

## **Joint Planning and Budget Committee (JPB) 2024-2025 End-of-Year Report**

### **I. JPB Committee Charge for 2024-2025 Academic Year**

- Please see the Chancellor's letter to the JPB Committee in this report.

### **II. JPB Members**

- Please see the JPB members in this report.

### **III. Number of Meetings**

- Total: 12
  - o Fall 2024 (6): 9/11, 10/9, 10/16, 10/30, 11/13, 12/11
  - o Spring 2025 (6): 1/29, 2/12, 3/12, 3/26, 4/23, 5/07

### **IV. Activities of the JPB Committee**

- The JPB Committee discussed and got involved in the following agenda items and activities this academic year. Please see the meeting agenda and minutes in this report.
  1. Enrollment update and target
  2. Budget 101
  3. HLC UWL timeline and components
  4. Pillar leads for the four pillars have the 2024-25 action steps associated with the goals submitted to the Provost
  5. Minds matter: Public health approaches to student mental health
  6. Frequently asked questions related to finance and budgeting
    - o The JPB Chair contacted the leaders of the four shared governance groups (Student Association, Faculty Senate, Academic Staff Council, University Staff Council) and asked for three or so FAQs from their respective groups.
  7. Chancellor's preliminary plan for strategic planning
  8. Chancellor's vision, philosophy, and leadership style in planning and budgeting processes. Chancellor's expectations from the JPB Committee
  9. The Chief of Staff's role
  10. Finance, budget, & capital projects
  11. Enrollment planning
  12. Salary study
  13. UWL Strategic Plan

### **V. Suggested Charges for Next Year's Committee**

- Continue to discuss the following topics
  1. Salary study
  2. State and System budget and capital budget projects and priority at UWL
  3. UWL strategic plan
  4. Enrollment status at UWL
  5. Budget 101

**VI. Minutes and Meeting Materials**

- Please find below the minutes and materials.

**VII. JPB Goals for 2024-25**

- To consider each agenda item in the context of its support for the strategic plan
- To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
- To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL



## MEMORANDUM

TO: Tim McAndrews, Convenor, JPB  
FROM: James Beeby, Chancellor  
SUBJECT: Committee Charge for 2024-2025 Academic Year  
DATE: September 5, 2024

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Please convey my gratitude to the committee members for their willingness to serve on JPB for the 2024-2025 academic year.

After a chairperson has been named, please be advised that their primary responsibilities in reference to my office are as follows:

- inform the Chancellor's Office of any changes in committee membership.
- organize and conduct meetings.
- promptly sending meeting minutes to Bobbi Webster ([bwebster@uwlax.edu](mailto:bwebster@uwlax.edu)) so that the minutes can be posted on the Joint Committees website. Minutes can be produced by the committee's recorder according to the appropriate by-laws.
- complete a year-end report on the committee's activities to be submitted to the Chancellor's Office no later than May 15, 2025.

The Chancellor's website contains an archive of past minutes and year-end reports (when available) - <https://www.uwlax.edu/chancellor/joint-committees/general-information-on-joint-committees/>

After consultation with colleagues, I ask the committee to enact the following special charge in addition to the traditional work of the committee:

- Please work with the pillar leads for the four pillars of the current strategic plan to provide proposed action steps to JPB associated with the goals endorsed in Spring 2024. JPBs role will be to provide feedback on the action steps to be helpful to the process.

It is my intention to launch a new strategic planning process after January 2025 and I will be consulting with JPB on the trajectory, scope, and timing of the process.

Throughout the process, I expect individual committee members to consult with their respective governance groups for input and agreement to issues.

If you have any questions about the charges, please feel free to contact me.

cc:

Chancellor's Cabinet  
Faculty Senate Chair  
Academic Staff Council Leadership  
University Staff Council Leadership  
Student Association Leadership



**Joint Planning and Budget Members (JPB)**  
**2024~25**  
**End-of-Year Report**

Ttl JPB MBRSH (29)	Reps	First Name	Last Name	Group	Dept/Program
1	1	Pearl	Bearhart	Member	ACS
2	2	Andrew	Ives	Member	ACS
3	3	Jamie	Schweiger	Member	ACS (2026)
4	4	Andrew	Ericson	Member	ACS (2026)
5	5	Troy	Richter	Member	ACS (2027)
6	6	Lisa	Weston	Member	ACS Vice Chair
7	1	Karl	Kunkel	Member	Admin   Dean   CASSH
8	2	Taggart	Brooks	Member	Admin   Dean   CBA
9	3	Ju	Kim	Member	Admin   Dean   CSH
10	4	Meredith	Thomsen	Member	Admin   Dean   GEL
11	5	Marcie	Wycoff-Horn	Member	Admin   Dean   SOE
12	6	Stephanie	Pope	Member	Admin   VC   Admin & Finance
13	7	Allison	Ziegelman	Member	Admin   VC   Advancement
14	8	Stacy	Narcotta-Welp	Member	Admin   VC   Diversity & Inclusion
15	9	Vitaliano	Figueroa	Member	Admin   VC   Student Affairs
16	10	Betsy	Morgan	Member	Admin   VC Provost   Academic Affairs
		James	Beeby	Ex-Officio	Ex-Officio   Chancellor
	1	Emily	Roraff	Ex-Officio	Ex-Officio   Budget Director
	2	Graciela	Engen	Ex-Officio	Ex-Officio   Inst Research
	3	John	Jax	Ex-Officio	Ex-Officio   Library
	4	Sandy	Grunwald	Ex-Officio	Ex-Officio   Provost   Assoc VC
	5	Maren	Walz	Ex-Officio	Ex-Officio   Immediate Past Chair of JPB
17	1	Anne	Galbraith	Member	Faculty   CSH   Vice Chair Fac Sen
18	2	Tim	McAndrews	Member	Faculty   CASSH
19	3	Chia-Chen	Yu	Member	Faculty   CSH
20	4	Jocelyn	Newton	Member	Faculty   CASSH
21	5	Darci	Thoune	Member	Faculty   CASSH (Shonk replacement)
22	6	Gwen	Achenreiner	Member	Faculty   CBA
23	7	Ben	Trnka	Member	Faculty IAS   CBA
24	1	Hailee	Gray	Member	Student Association
25	2	Grant	Hohman	Member	Student Association
26	3	Grace	Guyer	Member	Student Association
27	4	Heather	Talbot	Member	Graduate Student
28	1	Mary	Grattan	Member	USC
29	2	Sheri	Craig	Member	USC

## JPB Members Being Replaced Due to Resignation or Class Schedule Conflict

First Name	Last Name	Group	Dept/Program	Reason
Chris	Stindt	Member	ACS	Resignation from university
Sandra	Vinney	Member	USC	Resignation from university
Emma	Latus	Member	Student Association	Class schedule conflict
Avery	Ladd-Winders	Member	Student Association	Class schedule conflict

## Joint Planning & Budget Committee Agenda

1:15 p.m., September 11, 2024

1102/1104 Wittich Hall

Recorder: McAndrews

### Attendance

First Name	Last Name	Status	Group	Dept/Program
Pearl	Bearhart		Member	ACS Vice Chair
Chris	Stindt		Member	ACS
Jamie	Schweiger		Member	ACS (2026)
Andrew	Ericson		Member	ACS (2026)
Troy	Richter		Member	ACS (2027)
Lisa	Weston		Member	ACS (2027)
Karl	Kunkel		Member	Admin   Dean   CASSH
Taggart	Brooks		Member	Admin   Dean   CBA
Ju	Kim		Member	Admin   Dean   CSH
Meredith	Thomsen		Member	Admin   Dean   GEL
Marcie	Wycoff-Horn		Member	Admin   Dean   SOE
Stephanie	Pope		Member	Admin   VC   Admin & Finance
Allison	Ziegelman		Member	Admin   VC   Advancement
Stacy	Narcotta-Welp		Member	Admin   VC   Diversity & Inclusion
Vitaliano	Figueroa		Member	Admin   VC   Student Affairs
Betsy	Morgan		Member	Admin   VC Provost   Academic Affairs
Emily	Roraff		Ex-Officio	Ex-Officio   Budget Director
James	Beeby		Ex-Officio	Ex-Officio   Chancellor
Graciela	Engen		Ex-Officio	Ex-Officio   Inst Research
John	Jax		Ex-Officio	Ex-Officio   Library
Sandy	Grunwald		Ex-Officio	Ex-Officio   Provost   Assoc VC
Anne	Galbraith		Member	Faculty   CSH   Vice Chair Fac Sen
Tim	McAndrews		Member	Faculty   CASSH
Chia- Chen	Yu		Member	Faculty   CSH
Tushar	Das		Member	Faculty   CSH
Jocelyn	Newton		Member	Faculty   CASSHe
Darci	Thoune		Member	Faculty   CASSHe (Shonk replacement)
Gwen	Achenreiner		Member	Faculty   CBA
Ben	Trnka		Member	Faculty IAS   CBA
Emma	Latus		Member	Student Association
Avery	Ladd-Winders		Member	Student Association
			Member	Student Association
Heather	Talbot		Member	Graduate Student
Mary	Grattan		Member	USC
Sandra	Vinney		Member	USC

- I. Introductions – name, role, and reason/interest for serving
- II. Approval of 05-01-2024 Minutes (attached)
- III. Election of Chair and Recorder
  - a. Chair (any member that served last year)
  - b. Recorder
- IV. Executive Committee Elections
  - a. Membership: JPB Chair, 1 faculty, 1 dean, 1 academic staff, 1 university staff, 1 student
  - b. Faculty rep:
  - c. Dean rep:
  - d. Academic Staff (NIAS) rep:
  - e. University Staff rep:
  - f. Student rep:
- V. Charge and Remarks by Chancellor Beeby
  - a. Special charge: Please work with the pillar leads for the four pillars of the current strategic plan to provide proposed action steps to JPB associated with the goals endorsed in Spring 2024. JPBs role will be to provide feedback on the action steps to be helpful to the process.
    - i. Increasing community engagement
    - ii. Achieving excellence through equity & diversity
    - iii. Investing in our people
    - iv. Advancing transformational education
- VI. Adjournment

## Joint Planning & Budget Committee Agenda

1:15 p.m., May 1, 2024

In person, 1102/1104 Wittich

Guests may join via [Zoom](#) [Mtg ID 936 5442 4020; Passcode 706085]

Recorder: Vinney

Alternate Recorder: Stindt

Present: TJ Brooks, Rose Brougham, Mary Grattan, Karl Kunkel, Emma Latus, Pat Markos, Tim McAndrews, Marie Moeller, Betsy Morgan, Jocelyn Newton, Kelly Nowicki, Greg Reichert, Ken Shonk, Michaela Smith, Meredith Thomsen, Chia-Chen Yu, Maren Walz, Marcie Wycoff-Horn, Vitaliano Figueroa

Zoom: Ju Kim, Pearl Bearhart, Bob Hetzel Excused:

Sandra Vinney

Absent: Avery Ladd-Winders, Stacy Narcotta Welp, Swasthikia Selvakumar

### Agenda:

1. Approval of meeting minutes: [4/17/2024](#) – Approved by unanimous Voice vote
2. Chancellor's update
  - a. Chalking and monitoring situation. Hearing regarding Joe Gow, expecting press.
3. Provost's update
  - a. Friday, May 3 is Research and Creativity Symposium
  - b. General Education program revisions were approved in April (first time in 25 years) Effective Fall 2025, next year is logistical changes
    - i. Tim Dale led, but moving to CBA, so searching for new General Education Coordinator
  - c. Proposal for System funding for High Impact Practices (HIPS). Center Faculty to SIMMER training, train the trainer model, so group can put on workshop on campus
  - d. First time issuing digital diplomas for the first time this spring
4. CFO's update
  - a. Budget 101 information no set timeline for online distribution
  - b. Deloitte – many met with consultants, challenges and strengths to be shared for feedback, expected final report late June, Chancellor Beeby takes to Board of Regents

5. Open search updates
  - a. Today at 2:45 Open forum for Vice Chancellor for Diversity and Inclusion, Stacy
  - b. CHRO, On campus interviews week of May 13<sup>th</sup>
6. New business
  - a. Greg Reichert Foundation Optimized Alignment update
  - b. Janie Morgan and Greg Reichert shared about the Evolution of the Foundation at UWL
    - i. UWL Endowment is \$36.7 million, 3<sup>rd</sup> in System
    - ii. Interdependent until 2009, Independent until 2015, Interdependent since
    - iii. Reviewed peer and aspirant Foundations, some bumps in the road, Oshkosh and Covid
    - iv. Advancement Services Assessment and Staffing and Capacity Analysis
    - v. Optimizing Alignment – Foundation and Alumni Association came together as one board/staff/plan
    - vi. Became the UWL Alumni and Friends Foundation, Future? Leadership changes, internal and external
7. Acknowledgements
  - a. 2024-25 student leadership
  - b. Executive Committee
  - c. Outgoing members
  - d. Retirements
  - e. Vice Chancellor Reichert
  - f. Vice Chancellor Hetzel
8. Adjournment

**JPB Executive Committee Members:**

Pearl Bearhart, Academic Staff TJ  
Brooks, Dean  
Emma Latus, Student Association Kelly  
Nowicki, Faculty Senate Sandra Vinney,  
University Staff Maren Walz, Chair

## Joint Planning & Budget Committee Minutes

1:15 p.m., September 11, 2024

1102/1104 Wittich Hall

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- VI. Discussion
  - a. Meeting pattern
    - i. Every other week starting Wed., Oct. 2
    - ii. Next meeting date, Wed., Oct. 2 – Budget 101
  - b. JPB Faculty Membership
    - i. We have 8 faculty members and need only 7
    - ii. Awaiting guidance from SEC regarding faculty membership

Adjournment: ~2:10 pm



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Emma Latus, Student Association Kelly  
Nowicki, Faculty Senate Sandra Vinney,  
University Staff Maren Walz, Chair

## Joint Planning & Budget Committee Agenda

1:15 p.m., October 9, 2024

Student Union 2310 – Senate

Chambers

Recorder: Achenreiner

Alternate: Bearhart

Attendance

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Pearl	Bearhart		Member	ACS Vice Chair
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- I. Approval of meeting minutes: 09-11-2024
- II. Updates
  - a. Chancellor's Update
  - b. Provost's Update
  - c. CFO's Update
- III. New Business
  - a. Elect - Chair
  - b. Enrollment Update – Grace Engen
  - c. Enrollment Targets – Corey Sjoquist
  - d. Rankings - Grace Engen
    - i. Other updates

Upcoming meetings:

