F, Admissions, IRAP, and a faculty member with modeling and forecasting expertise perhaps from the Economics or similar department. Our committee feels it would be reasonable to expect a forecast report including 3-5 strategic options from the taskforce by Fall 2020 if the taskforce is formed and charged by mid-November.

We would be happy to meet with you at your request to discuss why we think this would be helpful to the campus. Thank you for your consideration.

Respectfully,

JPB Executive Committee

(Enilda Delgado, Becki Elkins, Brandon Harris, Dana Nielsen, Troy Richter, & Mark Sandheinrich)



# University of Wisconsin-La Crosse

## Growth, Quality & Access

### Differential Tuition Overview



**Joint Planning & Budget  
Committee**

**November 6, 2019**





# GQA Program History

- Differential Tuition vs. State GPR Funding
- Growth & Access Proposal 2006-07
  - \$1,320/Yr.
  - 25% Financial Aid
  - Rejected by UWS, BOR & Legislature
- Growth, Quality & Access Proposal 2007-08
  - \$1,000/Yr.
  - 2 Year Phase-In
  - 75 Faculty & 20 Staff

# GQA Program History (Con't.)

- Fall 2007
  - Student Vote: 1,560 → Yes (65.7%)
  - Shared Governance Support
  - Regent Approval
  - Legislative Support

# GQA Funding Model

- Self-Supporting Program
- 2 Revenue Streams
  - Differential Tuition (\$1,000 to \$1,146)
  - Enrollment Growth (1,000 students)
- Position Allocation
  - 85% for Faculty/IAS Positions
  - 15% for Staff Positions

# GQA Program Implementation

Fiscal Year	Instr. Positions	Staff Positions	Total	GQA FTE	Student to Faculty Ratio
2009	49.50	3.96	53.46	53.46	23:1
2010	24.00	7.92	31.92	85.38	21:1
2011	22.75	13.42	36.17	121.55	21:1
2012	17.00	5.12	22.12	143.67	20:1
2013	37.88	1.33	39.21	182.88	20:1
2014	9.90	2.16	12.06	194.94	19:1
2015	8.62	4.25	12.87	207.81	19:1
2016	(16.50)	(4.00)	(20.50)	187.31	18:1
2017	(10.65)	(2.00)	(12.65)	174.66	18:1
2018	(1.00)	0.02	(0.98)	173.68	18:1
2019	-	-	-	173.68	18:1
Total	141.50	32.18	173.68	173.68	

# FY20 GQA Program Summary

141.50	Instructional FTE
<u>32.18</u>	Staff FTE
173.68	Total FTE

\$10.08M	Salaries
4.29M	Fringe Benefits
<u>.78M</u>	S&E
\$15.15M	Total

# FY20 GQA Program Summary (Con't.)

\$10.78M	Differential Tuition
<u>4.37M</u>	Enrollment Growth
\$15.15M	Total

\$201,648	2% Pay Plan
120,000	Fringe Benefit Increase
<u>60,000</u>	Promotion & Career Progression
\$381,648	Total

# GQA Fiscal Challenges

- Funding Salaries & Fringe Benefits
- Tuition Freeze
- Enrollment
- UWS Assessments

# Questions & Answers



University of Wisconsin-La Crosse  
GQA & Academic Initiatives Differential Tuition  
Budget Planning Forecast  
Fiscal Years 2021-24

**DRAFT FOR DISCUSSION ONLY**

**Table 1: GQA & Academic Initiatives Differential Tuition**

Item	FY21	FY22	FY23	FY24
<b>Tuition Increase</b>	0%	0%	0%	1%
<b>Budget Adjustments</b>				
Enrollment & Operating Changes <sup>1 2 3 4</sup>	316,503	325,000	479,200	797,728
2% Pay Plan - GQA Positions	212,553	191,519	182,116	170,699
Faculty Promotion & Career Progression - GQA Positions	60,000	60,000	60,000	60,000
Fringe Benefit Increase	120,000	81,635	77,874	73,307
Less: Tuition Offset	0	0	0	(200,000)
<b>Total</b>	<b>709,056</b>	<b>658,154</b>	<b>799,190</b>	<b>901,735</b>
<b>Academic Initiatives Budget Adjustments</b>	<b>14,063</b>	<b>16,355</b>	<b>23,679</b>	<b>29,889</b>

Notes:

1. FY21 adjustments for enrollment changes in transfer students, summer session & J-term.
2. FY22 adjustments for changes in transfer students, nonresident enrollment, application fee reduction & Common Systems.
3. FY23 adjustments include decrease of 50 students for Fall 2022 & EAB Navigate funding obligation of 100K.
4. FY24 adjustments include decrease of an additional 50 students for Fall 2023 & estimated UWS assessments of 100K.

**Table 2: GQA Budget Reduction Summary**

Item	FY21	FY22	FY23	FY24
<b>GQA Budget Reduction</b>	<b>709,056</b>	<b>658,154</b>	<b>799,190</b>	<b>901,735</b>
Instructional Positions and S&E (85%)	602,698	559,430	679,312	766,474
Non-Instructional Positions and S&E (15%)	106,358	98,723	119,879	135,260
<b>Total</b>	<b>709,056</b>	<b>658,154</b>	<b>799,190</b>	<b>901,735</b>
<b>GQA Instructional Position Reduction</b>				
Salary	430,498	399,593	485,223	547,482
Fringe Benefits	172,199	159,837	194,089	218,993
<b>Total</b>	<b>602,698</b>	<b>559,430</b>	<b>679,312</b>	<b>766,474</b>
<b>Estimated FTE Reduction</b>	<b>7.00</b>	<b>6.00</b>	<b>8.00</b>	<b>9.00</b>
<b>Non-Instructional Position Reduction</b>				
Salary	75,970	70,516	85,628	96,614
Fringe Benefits	30,388	28,207	34,251	38,646
<b>Total</b>	<b>106,358</b>	<b>98,723</b>	<b>119,879</b>	<b>135,260</b>
<b>Estimated FTE Reduction</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>

UW-L Joint Planning and Budget Committee  
1:15 PM, November 20, 2019  
260 Graff Main Hall (Auditorium)

Recorder: Stindt

Present: Abellera, Clauss, Delgado, Elkins, Fiegel, Figueroa, Hansen, Harris, Hawkins, Hayes, Ketzler, Kelly, Kovari, Kunkel, Milner, Morgan, Myers, Nielsen, Nowicki, Reichert, Sandheinrich, Stewart, Stindt, Thoen, Wycoff-Horn

Absent: Richter, Smith, C.

Meeting called to order by Chair Delgado at 1:15.

1. Approval of Meeting Minutes from November 6, 2019  
m/s/p
2. Chancellor's Update
  - a. Taskforce to review long term enrollment issues. Concerns about pessimistic forecast, goal is not to lose 1000 students. "We'd find ways not to do that." We don't know exactly what this decline will do. We will put a group together ... and... find the decrease and offset [it]. And how are we going to best serve the students of 2025 and beyond. Shared governance all approved the taskforce.
3. Discussion on UWL Long-term Enrollment Taskforce- Membership (7): Rep from JPB, Student Association, Administration and Finance, Diversity and Inclusion, Admissions, Institutional Research & Planning, and faculty member with modeling and forecasting expertise perhaps from Economics or similar department.
  - a. Nominations/election of JPB representative
    - i. The leader of each area listed above will nominate someone from their area/unit and then it will be endorsed by JPB at the next meeting. Nominations from JPB were accepted for this taskforce. Troy Richter was nominated but not present to decline. Enilda Delgado accepted nomination. Tav Hawkins was nominated but respectfully declined.
    - ii. AJ moved to close nominations. Troy Richter – 4. Enilda Delgado – 11. Executive committee will confirm endorsement.
4. New Business: Budget 101  
See powerpoint.
5. Adjournment  
Enilda motioned to adjourn at 3:00 pm.

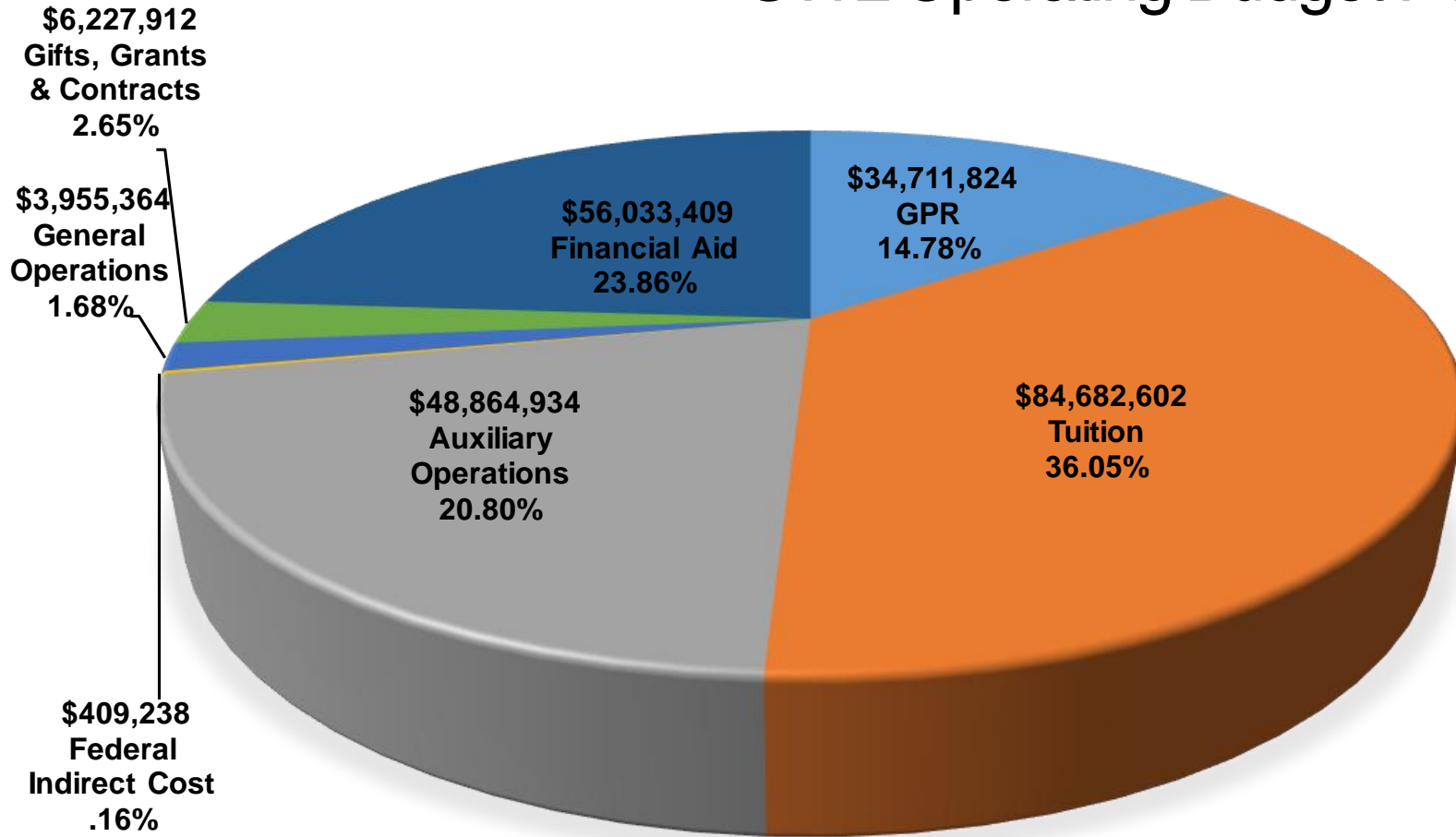
# University of Wisconsin-La Crosse



Budget Planning & Review  
Fiscal Year 2019-20



# UWL Operating Budget FY20



UWL Budget: \$234,885,283



# State Fund Appropriations

<b>Fund</b>	<b>Description</b>
<b>102</b>	<b>General Purpose Revenue (GPR)</b>
<b>104/132/189</b>	<b>Extended Learning &amp; SBDC</b>
<b>128</b>	<b>Auxiliaries &amp; Segregated Fees</b>
<b>131</b>	<b>Academic Fees - Tuition</b>
<b>136</b>	<b>General Operations</b>
<b>150</b>	<b>Federal Indirect Cost Reimbursement</b>
<b>233</b>	<b>Gifts</b>

# All Funds Budget by Division & College

Division	Unclassified	Classified	S&E & Capital	Fr. Benefits & Other	Pct.	Total
Chancellor	421,204	4,000	60,900	0	0.21%	486,104
Academic Affairs						
Provost	6,847,242	1,756,018	4,553,250	58,538,142	30.52%	71,694,652
SOE	3,551,101	366,536	1,275,832	626,385	2.48%	5,819,854
CBA	7,070,613	256,057	325,816	706,773	3.56%	8,359,259
CASSH	13,241,255	646,125	1,039,958	1,553,269	7.02%	16,480,607
CSH	17,721,722	780,426	2,136,350	2,099,350	9.68%	22,737,848
<b>Total Academic Affairs</b>	<b>48,431,933</b>	<b>3,805,162</b>	<b>9,331,206</b>	<b>63,523,919</b>	<b>53.26%</b>	<b>125,092,220</b>
Admin. & Finance	5,333,718	7,208,415	13,418,186	(3,218,747)	9.68%	22,741,572
Student Affairs	6,232,626	3,337,635	19,375,177	14,813,910	18.63%	43,759,348
University Advancement	1,523,294	139,588	131,964	184,048	0.84%	1,978,894
Diversity & Inclusion	1,430,421	135,305	135,812	179,170	0.80%	1,880,708
University-Wide	993,313	68,763	5,433,975	32,450,386	16.58%	38,946,437
<b>Total</b>	<b>64,366,509</b>	<b>14,698,868</b>	<b>47,887,220</b>	<b>107,932,686</b>	<b>100.00%</b>	<b>234,885,283</b>

# All Funds Budget by Expenditure Function

Division	Instruction	Research	Public Service	Academic Support	Student Services	Financial Aid	Auxiliary Enterprises	Physical Plant	Institutional Support	Pct.	Total
Chancellor	0	0	9,232	0	0	0	0	0	476,872	0.21%	486,104
Academic Affairs											
Provost	4,185,593	195,639	50,573	4,988,977	3,600,958	58,078,456	0	0	594,456	30.52%	71,694,652
SOE	3,550,482	500	678,590	1,424,207	55,267	110,808	0	0	0	2.48%	5,819,854
CBA	7,552,649	39,256	232,105	527,749	0	0	0	0	7,500	3.56%	8,359,259
CASSH	15,482,599	0	88,855	689,853	164,300	45,000	0	0	10,000	7.02%	16,480,607
CSH	21,397,935	27,874	82,514	1,136,119	10,150	65,256	0	0	18,000	9.68%	22,737,848
Total Academic Affairs	52,169,258	263,269	1,132,637	8,766,905	3,830,675	58,299,520	0	0	629,956	53.26%	125,092,220
Admin. & Finance	1,272,992	0	0	4,491,581	926,343	43,800	1,318,670	8,559,197	6,128,989	9.68%	22,741,572
Student Affairs	0	0	310,865	0	18,662,362	127,806	24,231,486	0	426,829	18.63%	43,759,348
University Advancement	0	0	11,695	528,262	0	0	0	0	1,438,937	0.84%	1,978,894
Diversity & Inclusion	0	0	4,158	0	1,876,550	0	0	0	0	0.80%	1,880,708
University-Wide	14,796,526	3,807,671	677,263	4,160,010	895,870	(17,633)	0	11,774,688	2,852,042	16.58%	38,946,437
Total	68,238,776	4,070,940	2,145,850	17,946,758	26,191,800	58,453,493	25,550,156	20,333,885	11,953,625	100.00%	234,885,283



# Biennial Budget Reduction History (M)

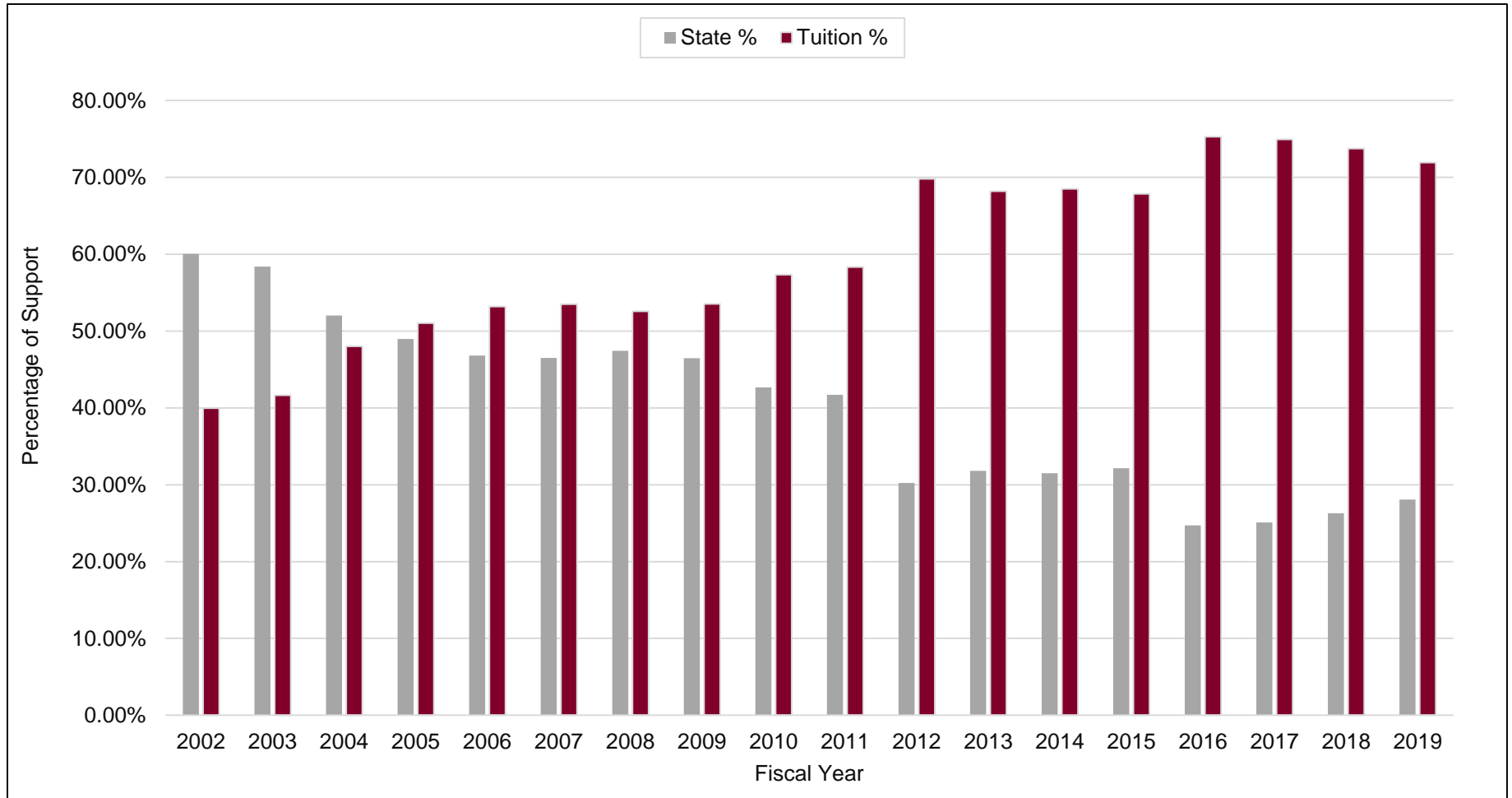
Biennium	UW System Reduction	UWL Base Reduction	UWL 1x Reduction	UWL Total Reduction	UWL FTE Reduction	UWL Biennial Reduction	Student to Faculty Ratio
2001-03	55	1.40	.60	2.00	13	3.40	22:1
2003-05	100	1.70	.80	2.50	27	4.20	22:1
2005-07	90	1.80	-	1.80	30	3.60	24:1
2007-09	25	-	.60	.60	-	.60	23:1
2009-11	155	3.10	3.86	6.96	6	9.50	21:1
2011-13	125	5.20	2.71	7.91	2	13.10	20:1
2013-15	62	2.48	-	2.48	-	4.96	19:1
2015-17	125	6.85	-	6.85	81	13.70	18:1
<b>Total</b>	<b>737</b>	<b>22.53</b>	<b>8.57</b>	<b>31.10</b>	<b>159</b>	<b>53.06</b>	



## Resource Allocation History

<b>Biennium</b>	<b>Amount (M)</b>	<b>Description</b>
<b>2003 &amp; 2013</b>	<b>1.38</b>	<b>Academic Initiatives</b>
<b>2008-15</b>	<b>15.21</b>	<b>Growth Quality &amp; Access</b>
<b>2017-19</b>	<b>1.30</b>	<b>15-17 Lapse Return</b>
<b>2017-19</b>	<b>1.00</b>	<b>Utility &amp; Fringe Benefits</b>
<b>2017-19</b>	<b>1.20</b>	<b>Outcomes Based Funding</b>
<b>2019-21</b>	<b>.96</b>	<b>Outcomes Based Funding</b>
<b>Total</b>	<b>21.05</b>	

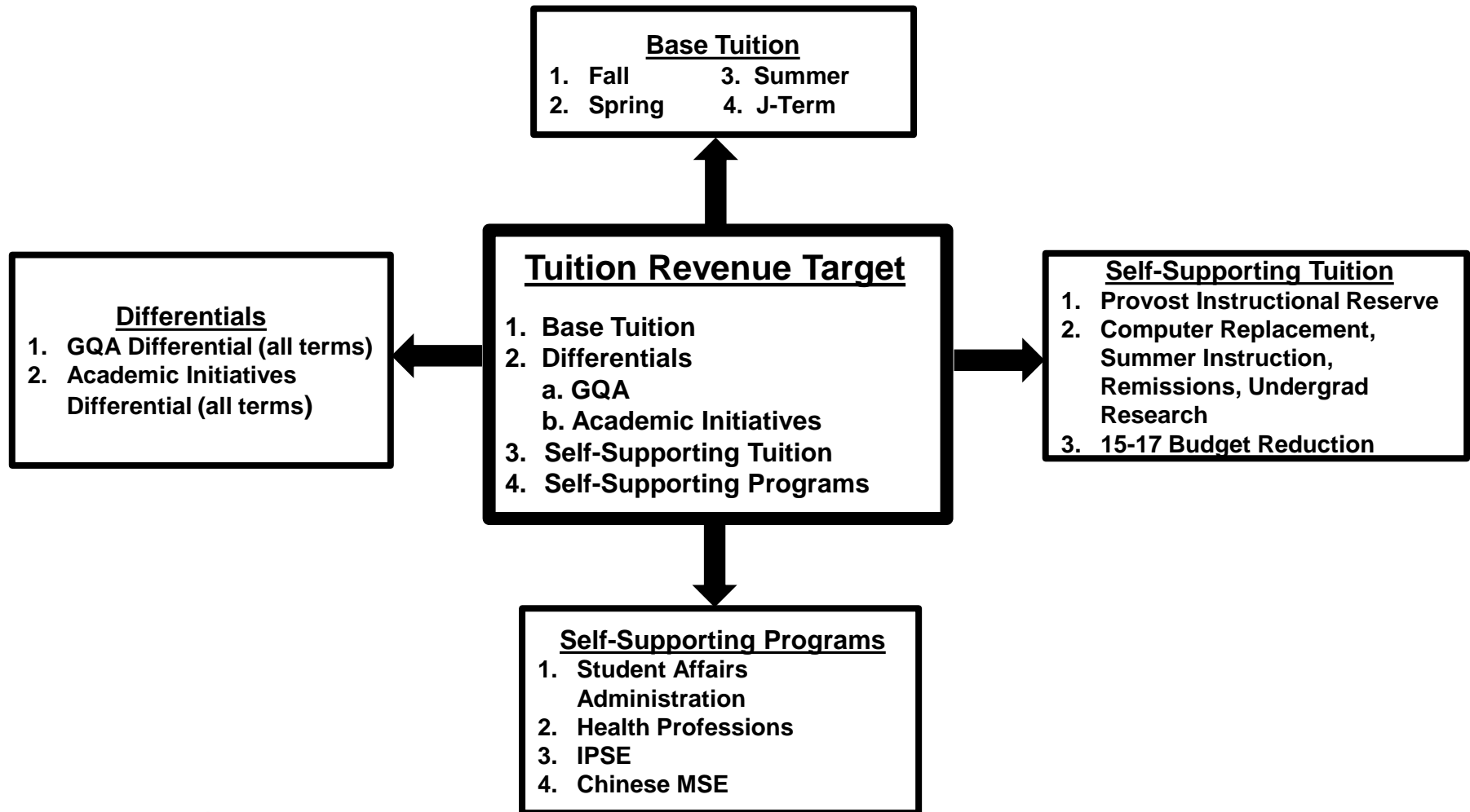
# UWL GPR/Tuition Funding Support



Fiscal Year 2019-20



# UWL Tuition Revenue Target



# UWL Tuition Budget Summary

<b>Budget Detail for Tuition Revenue Target</b>	<b>Amount</b>
<b>FY20 Tuition Revenue Target</b>	<b>81,743,205</b>
<b>Obligations:</b>	
<b>UW System Tuition Pool Obligation</b>	<b>53,630,844</b>
<b>Growth, Quality &amp; Access</b>	<b>15,207,281</b>
<b>Academic Initiatives</b>	<b>1,378,109</b>
<b>Self-Supporting Tuition</b>	<b>7,789,600</b>
<b>Self-Supporting Programs</b>	<b>3,737,371</b>
<b>Total FY20 Tuition Budget</b>	<b>81,743,205</b>

# GQA Program Summary

<b>Description</b>	<b>Amount</b>
<b>Tuition Per Full-Time Student</b>	<b>1,146</b>
<b>GQA Tuition Revenue Budget</b>	<b>15,207,288</b>
<b>GQA Expenditure Budget</b>	
<b>Salaries</b>	<b>10,117,654</b>
<b>Fringe Benefits</b>	<b>4,307,774</b>
<b>Supplies &amp; Expense</b>	<b>781,860</b>
<b>Total Expenses</b>	<b>15,207,288</b>
<b>Faculty Positions</b>	<b>141.50</b>
<b>Staff Positions</b>	<b>32.18</b>
<b>Total GQA Positions</b>	<b>173.68</b>

# Academic Initiatives

<b>Program Area</b>	<b>Program</b>	<b>FY2019-20 Budget</b>	<b>FY2019-20 FTE</b>
Advising	Learning Center	164,644	-
Advising	ACCESS Center	46,785	0.83
Advising	Academic Advising Center	278,049	3.16
Advising	School of Education	69,177	1.00
Diversity	Campus Climate	219,335	3.00
Diversity	Pride Center	25,462	0.30
Diversity	Admissions-Diversity Recruiter	82,551	1.00
Diversity	Violence Prevention	19,281	.50
Internationalization	International Ed. & Engagement	168,017	-
Research	Library	153,354	-
Research	Undergraduate Research	107,669	0.60
Research	Graduate Research	44,000	-
<b>Total</b>		<b>1,378,109</b>	<b>10.39</b>
<b>Note: Academic Initiatives differential tuition amounts to \$139.92 for the academic year.</b>			

## State Pay Plan History

<b>Fiscal Year</b>	<b>State Pay Plan</b>	<b>CUPA</b>
<b>2009-10</b>	<b>0.00%</b>	<b>0.0%</b>
<b>2010-11</b>	<b>0.00%</b>	<b>1.1%</b>
<b>2011-12</b>	<b>-6% to -12%</b>	<b>2.0%</b>
<b>2012-13</b>	<b>0.00%</b>	<b>2.2%</b>
<b>2013-14</b>	<b>1.00%</b>	<b>2.3%</b>
<b>2014-15</b>	<b>1.00%</b>	<b>2.3%</b>
<b>2015-16</b>	<b>-2% to -4%</b>	<b>2.4%</b>
<b>2016-17</b>	<b>0.00%</b>	<b>2.6%</b>
<b>2017-18</b>	<b>2.00%</b>	<b>3.0%</b>
<b>2018-19</b>	<b>2.00%</b>	<b>3.0%</b>
<b>2019-20</b>	<b>2.00%</b>	<b>3.0%</b>

Fiscal Year 2019-20



# UWL Self-Funded Base Compensation

<b>Fiscal Year</b>	<b>Faculty</b>	<b>IAS</b>	<b>NIAS</b>	<b>Univ. Staff</b>	<b>F.B.</b>	<b>Total</b>
2019	313,589	108,450	33,173	258,423	138,445	852,080
2018	267,781	62,061	188,370	82,454	116,529	717,195
2017	472,895	81,217	266,698	67,347	172,302	1,060,459
2016	682,211	79,632	216,787	385,992	264,737	1,629,359
2015	525,758	100,542	117,243	87,827	161,286	992,656
2014	204,227	43,446	26,370	126,607	77,726	478,376
2013	221,490	59,096	76,352	126,606	93,808	577,352
2012	107,000	20,500	18,506	-	28,325	174,331
<b>Total</b>	<b>2,794,951</b>	<b>554,944</b>	<b>943,499</b>	<b>1,135,256</b>	<b>1,053,158</b>	<b>6,481,808</b>

Fiscal Year 2019-20





# UWL Self-Funded Lump Sum Compensation

Fiscal Year	Faculty	IAS	NIAS	Univ. Staff	F.B.	Total
2020	250,836	55,605	197,055	109,199	118,863	731,558
2019	247,079	57,235	181,230	106,470	114,851	706,865
2018	523,697	143,049	366,936	245,503	248,162	1,527,347
2017	283,791	105,306	243,388	263,291	173,781	1,069,557
2016	260,341	87,933	233,054	179,637	147,627	908,592
2015	223,778	30,258	81,871	80,000	80,686	496,593
2014	141,890	22,118	78,336	-	47,015	289,359
Total	1,931,412	501,504	1,381,870	984,100	930,984	5,729,870