10/16 - Budget 101

10/30

11/13

12/11

**JPB Executive Committee Members:**

Pearl Bearhart, Academic Staff

Sandra Vinney, University Staff

Ju Kim, Dean

Tim McAndrews, Faculty

Emma Latus, Student Association

Open, Chair

## Joint Planning & Budget Committee Minutes

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1102/1104 Wittich Hall

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Adjournment: ~2:10 pm



## Fall 2024

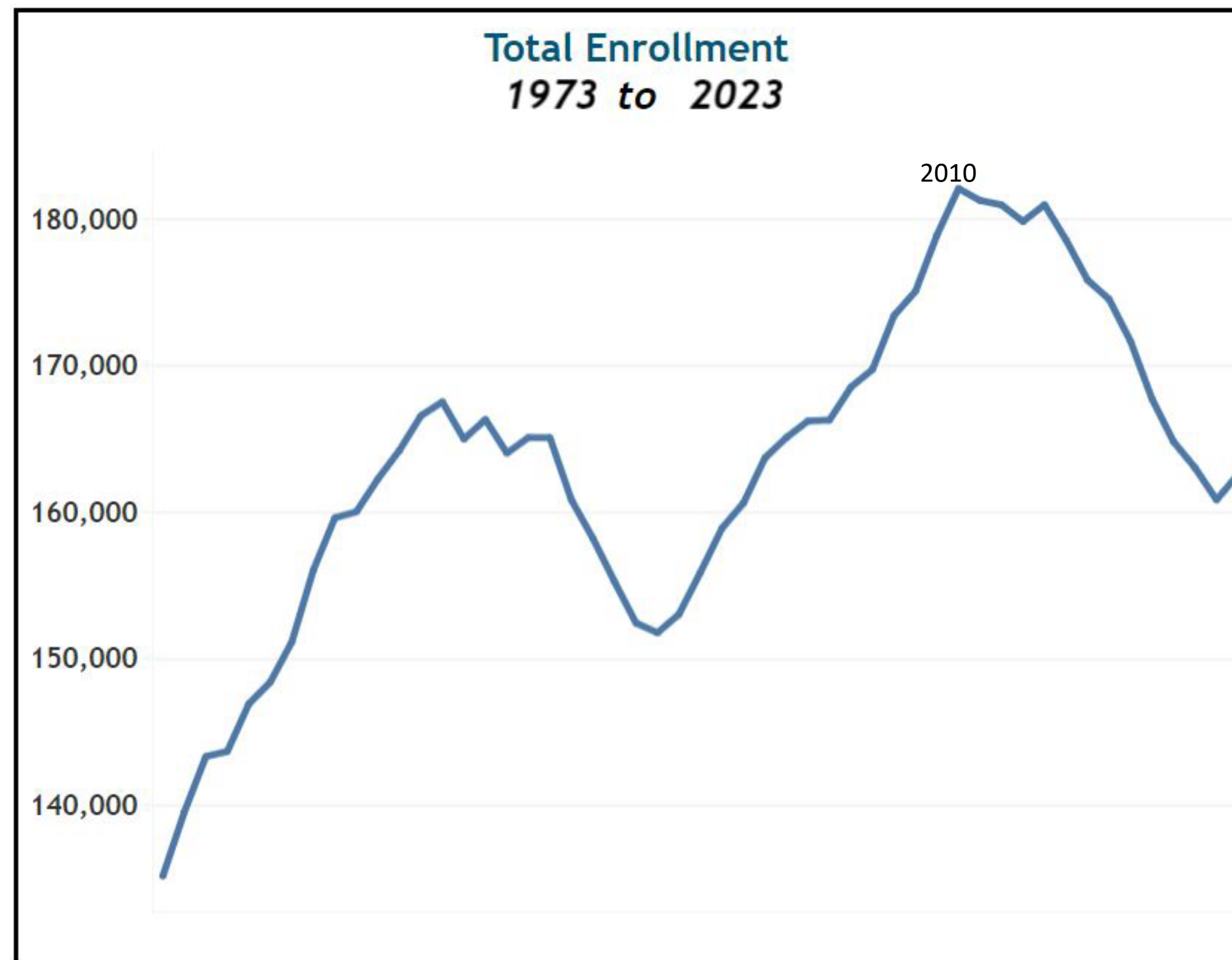
- Enrollment Updates
- Enrollment Targets
- Rankings



Prepared for UWL Joint Planning and Budget by  
Corey Sjoquist and Graciela Engen, October 9, 2024

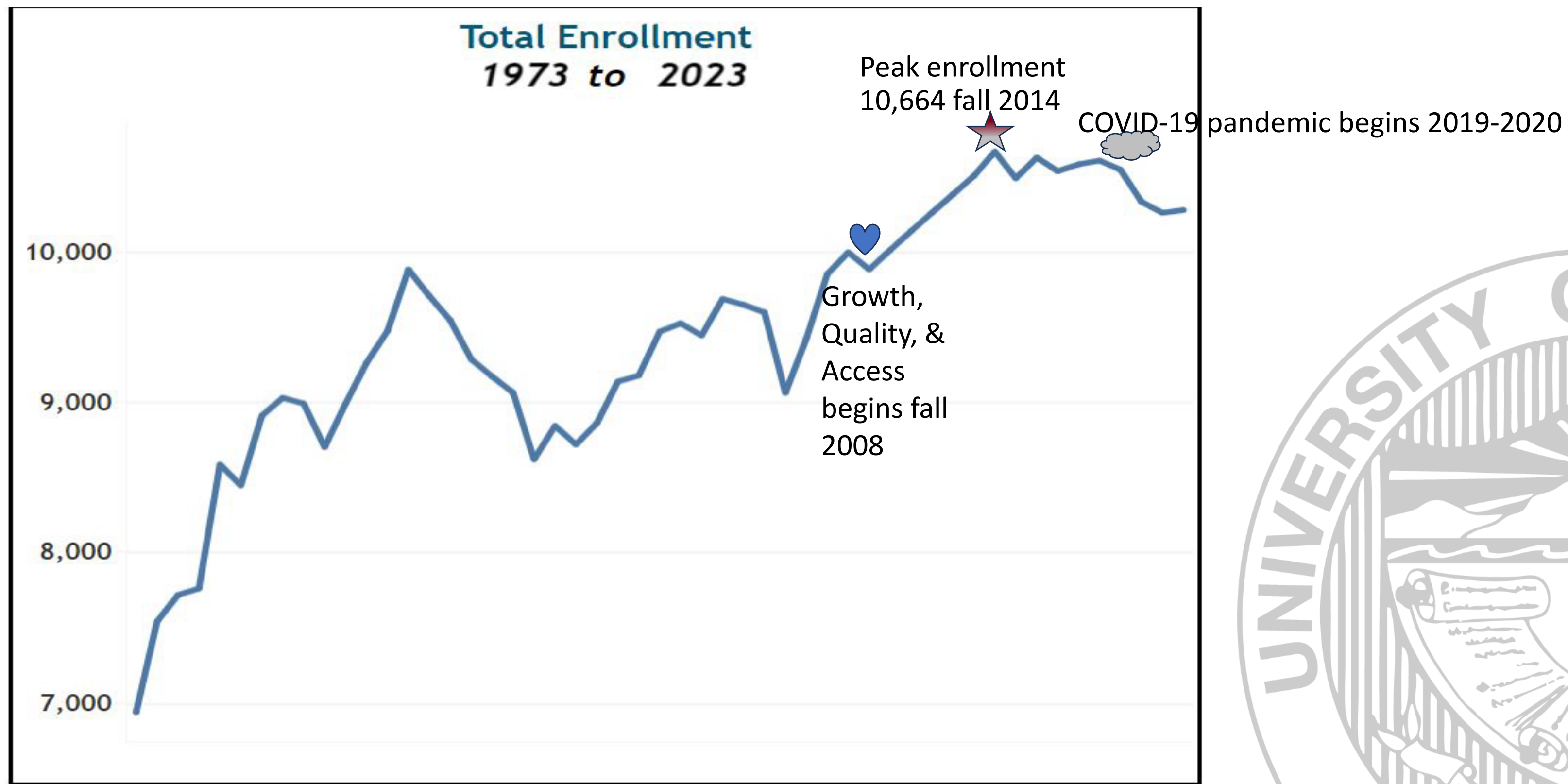
## UW System Enrollment Fall 1973-Fall 2023

Peak enrollment:  
182,090 in 2010



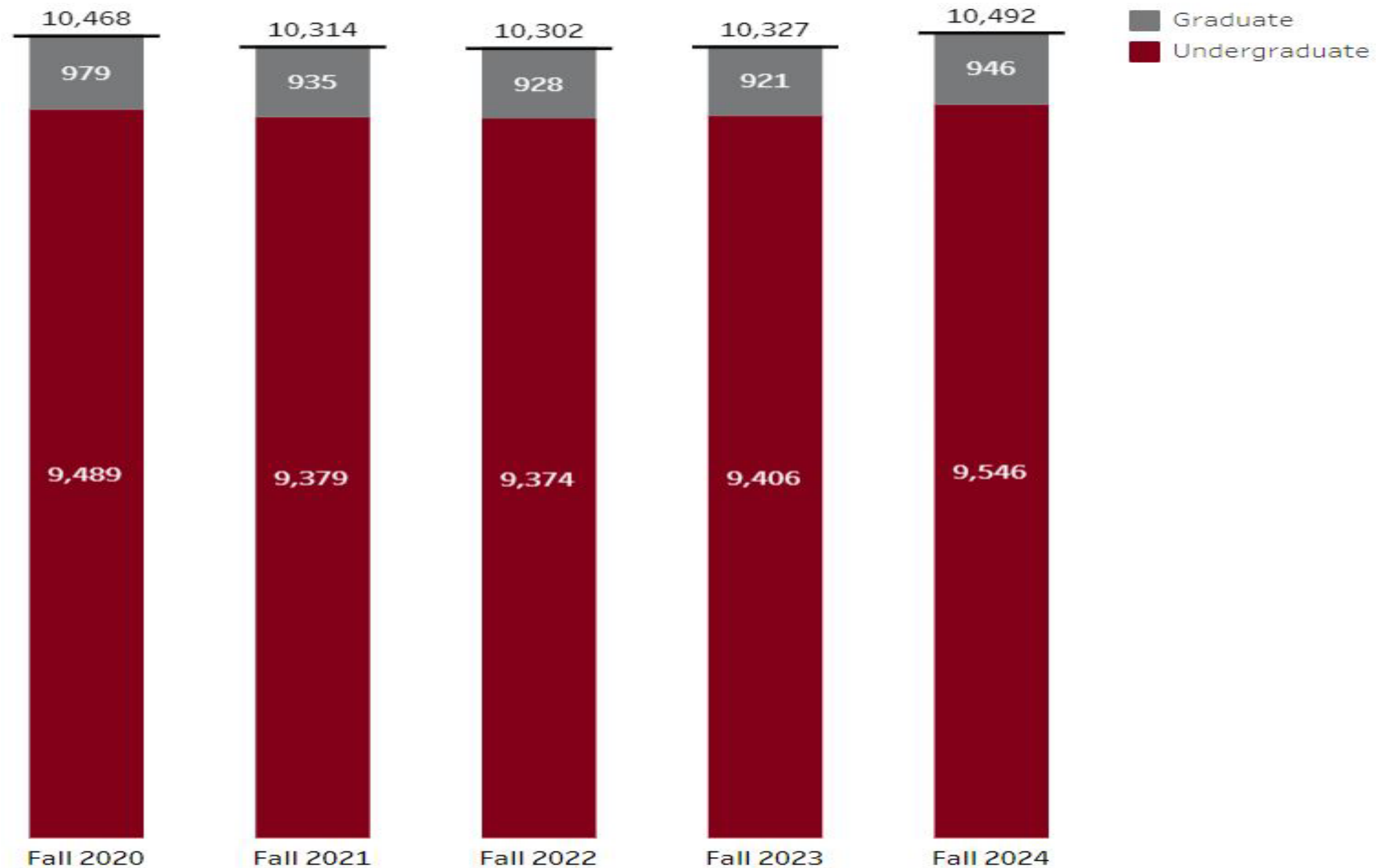


## UW-La Crosse Fall Enrollment 1973-2023





# UW-La Crosse Fall 2024 Enrollment



FALL 2024:

**10,492**

165 ↑

Strong recruitment efforts, large first-year cohorts, and very healthy student retention.



# Enrollment by College: Fall 2017 to Fall 2024

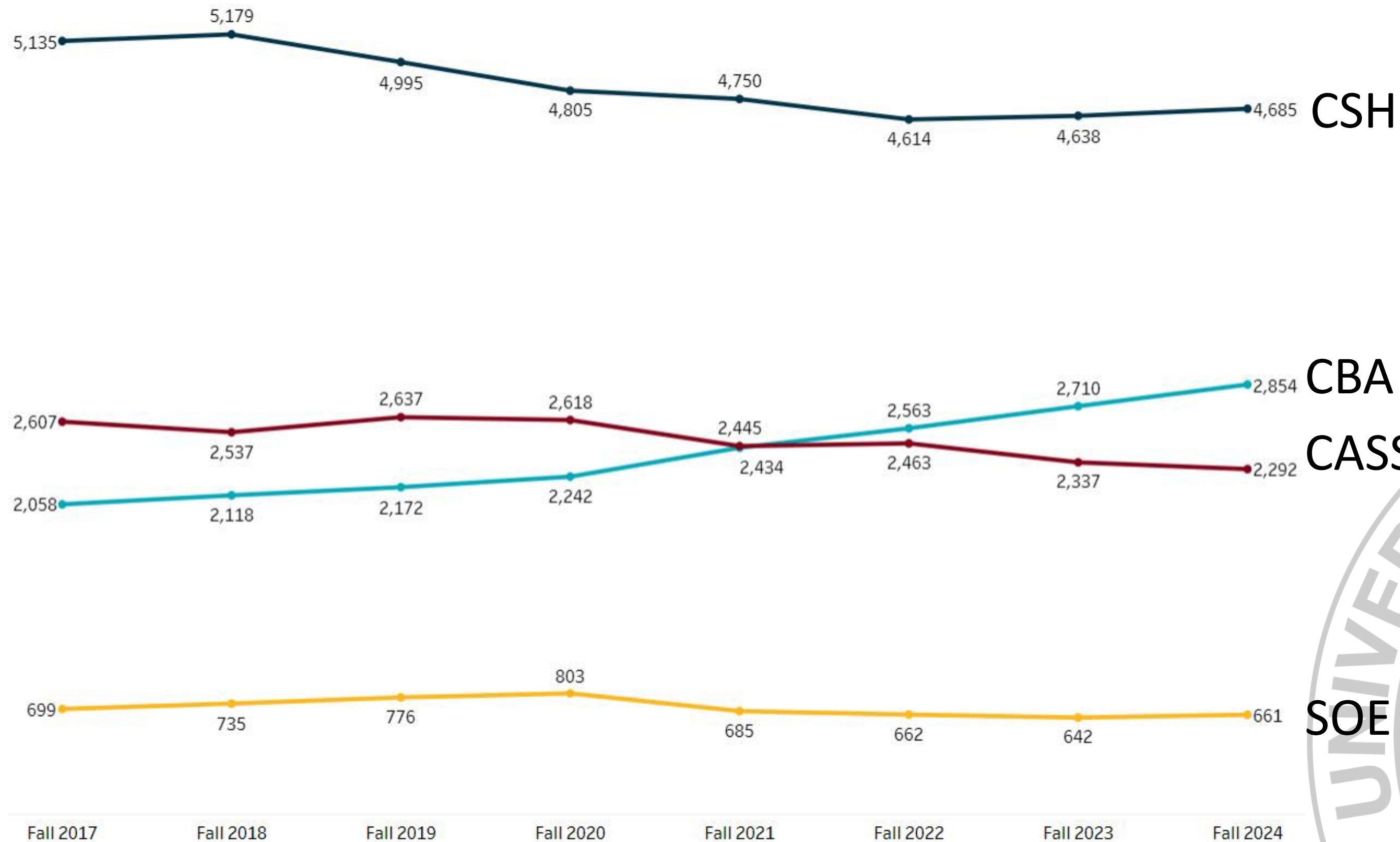
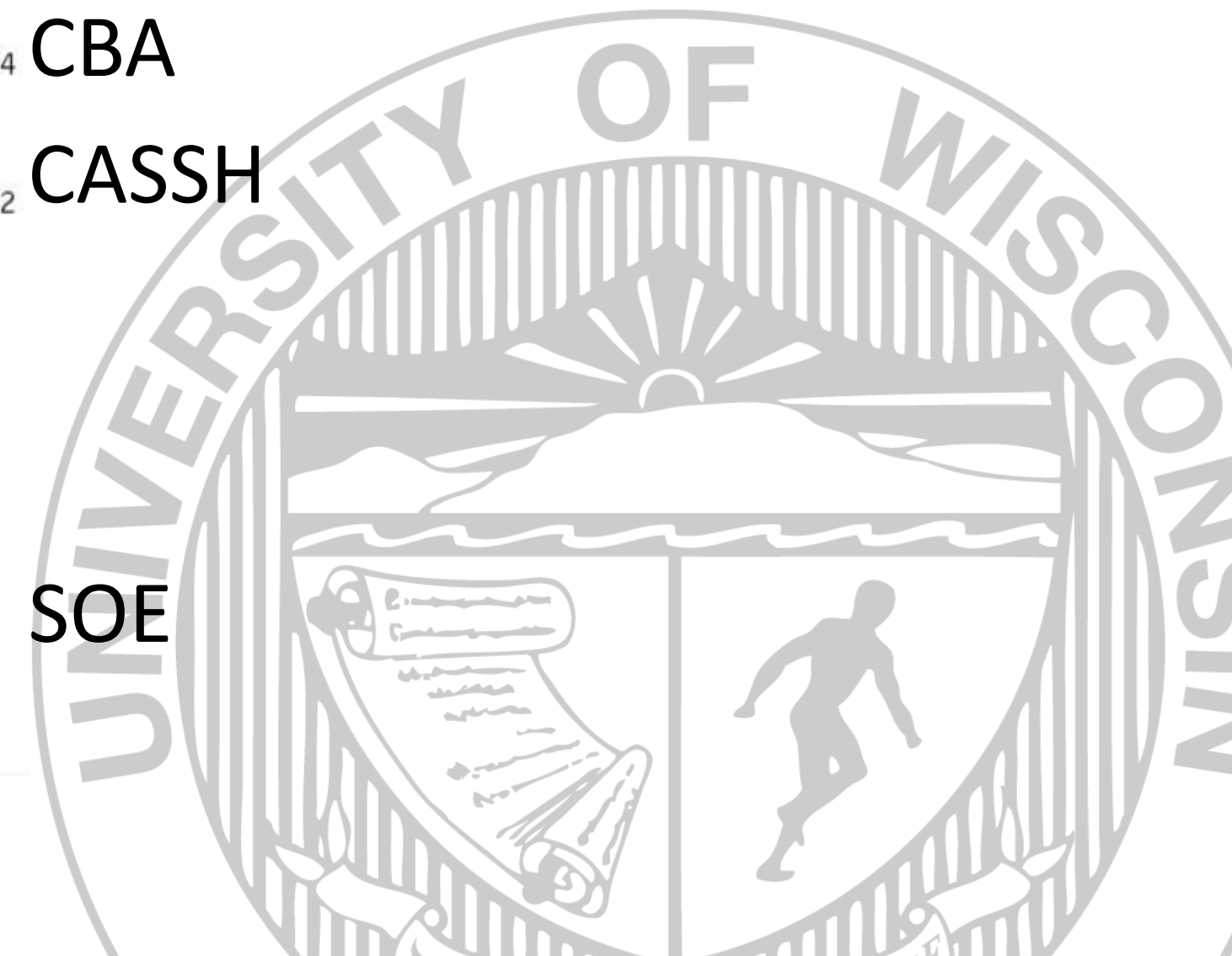


Chart enrollment counts are based on first major only.

CBA  
CASSH  
SOE



## Fall 2024 UWL Undergraduate Students

**9,546 undergraduate  
140↑**

**ALL undergraduate  
students**

**9,279 degree-seeking  
74↑**

**degree-seeking  
undergraduate students**



## Fall 2024 UWL Graduate Students

**946 graduate**

**25 ↑**

**All graduate students**

**921 degree-seeking**

**26 ↑**

**degree-seeking  
graduate students**



# Fall 2024 International Students

**87 students**

**4↑**

63 bachelor-degree-seeking (53 prior year)

10 graduate-degree-seeking (17 prior year)

14 non-degree-seeking (13 prior year)



# Fall 2024 New Transfer Students

**319 students**

**39 students** ↓





# Fall 2024 Non-Degree-Seeking Students

## 292 Non-Degree Seeking Students (223 prior year)

- 194 High School Students
  - 131 prior year
- 73 Other Special (non-degree seeking) Undergraduate Students
  - 70 prior year
- 25 Special (non-degree-seeking) Graduate Students
  - 26 prior year



# Fall 2024 New First-Year Students



**2,325 students**

**31 students ↑**







## Fall 2024 UWL First-Time, First-Year Cohort: Most Popular Names



# Fall 2024 First-Year Cohort

Fall 2023 first-year cohort in parentheses

- 81.6% WI Resident (79.9%)
- 22.0% First Generation (21.7%)
- 9.9% Students of Color (10.0%)
- 17.5% Pell Eligible (13.3%)\*

\*Increase in the percent of students who are Pell eligible can be attributed to FAFSA changes this year, which allowed more students to qualify.



## **First-Year Students entering with credit**

- The number of first-year students entering as sophomores (30-59 credits)
  - 2019-2020: 94 students
  - 2020-2021: 93 students
  - 2021-2022: 120 students
  - 2022-2023: 137 students
  - 2023-2024: 137 students
  - 2024-2025: 187 students



# Fall 2024 UWL Retention Rate



**86.7%**



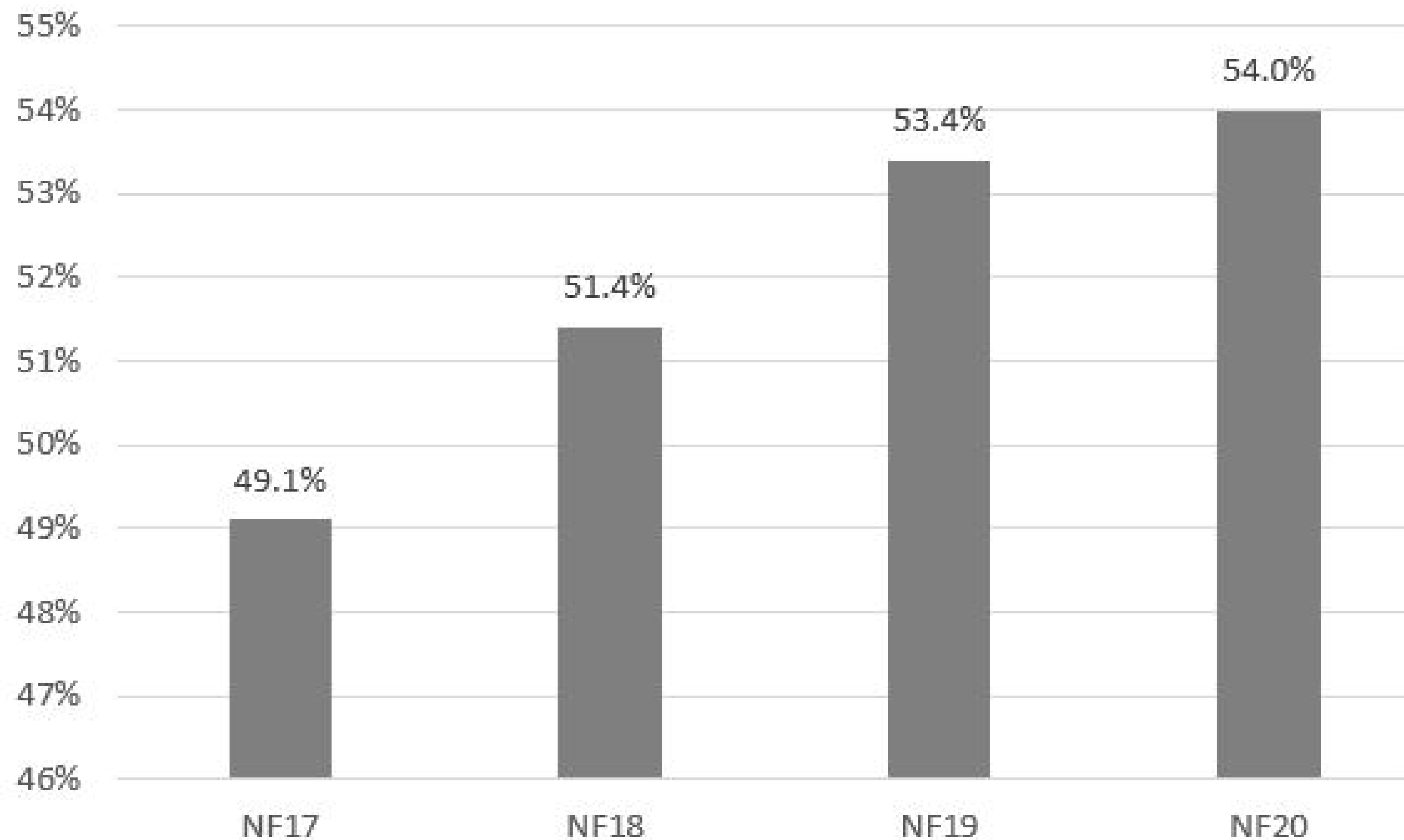
fall 2023 first-year students enrolled at UWL fall 2024

**Highest Retention in Past 10 Years**

Top 3 UWL Retention Rates in Past 50 Years



# UWL 4-Year Graduation Rates

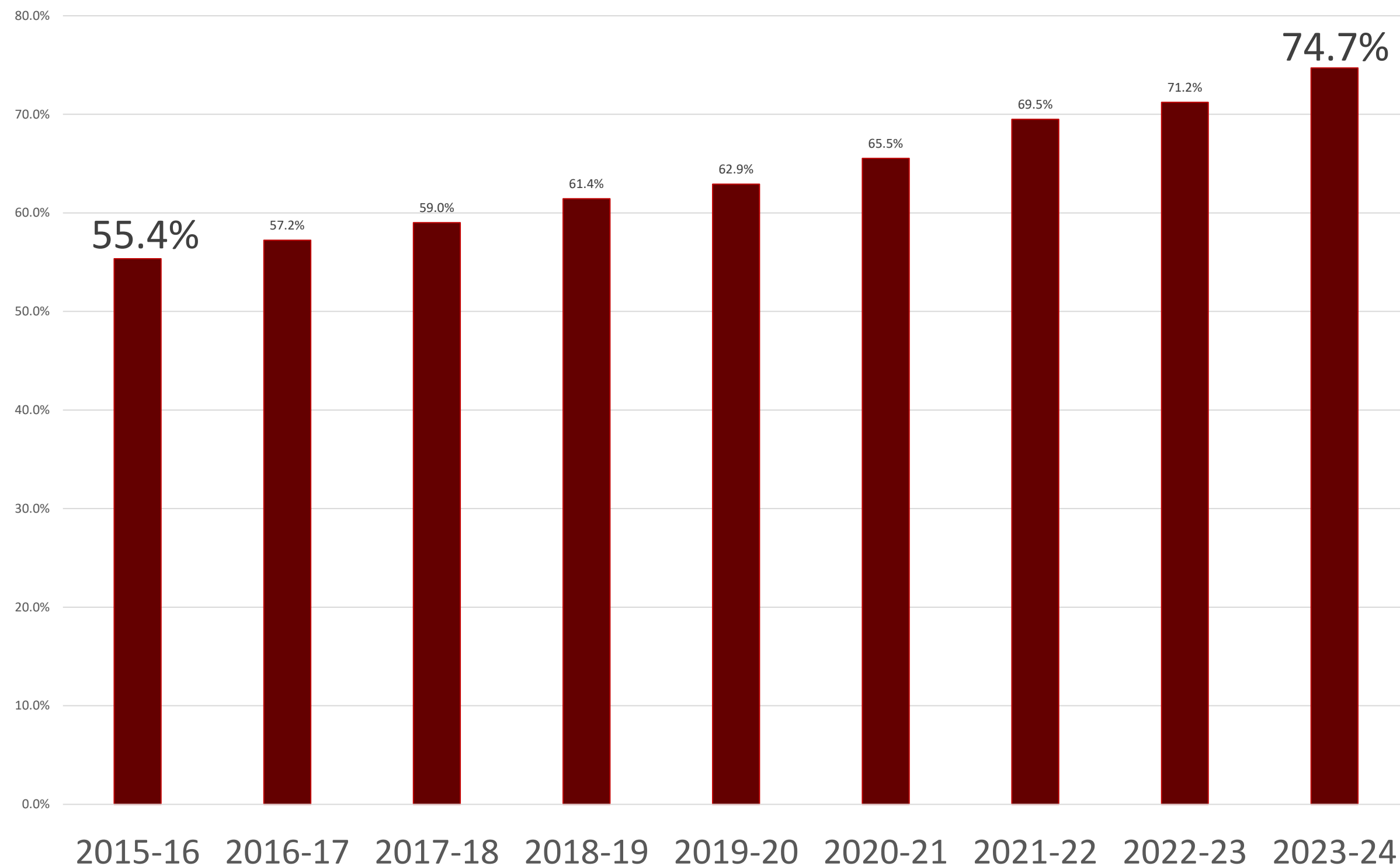


UWL's six-year graduation rate is steady and consistent at 71%, while our four-year graduation rate increases each year.





# Percent Earned Bachelor's Degree in 4 Years



Of the 2023-24 graduates, 86% graduated within 4½ years and 95.5% graduated within 5 years.



# Enrollment Target Setting Group

- Jenni Brundage – Residence Life
- Graciela Engen – Institutional Research, Assessment & Planning
- Vitaliano Figueroa – Student Affairs
- Sandy Grunwald – Academic Affairs
- Stephanie Pope – Administration & Finance
- Emily Roraff – Budget Office
- Corey Sjoquist – Admissions & Recruitment



# Enrollment Targets

	Spring 2021	Fall 2021	Spring 2022	Fall 2022	Spring 2023	Fall 2023	Spring 2024	Fall 2024	Spring 2025	Fall 2025	Spring 2026
Total 10th Day	9,559	10,314	9,398	10,302	9,333	10,327	9,600	10,492			
First Year Target		2,150		2,150		2,200		2,225		2,225	
First Year Actual		2,207		2,308		2,294		2,325			
Transfer Target	100	350	100	350	100	350	100	335	90	335	90
Transfer Actual	107	394	119	351	105	358	91	318			
1st to 2nd Year Retention		84% 2020 cohort		84% 2021 cohort		87% 2022 cohort		87% 2023 cohort			



# Admissions Funnel Tables

- Biweekly reports distributed to:
  - Chancellor's Cabinet
  - Provost Council
  - Enrollment Target Setting Group
- [Admissions Funnel Tables](#)



# **U.S. News and World Report 2025 Best Colleges Rankings**



# U.S. News and World Report Public Regional Midwest 2019-2022

Rank ↓								
	Score →							
2019	1) Truman State University	2) University of Northern Iowa	3) Grand Valley State University	4) UW La Crosse	5) Eastern Illinois University	5) University of Michigan-Dearborn	5) UW Eau Claire	
	78	65	61	60	56	56	56	
2020	1) Truman State University	2) University of Northern Iowa	3) UW La Crosse	4) University of Illinois - Springfield	4) University of Michigan - Dearborn	4) UW Eau Claire		
	82	72	67	64	64	64		
2021	1) Truman State University	2) University of Northern Iowa	3) Grand Valley State University	4) University of Illinois - Springfield	4) University of Michigan - Dearborn	6) UW La Crosse	6) University of Nebraska Kearney	8) UW Eau Claire
	82	71	68	66	66	65	65	63
2022	1) Truman State University	2) University of Northern Iowa	3) Grand Valley State University	4) University of Illinois - Springfield	5) University of Michigan - Dearborn	6) University of Nebraska Kearney	7) UW La Crosse	8) UW Eau Claire
	85	73	70	69	68	67	65	64

**2023 Best National Universities**  
**UWL #250 of 443 (tie)**

**Best National Public Universities**  
**UWL #124 of 227 (tie)**

**2024 Best National Universities**  
**UWL #249 of 439 (tie)**

**Best National Public Universities**  
**UWL #135 of 227 (tie)**



2025 U.S.  
News and  
World Report

Current  
Ranking  
164 institutions  
(57 public)

School Name	2025 Rank Midwest	Previous Rank	Change
University of Wisconsin--Eau Claire	20 (#4 public)	21	1
University of Wisconsin--La Crosse	28 (#7 public)	N/A	N/A
University of Wisconsin--Whitewater	34	43	9
University of Wisconsin--Stevens Point	41	47	6
University of Wisconsin--River Falls	48	60	12
University of Wisconsin--Platteville	60	60	0
University of Wisconsin--Green Bay*	64	66	2
University of Wisconsin--Stout	79	67	-12
University of Wisconsin--Parkside	118	103	-15
University of Wisconsin--Superior	124	124	0



First-Year Retention Rate	Actual Graduation Rate	Graduation Rate Performance: predicted graduation rate v. actual	Pell Graduation Rate	Pell Graduation Rate Performance: Pell compared to Non-Pell Graduation Rate (bonus points for institutions with more Pell students)
5%	16%	10%	5.5%	5.5%
Median debt for grads with federal loans (\$)	College grads earning more than a HS grad (%)	Faculty salary rank	Percent of faculty who are full-time	Peer assessment score
5%	5%	8%	3%	20%
Student/ faculty ratio	Financial resources rank		Standardized Tests	
4%	8%		5%	

2025 U.S. News and World Report

Weight of Ranking Factors





**2025 U.S. News  
and World Report**

**Retention Rate**

**Weight 5%**

University of Wisconsin--Eau Claire	82%
University of Wisconsin--La Crosse	87%
University of Wisconsin--Whitewater	78%
University of Wisconsin--Stevens Point	76%
University of Wisconsin--River Falls	73%
University of Wisconsin--Platteville	78%
University of Wisconsin--Green Bay	69%
University of Wisconsin--Stout	74%
University of Wisconsin--Parkside	71%
University of Wisconsin--Superior	71%

Among the 57 public universities on this list, UWL has the #1 retention rate. Among *all* institutions on this list (including private universities), only 4 of 164 have a higher retention rate than UWL.