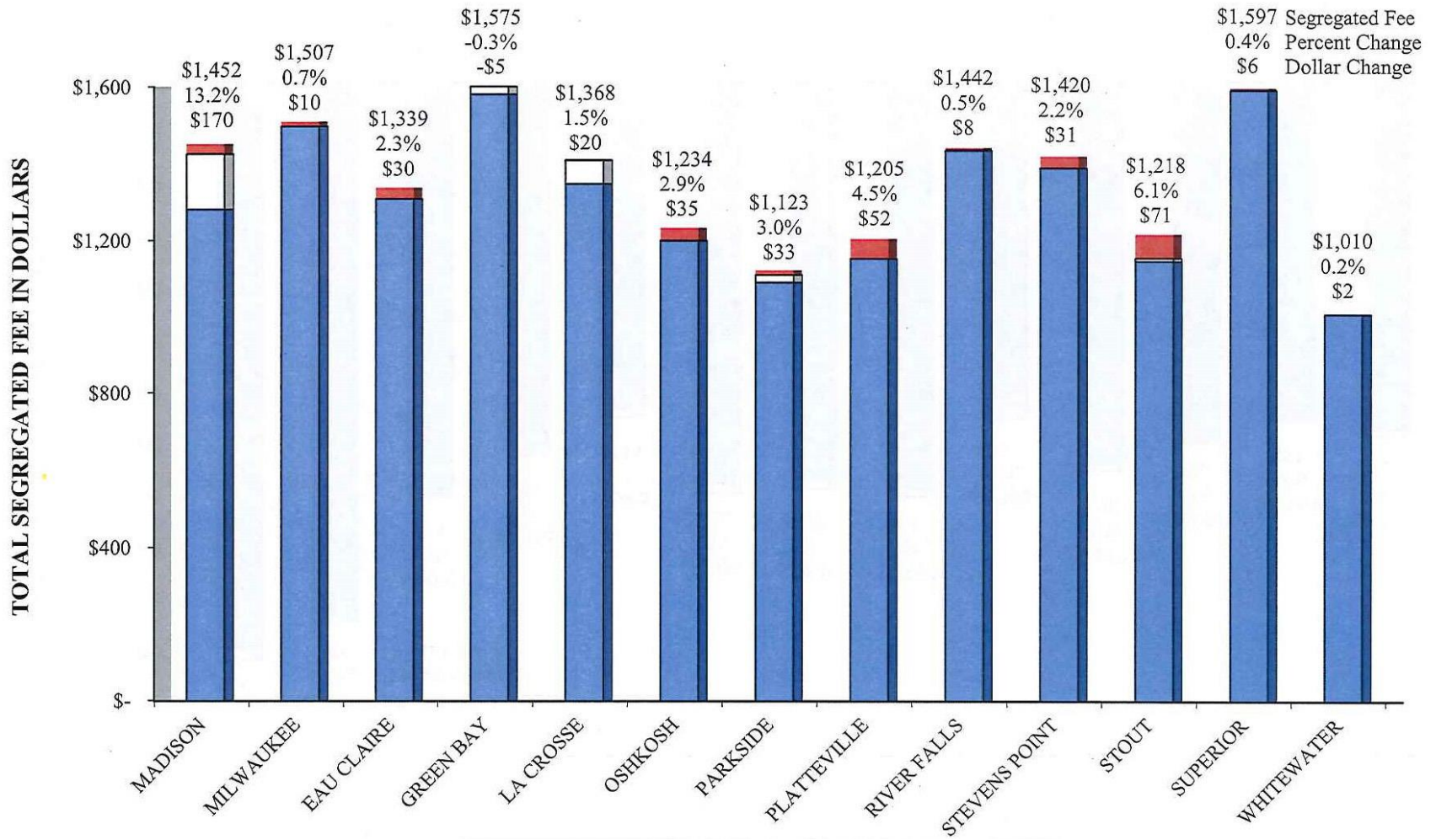
Fiscal Year 2019-20



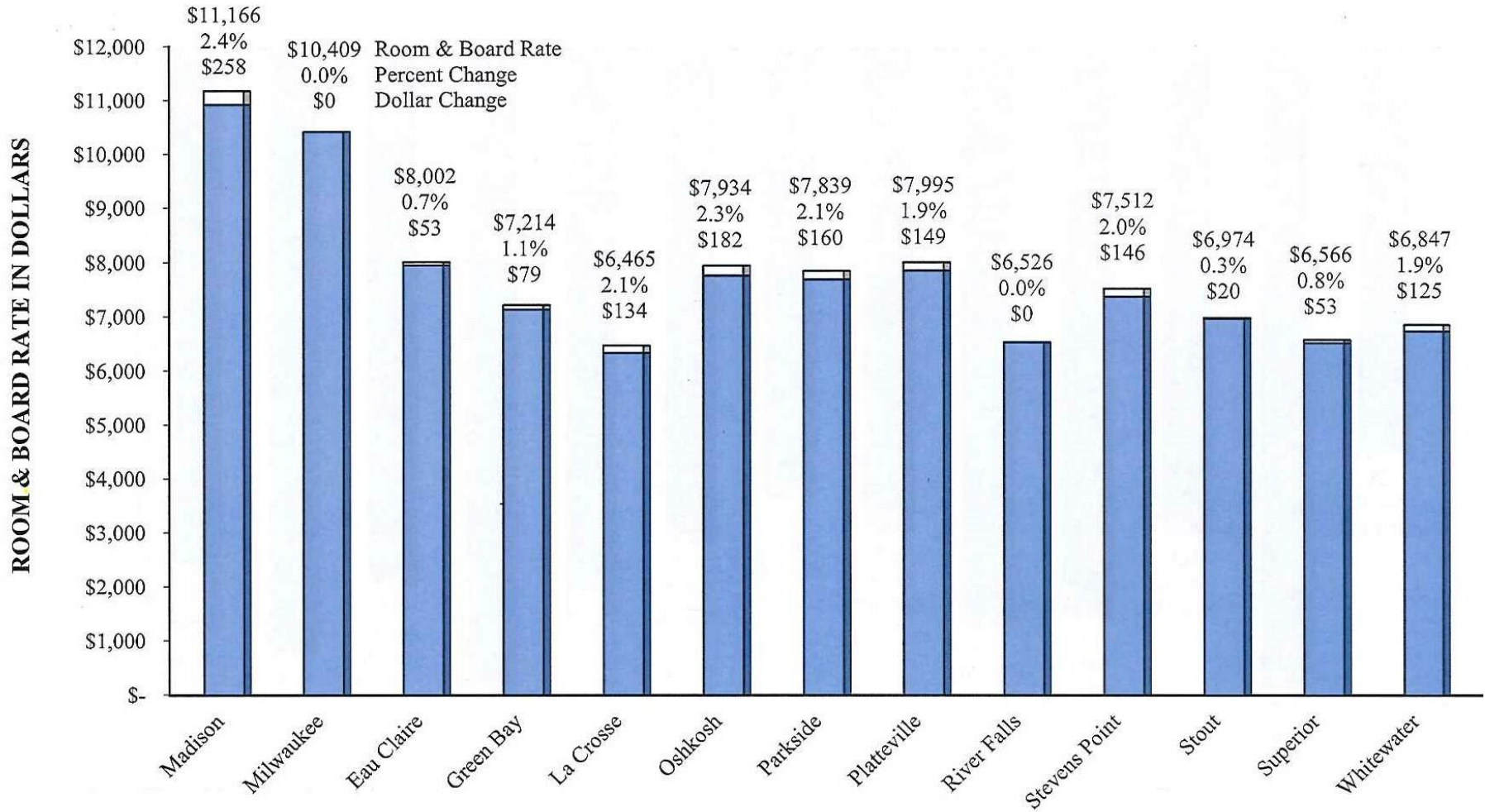
## Cost of Attendance Summary

<b>Item</b>	<b>FY20 Rate</b>	<b>FY12-20 Increase</b>
<b>Tuition</b>	<b>\$6,298</b>	<b>0.7%</b>
<b>GQA Differential</b>	<b>\$1,146</b>	<b>0.7%</b>
<b>Academic Initiatives Differential</b>	<b>\$140</b>	<b>0.7%</b>
<b>Segregated Fees</b>	<b>\$1,368</b>	<b>4.9%</b>
<b>Textbook Rental</b>	<b>\$174</b>	<b>-1.0%</b>
<b>Room</b>	<b>\$3,921</b>	<b>1.6%</b>
<b>Board</b>	<b>\$2,544</b>	<b>0.4%</b>

# UW System Segregated Fee Schedule FY19-20



# UW System Room & Board Rates FY19-20



# UW System Textbook Rental Rates

<b>Institution</b>	<b>2018-19</b>	<b>2019-20</b>	<b>Change</b>	<b>% Change</b>
<b>Eau Claire</b>	<b>150.00</b>	<b>140.00</b>	<b>-10.00</b>	<b>-6.67%</b>
<b>La Crosse</b>	<b>173.92</b>	<b>173.92</b>	<b>-</b>	<b>0.00%</b>
<b>Platteville</b>	<b>225.00</b>	<b>250.00</b>	<b>25.00</b>	<b>11.11%</b>
<b>River Falls</b>	<b>162.90</b>	<b>167.78</b>	<b>4.88</b>	<b>3.00%</b>
<b>Stevens Point</b>	<b>151.68</b>	<b>151.68</b>	<b>0.00</b>	<b>0.00%</b>
<b>Stout</b>	<b>515.40</b>	<b>450.90</b>	<b>(64.50)</b>	<b>-12.51%</b>
<b>Whitewater</b>	<b>165.12</b>	<b>165.12</b>	<b>-</b>	<b>0.00%</b>

## Challenges:

- 10 Yr. Tuition Freeze
- State Funding Priorities
- WI Demographics
- Sustaining Enrollment
- Employee Recruitment & Retention

## Opportunities:

- Academic Quality
- Campus Life
- Thawing of Tuition Freeze
- Resource Planning Strategies
- Capital Infrastructure Investment

# Questions & Answers

Fiscal Year 2019-20





UW-L Joint Planning and Budget Committee  
1:15 PM, February 12, 2020  
325 Graff Main Hall

Recorder: Thoen

Present: Abellera, Abler, Agtenberg, Clauss, Delgado, Elkins, Figueroa, Hansen, Harris, Hawkins, Hayes, Hetzel, Kelly, Kovari, Kunkel, Milner, Morgan, Nielsen, Nowicki, Reichert, Richter, Sandheinrich, Stewart, Stindt, Thoen, Wycoff-Horn

Absent: Fiegel, Smith, C.

Meeting called to order by Chair Delgado at 1:17.

1. Approval of Meeting Minutes from November 20, 2019. M/S/P.
2. Chancellor's Update
  - a. Title IX Open Forum this afternoon at 3:30 p.m. in 1400 Centennial Hall. There may be budgetary implications to be seen later.
  - b. UW System distributed enrollment projections showing that UWL enrollment will increase until 2025. This is a reminder that every institution will be addressing these projections as they move forward. While enrollment levels may be able to be projected, the State contribution and tuition rates are not able to be projected in the same way. Strategic plan will have an impact on strategies moving forward.
3. Provost's Update
  - a. No report.
4. CFO's Update
  - a. Fiscal Notes – Jterm and Spring enrollment forecast was short in its prediction. Thus, tuition revenue is lower than predicted. The tuition revenue for Spring is a moving target and will not be able to be finalized until later in the semester.
  - b. Building meeting is taking place in Madison in two weeks. The fieldhouse project was well received. Will be breaking ground two weeks after the opening of Wittich Hall in July.
5. Strategic Planning Update
  - a. Will give update at next meeting.
6. Long-Term Enrollment Taskforce Update
  - a. Enilda announce the committee members: Barbara Stewart, TJ Brooks, Natalie Solverson, Sita Agterberg, Corey Sjoquist, Bob Hetzel and Enilda Delgado. The committee has met a few times and plan to report back to JPB in March. The first three charges have been solidified.
7. New Business
  - a. Soaring Eagles Scholarship Funding (Hetzel, Grunwald, Sjoquist)
    - i. This is very important recruiting initiative. The scholarship is a tiered award of \$1,000, \$2,000, or \$3,000/year with a total awarded of \$500,000/year. Other competitive institutions are able to offer more than what UWL is able to offer through allocation of base funding. More students say no to UWL than say yes to UWL. These scholarships help surpass the enrollment target numbers.

In September, Bob brought data to JPB. The source of the funding for the Soaring Eagles Scholarship comes from carryover dollars. The problem is there are not enough resources to cover all \$500,000 (\$150,000 short) for FY20. We are unable to reduce the

scholarships as it is the current year that they have been awarded. What are we doing for FY20 (\$150,000 short) and FY21 (\$250,000 short)? Do we continue to fund it? If so, how?

Options for FY20 are:

- do away with the scholarship
- Program Revenue (PR) balances financial aid assessment 1.45%
- GPR assessment to divisions
- eliminate FY21 1% lump sum payment
- a combination of PR/GPR

Assessing the PR balances is what Bob recommends. There was concern raised that the cost is not equally being shared and discussion was had to show how using the PR balances would be a equally shared expense. Using the option of utilizing GPR assessment to divisions, cuts would have to be made in order to cover this expense. Discussion was had regarding the need to make this endeavor sustainable as it clearly is not currently sustainable relying on carryover dollars. Graduate programs are asking that they be able to use their dollars toward graduate students as they have been tapped for undergraduate endeavors from the institution and their graduate students are not seeing a benefit.

Options for FY21 are:

- Option 1: assessment to PR balances of 2.36%
- Option 2: assessment to department S&E .75%

Motion turned down to table this until the next meeting.

M/S/P Support Option 1 for FY21. Discussion was had regarding sustainability. 1% lump sums are not a part of the base salary and some employees would be willing to forego that payment to help fund this program.

Motion amended, support Option 1 for FY21 and table FY20, FY22 and beyond to discuss at the next meeting. 15 in favor/10 opposed. M/S/P

- b. Update on GQA positions reduction for FY21 (Provost/Deans/Vice Chancellors)
  - i. In 2008, tuition began to be assessed to students and it was named Growth, Quality, and Access (GQA). This money is spent on creating positions which best suited student needs. Priorities are driven by strategic planning, but there are other underlining things that also have an impact on decision making. The GQA reduction was distributed evenly based on growth to come to the total reduction of \$602,698 for FY20. We are still in a better place than where we were in 2008. FY21 has a \$76,000 reduction for staffing. Thus, a reduction of 2 positions/year will be seen each year for the next four years.
- c. Information on Adobe Creative Cloud (Hetzl)
  - i. Institutional resources are being leveraged to pay for a program that is heavily used by students. The ability to have a campus wide license is a cost savings and gives faculty, staff and students better access rather than just access to the students. Everyone will have access to all of the Adobe products rather than simply the basic version.

## 8. Adjournment

Stindt motioned to adjourn at 2:57 p.m.

**DRAFT FOR DISCUSSION ONLY**

**Table 1: FY19 Carryover Summary**

Item	Amount
<b>FY19 GPR Carryover to FY20</b>	<b>191,487</b>
<b>FY20 Carryover Obligations</b>	
UWS Employee Health Insurance	53,293
ADA Support Services (Interpreter 1 position)	42,500
Soaring Eagle Scholarships	250,000
<b>Total</b>	<b>345,793</b>
<b>FY20 Carryover Shortfall</b>	<b>(154,306)</b>

**Table 2: Soaring Eagle Scholarship Funding Options**

1. Reduce Soaring Eagle or OBF scholarship funding by \$154,306		
2. PR Balance Financial Aid Assessment 1.45%		
→ Balances > \$5,000 = \$10,621,456		
→ Account Exclusions: Allocable Seg Fees, IEE Exchange, Facility Projects, Special Course Fees & Start-up		
3. GPR Assessment to Divisions:		
<b>Division</b>	<b>Amount</b>	
Chancellor	783	
Academic Affairs	103,974	
Administration & Finance	41,421	
Diversity & Inclusion	2,507	
Student Affairs	3,134	
University Advancement	2,487	
<b>Total</b>	<b>154,306</b>	
4. Eliminate FY21 1% Lump Sum Payment		

## Long-term Enrollment Taskforce

In his book *Demographics and the Demand for Higher Education* Carleton College economics professor Nathan Grawe argues that beginning in 2025 the demand for a college degree from four-year comprehensive institutions in Wisconsin will decline 15% or more relative to 2012. While it is difficult to know exactly how this general decline will impact individual institutions, it is important for us here at UWL to gather and analyze the data and trends associated with the coming demographic shift. For example, if we are able to maintain the current percentage of Wisconsin high school graduates in our first-year class, what could be the magnitude of the decrease in our first-year class in 2025? In order to offset that decrease, and maintain the current size (2175 students) of our first-year class, how much do we need to grow our percentage share of Wisconsin high school graduates over the next five years? Moreover, what will be the demographic mix of Wisconsin high school graduates in 2025, and in our own first-year class? And what types of programs and services might we need to add or enhance to provide the highest quality academic experience to our demographically changing student body?

In order to research and formulate answers to these kinds of questions, our Joint Planning and Budget Committee (JPB) is creating a UWL Long-term Enrollment Taskforce. The taskforce will include a representative from JPB, Student Association, Administration and Finance, Diversity and Inclusion, Admissions, Institutional Research & Planning, and a faculty member with modeling and forecasting expertise perhaps from Economics or a similar department. JPB will appoint the members of the taskforce.

The taskforce will begin working as soon as possible, in the hope of presenting a report to JPB and the UWL shared governance groups in the middle of Spring Semester 2020. Once the taskforce provides its report, we will begin formulating the specific strategies and tactics needed to keep UWL enrollment strong. Likewise, at that point we can discuss the implications Wisconsin's coming demographic shift has for the next round of strategic planning at UWL.

# FY20 SOARING EAGLE SCHOLARSHIP FUNDING

- Assessment to PR Balances: 1.46% = \$154,306
- Funds 128, 131, 132, 136, 150 & 189
- Accounts Balances  $\geq$  \$5,000
- Exclusions:
  - Allocable Seg Fees
  - Special Course Fees
  - IEE Exchange & Study Abroad
  - Start-Up
  - Facility Projects
- Assessment Examples:

Balance	Amount
5,000	73
50,000	730
100,000	1,460
1,000,000	14,600

# FY21 SOARING EAGLE SCHOLARSHIP FUNDING

- Option 1: Assessment to PR Balances: 2.36% = \$250,000
  - Funds: 128, 131, 132, 136, 150 & 189
- Option 2: Assessment to Dept. S&E: .75% = \$250,000
  - Funds: 102, 104, 128, 131, 132, 136, 150, 189 & 402
- Exclusions:
  - Allocable Seg Fees
  - IEE Exchange & Study Abroad
  - Facility Projects
  - Special Course Fees
  - Start-Up
  - ALRA Accounts

UW-L Joint Planning and Budget Committee

1:15 PM, March 11, 2020

150 Murphy Library

Recorder: Abellera

Present: Abellera, Abler, Agtenberg, Claus, Delgado, Elkins, Hansen, Harris, Hawkins, Hays, Hetzel, Kelly, Kovari, Kunkel, Milner, Morgan, Nielsen, Nowicki, Reichert, Richter, Smith, Stewart, Thoen, Wycoff-Horn

Absent: Fiegel, Figueroa, Sandheinrich, Stindt

Meeting called to order by Chair Delgado at 1:16 PM.