2025 U.S.  
News &  
World  
Report

Graduation  
Rates

	Six-Year Graduation Rate (NF14 to NF17)	Graduation Rate Performance = Predicted v actual
WEIGHT	16%	10%
University of Wisconsin--Eau Claire	68%	63%
University of Wisconsin--La Crosse	71%	67%
University of Wisconsin--Whitewater	64%	55%
University of Wisconsin--Stevens Point	56%	53%
University of Wisconsin--River Falls	61%	58%
University of Wisconsin--Platteville	62%	58%
University of Wisconsin--Green Bay	55%	55%
University of Wisconsin--Stout	53%	59%
University of Wisconsin--Parkside	40%	52%
University of Wisconsin--Superior	44%	55%



Among the 57 public universities on this list, UWL has the #1 6-year graduation rate. Among *all* institutions on this list (including private universities), only 8 of 164 have a higher graduation rate than UWL.

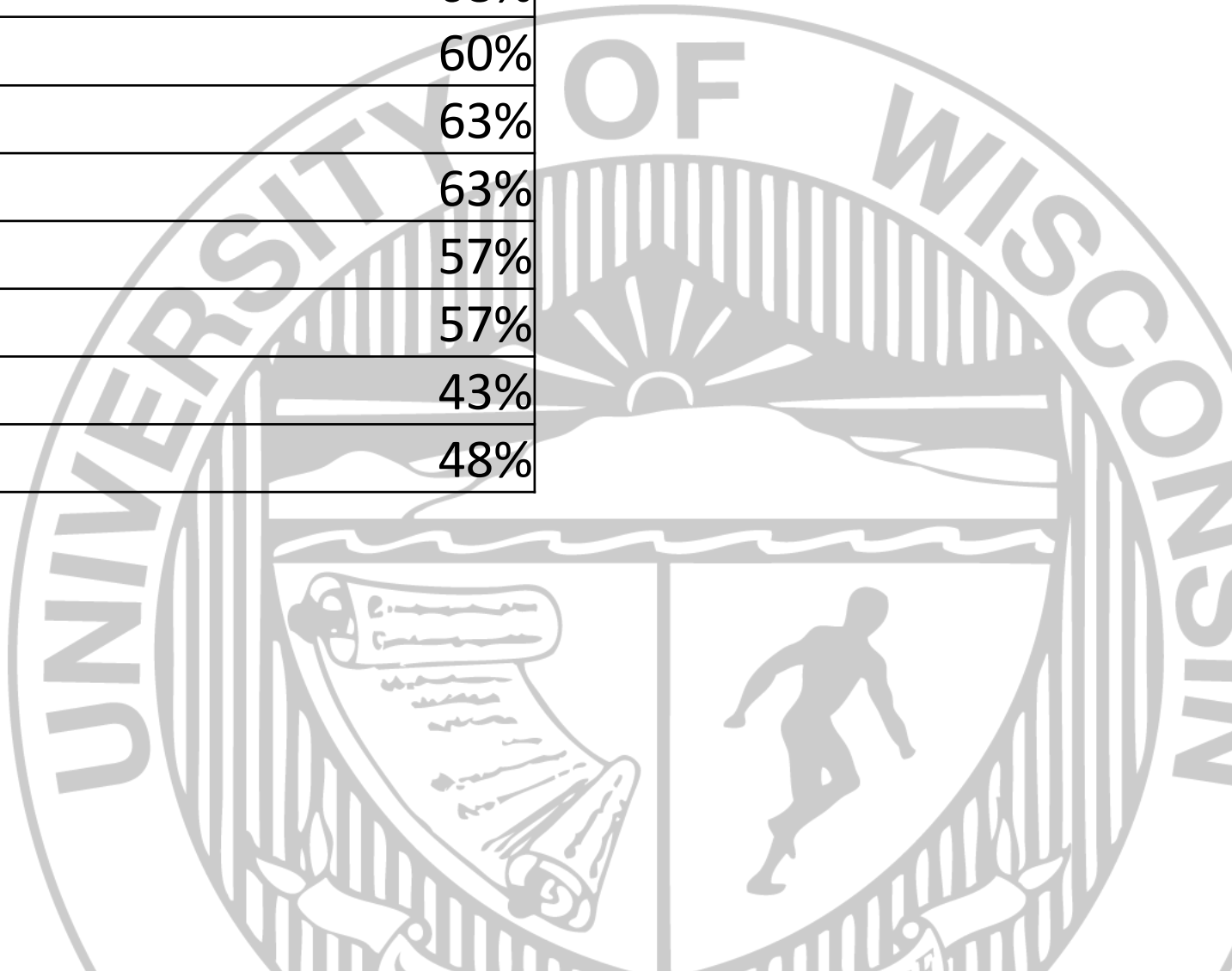


# 2025 U.S. News and World Report

## Pell Graduation Rates

	Pell Graduation Rate	Pell Graduation Rate Performance: Pell compared to Non-Pell Graduation Rate (bonus points for institutions with more Pell students)
<b>WEIGHT</b>	<b>5.5%</b>	<b>5.5%</b>
University of Wisconsin--Eau Claire	63%	70%
University of Wisconsin--La Crosse	67%	73%
University of Wisconsin--Whitewater	55%	68%
University of Wisconsin--Stevens Point	48%	60%
University of Wisconsin--River Falls	56%	63%
University of Wisconsin--Platteville	57%	63%
University of Wisconsin--Green Bay	43%	57%
University of Wisconsin--Stout	41%	57%
University of Wisconsin--Parkside	35%	43%
University of Wisconsin--Superior	36%	48%

Among the 57 public universities on this list, UWL has the #1 Pell graduation rate. Among *all* institutions on this list (including private universities), only 2 of 164 have a higher Pell graduation rate than UWL.



2025 U.S.  
News &  
World  
Report

Student  
Loan Debt  
and  
Alumni  
Earnings

	Median debt for grads with federal loans (\$)	College grads earning more than a HS grad (%)
WEIGHT	5%	5%
University of Wisconsin--Eau Claire	20,909	87%
University of Wisconsin--La Crosse	22,500	90%
University of Wisconsin--Whitewater	23,188	88%
University of Wisconsin--Stevens Point	21,503	86%
University of Wisconsin--River Falls	20,500	86%
University of Wisconsin--Platteville	21,977	91%
University of Wisconsin--Green Bay	18,500	85%
University of Wisconsin--Stout	23,000	89%
University of Wisconsin--Parkside	20,492	83%
University of Wisconsin--Superior	22,500	81%



2025 U.S.  
News &  
World Report

Faculty Data

	Faculty salary rank	% of faculty who are full- time
WEIGHT	8%	3%
University of Wisconsin--Eau Claire	41	73.2%
University of Wisconsin--La Crosse	76	76.5%
University of Wisconsin--Whitewater	26	83.0%
University of Wisconsin--Stevens Point	82	66.9%
University of Wisconsin--River Falls	100	60.2%
University of Wisconsin--Platteville	127	81.5%
University of Wisconsin--Green Bay	90	66.6%
University of Wisconsin--Stout	48	81.1%
University of Wisconsin--Parkside	105	56.6%
University of Wisconsin--Superior	90	50.2%



2025 U.S.  
News &  
World Report

Financial  
Resources  
Rank  
(spending  
per student)

	Financial resources rank (spending per student)
<b>WEIGHT</b>	<b>8%</b>
University of Wisconsin--Eau Claire	123
University of Wisconsin--La Crosse	129
University of Wisconsin--Whitewater	131
University of Wisconsin--Stevens Point	95
University of Wisconsin--River Falls	108
University of Wisconsin--Platteville	100
University of Wisconsin--Green Bay	134
University of Wisconsin--Stout	102
University of Wisconsin--Parkside	87
University of Wisconsin--Superior	35



2025 U.S.  
News &  
World Report

Peer  
Assessment

	Peer assessment score (out of 5)
WEIGHT	20%
University of Wisconsin--Eau Claire	3.4
University of Wisconsin--La Crosse	3.2
University of Wisconsin--Whitewater	3.2
University of Wisconsin--Stevens Point	3.1
University of Wisconsin--River Falls	3.0
University of Wisconsin--Platteville	3.0
University of Wisconsin--Green Bay	3.2
University of Wisconsin--Stout	3.0
University of Wisconsin--Parkside	2.8
University of Wisconsin--Superior	2.9



Survey administrators sent UWL’s 2025 survey to the wrong group of peers, so they used UWL’s 2022 peer assessment score in its place.



# 2025 U.S. News and World Report

## Student to Faculty Ratio

	Student/faculty ratio
WEIGHT (formerly 1%)	4%
University of Wisconsin--Eau Claire	17.7
University of Wisconsin--La Crosse	19.7
University of Wisconsin--Whitewater	19.7
University of Wisconsin--Stevens Point	20.4
University of Wisconsin--River Falls	16.4
University of Wisconsin--Platteville	20.4
University of Wisconsin--Green Bay	23.0
University of Wisconsin--Stout	18.3
University of Wisconsin--Parkside	14.5
University of Wisconsin--Superior	13.0



# 2025 U.S. News and World Report Standardized Tests – ACT Scores – Weight 5%

Must have a minimum of 50% of new students submitting scores	Fall 2022 (50%+ reporting)		Fall 2024 (25% TOPY/36% all)	
	ACT Composite Score at 25th percentile	ACT Composite Score at 75th percentile	ACT Composite Score at 25th percentile	ACT Composite Score at 75th percentile
University of Wisconsin--La Crosse	21	26	22	27



**Thank you**

**Questions?**





Joint Planning & Budget Committee Minutes  
1:15 p.m., October 9, 2024  
Student Union 2310 – Senate Chambers

Guests may join via [Microsoft Teams](#) [Meeting ID: 216 479 675 210      Passcode: vSK8kH]

Recorder: Achenreiner

JPB Committee and Ex-Officio Members in Attendance: Achenreiner, Beeby, Brooks, Engen, Ericson, Figueroa, Galbraith, Grattan, Grunwald, Guyer, Jax, Kim, Kunkel (via Teams), Latus. McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Schweiger, Talbot, Thomsen, Trnka, Vinney (via Teams), Walz, Wycoff-Horn, Yu, Ziegelman

### Agenda:

- I. Approval of meeting minutes: M/S/P to approve the 09-11-2024 meeting minutes – unanimous by voice.
- II. Updates
  - a. Chancellor's Update -- The Chancellor introduced Stacy Twite, Chief of Staff. He briefly discussed the Regents meeting hosted by UW Parkside and the regents' support for the Universities of Wisconsin budget request. He has also met with legislators and business leaders. Family weekend had a good turnout and was viewed favorably.
  - b. Provost's Update -- The Provost discussed two new majors – Data Science and Engineering Physics have been submitted to the Board of Regents for review at their December meeting. She also stressed the importance of Early Alert via Navigate.
  - c. CFO's Update – Numerous payroll errors (about 200) were discussed. UWL is working with the Universities of Wisconsin to identify the root cause of these errors. Her team is planning for a variety of budget scenarios, anywhere from \$0-855 million, depending on what the legislature approves. Workday is coming in July and will impact Business Services and Human Resources most directly, but all employees will be impacted and training for various levels of access will be provided.
- III. New Business
  - a. M/S/P unanimously to elect Chia-Chen Yu to Chair the Joint Planning and Budget Committee for 2024-25, via a voice vote.
  - b. Enrollment Update – Grace Engen shared high enrollment numbers for Fall 2024, along with more first year students entering with sophomore standing. Retention is also at a high (86.7%). Four- and six-year graduation rates are also high and have increased substantially from 10 years ago.
  - c. Enrollment Targets – Corey Sjoquist shared that enrollment targets for Fall 2025 will remain the same, or very similar, as this past year. We have seen a drop in the number of Pell-Eligible students which could impact federal grants

supporting programs like Mc Nair and Upward Bound.

- d. Rankings - Grace Engen shared updates regarding UWL's placement on regional and national rankings.

Upcoming meetings:

- 10/16 - Budget 101
- 10/30
- 11/13
- 12/11

Adjournment 2:10 p.m.

**JPB Executive Committee Members:**

Pearl Bearhart, Academic Staff

Sandra Vinney, University Staff

Ju Kim, Dean

Tim McAndrews, Faculty

Emma Latus, Student Association

Chia-Chen Yu, Chair

Joint Planning & Budget Committee Agenda

1:15 p.m., October 16, 2024

In person, Graff Main Hall 260 - Hesperich Auditorium

Guests may join via [MS Teams](#) [Meeting ID: 257 117 301 134      Passcode: cxVLzu]

Recorder: Bearhart

Alternate Recorder: Brooks

Agenda:

1. Approval of meeting minutes: 10/09/2024 (approve on 10/30)
2. Budget 101 – Stephanie Pope, Vice Chancellor for Administration & Finance, and Emily Roraff, Budget Director
3. Chancellor's update
4. Provost's update
5. CFO's update
6. New business
7. Adjournment

**JPB Executive Committee Members:**

Pearl Bearhart, Academic Staff

Ju Kim, Dean

Emma Latus, Student Association

Tim McAndrews, Faculty

Sandra Vinney, University Staff

Chia-Chen Yu, Chair

# University of Wisconsin-La Crosse

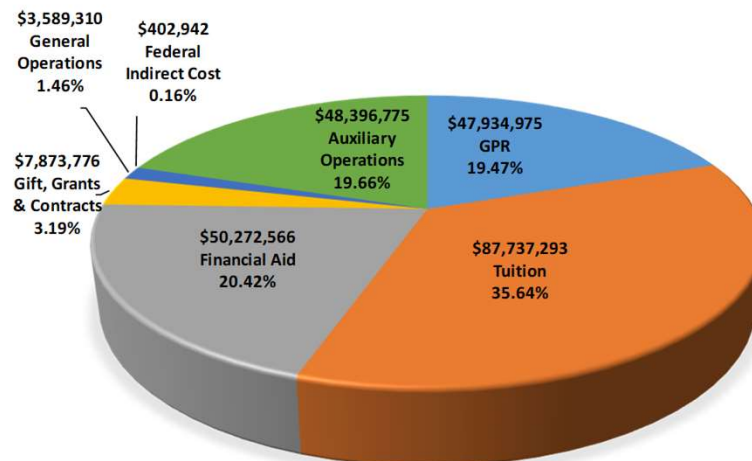


## Budget Planning & Review Fiscal Year 2024-25



1

## UWL Revenue Budget FY25

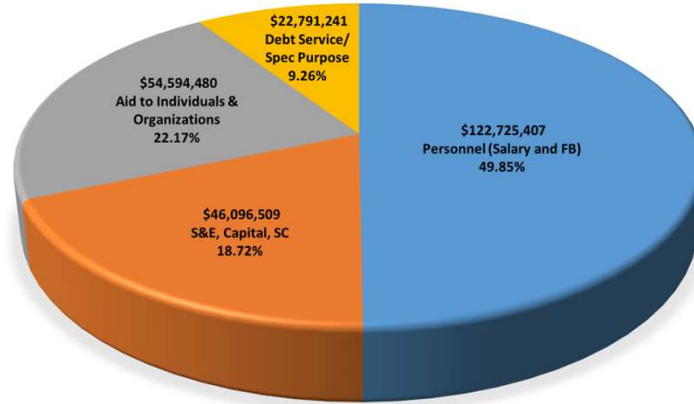


UWL Budget: \$246,207,637



2

## UWL Expenses FY25



Total Expenses: \$246,207,637



3

## All Funds Budget by Division & College

Division	Unclassified	University Staff	S&E & Capital	FB & Other	Pct.	Total
Chancellor	510,932	54,000	53,738	-	0.25%	618,670
Academic Affairs						
Provost	6,230,498	1,411,979	2,995,761	53,205,628	25.93%	63,843,866
SOE	2,855,622	169,185	348,455	425,437	1.54%	3,798,699
CBA	8,108,660	282,467	327,279	812,860	3.87%	9,531,266
CASSH	13,808,276	579,643	929,919	1,497,468	6.83%	16,815,306
CSH	18,219,599	1,056,247	2,086,969	1,980,260	9.48%	23,343,075
GEL	1,167,489	520,971	1,127,084	359,249	1.29%	3,174,793
Total Acad. Affairs	50,390,144	4,020,492	7,815,467	58,280,902	48.94%	120,507,005
Admin. & Finance	6,169,331	7,582,519	18,361,549	(1,166,055)	12.57%	30,947,344
Student Affairs	7,663,754	3,789,378	20,787,780	11,182,431	17.64%	43,423,343
University Adv.	2,189,406	126,102	160,791	294,558	1.13%	2,770,857
Diversity & Inclusion	1,740,478	187,463	132,490	180,605	0.91%	2,241,036
University-Wide	1,138,780	26,897	6,807,392	37,726,313	18.56%	45,699,382
Total	69,802,825	15,786,851	54,119,207	106,498,754	100.00%	246,207,637