1. Approval of Meeting Minutes from February 26, 2020
  - a. Sita's name was misspelled. M/S/P.
2. COVID-19 UWL Preparedness Plan (Dr. Deyo and Chief Hill)
  - a. Team is at 60% completion with the actual plan. There are three phases or levels to the plan as it stands.
    - i. Level I: Confirmed case in 60m radius
    - ii. Level II: Confirmed in City of La Crosse, maybe tri-country
    - iii. Level III: Confirmed case on campus
  - b. Part of the plan is being tested regarding online services. IT is working with Academic Affairs. There will be another Committee meeting on Friday, March 13<sup>th</sup>.
  - c. There are no current cases on campus or in La Crosse. Cases were likely missed during initial testing, but testing has been expanded. Prediction models indicate that the virus will likely affect this area.
  - d. Campus wide email from March 11<sup>th</sup>.
    - i. UWL will be extending spring break by one additional week, allowing for time to prepare. UWL will be coming back to class through online instruction. At this time, UWL is not planning to close campus, but will be moving classes to an online format to protect the campus community. UWL will be suspending university associated travel out of state, however some in-state travel may be permissible. UWL will be working closely with the local health department as well as local institutions and colleges to implement community-wide response and support. At this time, buildings will remain open.
  - e. Q & A
    - i. Classes will be online until April 10th, any changes will be communicated.
    - ii. *What if employees want to work from home?*
      - No answers from HR yet, but coming soon.
    - iii. *What about graduate assistants? Will they be treated as student v. staff?*
      - Graduate assistants will be required to work and move to online courses
      - Additional information on this to come soon
    - iv. *Can you speak more about existing models for how COVID-19 will come to La Crosse?*
      - Trajectory depends on preventative measures. There are many models. This hinges to some degree on where people travel during Spring Break. The Wisconsin Department of Public Health has no current restrictions or quarantines on domestic locations.
    - v. *How will student employees be treated?*
      - Those places and job sites will remain open, as of now. Ideally, UWL will be leaving Murphy open to the extent possible and will be separating students and

- encouraging more than 6 feet of distance between people. Faculty, staff, and/or students who are exhibiting symptoms will be encouraged to not be on campus.
- vi. *What about courses with labs?*
    - This will be determined discipline-by-discipline in terms of how courses and faculty are choosing to deal with that element. UWL will be allowing sciences to do what they can in terms of learning outcomes.
  - vii. *What about student teaching?*
    - If the school district closes, then that student teacher will not be held accountable; student teachers always follow the school district calendar. For example, trainers in the School Psychology program will make that call (accreditors may give alternatives to completing hours).
  - viii. *Re: Madison's decision with residence halls - why do we have two different models?*
    - Madison is concerned with people living and eating in close proximity, wanting students to NOT return to their residence halls. At UWL, we have concerns about that activity, but do not want to tell students who don't have access to a home, place to stay, access to internet, etc. not to come back. Other college campuses are about 50/50 about whether they are allowing or telling students they can return to campuses.
  - ix. *What is the plan for Murphy computer labs?*
    - Alternating seating is an option
  - x. *What about job candidate travel?*
    - This has not been discussed yet and is unknown at this time. There are multiple searches that will be proceedings and are in progress.
  - xi. *What about online testing?*
    - UWL is recommending that everything be online and not waiting until classes resume in person. There is a potential feature that is being offered as a response to this, including anti-cheating software.
  - xii. *What about screen sensitivities for students?*
    - This is developing and will be addressed case by case.
  - xiii. *What about the food pantry and basic medication access?*
    - Larry has been working on beefing up the food pantry, as well as making hand sanitizer and basic medications available.
  - xiv. *What about at-home testing for cases?*
    - The health department is helping with this. There is not much additional space for quarantining students on campus. There has been discussion about opening up additional spaces on campus.
  - xv. *Will there be an FAQ page?*
    - Communications is working on developing an FAQ page, using Madison and Milwaukee's pages as models. Also, to people who are fielding calls, there is discussion of implementing a helpline or question line centered at dispatch; this is not completed yet.
  - xvi. *Is the campus wide email messaging going to parents and family members?*
    - Our mechanism for communication with parents is through Student Affairs. We do not have a contact information roster for reaching parents directly. Information can be found at: [uwlax.edu/info/covid-19/](http://uwlax.edu/info/covid-19/).
  - xvii. *What is the justification for adding an extra week of spring break?*
    - The reason for cancelling is to give people time to prepare for transition to online classes. The three weeks is due to a model for self-quarantine, to minimize our large group contact and exposure and builds in a buffer.
  - xviii. *Are the lost hours of the cancelled week going to be absorbed?*
    - Yes



### 3. Chancellor's Update (at 2:30 PM)

- a. UWL has cancelled all travel out of state for the break and moving forward. There were a lot of athletic trips that were scheduled and students are upset. At this time, athletics are back on and moving forward. Conference-wide they are not yet agreeing to stop travel. There are arguments that stopping travel will not stop the virus from getting here, but slowing it down is important. Things are happening hourly. This situation is unprecedented in higher education. The design of the spring break extension, takes into account that we need more time to plan.
- b. We recommend delaying deadlines for the week that classes are being cancelled due to the Spring Break extension.
- c. It is too early to make a call on Commencement or other late spring events.
- d. *Question: what would cause campus to close?*
  - i. We have control over residence halls. The majority of students don't live there, but live in the greater community. That would be in the Level III response, if we have a confirmed case on campus, essential personnel only will be on campus. Levels have been defined by the emergency response planning team.
- e. Track & Field Nationals teams are willing to self-quarantine after they come back from competing. Other UW schools were sending students.
- f. *Question: what are we doing to discourage students from drinking during cancelled classes and congregating in large groups downtown?*
  - i. This will be discussed and answers to come.
- g. Concern about employees that have children who attend other schools out of state and in different places, coming back because their universities are closing.
- h. Concerns with working remotely
- i. Employee protocols and concerns about minimizing contact between employees on campus.  
*Question: how are we making decisions about this?*
  - i. Focus has been on what are we doing to do right now. Communications is working on a document with major topics and collecting questions to get a sense of major areas of concern; How would HR be prepared to handle FMLA? CDC is recommending 20s of hand washing. If you're sick stay home and do not come to work. There are also decisions being made on the department supervisor level. UWL is encouraging supervisors to approach things equitably. There will hopefully be some shared, consistent messaging offered to supervisors. HR is prepared to begin receiving these questions. There is a system wide subgroup, and UWL is coordinating with them and different agencies.
- j. Consistency across campuses with regard to travel restrictions and events
  - i. Messaging from system was indicating autonomy for campuses, but people are wanting more coordinated approach. There was a phone call with chancellors last night. Madison had a format, and other schools were following suit.
- k. *Question: what is recommended for committees and student meetings?*
  - i. Just be flexible and cognizant about not coming onto campus if you are sick. If students are interested in tabling gatherings, they can do so. There is no requirement that you are getting together.
- l. Guidance on working remotely (even when people are feeling just a little ill)
  - i. People are needing immediate guidance, so people don't blow through their sick leave. UW System is receiving outside consulting and the system is complex. HR says they're working as fast as they can.
- m. Is it helpful for JPB to consult on whether student athletes can travel?



## **Agenda**

UW-L Joint Planning and Budget Committee

1:15 PM, March 11, 2020

150 Murphy Library

Recorder: Abellera

Alternate Recorder: Abler

1. Approval of Meeting Minutes from February 26, 2020
2. Announcements/Updates-
  - a. JBP Executive Committee – agenda items for this academic year:
    - i. What is the future of UWL's strategic plan and the position(s) associated with the plan? Longstanding Structure for Strategic Planning?
    - ii. How do our future funding decisions align with our strategic plan?
      - Does the Master plan align with the overall strategic plan?
    - iii. How does our future enrollment management align with our strategic plan?
3. COVID-19 UWL Preparedness Plan (Dr. Deyo and Chief Hill)
4. Chancellor's Update (at 2:30 p.m.)
5. Provost's Update
6. CFO's Update
7. Strategic Planning Update- none
8. New Business
  - a. UWL Long-term Enrollment Taskforce
9. Adjournment

## Long-term Enrollment Taskforce

In his book *Demographics and the Demand for Higher Education* Carleton College economics professor Nathan Grawe argues that beginning in 2025 the demand for a college degree from four-year comprehensive institutions in Wisconsin will decline 15% or more relative to 2012. While it is difficult to know exactly how this general decline will impact individual institutions, it is important for us here at UWL to gather and analyze the data and trends associated with the coming demographic shift. For example, if we are able to maintain the current percentage of Wisconsin high school graduates in our first-year class, what could be the magnitude of the decrease in our first-year class in 2025? In order to offset that decrease, and maintain the current size (2175 students) of our first-year class, how much do we need to grow our percentage share of Wisconsin high school graduates over the next five years? Moreover, what will be the demographic mix of Wisconsin high school graduates in 2025, and in our own first-year class? And what types of programs and services might we need to add or enhance to provide the highest quality academic experience to our demographically changing student body?

In order to research and formulate answers to these kinds of questions, our Joint Planning and Budget Committee (JPB) is creating a UWL Long-term Enrollment Taskforce. The taskforce will include a representative from JPB, Student Association, Administration and Finance, Diversity and Inclusion, Admissions, Institutional Research & Planning, and a faculty member with modeling and forecasting expertise perhaps from Economics or a similar department. JPB will appoint the members of the taskforce.

The taskforce will begin working as soon as possible, in the hope of presenting a report to JPB and the UWL shared governance groups in the middle of Spring Semester 2020. Once the taskforce provides its report, we will begin formulating the specific strategies and tactics needed to keep UWL enrollment strong. Likewise, at that point we can discuss the implications Wisconsin's coming demographic shift has for the next round of strategic planning at UWL.

# Long Term Enrollment Task Force Report

Prepared for Joint Planning and Budget | March 2020

Sita Agterberg – Student Association

Taggert Brooks -- Economics

Enilda Delgado – Sociology/JPB

Bob Hetzel – VC for A&F

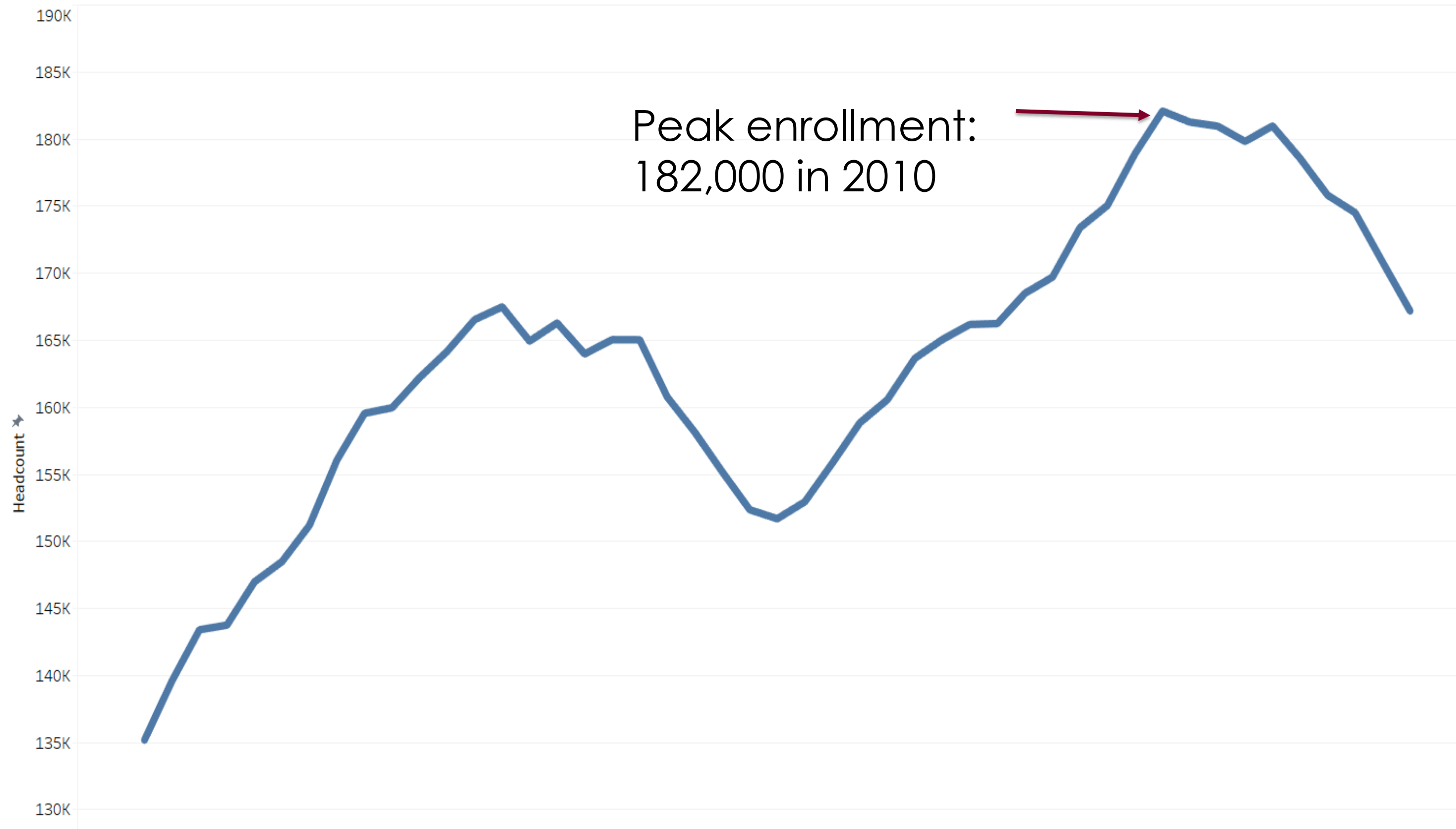
Corey Sjoquist -- Admissions

Natalie Solverson – IRAP

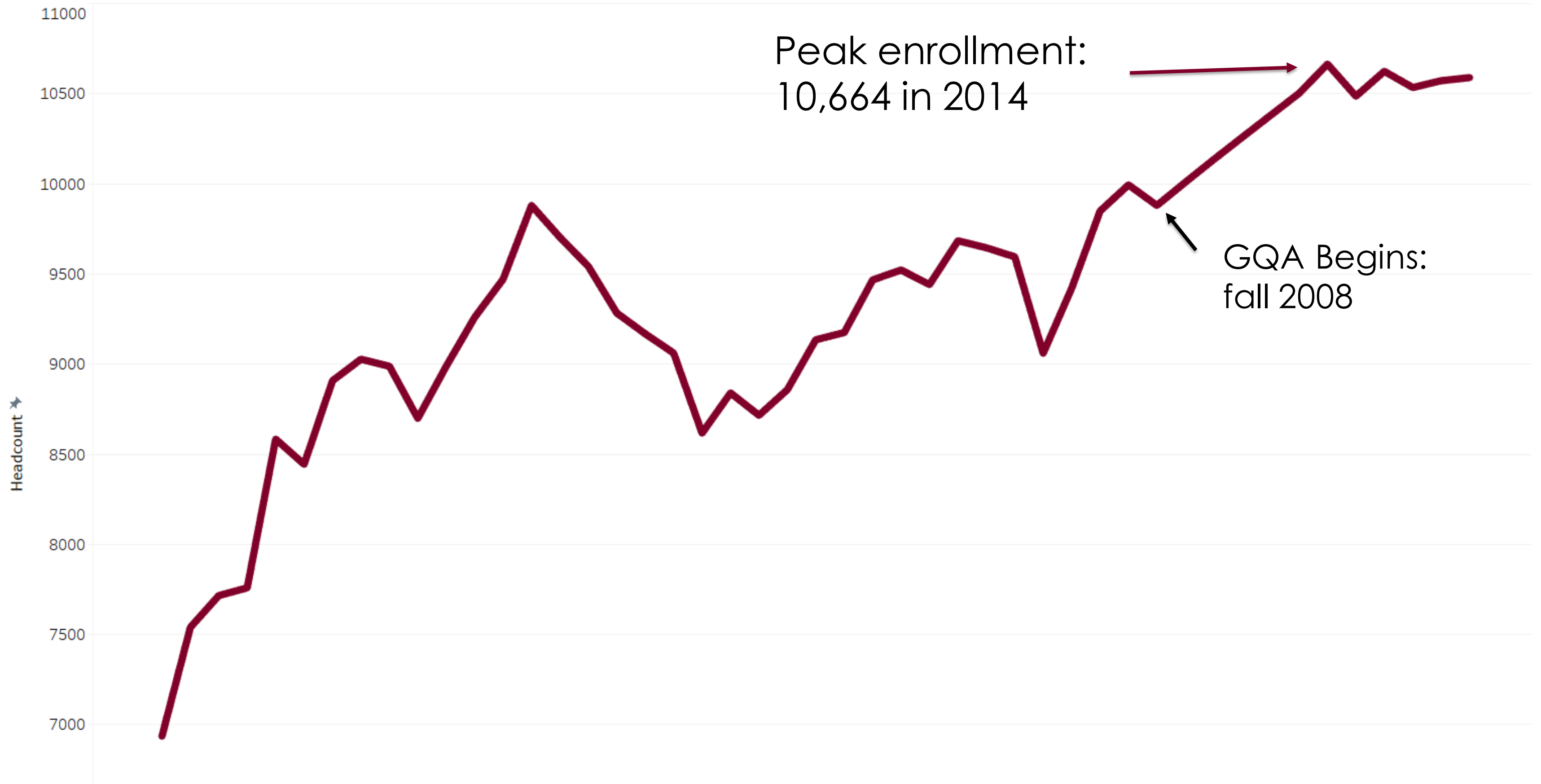
Barbara Stewart – D&I



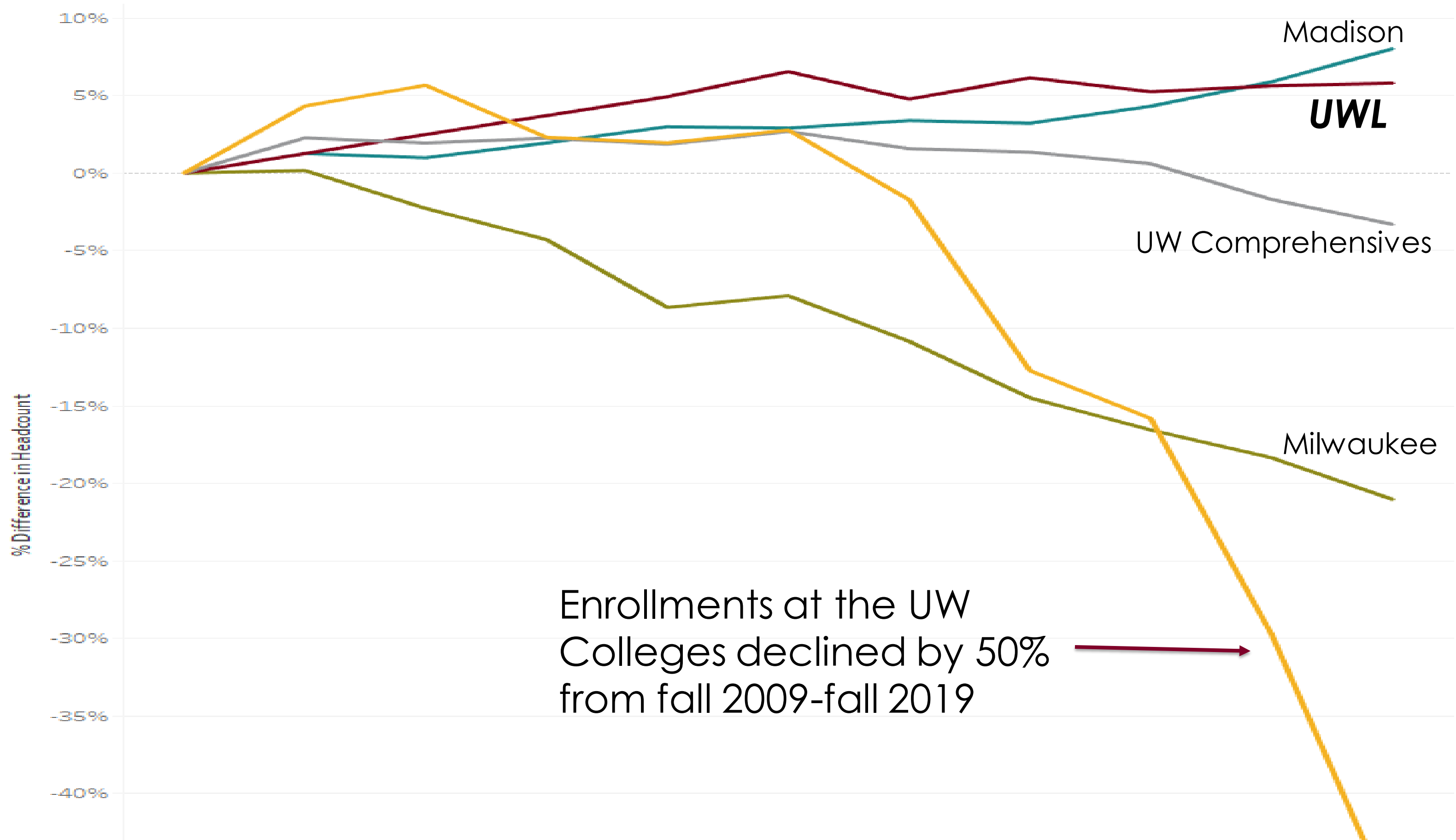
# UW System Enrollment, 1973 to 2019



# UWL Enrollment, 1973 to 2019



# UW System Enrollment, 2009 to 2019 – % change by sector

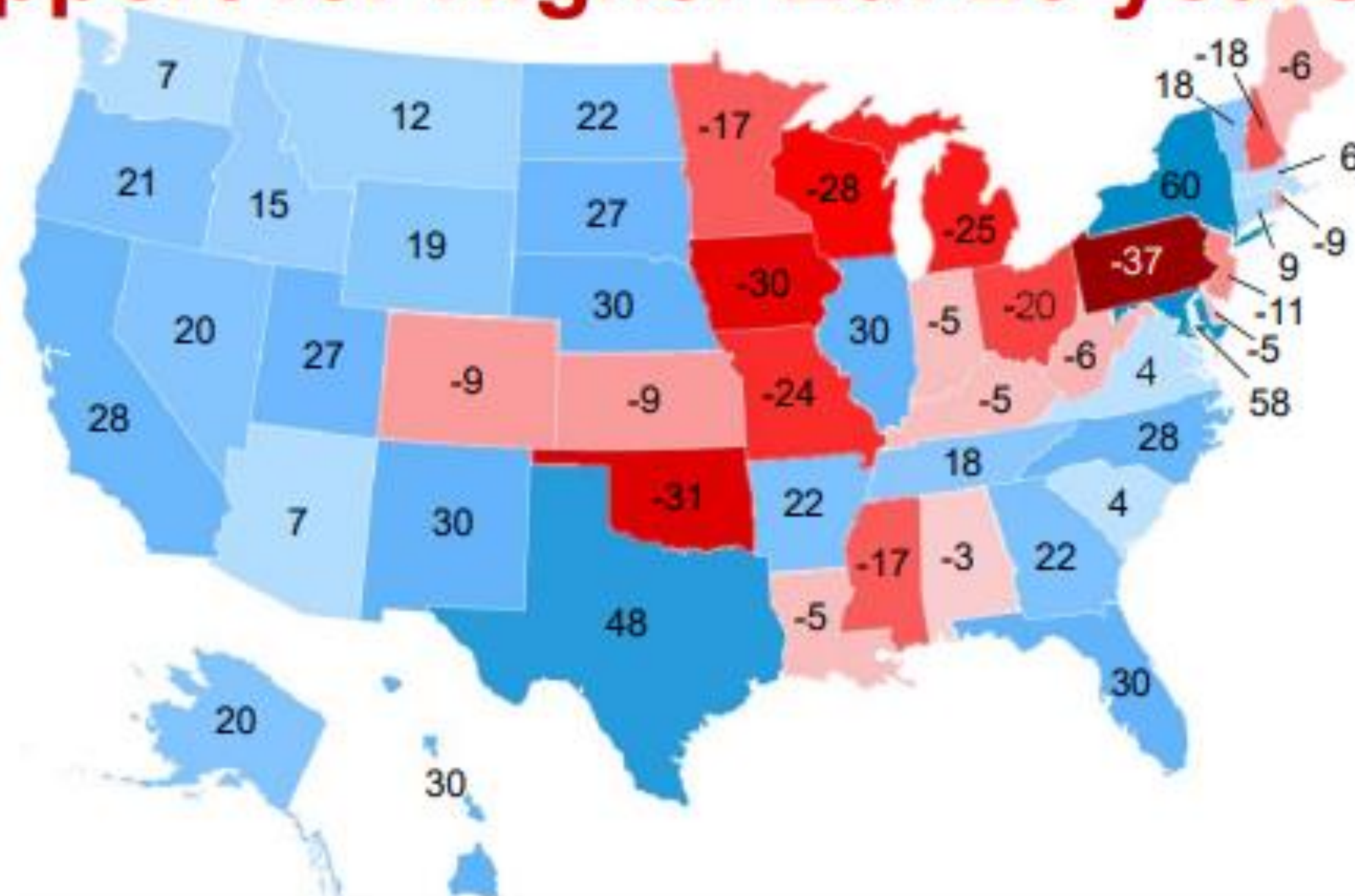






# State Support for Higher Ed: 20 years

% change in state spending per student, 1998-2018 (adjusted for inflation)



Source: State Higher Education Finance, [www.shfeo.org/projects/state-higher-education-finance/](http://www.shfeo.org/projects/state-higher-education-finance/)



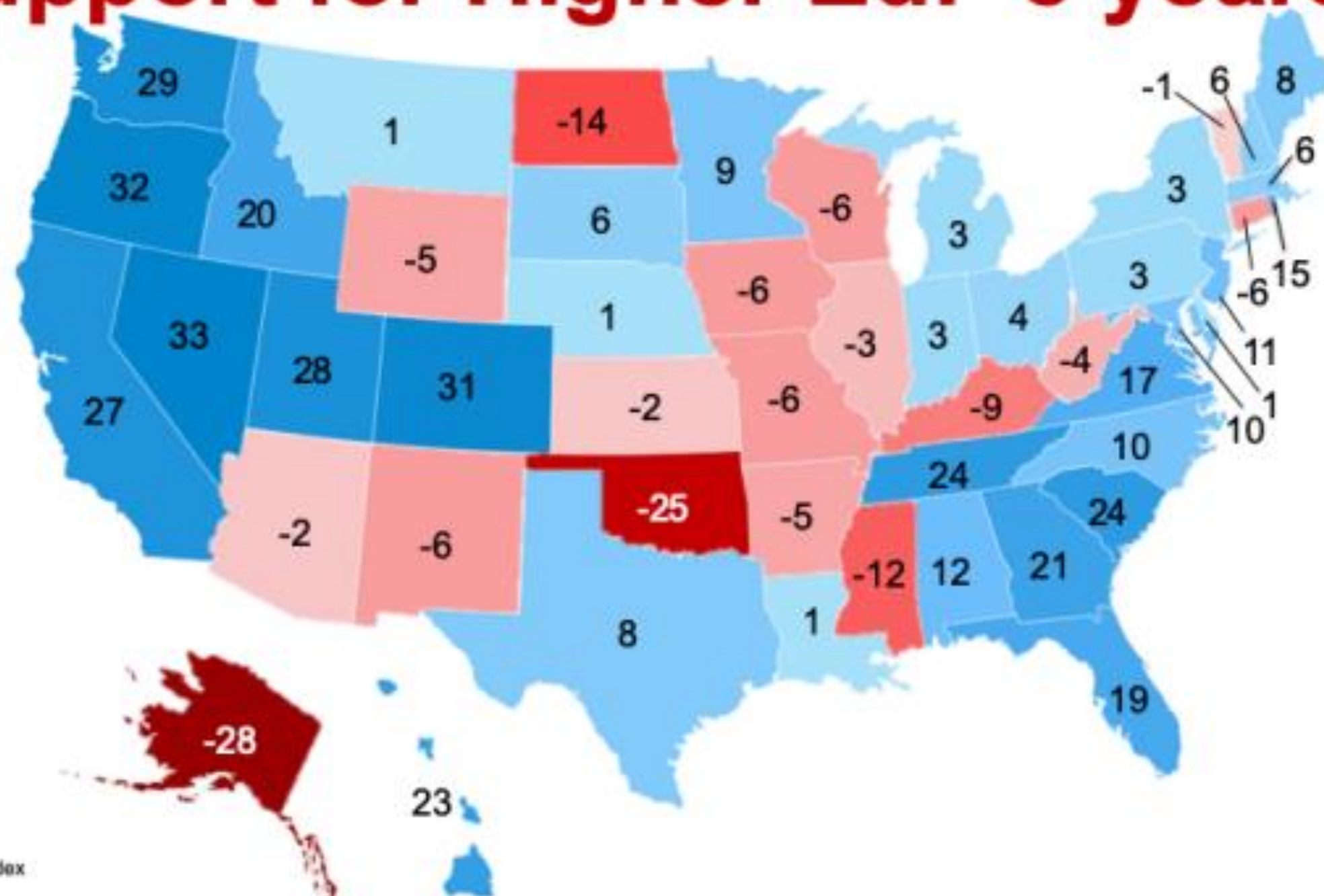
Cribbed from UW-Madison Rebecca Blank's February Presentation to the BOR





# State Support for Higher Ed: 5 years

% change in state spending per student, 2015-2020 (adjusted for inflation)



Source: Grapevine FY2020 and Consumer Price Index



Cribbed from UW-Madison Rebecca Blank's February Presentation to the BOR

# Long Term Enrollment Task Force

- If we keep the current percentage of WI high school graduates in our first-year class, what could be the magnitude of the decrease in 2025?
- How much would we need to grow market share to offset that decrease?
- What will be the demographic mix of Wisconsin high school graduates in 2025, and in our own first-year class?
- What types of programs and services would we need to add or enhance to provide the highest quality academic experience to our demographically changing student body?



# What We Forecasted

- Undergraduate Degree Seeking Students
- Relative composition of these populations
- Discussion of programs and services would need to be more involved and longer term



# What We Assumed

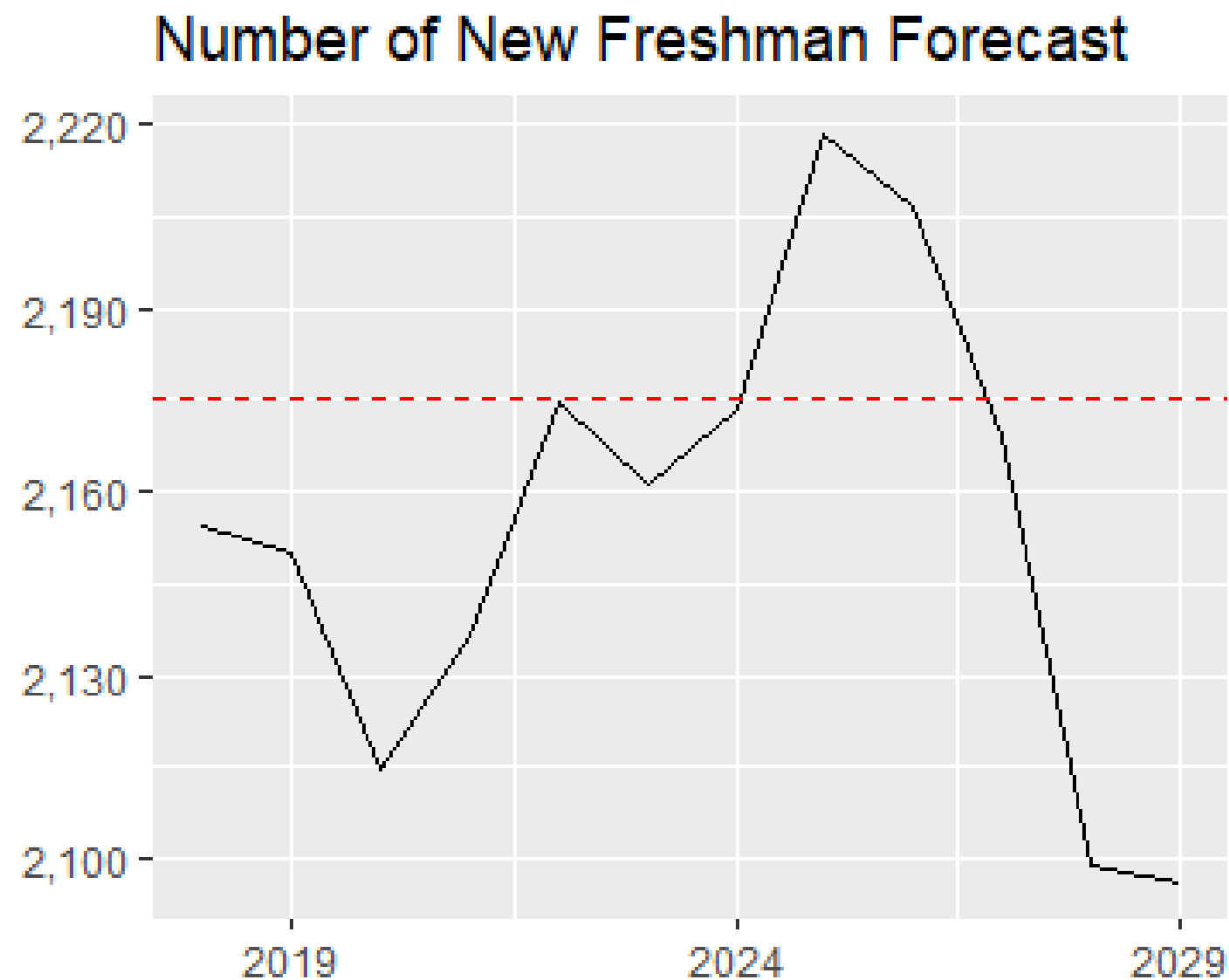
- Forecasts to 2029 where possible
- WI and MN students comprise the majority of incoming students
- Overall forecasts attempt to include new transfer students, not just first-years (FY)
- No change in retention rates or graduation rates
- No change in diversity beyond what's present in the trending data
- No change in competition from other institutions
- Each individual forecast may not add to the same number, but the general pattern holds across forecasts

Clearly, we know many of these assumptions are not going to hold.  
But it's where we start.