Fiscal Year 2024-25



4

## State Fund Appropriations

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

Fiscal Year 2024-25



5

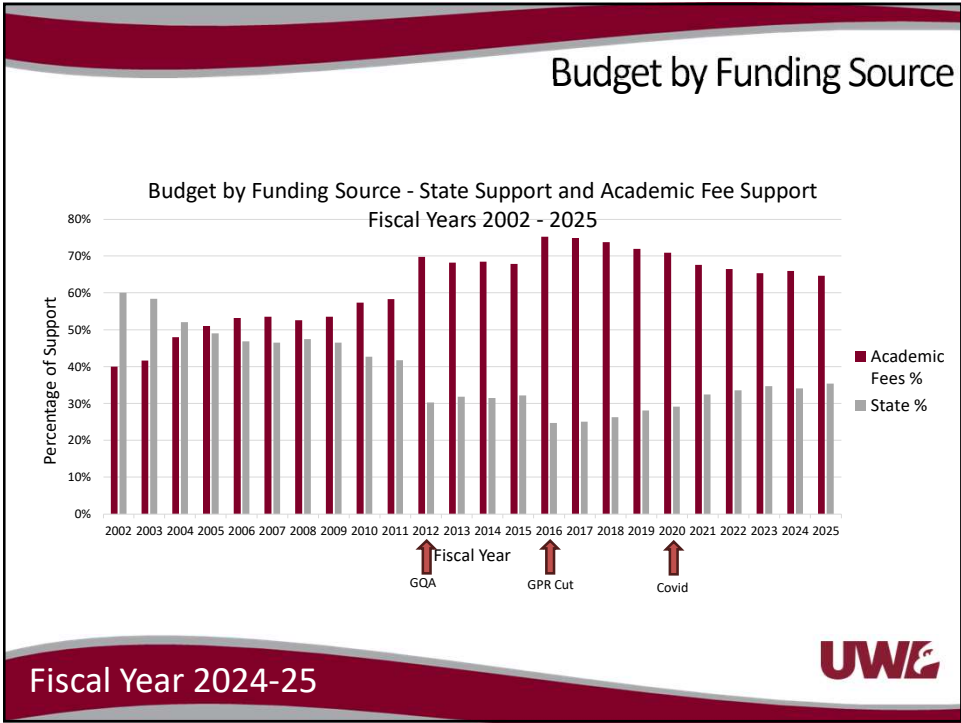
## New Resource Allocation History

Biennium	Amount (M)	Description
2003 & 2013	1.36	Academic Initiatives
2008-15	14.70	Growth Quality & Access
2017-19	1.30	15-17 Lapse Return
2017-19	1.00	Utility & Fringe Benefits
2017-19	1.20	Outcomes Based Funding
2019-21	.96	Outcomes Based Funding
Total	20.52	

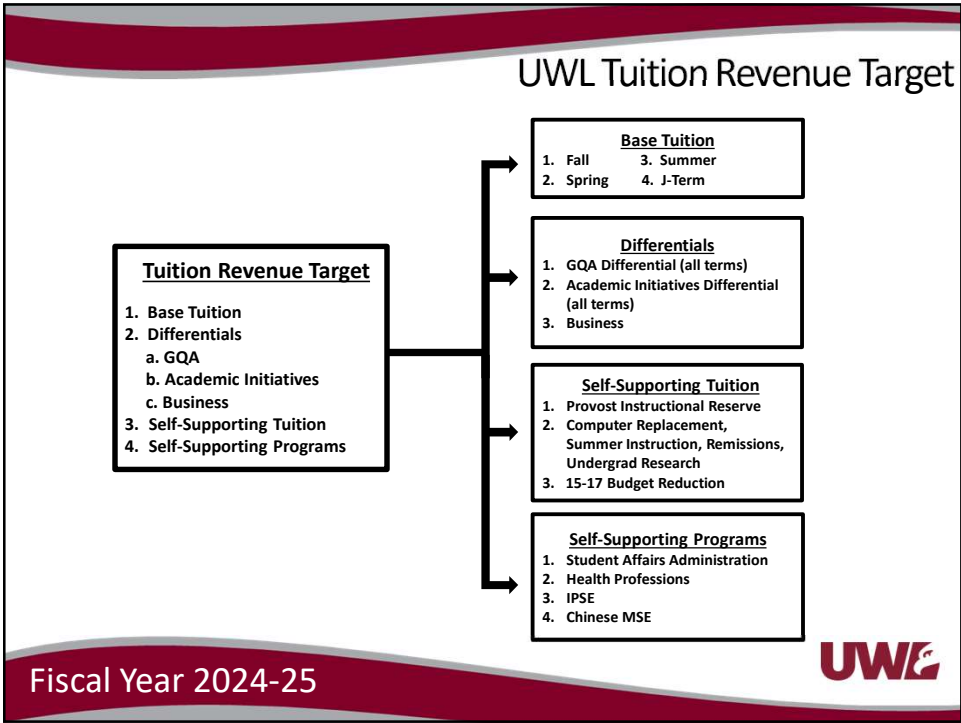
Fiscal Year 2024-25



6



7



8

## UWL Tuition Budget Summary

Budget Detail for Tuition Revenue Target	Amount
FY25 Tuition Revenue Target	86,811,509
Obligations:	
UW System Tuition Pool Obligation	56,987,165
Growth, Quality & Access	14,670,880
Academic Initiatives	1,456,245
Self-Supporting Tuition	8,050,960
Self-Supporting Programs	5,646,259
Total FY25 Tuition Budget	86,811,509

Fiscal Year 2024-25



9

## GQA Program Summary

Description	Amount
GQA Differential Tuition Per Full-Time Student	1,302
GQA Tuition Revenue Budget	14,670,880
GQA Expenditure Budget	
Salaries	9,343,205
Fringe Benefits (Estimated)	4,099,405
Supplies & Expense	717,354
Financial Aid	510,916
Total Expenses	14,670,880
Faculty Positions	119.00
Staff Positions	25.50
Total GQA Positions	144.50

Fiscal Year 2024-25



10



## Academic Initiatives

Program Area	Program	FY2024-25 Budget	FY2024-25 FTE
Advising	Learning Center	158,667	-
Advising	ACCESS Center	78,941	0.83
Advising	Academic Advising Center	288,432	2.75
Advising	School of Education	99,167	1.00
Diversity	Center for Transformative Justice (CTJ)	224,525	2.50
Diversity	Pride Center	30,816	0.30
Diversity	Admissions-Multicultural Recruiter	85,308	1.00
Diversity	Violence Prevention	22,085	-
Internationalization	International Ed. & Engagement	167,621	-
Research	Library	147,040	-
Research	Undergraduate Research	111,043	0.60
Research	Graduate Research	42,600	-
<b>Total</b>		<b>1,456,245</b>	<b>8.98</b>

Note: Academic Initiatives differential tuition amounts to \$152.80 for the academic year.

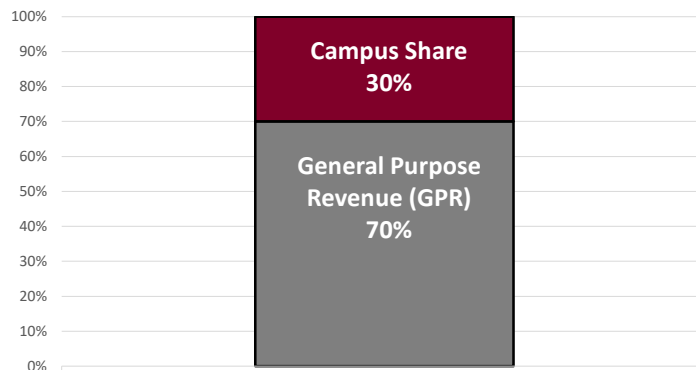
Fiscal Year 2024-25



11

## Pay Plan Funding

Historically, employee salary increases ("pay plan") are split between the state (70%) and the campus (30%).



Fiscal Year 2024-25



12

## State Pay Plan History

Fiscal Year	State Pay Plan	CUPA
2009-10	0.00%	0.0%
2010-11	0.00%	1.1%
2011-12	-6% to -12%	2.0%
2012-13	0.00%	2.2%
2013-14	1.00%	2.3%
2014-15	1.00%	2.3%
2015-16	-2% to -4%	2.4%
2016-17	0.00%	2.6%
2017-18	2.00%	3.0%
2018-19	2.00%	3.0%
2019-20	2.00%	3.0%
2020-21	2.00%	2.5%
2021-22	2.00%	3.0%
2022-23	2.00%	3.0%
2023-24	4.00%	4.0%

Fiscal Year 2024-25



13

## UWL Financial Horizon

### Challenges

- Employee Recruitment & Retention
- WI Demographics / Enrollment
- State Funding Priorities

Fiscal Year 2024-25



14

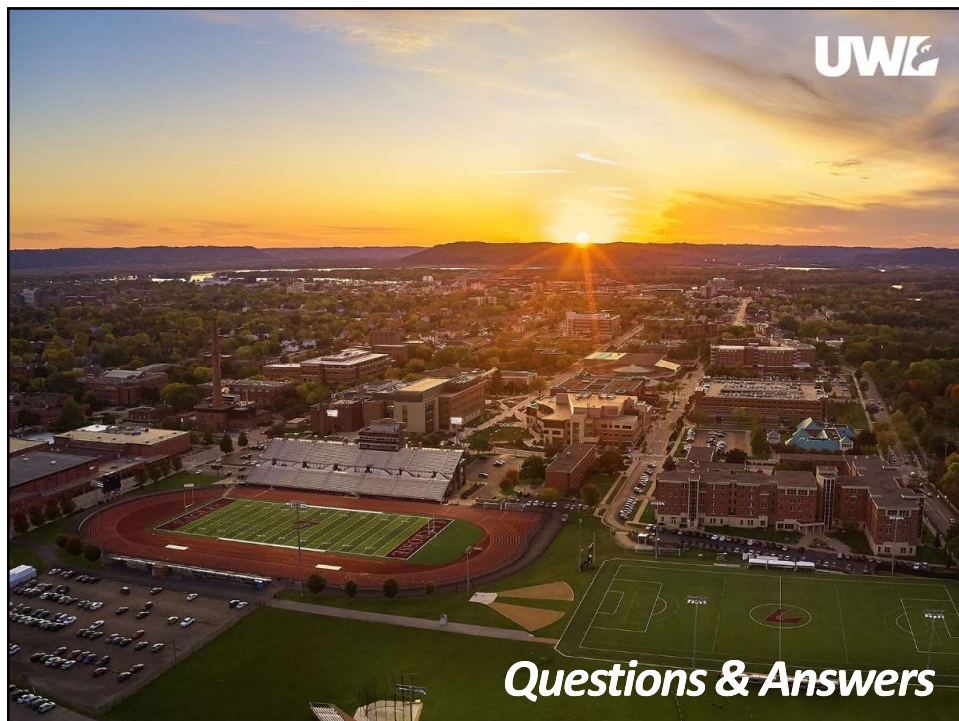
**Opportunities**

- Prairie Springs Science Center
- Biennial Budget Request
- ATP / Workday
- Strategic Planning

Fiscal Year 2024-25



15



***Questions & Answers***

16

## Joint Planning & Budget Committee Minutes

1:15 p.m., October 16, 2024

Graff Main Hall 260 - Hesperich Auditorium

Guests may join via [MS Teams](#) [Meeting ID: 257 117 301 134      Passcode: cxVLzu]

Recorder: Bearhart

JPB Committee and Ex-Officio Members in Attendance: Achenreiner, Bearhart, Brooks, Ericson, Galbraith (via Teams), Grunwald, Grattan, Guyer, Kim, Kunkel, Latus, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Schweiger, Thomsen, Thoun, Trnka, Vinney (via Teams), Walz, Weston, Wycoff-Horn, Yu

### Agenda:

1. Approval of meeting minutes: 10/09/2024
  - a. Approval of meeting minutes will occur at the next JPB meeting.
2. Budget 101 – Stephanie Pope, Vice Chancellor for Administration & Finance, and Emily Roraff, Budget Director
  - a. Vice Chancellor Pope and Emily Roraff presented the Budget 101 slideshow, questions left for the end. Session was recorded.
3. Chancellor's update  
Not present today.
4. Provost's update  
No update.
5. CFO's update  
Budget 101 is the update.
6. New business  
No new business.
7. Adjournment at 2:10pm

### JPB Executive Committee Members:

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Emma Latus, Student Association  
Tim McAndrews, Faculty  
Sandra Vinney, University Staff  
Chia-Chen Yu, Chair

## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., October 30, 2024

In person, Student Union 2310 – Senate Chambers

Guests may join via [MS Teams](#) [Meeting ID: 213 246 097 018      Passcode: LVDeoP]

Recorder: Brooks

Alternate Recorder: Ericson

## Agenda:

1. Introduction of New Committee Member and Update
  - a. New member Grace Guyer, student representative
  - b. Update (please see *2024~25 JPB Members* file)
    - JPB Faculty Membership
      - o We have 8 faculty members and need only 7. Guidance from SEC that Tushar Das agreed to step down
    - JPB ACS Membership
      - o Contacted Academic Staff Council (ACS) for the new ACS representative to replace Chris Stindt (representative of Academic Staff Council)
2. Approval of Meeting Minutes
  - a. 10/09/2024
  - b. 10/16/2024
3. JPB Executive Committee
  - a. Members: Pearl Bearhart, Ju Kim, Emma Latus, Tim McAndrews, Sandra Vinney, & Chia-Chen Yu
  - b. Agenda Items for Fall 2024 Meetings (presenters in parentheses)
    - 10/30
      - o HLC UWL Timeline and Components (Sandy Grunwald and Tim McAndrews)
    - 11/13
      - o Pillar leads for the four pillars have the 2024-25 action steps associated with the goals submitted to the Provost\* (Provost)
    - 12/11
      - o Minds Matter: Public Health Approaches to Student Mental Health (Provost and Crystal Champion)
  - c. Future Agenda Items
    - Chancellor's vision, philosophy, and leadership style in planning and budgeting processes. Chancellor's expectations from the JPB Committee
    - Chancellor's preliminary plan for strategic planning

## d. Tentative Spring 2025 Meeting Dates for JPB

1/29/2025  
2/12/2025  
2/26/2025  
3/12/2025  
3/26/2025  
4/09/2025  
4/23/2025  
5/07/2025

## e. Topics/Plans for Spring 2025

- If you have ideas, please share them. Will begin work on outlining topics

4. Chancellor's update
5. Provost's update
6. CFO's update
7. HLC UWL Timeline and Components (Sandra Grunwald & Tim McAndrews)
  - The process of UWL's next reaffirmation of our accreditation with the Higher Learning Commission (HLC)
8. New business
9. Adjournment

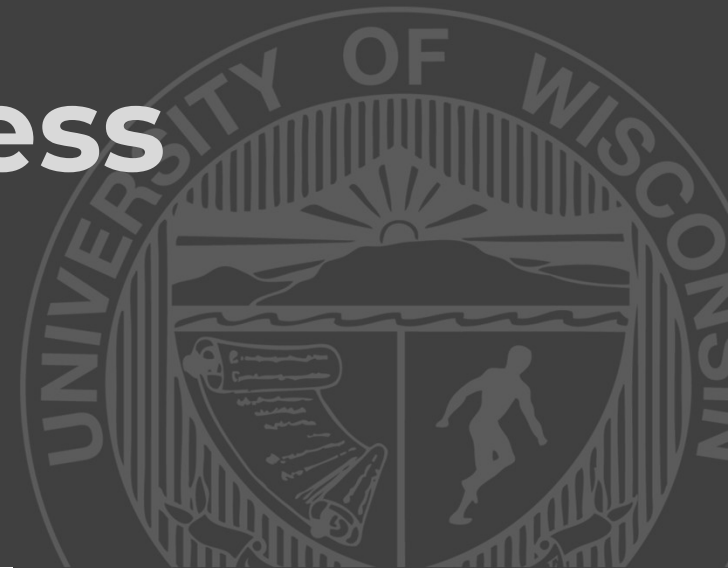
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1. Pillar: Investing in our People: **Stephanie Pope & Julia Getchell**
2. Pillar: Achieving Excellence Through Equity and Diversity: Stacy Narcotta-Welp and **Nevin Heard**
3. Pillar: Community Engagement: Lisa Klein and **Marie Moller**
4. Pillar: Transformative Education: Betsy Morgan and Sandy Grunwald

**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Emma Latus, Student Association  
Tim McAndrews, Faculty  
Sandra Vinney, University Staff  
Chia-Chen Yu, Chair

# **UWL's HLC Reaffirmation Process**





# Why UWL cares about HLC Accreditation

- Assurance of program quality and credibility
- Eligibility for federal financial aid and scholarships
- Transferability of credits
- Professional licensure and certification
- Employer recognition and job opportunities



# Timeline and Components

- Year 4: Mid-cycle Assurance Review
- Years 5–9: Quality Initiatives
- Year 10: Comprehensive Evaluation for Reaffirmation of Accreditation

We are in Year 9 right now!



# UWL Quality Initiative Project

## *Minds Matter*

- The initiative focuses on a public health approach to promoting mental health with a focus on enhancing student success through increased attention to a healthy campus environment.
- <https://www.uwlax.edu/minds-matter/>
- Final Report due June 2025



# Comprehensive Evaluation

- Federal Compliance Review
- Assurance Review
- Student Opinion Survey
- On Site Peer Review Visit – April 20-21, 2026



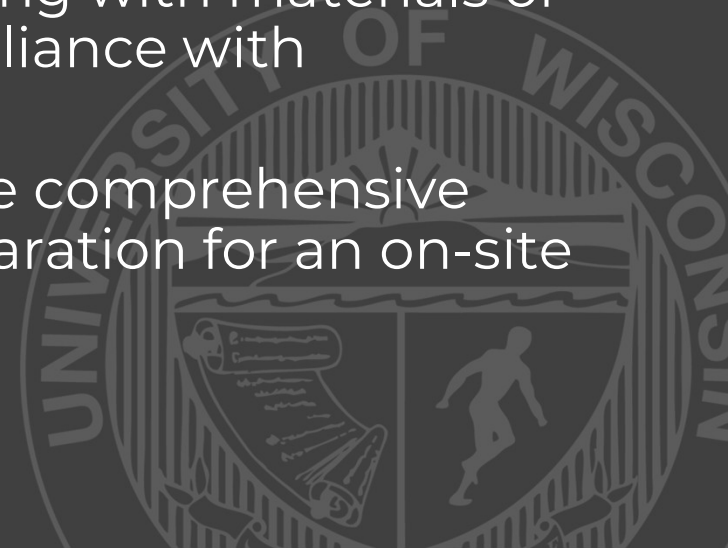
# Federal Compliance Review

- Sandy Grunwald lead on this part
- Demonstrate that UWL is complying with the expectations of specific regulations set by the U.S. Department of Education. HLC is required to conduct this review as a federally recognized accrediting agency
- Any issues will be brought forth during the Onsite Visit



# Assurance Review

- Tim McAndrews lead on this part
- UWL submits an Assurance Argument, along with materials of evidence to demonstrate that it is in compliance with HLC's Criteria for Accreditation.
- The team of peer reviewers conducting the comprehensive evaluation reviews these materials in preparation for an on-site visit



# Criteria for Accreditation

- **Criterion 1. Mission**
  - Mission Alignment
  - Mission and Public Good
  - Mission and Diversity of Society
- **Criterion 2. Integrity: Ethical and Responsible Conduct**
  - Integrity
  - Transparency
  - Board Governance
  - Academic Freedom and Freedom of Expression
  - Knowledge Acquisition, Discovery and Application
- **Criterion 3. Teaching and Learning for Student Success**
  - Educational Programs
  - Exercise of Intellectual Inquiry
  - Sufficiency of Faculty and Staff
  - Support for Student Learning and Resources for Teaching
  - Assessment of Student Learning
  - Program Review
  - Student Success Outcomes
- **Criterion 4. Sustainability: Institutional Effectiveness, Resources and Planning**
  - Effective Administrative Structures
  - Resource Base and Sustainability
  - Planning for Quality Improvement



# Student Opinion Survey

- HLC conducts an online survey of UWL's student body two months prior to the on-site peer review visit.
- The survey is intended to give students an opportunity to participate in the evaluation process, and to help identify questions for the peer reviewers to ask while on site.



# On Site Peer Review Visit

- April 20-21, 2026
- The team works with the institution to create the agenda for the visit, which typically includes meetings with the institution's leadership and board, as well as open forums with faculty, staff and students.
- Visits typically last 1 1/2 days. The team will remain in the area for an additional day of deliberations after the visit.
- Determine if any Interim Reports are required

## Joint Planning &amp; Budget Committee Minutes

1:15 p.m., October 30, 2024

In person, Student Union 2310 – Senate Chambers

Guests may join via [MS Teams](#) [Meeting ID: 213 246 097 018] Passcode: LVDeoP]

Recorder: Brooks

JPB Committee and Ex-Officio Members in Attendance: Achenreiner (via Teams), Bearhart, Beeby, Brooks, Ericson, Figueroa, Galbraith, Grattan, Grunwald, Guyer (via Teams), Jax, Allen (for Kim), Kunkel, Ladd-Winders, Latus, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Schweiger, Talbot, Thomsen, Thoun, Trnka, Vinney (via Teams), Walz (via Teams), Weston, Wycoff-Horn, Yu, Ziegelman

## Agenda:

1. Introduction of New Committee Member and Update
  - a. New member Grace Guyer, student representative (attended online)
  - b. Update (please see *2024~25 JPB Members* file)
    - JPB Faculty Membership
      - o We have 8 faculty members and need only 7. Guidance from SEC that Tushar Das agreed to step down
    - JPB ACS Membership
      - o Contacted Academic Staff Council (ACS) for the new ACS representative to replace Chris Stindt (representative of Academic Staff Council)
2. Approval of Meeting Minutes
  - a. 10/09/2024
  - b. 10/16/2024  
(approval of minutes moved Mary G/second TJB) passed unanimous.
3. JPB Executive Committee
  - a. Members: Pearl Bearhart, Ju Kim, Emma Latus, Tim McAndrews, Sandra Vinney, & Chia-Chen Yu
  - b. Agenda Items for Fall 2024 Meetings (presenters in parentheses)
    - 10/30
      - o HLC UWL Timeline and Components (Sandy Grunwald and Tim McAndrews)
    - 11/13
      - o Pillar leads for the four pillars have the 2024-25 action steps associated with the goals submitted to the Provost\* (Provost)
    - 12/11

- Minds Matter: Public Health Approaches to Student Mental Health (Provost and Crystal Champion)
- c. Future Agenda Items
  - Chancellor's vision, philosophy, and leadership style in planning and budgeting processes. Chancellor's expectations from the JPB Committee
  - Chancellor's preliminary plan for strategic planning
- d. Tentative Spring 2025 Meeting Dates for JPB
  - 1/29/2025
  - 2/12/2025
  - 2/26/2025
  - 3/12/2025
  - 3/26/2025
  - 4/09/2025 likely conflict with April 10-11 regents meeting in Madison
  - 4/23/2025
  - 5/07/2025
- e. Topics/Plans for Spring 2025
  - If you have ideas, please share them. Will begin work on outlining topics
- 4. Chancellor's update
  - He got back from Milwaukee. No regents meeting. We discussed lump sum.
- 5. Provost's update
  - no update
- 6. CFO's update
  - no update
- 7. HLC UWL Timeline and Components (Sandra Grunwald & Tim McAndrews)
  - The process of UWL's next reaffirmation of our accreditation with the Higher Learning Commission (HLC)
  - Please see slides below.
- 8. New business
  - request by chair for agenda items for JPB.
- 9. Adjournment 2:20 p.m.

\*Note: Pillar leads for the four pillars in the "Revised Strategic Planning Goals" document (please see updates highlighted in yellow)

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3. Pillar: Community Engagement: Lisa Klein and Marie Moller
4. Pillar: Transformative Education: Betsy Morgan and Sandy Grunwald

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Ju Kim, Dean  
Emma Latus, Student Association  
Tim McAndrews, Faculty  
Sandra Vinney, University Staff  
Chia-Chen Yu, Chair

## HLC UWL Timeline and Components

Presenters: Sandra Grunwald & Tim McAndrews

### UWL's HLC Reaffirmation Process

1

### Why UWL cares about HLC Accreditation

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- Eligibility for federal financial aid and scholarships
- Transferability of credits
- Professional licensure and certification
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2

### Timeline and Components

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- The initiative focuses on a public health approach to promoting mental health with a focus on enhancing student success through increased attention to a healthy campus environment.

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7

### Criteria for Accreditation

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  - Academic Freedom and Freedom of Expression
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  - Educational Programs
  - Exercise of Intellectual Inquiry
  - Sufficiency of Faculty and Staff
  - Support for Student Learning and Resources for Teaching
  - Assessment of Student Learning
  - Program Review
  - Student Success Outcomes
- **Criterion 4. Sustainability: Institutional Effectiveness, Resources and Planning**
  - Effective Administrative Structures
  - Resource Base and Sustainability
  - Planning for Quality Improvement

8

### Student Opinion Survey

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### On Site Peer Review Visit

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- Visits typically last 1 1/2 days. The team will remain in the area for an additional day of deliberations after the visit.
- Determine if any Interim Reports are required

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- Determine if any Interim Reports are required

10

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## Joint Planning & Budget Committee Agenda

1:15 p.m., November 13, 2024

In person, Student Union 2310 – Senate Chambers

Guests may join via [MS Teams](#) [Meeting ID: 228 517 848 568      Passcode: 5K4Her]

Recorder: Ericson

Alternate Recorder: Galbraith

### Agenda:

1. Approval of Meeting Minutes
  - a. 10/30/2024
2. JPB Executive Committee
  - a. JPB Goals for 2024-25
    - To consider each agenda item in the context of its support for the strategic plan
    - To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
    - To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL
  - b. Agenda Items for Fall 2024 Meetings (presenters in parentheses)
    - 11/13
      - o Pillar leads for the four pillars have the 2024-25 action steps associated with the goals submitted to the Provost\* (Provost)
    - 12/11
      - o Minds Matter: Public Health Approaches to Student Mental Health (Provost and Crystal Champion)
  - c. Future Agenda Items
    - Chancellor's vision, philosophy, and leadership style in planning and budgeting processes. Chancellor's expectations from the JPB Committee
    - Chancellor's preliminary plan for strategic planning
  - d. Potential Topics/Plans for Spring 2025
    - Gather frequently asked questions related to finance and budgeting
      - o e.g., possibility of tuition waiver benefits for employees
    - Capital budget projects and priority at UWL
    - The Chief of Staff's role?
    -

## e. Tentative Spring 2025 Meeting Dates for JPB

1/29/2025

2/12/2025

2/26/2025

3/12/2025

3/26/2025

4/09/2025: likely conflict with April 10-11 regents meeting in Madison

4/23/2025

5/07/2025

3. Chancellor's update
4. Provost's update
5. CFO's update
6. Presentation: Pillar leads for the four pillars have the 2024-25 action steps associated with the goals submitted to the Provost\* (Provost)
  - a. Ask JPB feedback on the action steps developed for the goals
7. Adjournment

\*Note: Pillar leads for the four pillars in the "Revised Strategic Planning Goals" document (please see updates highlighted in yellow)

1. Pillar: Investing in our People: Stephanie Pope & Julia Getchell
2. Pillar: Achieving Excellence Through Equity and Diversity: Stacy Narcotta-Welp and Nevin Heard
3. Pillar: Community Engagement: Lisa Klein and Marie Moller
4. Pillar: Transformative Education: Betsy Morgan and Sandy Grunwald

**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff

Ju Kim, Dean

Emma Latus, Student Association

Tim McAndrews, Faculty

Sandra Vinney, University Staff

Chia-Chen Yu, Chair



TO: JPB

From: Provost Betsy Morgan

RE: Revised Strategic Planning Goals as Aligned with UWSA

Date: 11/11/2024

The following indicates the alignment of UWL's goals with the UWSA 2023-2028 Strategic Plan - <https://www.wisconsin.edu/president/strategic-plan/>

<b>Investing in our People</b> Stephanie Pope & Julia Getchell	<b>Universities of Wisconsin Strategic Planning Alignment (when applicable) - Goal level</b>
Goal 1: Prioritize employee compensation.	3.2, 3.4 3.2 Secure the resources to provide competitive compensation packages  3.4 Assist the universities in recruiting, developing, and retaining a high-quality, diverse, and innovative faculty and staff
Goal 2: Promote an environment of employee inclusion, ownership and engagement.	3.1  3.1 Advance an inclusive and engaging workplace
Goal 3: Create clear and consistent assessment and accountability policies for all employees.	3.1  3.1 Advance an inclusive and engaging workplace
Goal 4: Encourage employees to utilize the Educational Assistance program.	3.3  3.3 Coordinate with universities to enhance professional development that fosters career progression
<b>Achieving Excellence Through Equity and Diversity</b> Stacy Narcotta-Welp & Nevin Heard	
Goal 1: Create learning environments that sustain and support students from underrepresented backgrounds to achieve their academic and career goals within U.S. academia.	2.3 2.3 Enhance our focus on achieving a more diverse, equitable, and inclusive environment for our students
Goal 2: Ensure that all employees can be engaged in creating a dynamic and welcoming campus community.	3.4 3.4 Assist the universities in recruiting, developing, and retaining a high-quality, diverse, and innovative faculty and staff
Goal 3: Build transformative and reciprocal relationships such that diversity, equity, and inclusion efforts are fully coordinated within the campus and community ecosystem.	3.4 3.4 Assist the universities in recruiting, developing, and retaining a high-quality, diverse, and innovative faculty and staff

Goal 4: Uplift and share our progress related to student success in enrollment, retention, and graduation across populations to convey the impact of the institution's mission, vision, and values within the campus community, state, and region.	2.3 2.3 Enhance our focus on achieving a more diverse, equitable, and inclusive environment for our students
<b>Community Engagement</b> Lisa Klein & Marie Moeller	
Goal 1: Market and broker mutually beneficial relationships between UWL and private/public organizations in the greater La Crosse community, state and region.	5.6, 8.2 5.6 Advocate for resources for the university, helping stakeholders understand the significant positive economic impact of our institutions and positive consequences for the state of a strong system of higher education  8.2 Leverage the UW brand through an umbrella marketing campaign to drive enrollment
Goal 2: Initiate strategies that create and promote increased opportunities for community engagement that are academically grounded.	2.2, 6.5 2.2 Assist the universities in expanding high-impact practices to students across the curriculum  6.5 Assist the universities in increasing research collaborations with industry partners
Goal 3: Advocate for integrating community engagement into the UWL campus culture.	NA
Goal 4: Determine and implement meaningful metrics to be used when measuring community engagement at UWL.	NA
Goal 5: Onboard and integrate new campus leadership and other employees into community engagement activities.	NA
<b>Transformative Education</b> Betsy Morgan & Sandy Grunwald	
Goal 1: Increase the opportunities for students to engage in high-impact practices by graduation.	2.2, 2.6 2.2 Assist the universities in expanding high-impact practices to students across the curriculum  2.6 Coordinate with the universities to provide state-of-the-art facilities and digital platforms for student learning and academic excellence
Goal 2: Monitor persistence and retention rates with the goal of improvement.	2.1, 2.7

	<p>2.1 Support the universities in the provision of robust academic advising, career advising, and mental health support to students</p> <p>2.7 Review and modify or eliminate any System policies that have a negative impact on the ability of the universities to meet the academic and career advising and student mental health needs</p>
Goal 3: Expand international/global learning opportunities for all students.	NA
Goal 4: Enhance graduate education.	<p>2.5</p> <p>2.5 Assist the universities in enhancing online educational opportunities for adult learners</p>
Goal 5: Engage in effective enrollment management to efficiently use finite resources while enhancing the student experience and timely graduation.	<p>1.2</p> <p>1.2 Coordinate with the universities to identify and support best practices in collaboration with K-12 schools, technical colleges, and other educational partners to promote transition into, and success at, our universities</p>
Goal 6: Provide support for the academic components of key university initiatives such as community engagement, equity & diversity, Eagle Advantage, and sustainability.	NA



TO: JPB  
From: Interim Chancellor Betsy Morgan  
RE: Revised Strategic Planning Goals  
Date: Feb 13, 2024

I submit these revised goals to JPB. The Chancellor's Cabinet endorses these goals. After JPB feedback, I will add a column that reflects alignment with the strategic plan of the Universities of Wisconsin.