# What is the magnitude of the decrease maintaining current market share of first year students (Charge A)?



Source: Authors Calculations

We predict FY class sizes will be generally stable (some declines in 2020-2021), then increasing through 2025, when declines begin.

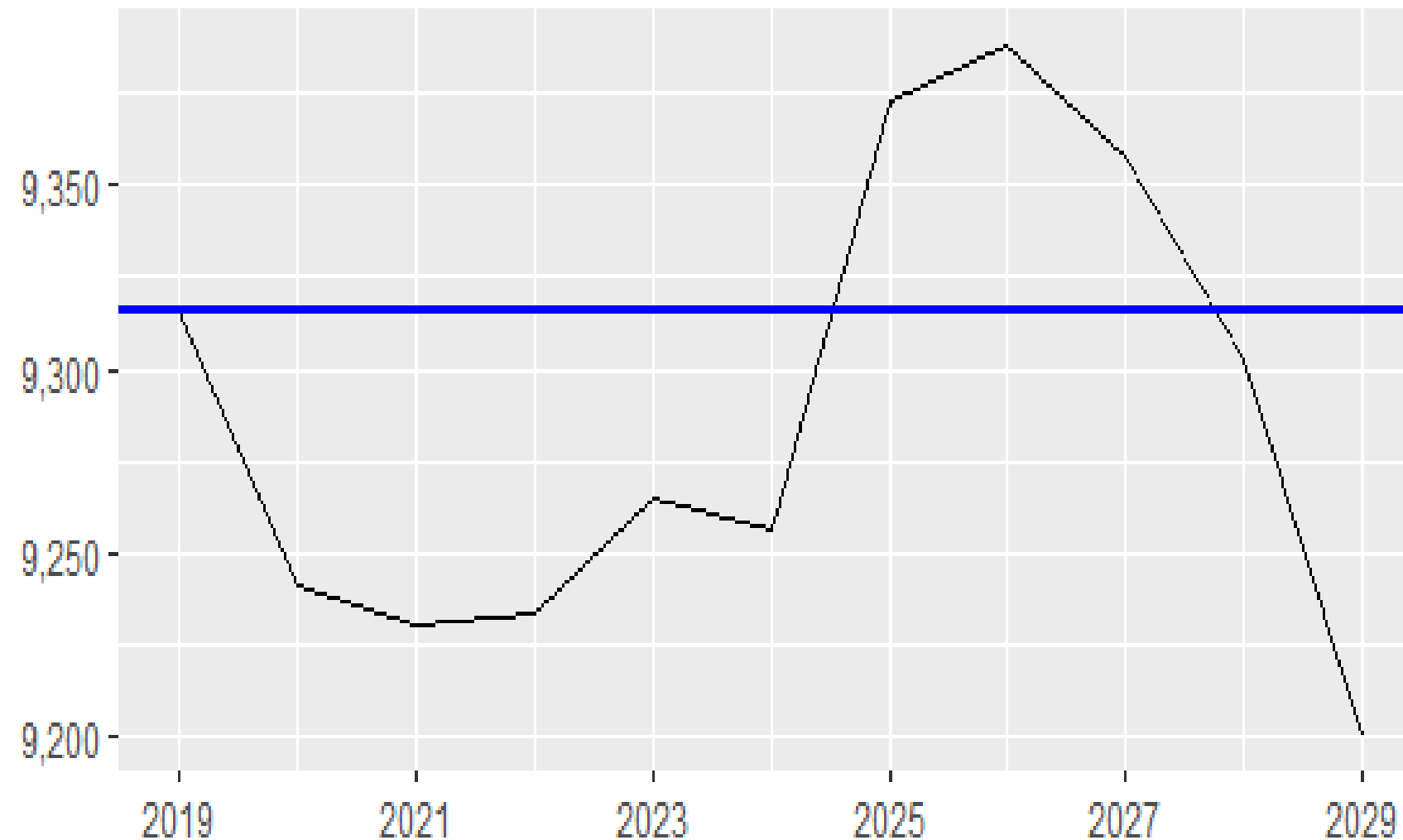
**Predicted high = 2200,  
predicted low = 2100**

Fall 2018 and Fall 2019 already outperformed the forecast by 1%-2%



# Related – Total Undergrad Degree Enrollment

## Forecast Stock of Degree Seeking Ugrds



Source: Authors Calculations

\*Actual enrollments fall 2019 outperformed forecast by 100 students (1%)

\*Blue line = predicted fall 2019 enrollment

Enrollment of new transfer students has declined in recent years; we expect this trend to continue.

**Forecast** for total undergrad degree enrollment includes both FY and transfer enrollment, with peak enrollment in 2026, and declining thereafter.

**Near term low – fall 2021, 9230, up to 9388 in fall 2026 (+158 at that point), then down to 9200 in fall 2029 (30 students fewer than fall 2021)**



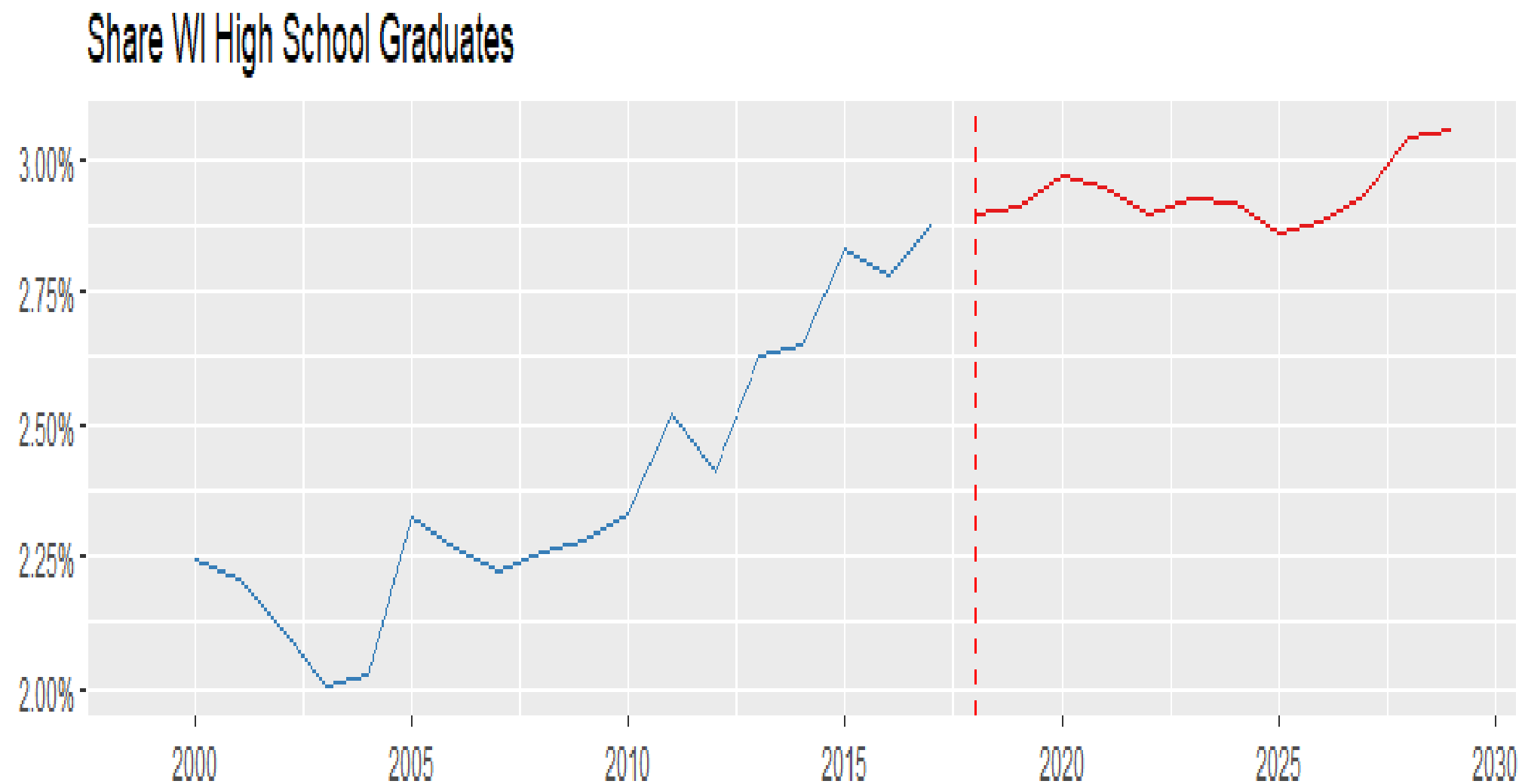
# Again, a thing about FORECASTS

- The forecasts will change as we get more information.
- Enrollment forecasts are cumulative. As in, we don't have to wait until fall 2029 to know what the enrollment might be in fall 2029...we will start to know in fall 2026, then 2027, then 2028.
- New first-year students are relatively easy to forecast. New transfers, harder.





# How much do we need to increase market share? (Charge B)



Source: Authors

Current market share of WI students is 2.7%, need to increase to 3% +

We have increased our market share consistently since fall 2012, when it was 2.2%

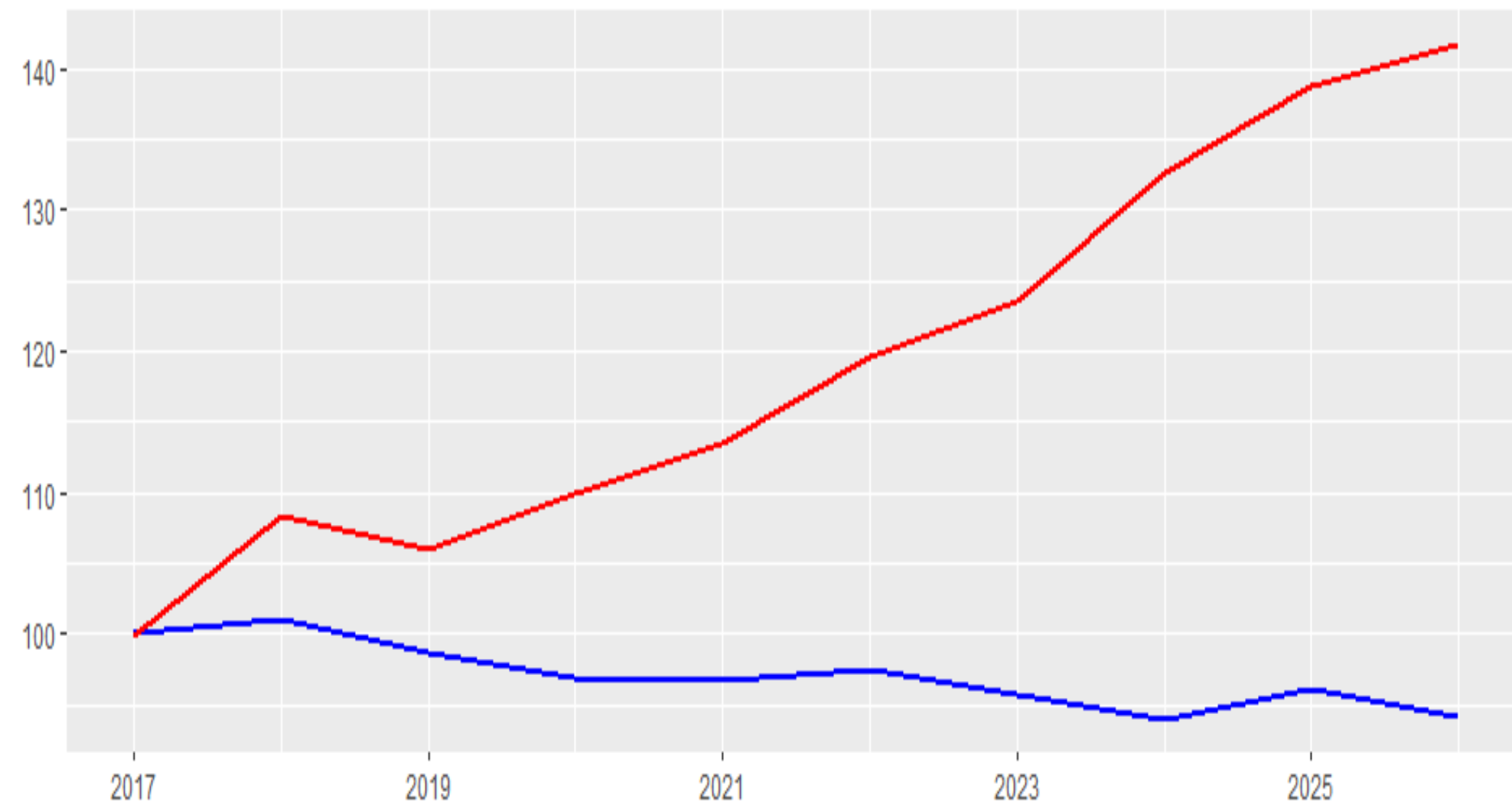
*Increases have been from pool of students entering UWS schools (i.e., more students are choosing UWL within the pool of students enrolling at UWS schools)*



# What will the demographic mix be of our first-year class in 2025? (Charge C)

## Forecast Enrollments of Wisconsin HS Graduates by Race, indexed to 2017

UWL's enrollment of non-white Wisconsin public high school graduates expected to increase



Source: Authors Calculations from Applied Population Lab Data

If we enroll white students at same rate as current, and students of color at same rate, net effect is a decline of 25 students in the FY class in 2026

(251 Wisconsin students of color, 1408 white students)



Line graph shows the relative growth in students of color (red) compared to white students (blue) from 2017 to 2026

## University Of Wisconsin 2-Year Enrollment Declined 49 Percent Since 2010

UW System Branch Campuses See Declines As High As 50 Percent Between 2018 And 2019

By Rich Kremer

Published: Friday, October 18, 2019, 8:10am

Updated: Friday, October 18, 2019, 4:15pm

## UW-Oshkosh Offering Early Retirement Incentives To Faculty, Staff

Goal Is To Close Projected Budget Shortfall In 2021 Due To Declining Enrollment

By Rich Kremer

Published: Thursday, December 12, 2019, 12:50pm

Updated: Thursday, December 12, 2019, 5:05pm

## As enrollment continues to drop, UW-Whitewater becomes latest college to consider layoffs, staff cuts

[Devi Shastri](#), Milwaukee Journal Sentinel Published 3:38 p.m. CT Jan. 28, 2020 | Updated 1:25 p.m. CT Jan. 29, 2020

## UW-Stevens Point Grapples With Budget Shortfalls, Changing Demographics

Chancellor Considers Plan To Eliminate 6 Majors, Restructure University

By Bridgit Bowden

Published: Tuesday, April 2, 2019, 5:40am


## UWM is bleeding faculty, but its budget is balanced for the first time since 2012

[Karen Herzog](#), Milwaukee Journal Sentinel Published 5:00 a.m. CT Oct. 1, 2018 | Updated 4:38 p.m. CT Oct. 1, 2018



# Budget Planning FY21-24

## 14 October 2019

- Budget Planning Document from fall 2019 (click icon to access) 
- With the resident undergraduate tuition freeze in place, even if we maintain our enrollment, we will need to make budget reductions in each of the next four fiscal years.
- The budget planning document assumes declines of 50 students in FY23 and FY24, for a decline of 100 students. The forecast stock has that decline placed in FY22 and FY23. But general alignment on what will happen in short term.



# Budget Planning FY21-24

## 14 October 2019

- To be clear, even if we maintain our undergraduate enrollment over the next few years, we will still be experiencing budget reductions because the undergraduate resident tuition pool is not increasing due to the tuition freeze.