**Pillar: Investing in our People (Bob Hetzel) – 2/2024**  
**(Summary – added one goal)**

Goals to Keep	Goals to Remove	New Goals
Prioritize employee compensation.		
Promote an environment of employee inclusion, ownership and engagement.		
Create clear and consistent assessment and accountability policies for all employees.		
		Encourage employees to utilize the Educational Assistance program.

**Pillar: Achieving Excellence Through Equity and Diversity Pillar – Stacy Narcotta-Welp**  
**(Summary – reworded 4 goals)**

Goals as Stated in Original Pillar	Goals to Remove	New Goal
Goal 1: Achieve demographic equity in access and retention for students, staff, faculty, and administrators. (Equity Liaison Initiative.)		Create learning environments that sustain and support students from underrepresented backgrounds to achieve their academic and career goals within U.S. academia. <i>(Not removing but updating language, as the Equity Liaison program has been fully created and operational since 2018.)</i>
Goal 2: Provide fully inclusive educational experiences for all students.		Ensure that all employees can be engaged in creating a dynamic and welcoming campus community. <i>(Reword)</i>

Goal 3: Ensure that all employees are engaged in creating a dynamic and welcoming campus community.		Build transformative and reciprocal relationships such that diversity, equity, and inclusion efforts are fully coordinated within the campus and community ecosystem. <i>(Reword)</i>
Goal 4: Make UWL's Equity and Diversity efforts highly visible and coordinated across campus.		Uplift and share our progress related to student success in enrollment, retention, and graduation across populations to convey the impact of the institution's mission, vision, and values within the campus community, state, and region. <i>(Reword)</i>

**Pillar: Community Engagement (Lisa Klein & Greg Reichert)**  
**(Summary – added one goal, dropped one goal)**

Goals to Keep	Goals to Remove	New
Market mutually beneficial relationships between UWL and private/public organizations in the greater La Crosse community, state and region.		Goal 1: Market and broker mutually beneficial relationships between UWL and private/public organizations in the greater La Crosse community, state and region. <i>(slight reword)</i>
Initiate strategies that create and promote increased opportunities for students' community engagement that are academically grounded.		Goal 2: Initiate strategies that create and promote increased opportunities for community engagement that are academically grounded. <i>(slight reword)</i>
Advocate for integrating community engagement into UWL policies and procedures.		Goal 3: Advocate for integrating community engagement into the UWL campus culture. <i>(slight reword)</i>
Measure community engagement across UWL.		Goal 4: Determine and implement meaningful metrics to be used when measuring community engagement at UWL. <i>(slight reword re: obtainable outcomes)</i>
		Goal 5: Onboard and integrate new campus leadership and other

		employees into community engagement activities.
	Secure funding to support continued community engagement.  <i>(Completed with the CE Coordinator position creation)</i>	

### **Pillar: Transformative Education (Morgan/Grunwald)**

#### **(Summary – dropped two goals, added two goals)**

<b>Goals to Keep</b>	<b>Goals to Remove</b>	<b>New Goals</b>
Increase the opportunities for students to engage in high-impact practices by graduation.		
Monitor persistence and retention rates with the goal of improvement.		
Expand international/global learning opportunities for all students.		
Enhance graduate education.		
	Increase opportunities for cross-disciplinary teaching and learning. <i>(Note: New program proposals now stress cross discipline program development. Workload load components of teaching handled at dept/college level.)</i>	
	Evaluate and revise the General Education program. <i>(Note: Completed)</i>	
		Engage in effective enrollment management to efficiently use finite resources while enhancing the student experience and timely graduation.
		Provide support for the academic components of key university initiatives such as community engagement, equity & diversity, Eagle Advantage, and sustainability.



## UWL Strategic Plan – Sustaining Excellence - 2024-2025 Action Steps

Pillar: Advancing Transformative Education (Betsy Morgan & Sandy Grunwald)

Pillar: Investing in Our People (Stephanie Pope & Julia Getchell)

Pillar: Increasing Community Engagement (Lisa Klein & Marie Moeller)

Pillar: Achieving Excellence through Equity and Diversity (Stacy Narcotta-Welp & Nevin Heard)

<b>Pillar: Transformative Education</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
<b>Transformative Education</b>	1.Increase the opportunities for students to engage in high-impact practices by graduation.	1A. Promote effective examples of community-based learning activities to students, instructors, and the community.	Community Engagement Coordinator
<b>Transformative Education</b>	1.Increase the opportunities for students to engage in high-impact practices by graduation.	1B. Global learning (see action steps below in 5).	
<b>Transformative Education</b>	1.Increase the opportunities for students to engage in high-impact practices by graduation.	1C. Expand mentor training for undergraduate and graduate research through CIMER-related workshops.	ORSP, Grad Studies, CATL, Provost's Office,
<b>Transformative Education</b>	2. Monitor persistence and retention rates with the goal of improvement.	2A. Continuing active identification and engagement of <ul style="list-style-type: none"> <li>• Students who haven't registered</li> <li>• Students with only 1-11 credits</li> <li>• First generation transfer students</li> <li>• First week indicators – identify students who have not: <ul style="list-style-type: none"> <li>○ picked up their books</li> <li>○ moved into residence hall</li> <li>○ logged into canvas, who hasn't</li> <li>○ utilized their meal plan</li> </ul> </li> </ul>	AVC with others (AAC/ASDs, FA, OSL, Res Life)
<b>Pillar: Transformative Education</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
<b>Transformative Education</b>	2. Monitor persistence and retention rates with the goal of improvement.	2B. Monitor retention of UWL First Scholars and other first-generation students who are not First Scholars with potential of implementing positive program aspects to other cohorts of students.	Monitor: IR Implementation: Financial Aid, SSS & Residence Life

<b>Transformative Education</b>	2. Monitor persistence and retention rates with the goal of improvement.	2C. Examine disaggregated data concerning retention discrepancies and propose programming or interventions (see 2A as an example).	Student Achievement Committee
<b>Transformative Education</b>	3. Engage in effective enrollment management to efficiently use finite resources while enhancing the student experience and timely graduation.	3A. Develop mechanisms for identifying low-enrolled programs to recommend improvements/ modifications to maximize efficient use of department/college resources.	Course Registration Coordination working group
<b>Transformative Education</b>	3. Engage in effective enrollment management to efficiently use finite resources while enhancing the student experience and timely graduation.	3B. Document the current enrollment trends and difficulties and provide recommendations to Provost.	Course Registration Coordination working group
<b>Transformative Education</b>	4. Enhance graduate education.	4A. Enhance marketing of programs by focusing on identifying current undergraduates interested in pursuing graduate education at UWL and developing an annual marketing campaign to alumni that will share information about online graduate programs aligned with their interests.	Graduate & Extended Learning, Graduate Programs and College Offices
<b>Transformative Education</b>	4. Enhance graduate education.	4B. Collect and analyze information about workload among graduate instructors.	Graduate & Extended Learning, Graduate Council, Deans
<b>Transformative Education</b>	4. Enhance graduate education.	4C. Develop a new incentive program to support faculty in grant-writing activities to secure external funding for graduate students, faculty, and programs.	Graduate & Extended Learning
<b>Transformative Education</b>	5. Expand international/global learning opportunities for all students.	5A. Plan a Spring 2025 trip to South Asia with senior administrator (Chancellor), IEE rep, Admissions rep and program faculty to visit partners (focus on MSE).	IEE, Admissions, Provost
<b>Pillar: Transformative Education</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
<b>Transformative Education</b>	5. Expand international/global learning opportunities for all students.	5B. Create an IEE Advisory board from key UWL constituents (ISO, Fulbright, Faculty Led, Cohort programs) as a sounding board for UWL experience.	IEE

<b>Transformative Education</b>	5. Expand international/global learning opportunities for all students.	5C. Propose a trial of an in-country recruiter for a South Asian country (India/China/Vietnam) to start Fall 2025.	Admissions/IEE
<b>Transformative Education</b>	6. Provide support for the academic components of key university initiatives such as community engagement, equity & diversity, Eagle Advantage, and sustainability.	6A. Community Engagement: Populate departmental homepages to include information about internships common for the department's programs.  6B. Create processes to help connect instructors with business and other community members for in-class sessions.	Career Services, UComm, Community Engagement Coordinator.  Community Engagement Coordinator & Colleges
<b>Transformative Education</b>	6. Provide support for the academic components of key university initiatives such as community engagement, equity & diversity, Eagle Advantage, and sustainability.	6C: Equity & diversity – Explore effective collaborations between college DEI Fellows, CATL, and the Equity Liaison program.	Inclusive Teaching Specialist and DEI Fellows
<b>Transformative Education</b>	6. Provide support for the academic components of key university initiatives such as community engagement, equity & diversity, Eagle Advantage, and sustainability.	6D. Eagle Advantage. Offer Eagle Advantage Infusion Training (goal of 20 additional instructional staff completing it in AY 2024-25).	Colleges, CATL & Career Services
<b>Pillar: Transformative Education</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
<b>Transformative Education</b>	6. Provide support for the academic components of key university initiatives such as community engagement, equity & diversity, Eagle Advantage, and sustainability.	6E. Sustainability – Work with University Communications to publicize inclusion of the new category of “The Planet that Sustains Us” within the General Education program and highlight sustainability aspects within major/minor curricula,	General Education Coordinator & Sustainability Coordinator

		(e.g. Environmental Studies Minor, Environmental Science Major, Sustainable Business Minor).	
<b>Pillar: Investing in Our People</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
<b>Invest in Our People</b>	1. Prioritize employee compensation.	1A. Advocate for the UW System Budget Request which includes pay plan, market, and merit components.	Vice Chancellor for Administration & Finance, Budget Director, Cabinet
<b>Invest in Our People</b>	1. Prioritize employee compensation.	1B. Review current inequities and develop plans for a long-term compensation strategy to address pay inequities and pay gap.	Vice Chancellor for Administration & Finance, Budget Director, Cabinet
<b>Invest in Our People</b>	2. Promote an environment of employee inclusion, ownership and engagement.	2A. Work with staff in shared governance groups and with D&I staff to promote current activities and currently available benefits while also identifying areas for possible improvement, particularly in areas of low or no-cost solutions.	Human Resources Staff
<b>Invest in Our People</b>	3. Create clear and consistent assessment and accountability policies for all employees.	3A. Review and inventory policies, procedures, and practices as they align with Workday HCM system and any Universities of Wisconsin System level policy change. Implement new policies, procedures, or practices as necessary.	Human Resources Staff
<b>Invest in Our People</b>	4. Encourage employees to utilize the Educational Assistance program.	4A. Include information in new employee on-boarding and orientation process.	Human Resources Staff
<b>Invest in Our People</b>	4. Encourage employees to utilize the Educational Assistance program.	4B. Inform employees via Campus Connection, HR Blog Posts, and on an individual basis as needed.	Human Resources Staff
<b>Pillar: Community Engagement</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
<b>Community Engagement</b>	1. Market and broker mutually beneficial relationships between UWL and private/public organizations in the greater La Crosse community, state and region.	1A. Continued relationship building with La Crosse Synergy Organizations (Chamber, DMI, LADCO, 7 Rivers Alliance and Explore La Crosse) to promote top internship sites, top employers of UWL alumni and top research sites in the community through an on-campus digital sign campaign.	Community Engagement Coordinator

		Slides run in fall, winter and spring. Slides will also be shared with additional on-campus constituents.	
<b>Community Engagement</b>	1. Market and broker mutually beneficial relationships between UWL and private/public organizations in the greater La Crosse community, state and region.	1B. Continued relationship building with La Crosse Synergy Organizations (Chamber, DMI, LADCO, 7 Rivers Alliance and Explore La Crosse) to create methods of cross-promotion and partnership with a focus on Handshake addressing current needs of the local workforce.	Community Engagement Coordinator, Career Services
<b>Community Engagement</b>	2. Initiate strategies that create and promote increased opportunities for community engagement that are academically grounded.	2A. Create an internship webpage as part of ongoing efforts to standardize academic department webpages to include a list of the top internship sites within each academic department.	UCOMM, Career Services
<b>Community Engagement</b>	2. Initiate strategies that create and promote increased opportunities for community engagement that are academically grounded.	2B. Explore the possibilities for creating a Community Engaged Learning (CEL) Certificate for students.	Associate Dean of CASSH, Community Engagement Coordinator, (GEL if badged non-credit microcredential)
<b>Community Engagement</b>	2. Initiate strategies that create and promote increased opportunities for community engagement that are academically grounded.	2C. Develop resources that contextualize CEL work for faculty retention/promotion materials reported in Digital Measures.	Associate Dean of CASSH, Community Engagement Coordinator
<b>Pillar: Community Engagement</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
<b>Community Engagement</b>	3. Advocate for integrating community engagement into the UWL campus culture.	3A. Promote the “ <a href="#">UWL Employees UGetConnected</a> ” group as an opportunity to help UWL staff and faculty find opportunities to connect with the Greater La Crosse Area with a focus on employee retention. Develop a flyer that HR will distribute to new hires.	Program Coord. For Civic Engagement and Leadership, Community Engagement Coordinator, UCOMM, HR