Fiscal Impact of 100 Student Decline  
(~1% decline in enrollment)  
FY20 Tuition and Fee Schedule

Item	Annual Amount	Amt/100 Students
Tuition	7,584.72	758,472
Segregated Fees	1,367.66	136,766
Room	3,921.00	392,100
Board	2,544.00	254,400

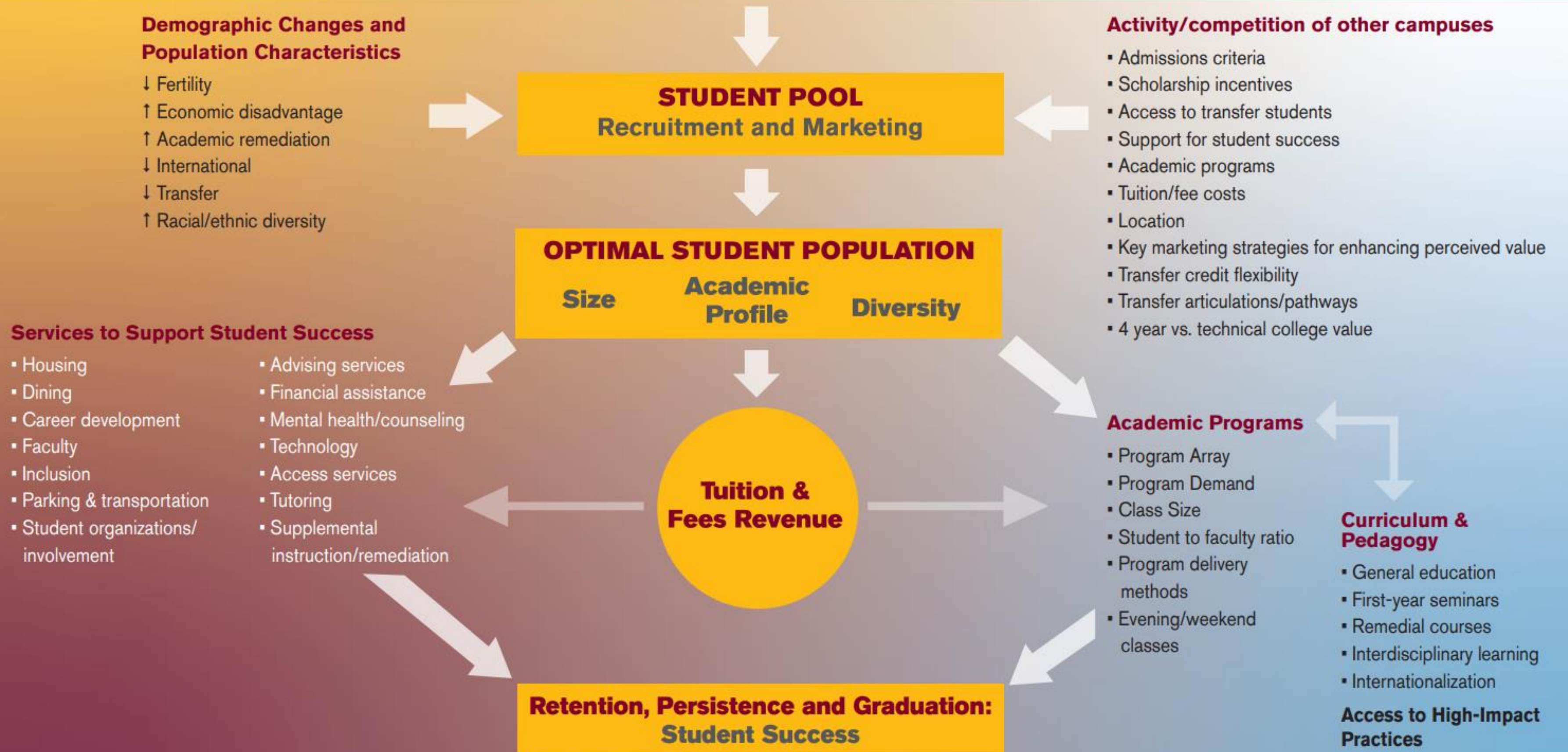
**Total = \$1.54 Million**



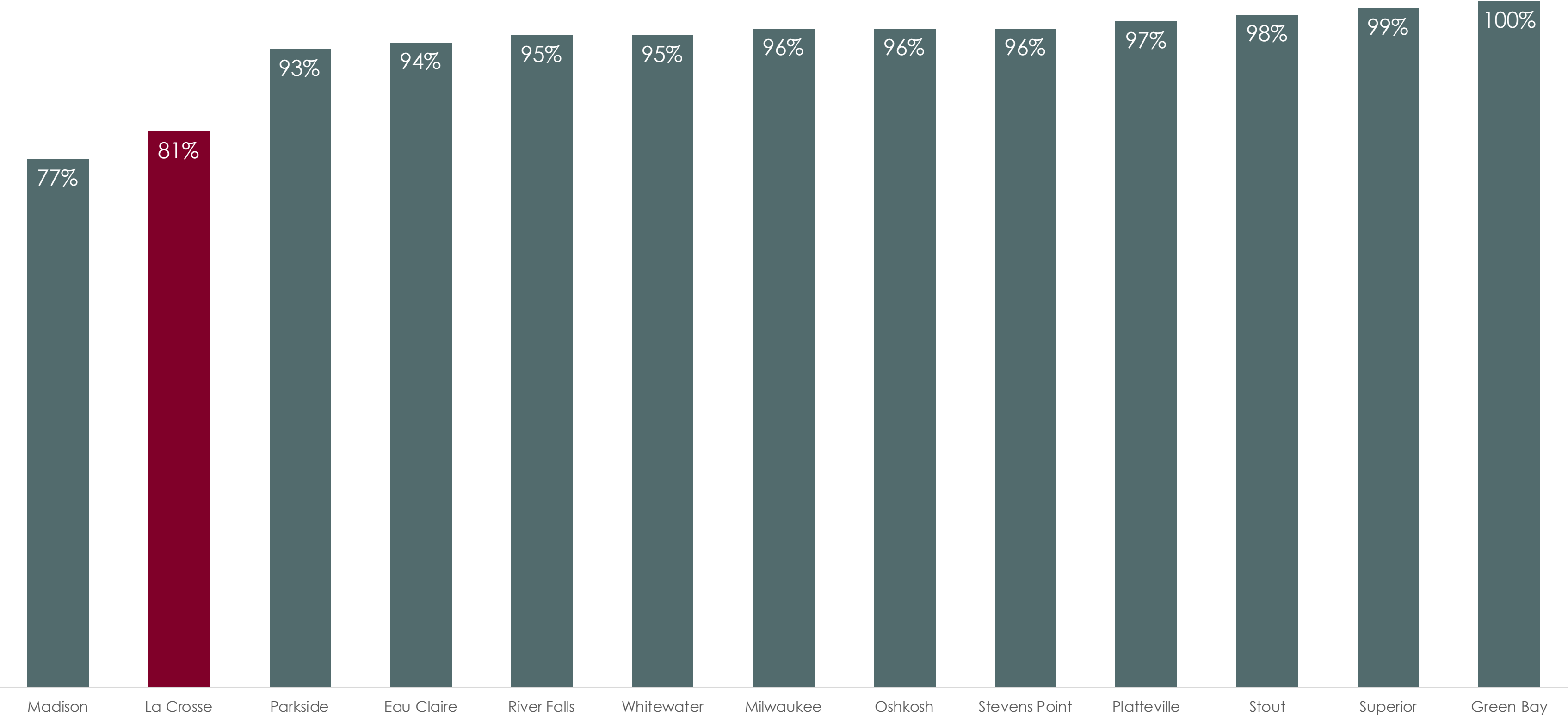


# What kind of University do we want to be?

UWL Mission, Vision, and Priorities  
Strategic Plan: Sustaining Excellence



# New FY Admit Rates for Fall 2020 as of February 1, 2020





UW-L Joint Planning and Budget Committee  
1:15 PM, April 15, 2020  
Virtual Meeting – via WebEx (<https://uwlax.webex.com/meet/edelgado>)

Recorder: Abler

Present: Abellera, Abler, Agtenberg, Claus, Delgado, Elkins, /  
Figueroa, Hansen, Harris, Hawkins, Hays, Hetzel, Kelly, Kovari, Kunkel, Milner, Morgan, Nielsen, Nowicki,  
Reichert, Richter, Sandheinrich, Smith, Stewart, Stindt, Thoen, Wycoff-Horn

Absent: Fiegel

Meeting called to order by Chair Delgado at 1:16 PM.

1. Approval of Meeting Minutes from March 11, 2020     M/S/P
2. Chancellor's Update  
Dealing with COVID-19-- Primary goal is protecting the health and safety of everyone  
Fall semester—Deposits for housing and registration tracking like last year  
Retention rates unknown  
Orientation and summer registration likely online this year  
Conversations regarding linking strategic planning with accreditation suspended due to pandemic
3. Provost's Update—Surveying students regarding late-summer graduation, maybe August 22<sup>nd</sup>?  
Face-to-face summer courses limited to session III (July 20-August 28)
4. CFO's Update  
COVID-19 Budget Planning Presentation (attached pdf), projected \$4.2 million shortfall FY21 to be  
addressed by reducing travel (\$1M), vacant position holdback (\$1M), using tuition reserves (\$1.8M)  
reducing purchases (\$500K), and carryover from FY20 (\$500K), no base budget cuts  
Federal money (CARES Act) will bring UWL \$6.8 million, \$3.4 million must go directly to students,  
likely based on Pell grant eligibility and other factors, payments will be handled through financial aid  
office  
Waiting for guidance from Education Secretary on how the remaining \$3.4 million can be used  
  
Summer events (e.g track meet) on hold or cancelled
5. Strategic Planning Update- Dashboard: <https://www.uwlax.edu/info/strategic-plan/> (Solverson)  
Natalie Solverson presented the dashboard metrics for each of the Strategic Plan pillars
6. New Business  
FY20 Soaring Eagle Scholarships \$154K short, will be added in with other costs of COVID-19 now  
Cowley Phase II? Still on track but must convince legislature for next budget cycle
7. Future Steps--UWL Long-term Enrollment Taskforce  
Taskforce presentations to governance groups postponed to fall, enrollment model STH by pandemic  
  
Next meetings: 4/22, 4/29, 5/6
8. Adjournment-- Motion to adjourn at 2:58 PM     M/S/P.

## Agenda

UW-L Joint Planning and Budget Committee

1:15 PM, April 15, 2020

Virtual Meeting – via WebEx (<https://uwlax.webex.com/meet/edelgado>)

Recorder: Abler

Alternate Recorder: Agtenberg

1. Approval of Meeting Minutes from March 11, 2020
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  - a. JBP Executive Committee – agenda items for this academic year:
    - i. What is the future of UWL's strategic plan and the position(s) associated with the plan? Longstanding Structure for Strategic Planning?
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      - Does the Master plan align with the overall strategic plan?
    - iii. How does our future enrollment management align with our strategic plan?
3. Chancellor's Update
  - a. Future of Strategic Planning update
4. Provost's Update
5. CFO's Update
6. Strategic Planning Update- Dashboard: <https://www.uwlax.edu/info/strategic-plan/> (Solverson)
7. New Business
  - a. Covid-19 Update (Hetzl)
    - i. CARES Act
  - b. Soaring Eagle Scholarship – FY20 (Hetzl)
8. Future Steps
  - a. UWL Long-term Enrollment Taskforce
9. Adjournment

# University of Wisconsin-La Crosse



COVID-19 Budget Planning  
Fiscal Year 2020-21

# Discussion Overview

- Fiscal Impact of Spring Semester
- Student Refunds
- COVID-19 Budget Planning Assumptions
- Budget Planning Forecast for Summer & Fall
- Funding Shortfall Strategies
- Questions & Answers

# Fiscal Impact of COVID-19 for Spring Semester

## Student Refunds:

3.123M	Residence Life
2.024M	Dining Services
128K	Parking Services
35K	Campus Recreation
84K	International Education
<u>45K</u>	Special Course Fees
5.439M	Total Refunds

# Impact of COVID-19 Refunds

## Delay of Capital Projects:

- Laux Hall Interior Renovation → 1 Yr.
- White Hall Renovation → 1 Yr.
- Sanford Hall Renovation → 2 Yrs.
- Angell/Hutch Renovation → 3 Yrs.
- Whitney Center Dining Renovation → 2 Yrs.

# COVID-19 Budget Planning Assumptions

- Plan for state budget cut & enrollment decline
- Do everything possible to avoid layoffs & furloughs
- Develop funding plan for current financial situation
- Manage FY20-21 w/o base budget reductions
- Maintain 1% lump sum payment for faculty & staff

# COVID-19 Budget Forecast for FY21

25M State Budget Lapse & 150 Less Students

1.108M State Budget Lapse

870K Summer Session Decrease

1.919M Enrollment Decrease

180K Application Fee Reduction

115K Indirect Cost Funding Decrease

4.192M Total Revenue Shortfall



# COVID-19 Budget Forecast for FY21

## Budget Shortfall Funding Recommendations

1.800M	Tuition Reserve
1.000M	Vacant Position Holdback
1.000M	Travel Holdback
500K	Purchasing Holdback
<u>500K</u>	FY20 Carryover
4.800M	Total*

\*Funding plan provides contingency for loss of 225 students

# COVID-19 Budget Planning – Next Steps

## Step 1: Monitor Key Enrollment Indicators

- Admissions & Housing Deposits
- Summer Session Registration
- Fall Registration - Continuing Students
- START - New First Year & Transfer
- Fall Semester 10th Day Reporting

Step 2: Determine if base budgets reductions are needed for FY22

# Questions & Answers



THE SECRETARY OF EDUCATION  
WASHINGTON, DC 20202

April 9, 2020

Dear College and University Presidents:

These are unprecedented and challenging times for your students and for you. I know you find yourselves grappling with issues you never imagined, and I want to assure you we are here to support you in your missions and to quickly provide the resources and flexibilities you need to continue educating your students. That's why we're focused on implementing the Coronavirus Aid, Relief, and Economic Security (CARES) Act quickly and faithfully.

I gave my team a charge as soon as the CARES Act was signed into law: get support to those most in need as quickly as possible. That starts with college students whose lives have been disrupted, many of whom are facing financial challenges and struggling to make ends meet.

As you know, the CARES Act provides several different methods for distributing roughly \$14 billion in funds to institutions of higher education. The most significant portion of that funding allocation provides that \$12.56 billion will be distributed to institutions using a formula based on student enrollment. Of the amount allocated to each institution under this formula, at least 50 percent must be reserved to provide students with emergency financial aid grants to help cover expenses related to the disruption of campus operations due to coronavirus. We are prioritizing this funding stream in order to get money in the hands of students in need as quickly as possible.

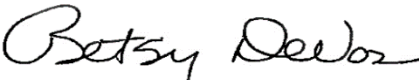
The CARES Act provides institutions with significant discretion on how to award this emergency assistance to students. This means that each institution may develop its own system and process for determining how to allocate these funds, which may include distributing the funds to all students or only to students who demonstrate significant need. The only statutory requirement is that the funds be used to cover expenses related to the disruption of campus operations due to coronavirus (including eligible expenses under a student's cost of attendance, such as food, housing, course materials, technology, health care, and child care). With that said, I would like to encourage the leadership of each institution to prioritize your students with the greatest need, but at the same time consider establishing a maximum funding threshold for each student to ensure that these funds are distributed as widely as possible. As a point of reference, you might consider using the maximum Federal Pell grant (for the 2019-2020 academic year, \$6,195) as that threshold. In addition, if you determine that your institution's students do not have significant financial need at this time, I would ask that you consider giving your allocation to those institutions within your state or region that might have significant need.

In order to access these funds, all institutions must sign and return the Certificate of Funding and Agreement via: [grants.gov](https://www.grants.gov) (<https://www.grants.gov/web/grants/applicants/registration.html>), acknowledging the terms and conditions of the funding. After the Department has received the

certificate, institutions may draw down their emergency assistance funds using the Department's G5 system.

The Department is also working expeditiously to allocate the remaining funding that is reserved for institutional use, and we will provide details on how institutions may apply for this institutional funding, as well as for other emergency funding, in the coming days. Thank you for your continued work on behalf of America's students.

Sincerely,

  
Betsy DeVos

**DRAFT FOR DISCUSSION ONLY**

**Scenario 1: GPR Budget Reduction & Enrollment Decrease (100 Students)**

Item	25M GPR	50M GPR	100M GPR
Fund 102 Budget Reduction (UWL GPR/Fee Share = 4.43%)	1,107,500	2,215,000	4,430,000
<b>Fund 131 Budget Adjustments</b>			
Summer Session Enrollment Decrease (Estimated at 25%)	870,079	870,079	870,079
Enrollment Decrease - Resident (50 students)	379,236	379,236	379,236
Enrollment Decrease - Nonresident Students (50 students)	820,213	820,213	820,213
Application Fee Reduction (50% Reduction)	180,000	180,000	180,000
Fund 150 Indirect Overhead Funding	114,658	114,658	114,658
<b>Subtotal Fund 131 Budget Adjustments</b>	<b>2,364,186</b>	<b>2,364,186</b>	<b>2,364,186</b>
<b>Total Fund 102 &amp; Fund 131 Budget Adjustments</b>	<b>3,471,686</b>	<b>4,579,186</b>	<b>6,794,186</b>

**Scenario 2: GPR Budget Reduction & Enrollment Decrease (150 Students)**

Item	25M GPR	50M GPR	100M GPR
Fund 102 Budget Reduction (UWL GPR/Fee Share = 4.43%)	1,107,500	2,215,000	4,430,000
<b>Fund 131 Budget Adjustments</b>			
Summer Session Enrollment Decrease (Estimated at 25%)	870,079	870,079	870,079
Enrollment Decrease - Resident (50 students)	379,236	379,236	379,236
Enrollment Decrease - Nonresident Students (100 students)	1,540,426	1,540,426	1,540,426
Application Fee Reduction (50% Reduction)	180,000	180,000	180,000
Fund 150 Indirect Overhead Funding	114,658	114,658	114,658
<b>Subtotal Fund 131 Budget Adjustments</b>	<b>3,084,399</b>	<b>3,084,399</b>	<b>3,084,399</b>
<b>Total Fund 102 &amp; Fund 131 Budget Adjustments</b>	<b>4,191,899</b>	<b>5,299,399</b>	<b>7,514,399</b>

**Scenario 3: GPR Budget Reduction & Enrollment Decrease (200 Students)**

Item	25M GPR	50M GPR	100M GPR
Fund 102 Budget Reduction (UWL GPR/Fee Share = 4.43%)	1,107,500	2,215,000	4,430,000
<b>Fund 131 Budget Adjustments</b>			
Summer Session Enrollment Decrease (Estimated at 25%)	870,079	870,079	870,079
Enrollment Decrease - Resident (100 students)	758,472	758,472	758,472
Enrollment Decrease - Nonresident Students (100 students)	1,540,426	1,540,426	1,540,426
Application Fee Reduction (50% Reduction)	180,000	180,000	180,000
Fund 150 Indirect Overhead Funding	114,658	114,658	114,658
<b>Subtotal Fund 131 Budget Adjustments</b>	<b>3,463,635</b>	<b>3,463,635</b>	<b>3,463,635</b>
<b>Total Fund 102 &amp; Fund 131 Budget Adjustments</b>	<b>4,571,135</b>	<b>5,678,635</b>	<b>7,893,635</b>

**Scenario 4: GPR Budget Reduction & Enrollment Decrease (500 Students)**

Item	25M GPR	50M GPR	100M GPR
Fund 102 Budget Reduction (UWL GPR/Fee Share = 4.43%)	1,107,500	2,215,000	4,430,000
<b>Fund 131 Budget Adjustments</b>			
Summer Session Enrollment Decrease (Estimated at 25%)	870,079	870,079	870,079
Enrollment Decrease - Resident (400 students)	3,033,888	3,033,888	3,033,888
Enrollment Decrease - Nonresident Students (100 students)	1,540,426	1,540,426	1,540,426
Application Fee Reduction (50% Reduction)	180,000	180,000	180,000
Fund 150 Indirect Overhead Funding	114,658	114,658	114,658
<b>Subtotal Fund 131 Budget Adjustments</b>	<b>5,739,051</b>	<b>5,739,051</b>	<b>5,739,051</b>
<b>Total Fund 102 &amp; Fund 131 Budget Adjustments</b>	<b>6,846,551</b>	<b>7,954,051</b>	<b>10,169,051</b>

April 9, 2020

**US Department of Education  
Education Stabilization Act  
Allocation of Funds to UW Institutions**

Institution	Total Estimated Funding to UW Institution	50/50 Split (Institutional Aid/Emergency Grants)
University of Wisconsin-Eau Claire	\$ 7,091,955	\$ 3,545,978
University of Wisconsin-Green Bay	\$ 3,504,931	\$ 1,752,466
University of Wisconsin-La Crosse	\$ 6,789,642	\$ 3,394,821
University of Wisconsin-Madison	\$ 19,783,001	\$ 9,891,501
University of Wisconsin-Milwaukee	\$ 16,925,665	\$ 8,462,833
University of Wisconsin-Oshkosh	\$ 6,207,761	\$ 3,103,881
University of Wisconsin-Parkside	\$ 3,781,946	\$ 1,890,973
University of Wisconsin-Platteville	\$ 4,792,670	\$ 2,396,335
University of Wisconsin-River Falls	\$ 4,427,466	\$ 2,213,733
University of Wisconsin-Stevens Point	\$ 6,312,792	\$ 3,156,396
University of Wisconsin-Stout	\$ 4,952,605	\$ 2,476,303
University of Wisconsin-Superior	\$ 1,488,367	\$ 744,184
University of Wisconsin-Whitewater	\$ 8,169,773	\$ 4,084,887
<b>UW System Total:</b>	<b>\$ 94,228,574</b>	<b>\$ 47,114,291</b>

Minutes  
UW-L Joint Planning and Budget Committee  
1:15 PM, April 22, 2020  
Virtual Meeting – via WebEx (<https://uwlax.webex.com/meet/edelgado>)

Recorder: Agterberg      Alternate Recorder: Clauss

Present: Abler, Agterberg, Clauss, Delgado, Elkins, Figueroa, Hansen, Harris, Hawkins, Hayes, Hetzel, Kelly, Kovari, Kunkel, Milner, Morgan, Nielsen, Nowicki, Reichert, Sandheindrich, Stewart, Stindt, Thoen

1. Approval of Meeting Minutes from April 15, 2020  
Sandheindrich- Move to approve  
Second- Abler
2. Chancellor's Update-Federally, we have received half of our money (about 3.5 million dollars) that needs to go directly to our students. We have a team led by Louise Janke and Sandy Chapman. The other half of the money is on its way. We have received guidance last night and we can use that money for dining and housing refunds.

On the state side, last Thursday the secretary of health extended the governors stay at home order until May 26. Legislators have challenged this. The extended order will affect the COVID-19 leave.

On the system level, last week the board of regents approved the policy for furloughs that many other campuses are using. UWL does not need to furlough anyone right now. The state may say that we need to take furloughs, but we haven't heard anything from them yet.

3. Provost's Update  
Morgan- We are in planning right now for the fall. I am concerned about having 13 different options for each campus in the fall because it makes it more difficult on our students and migration patterns. We have removed the advising hold one day in advanced and all balance holds. We are using Navigate to text and remind students to register the next day. There is a policy coming forward to faculty senate regarding S/U policy. It looks like it will pass and I will send out an email Friday to students, faculty, and staff about the final decision. We are planning on a survey to students and faculty about addressing issues of continuing online. Summer school registration looks strong and it is still going on.
4. CFO's Update
  - a. CARES Act funding
    - i. Yesterday we received the first 3.4 million dollars and the Department of Education released the guidelines for the second 3.4 million dollars
    - ii. Dr. Delgado sent out the lost revenue and out of pocket expenses excel spreadsheet. It will be updated every week and distributed to JPB. Each UW system school has
  - b. Admissions and Housing deposits – Updated numbers
    - i. Our admissions deposits are holding at the same percent as last year. We are at 87 more housing deposits than last year.
    - ii. We are trending slightly ahead of last year for pre-registration for START
  - c. Lost Revenue Excel Sheet summary—Refunded 5.5 million dollars. Staff parking refunded haven't happened yet.

Questions and Answers:



- d. Abler—I am wondering about special course fees. I'm not sure why it is included. *Can the student income continuation be used for the 3.4 million dollars?*
- i. Hetzel—The guidance has been unclear. It probably would not be eligible, but we have asked system to inquire on behalf of us.
- e. Delgado--*Could we have avoided expenses as far as student athletes are concerned?*
- i. Hetzel-- Many of the students had already left and we brought them back as soon as we could.
  - ii. Susan-- *I was curious how much of that we would have saved if student athletes had been asked to follow the same guidelines as everyone else.*
  - iii. Hetzel—We would have incurred a lower cost
  - iv. Delgado—We can let this be a lesson for the future so that we can all be on the same page as far as travel restrictions for students, faculty, and staff.
  - v. Susan—I would like to see how much of that money was because of the special circumstance.
- f. Elkins-- I appreciate all of the work folx are doing right now. So, I preface this with that point. I'm struggling to reconcile the conversations we were having in the fall about needing to plan for years of cutting/not filling positions with our current sense that we do not necessarily need to furlough individuals or cut positions. *Do we just now have access to funds that we did not have before? Or, are we using funds now that we were not willing to consider using before? Just trying to understand how to reconcile these conversations.*
- i. Hetzel—We had to reduce our GQA instructional lines by about 6 positions and our GQA staff positions by 2 and we will have to do that for the next 3 years. We will also be incurring additional GQA expenses and we will still have to work on that.
  - ii. Gow—We were going to delay renovations to the residence halls and Whitney, but with new money coming from the federal government, we may not have to do that.
  - iii. Hetzel—The 2% pay plan will save us 200,000 dollars. There are a number of implications with the COVID situation and how that will effect pay plan.
- g. Susan—*How will we pick up textbooks in the fall if they are going to be online?*
- i. Betsy—Students will get a prepaid mailing label and fall is still up in the air.
- h. Richter-- *Will lost revenue from the cancelled state track meet be reimbursed?*
- i. Hetzel—No. It will not be
- j. Richter—I am wondering if we could get a listing of students who got payout. *How do we determine this for students who hold multiple positions on campus?*
- k. Brooks- What about cost reductions and how that impacts net revenue?
- i. Hetzel-- The auxiliaries are down significantly. We are planning for changes in enrollment in summer and fall. Let's start with program revenue budget. The students have vacated, but we still have to pay utilities, cost of debt services, and personnel. We have a negotiated contract with Chartwell's for about half a million dollars. We have found some savings for students who aren't working at the front desk.
  - ii. There is not as much spending in departments for size or for student help. I envision that carryover for this year will be larger than last year because we aren't spending as much on supplies and expense.
- l. Clauss—Is it anyone's understanding if system is going to make the call about fall or will it be left up to individual campuses?
- i. Gow—That hasn't been determined yet, so we will keep an eye on it. It is dependent on where the state is at that point. We will need to figure out logistics for how to reschedule classes based on state recommendation.
- m. Richter—As far as room assignments in fall go, what guidances will there be for students to be placed in a room?

- i. Gow—That is a very important topic that system is beginning to talk about. We will get more clarity on these issues as the time approaches.

5. New Business

- a. Request for nominations for election to represent JPB on the Long-Term Enrollment Taskforce (Elkins)
  - i. JPB executive team discussed how we will move forward with representation of JPB on the Long-Term Enrollment taskforce moving into next year. We would like to open up for nominations, including self-nominations. I will send an email message right after this meeting with either self-nominations or nominations of other folks who are going to be on the committee this next year We will reach out to folks who have been nominated to see if they are interested or willing to serve in this capacity. I'm happy to answer any questions if folks have them.

6. Adjournment

- a. Abler—Move to adjourn

**COVID-19 Lost Revenue Tracking**  
**UW - La Crosse**

Item #	Fund	Dept. ID	Account #	Program #	Project #	Voucher # / Journal ID	Anticipated Event Date/Time Period	Net Loss Amount
1	128	049120	9212	8	AAH7699		4/7-4/10	\$2,017,212.62
2	128	025100	9215	2	AAH7699		4/6/2020	\$25,500.00
3	128	025116	9215	2	AAH7699		4/15/2020	\$4,563.15
4	128	025140	9215	2	AAH7699		4/14/2020	\$9,126.30
5	128	025200	9215	2	AAH7699		4/6/2020	\$26,500.00
6	128	025200	9215	2	AAH7699		4/6/2020	\$40,750.00
7	128	025220	9215	2	AAH7699		4/14/2020	\$9,000.00
8	128	025224	9215	2	AAH7699		4/14/2020	\$10,559.00
9	128	047060	9211	8	AAH7699		4/7-4/10	\$3,115,011.58
10	128	074502	9214	8	AAH7699		4/7-4/10	\$125,502.89
11	128	040400	9216	0	AAH7699		4/1-4/7	\$30,570.62
12	128	Multiple	9215	2	AAH7699		4/13/2020	\$45,713.92
13	136	048760	9216	0	AAH7699		4/1-4/3	\$4,786.00
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Reason for Loss (Relation to COVID-19 Pandemic)	Key Assumptions in Loss Estimation (if applicable)	What if any Campus Directive Drove this Decision
Dining Meal Plan/Block Plan Refunds	Per refund summary provided by Dining	Campus announcement related to decision to refund dining.
Exchange Admin Fee Refunds	Per refund summary provided by IEE	Campus announcement related to decision to refund IEE fees.
Fuas Exchange Refund	Per refund summary provided by IEE	Campus announcement related to decision to refund IEE fees.
Cattolica Exchange Refund	Per refund summary provided by IEE	Campus announcement related to decision to refund IEE fees.
Study Abroad Admin Fee Refunds	Per refund summary provided by IEE	Campus announcement related to decision to refund IEE fees.
SA Confirm Dep Refunds	Per refund summary provided by IEE	Campus announcement related to decision to refund IEE fees.
Educators SA Refund	Per refund summary provided by IEE	Campus announcement related to decision to refund IEE fees.
ISA Study Abroad Refund	Per refund summary provided by IEE	Campus announcement related to decision to refund IEE fees.
Housing Refund	Per refund summary provided by Housing	Campus announcement related to decision to refund housing.
Student Parking Refund	Per refund summary provided by Parking	Campus announcement related to decision to refund student parking.
REC Refunds - Fitness Classes, Trips, Memberships, Locker Rentals, Events	Per refund summary provided by the REC Center.	Campus announcement related to decision to refund student fees, safety concern of attendees.
Special Course Fee Refunds - field trips, portion of materials/supplies	Per refund summary provided by the Colleges.	Campus announcement related to decision to refund student course fees, safety concern of attendees.
Sports Performance - Roster Fee for Spring Sports	Per refund summary provided by Athletics.	Campus announcement related to decision to refund student spring fees, cancellation of spring sport season.



Additional Comments	Contact Person	Contact Info (email/phone)
Calculated meal plan savings, cash balances and awaiting other possible expenditure savings	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for IEE budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for IEE budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for IEE budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for IEE budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for IEE budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for IEE budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for IEE budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Awaiting possible cost reductions, delay of capital projects.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Awaiting possible cost reductions. Assumed mainly net loss for the semester.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Awaiting possible cost reductions.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for Special Course Fee accounts.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Assumed net loss for Sports Performance Center budget.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>

**COVID-19 Out-of-Pocket Expense Tracking**

**UW - La Crosse**

Item #	Fund	Dept. ID	Account #	Program #	Project #	Expense Date	Amount
1	128	47060	1541	8	AAH7699	4/2/2020	\$1,736.88
2	128	47060	1935	8	AAH7699	4/2/2020	\$325.97
3	102	74060	3115	6	AAH7699	4/2/2020	\$369.38
4	128	48712	3315	0	AAH7699	4/14/2020	\$15,919.40
5	136	48802	3315	0		3/15/2020	\$20,429.15
6	136	48810	3315	0		3/15/2020	\$7,836.85
7	136	48812	3315	0		3/15/2020	\$6,398.78
8	Various	Various	3315	Various	AAH7699	4/17/2020	\$225,600.00

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\$278,616.41



Voucher # / Journal ID	Business Purpose/Justification (Relation to COVID-19 Pandemic)	What if any Campus Directive Drove this Decision
	Custodial Overtime for Residence Hall Move out	Campus directive for residents to move out of halls
	Custodial Overtime Fringe Benefits	Campus directive for residents to move out of halls
	Purchase of additional headsets for employee telecommuting	Campus directive in supporting supplies related to telecommuting
	Flights rescheduled for T&F athletes missing original flights	Campus directive to allow travel for NCAA Championships
	Baseball Spring Trip; flights, baggage, bus to airport, rentals in FL, gas for rentals, lodging in FL, lodging night before departure flight, team food, team registration, game fees	Campus directive to bring all student athletes back from travel
	Softball Spring Trip; lodging in FL, game fees	Campus directive banning travel
	Tennis Spring Trip; lodging in FL, game fees, flights	Campus directive banning travel
	Student Income Continuation payments (\$200 to active student employees) Estimated.	Campus directive to provide support to students.

Additional Comments	Contact Person	Contact Info (email/phone)
Related to clearing halls of residents and cleaning the facilities	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Related to clearing halls of residents and cleaning the facilities	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Needed materials to successfully telecommute during campus closure	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>
Travel restrictions had caused student athletes to miss original flights	Erin Hanson	<a href="mailto:ehanson@uwlax.edu">ehanson@uwlax.edu</a>
Baseball time was allowed to go on trip, however was called back early. Lodging and game fees required pre-payment and company is not giving a refund. Flights were used.	Erin Hanson	<a href="mailto:ehanson@uwlax.edu">ehanson@uwlax.edu</a>
Lodging and game fees required pre-payment and company is not giving refund.	Erin Hanson	<a href="mailto:ehanson@uwlax.edu">ehanson@uwlax.edu</a>
Lodging and game fees required pre-payment and company is not giving refund. Flights were cancelled and we have a credit with Fox World travel.	Erin Hanson	<a href="mailto:ehanson@uwlax.edu">ehanson@uwlax.edu</a>
Payments will come from existing student help budget in the various accounts.	Kristin Stanley	<a href="mailto:kstanley@uwlax.edu">kstanley@uwlax.edu</a>