<b>Community Engagement</b>	3. Advocate for integrating community engagement into the UWL campus culture.	3B. Explore the <a href="#">Volunteer Time Off</a> (VTO) initiative offered at UW-Parkside.	Community Engagement Coordinator
<b>Community Engagement</b>	4. Determine and implement meaningful metrics to be used when measuring community engagement at UWL.	4A. Replace the UWL Community Idea Exchange metric (requests for partnership) with the Community Engaged Learning Program metric (number of course sections with a CEL designation).	Community Engagement Coordinator
<b>Community Engagement</b>	5. Onboard and integrate new campus leadership and other employees into community engagement activities.	5A. Work one-on-one with UWL's new Chancellor to introduce him to local business, civic, and non-profit leaders.	Community Engagement Coordinator
<b>Pillar: Achieving Excellence through Equity and Diversity</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
	1. <u>Student Success</u> : Create learning environments that sustain and support students from underrepresented backgrounds to achieve their academic and career goals within U.S. academia.	1A. Design and deliver a Universal Design in Teaching module for CATL's Inclusive Teaching Institute in January 2025.	ACCESS Center, CATL
<b>Pillar: Achieving Excellence through Equity and Diversity</b>	<b>Goal</b>	<b>24-25 Action Steps</b>	<b>Responsible Party(ies)</b>
	1. <u>Student Success</u> : Create learning environments that sustain and support students	1B. Assess and update New Student Orientation curriculum, related to RPD 4-21 requirements, to be delivered in Fall 2025.	CTJ, CATL, NSO, Residence Life

	from underrepresented backgrounds to achieve their academic and career goals within U.S. academia.		
	1. <u>Student Success</u> : Create learning environments that sustain and support students from underrepresented backgrounds to achieve their academic and career goals within U.S. academia.	1C. Offer new programming focused on discussion and civil dialogue as part of RPD 4-21 requirements.	CATL
	1. <u>Student Success</u> : Create learning environments that sustain and support students from underrepresented backgrounds to achieve their academic and career goals within U.S. academia.	1D. Connect with IEE and Study Abroad office to gauge the feasibility for creating more domestic study away options that sustain and support students from underrepresented backgrounds to achieve their academic and career goals.	CASSH DEI Fellow, IEE
	1. <u>Student Success</u> : Create learning environments that sustain and support students from underrepresented backgrounds to achieve their academic and career goals within U.S. academia.	1E. Recruit student participants, build curriculum, and launch new living-learning community (AERIE- Academy of Excellence: Representation in Involvement and Engagement) by Fall 2025.	OMSS, RGSS, Residence Life
	2. <u>Learning, Development, and Social Justice</u> : Ensure that all employees can be engaged in creating a dynamic and welcoming campus community.	2A. Develop Universal Design in Recruitment handout for hiring managers and search and screen committees.	ACCESS Center, E/AO
	2. <u>Learning, Development, and Social Justice</u> : Ensure that all employees can be engaged in	2B. Develop and share Disability 101 Workshop with departments across campus, highlighting disability as an identity.	ACCESS Center, CTJ

	creating a dynamic and welcoming campus community.		
	2. <u>Learning, Development, and Social Justice</u> : Ensure that all employees can be engaged in creating a dynamic and welcoming campus community.	2C. Review and update current processes and procedures for reporting campus incidents and the response process per new UWSA compliance guidelines.	Title IX, E/AAO, Youth Protections, BS&ET
	2. <u>Learning, Development, and Social Justice</u> : Ensure that all employees can be engaged in creating a dynamic and welcoming campus community.	2D. Create a process for current students, incoming students, and campus offices that clearly and accurately describes the requirements for the Pride Center LLC by Fall 25.	Pride
	2. <u>Learning, Development, and Social Justice</u> : Ensure that all employees can be engaged in creating a dynamic and welcoming campus community.	2E. Increase the number of students served by the Fostering Success for Independent Scholars program through the creation of targeted recruitment outreach and coordination with campus partners who also serve this population.	SSS
	2. <u>Learning, Development, and Social Justice</u> : Ensure that all employees can be engaged in creating a dynamic and welcoming campus community.	2F. Provide DEI professional development opportunities for CSH faculty and staff.	CSH
	3. <u>Ecological Excellence</u> : Build transformative and reciprocal relationships such that diversity, equity, and inclusion efforts are fully coordinated within the campus and community ecosystem.	3A. Develop a comprehensive Universal Design @ UWL resources webpage.	ACCESS Center, CATL
	3. <u>Ecological Excellence</u> : Build transformative and reciprocal relationships such that diversity, equity, and inclusion efforts are fully coordinated within the	3B. Charge an Indigenous Action Collaborative working group to bring together campus constituencies, who are working on indigenous community-focused initiatives, resulting in	VC and AVC D & I Division, various campus partners



	campus and community ecosystem.	recommendations that can be incorporated into campus strategic planning.	
	3. <u>Ecological Excellence</u> : Build transformative and reciprocal relationships such that diversity, equity, and inclusion efforts are fully coordinated within the campus and community ecosystem.	3C. Secure more funding for the SSS program in 2025-2030 with additional SSS-Disability and SSS-STEM grants.	SSS
	4. <u>Branding</u> : Uplift and share our progress related to student success in enrollment, retention, and graduation across populations to convey the impact of the institution's mission, vision, and values within the campus community, state, and region.	4A. Create and implement new communications plan that includes the development of new year-end report viewbook, website update, and social media protocols for the D & I Division.	VC/AVC D&I
	4. <u>Branding</u> : Uplift and share our progress related to student success in enrollment, retention, and graduation across populations to convey the impact of the institution's mission, vision, and values within the campus community, state, and region.	4B. Develop a prospective student classroom visit program that invites students to sit in on a current course from a variety of less common disciplines at UWL.	CASSH, Admissions

## Joint Planning &amp; Budget Committee Minutes

1:15 p.m., November 13, 2024

In person, Student Union 2310 – Senate Chambers

Guests may join via [MS Teams](#) [Meeting ID: 228 517 848 568      Passcode: 5K4Her]

Recorder: Ericson

PB Committee and Ex-Officio Members in Attendance:: Achenreiner, Bearhart (via Teams), Beeby, Brooks, Ericson, Figueroa, Galbraith, Grattan, Grunwald, Guyer, Jax, Kim, Kunkel, Latus, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Schweiger, Talbot, Thoune, Trnka (via Teams), Vinney, Walz, Weston, Wycoff-Horn, Yu, Ziegelman

## Agenda:

1. Approval of Meeting Minutes
  - a. 10/30/2024
    2. *Motion to approve – Andrew Ericson, second by Mary Grattan, approved unanimously.*
2. JPB Executive Committee
  - a. *Executive committee met recently, and discussed goals for the year, those are listed below. They also discussed future agenda topics and discussed a proposal to gather frequently asked questions, that could guide future meetings. To gather these FAQs, the executive committee plans to reach out the leaders of the different shared governance groups and ask for three or so FAQs from their respective group. There was feedback from the committee that it might be helpful to provide some “guardrails” for what sort of questions could be asked. Another recommendation to include a link to the Budget 101 presentation, when those requests go out. Other items or possible topics can continue to come in. Additionally, they set a schedule for remaining meetings of the academic year. There was concern about the April 9<sup>th</sup> date for JPB. That meeting will not be included in the meeting invitations.*
    - ii. JPB Goals for 2024-25
      - To consider each agenda item in the context of its support for the strategic plan
      - To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
      - To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL
    - iii. Agenda Items for Fall 2024 Meetings (presenters in parentheses)
    - iv. 11/13
      - Pillar leads for the four pillars have the 2024-25 action steps associated with the goals submitted to the Provost\* (Provost)

- 12/11
  - Minds Matter: Public Health Approaches to Student Mental Health (Provost and Crystal Champion)
  - v. Future Agenda Items
    - Chancellor's vision, philosophy, and leadership style in planning and budgeting processes. Chancellor's expectations from the JPB Committee
    - Chancellor's preliminary plan for strategic planning
  - vi. Potential Topics/Plans for Spring 2025
    - Gather frequently asked questions related to finance and budgeting
    - e.g., possibility of tuition waiver benefits for employees
    - Capital budget projects and priority at UWL
    - The Chief of Staff's role?
  - vii. Tentative Spring 2025 Meeting Dates for JPB
    - 1/29/2025
    - 2/12/2025
    - 2/26/2025
    - 3/12/2025
    - 3/26/2025
    - ~~4/09/2025~~
    - 4/23/2025
    - 5/07/2025
3. Chancellor's update
1. *Attended system meeting in Madison about budget, no decisions were made. Met with some key individuals last week about Prairie Springs. Continuing to meet with stakeholders in the community, and continuing to make rounds on-campus, recently met with a small group of CSH faculty and will meet with some CBA faculty soon. The Women's Soccer Team won their conference!*
    - i. *A question about what he is hearing from community stakeholders. Some are refamiliarized themselves with what is happening at UWL. Others are excited about opportunities to partner with the University.*
4. Provost's update
1. *No update.*
5. CFO's update
1. *Graff Hall HVAC phase 1 is nearing completion, phase 2 will begin in January. REC Climbing wall, is running 1 week behind. Planned reopening of Climbing Wall will occur in early Spring semester. Morris all-gender bathrooms project is completed.*
    - i. *Questions about the Tree Lighting Event, if there was a way leverage the event into something bigger given the great turnout.*

- *This was the second year of this event. There could be opportunities to leverage the good turnout. Suggestions are welcome! But there is some benefit to having a lowkey event, with little structure.*
  - ii. *ATP workshop on 11/14/24 from 1-3pm on the 3<sup>rd</sup> floor of the Student Union.*
- 6. Presentation: Pillar leads for the four pillars have the 2024-25 action steps associated with the goals submitted to the Provost\* (Provost)
  - i. *HLC will be looking for a plan with action steps that are being followed. The new action steps created by the pillar leads and approved by JPB last year. Universities of Wisconsin strategic plan goals were mapped against the UWL Strategic Plan and its subsequent goals. There has been some shifting of the pillar leads. Each action has its respective pillar, goal, 24-25 action, and responsible party(ies). Provost Morgan went through each pillar and their 24-25 action steps.*
  - a. Ask JPB feedback on the action steps developed for the goals
    - ii. *Question about overlap with Universities of Wisconsin Strategic Plan, regarding career progression, and it not being on UWL updated plan. Because the updated UWL plan is to guide until the next strategic plan, which will begin soon, not everything of interest to the campus may be included. But these sorts of topics will likely come up in the upcoming strategic planning process.*
    - iii. *Question about how this updated UWL Strategic Plan aligns with other divisions, colleges, etc. and their strategic plans. Generally, its preferred to have the campus-wide strategic plan to guide others, however if that falls behind, it may be necessary for individual units to go ahead and generate their own.*
    - iv. *Provost Morgan and Chancellor Beeby, both provide some insight and thoughts about the length of time that a strategic plan should be, and where this upcoming process would be starting at, which was effectively from scratch.*
      - *Motion to endorse by T.J. Brooks, Second by Troy Richter, unanimously approved.*
- 7. Adjournment
  - 1. *Meet adjourned at 2:16pm. Respectfully submitted, Andrew Ericson.*

\*Note: Pillar leads for the four pillars in the “Revised Strategic Planning Goals” document (please see updates highlighted in yellow)

1. Pillar: Investing in our People: **Stephanie Pope & Julia Getchell**
2. Pillar: Achieving Excellence Through Equity and Diversity: Stacy Narcotta-Welp and **Nevin Heard**
3. Pillar: Community Engagement: Lisa Klein and **Marie Moller**
4. Pillar: Transformative Education: Betsy Morgan and Sandy Grunwald

**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff

Ju Kim, Dean

Emma Latus, Student Association

Tim McAndrews, Faculty

Sandra Vinney, University Staff

Chia-Chen Yu, Chair

## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., December 11, 2024

In person, Student Union 2310 – Senate Chambers

Guests may join via [MS Teams](#) [Meeting ID: 291 499 424 330      Passcode: XbKZZE]

Recorder: Galbraith

Alternate Recorder: Grattan

## Agenda:

1. Introduction of New Committee Member and Update
  - a. New member Andrew Ives, ACS
  - b. Change of student representatives
    - Vote for a new student representative on the Executive Committee
2. Approval of Meeting Minutes
  - a. 11/13/2024
3. Discuss frequently asked questions related to finance and budgeting (please see the *FAQs* file)
  - a. Contacted the leaders of the four different shared governance groups on November 15 and asked for three or so FAQs from their respective groups
    - Student Association, Faculty Senate, Academic Staff Council (ASC), University Staff Council (USC)
2. Agenda Items for Spring 2025
  - a. Chancellor's preliminary plan for strategic planning (Chancellor)
    - Chancellor's vision, philosophy, and leadership style in planning and budgeting processes. Chancellor's expectations from the JPB Committee
    - Chancellor's preliminary plan for strategic planning
  - b. The Chief of Staff's role (Stacy Twite, Chief of Staff; 2/12 confirmed)
    - Introduction of the Chief of Staff's role. Responsibilities, preferred communication methods, role at the university and System levels
    - How the JPB could assist and what advice they can provide to the Chief of Staff and Chancellor's Office?
    - Any additional information the JPB Committee should learn about the Chief of Staff.
    - JPB Committee's additional suggestions and questions
  - c. Finance, Budget, & Capital Projects (Division of Administration and Finance; 3/12 confirmed)
    - Update of State and UW System budgets & capital projects
    - Capital budget projects and priority at UWL
    - Frequently asked questions related to finance and budgeting. This list of FAQs should be available at the end of this semester.

- CFO's vision, philosophy, and leadership style in planning and budgeting processes. How the JPB could assist and what advice they can provide?
  - JPB Committee's additional suggestions and questions
- d. Enrollment Forecasting and Planning for START and General Education & Enrollment Management (Provost's Office and Admission Office)
- How is the enrollment target set? The question is more about prospective students' interest in certain majors and colleges. Did UWL set a number of students to admit for each college? Or did UWL admit students regardless of students' intended majors?
  - Projection and enrollment management for current students and the START program
  - It would be helpful for the JPB to learn the level of coordination among offices and colleges for enrollment management.
  - Projection and plan for the change of enrollment from the new General Education Program
  - JPB Committee's additional suggestions and questions
3. Spring 2025 Meeting Dates for JPB (presenters in parentheses)
- 1/29/2025  
2/12/2025: The Chief of Staff's role (Chief of Staff, confirmed)  
2/26/2025  
3/12/2025: Finance, Budget, & Capital Projects (CFO, confirmed)  
3/26/2025  
4/23/2025: Discussion of future JPB goals (tentative)  
5/07/2025: Wrap-up & conclusion (tentative)
4. Chancellor's update
5. Provost's update
6. CFO's update
7. Presentation: Minds Matter: Public Health Approaches to Student Mental Health (Provost and Crystal Champion, Counseling Services Director)
8. Adjournment

### **JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
3. To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL

**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff

Ju Kim, Dean

Emma Latus, Student Association

Tim McAndrews, Faculty

Sandra Vinney, University Staff

Chia-Chen Yu, Chair



**FAQs Related to Finance and Budgeting**  
(last revised: 12/6/2024)

**I. Academic Staff Council (ASC)**

**II. Faculty Senate**

**III. Student Association**

1. What are the top financial priorities for the upcoming fiscal year?
2. How is the success of financial investments measured?
3. Is there a plan in place if state funding were to decrease?

Submitted by Emma Latus, President of UWL Student Association, on behalf of the Student Association

**IV. University Staff Council (USC)**

1. Compression. Wages of staff that have been employed for several years matches the compensation of new hires. This creates a moral issue as well as a retention problem.
2. Progression. University Staff welcomes the ability to better themselves for personal reasons as well as to benefit UWL and the campus community.
3. Wages. As you mentioned, low wages continue to be a frustration. Right now, a Custodian at UWL starts at \$16.00 and could go to any local school district where the starting wage is at least \$19.00 with similar benefits. Likewise, an Admin Assistant at UWL can go to Western, La Crosse County or either of the local hospitals and start at \$5.00 - \$6.00 more per hour.

Submitted by Kim Schliebe, Chair of University Staff Council (USC), on behalf of the USC



Joint Planning &  
Budget 12/11/2024

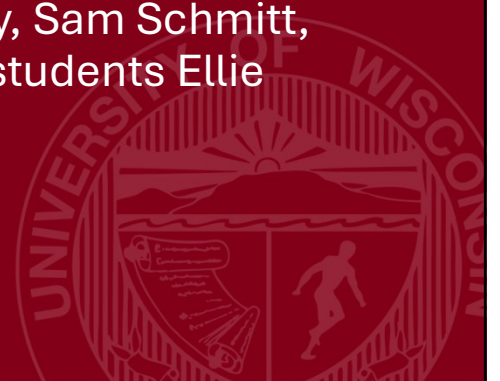


1



## Current Members

Crystal Champion, Betsy Morgan, Patrick Heise, Issy Beach, Michele Petit, Kaylie Connaughty, Sam Schmitt, Catherine Kolkmeier, Andrew Ives, and students Ellie Matejka and Rachel Schmitt.



2

## Higher Learning Commission (HLC)

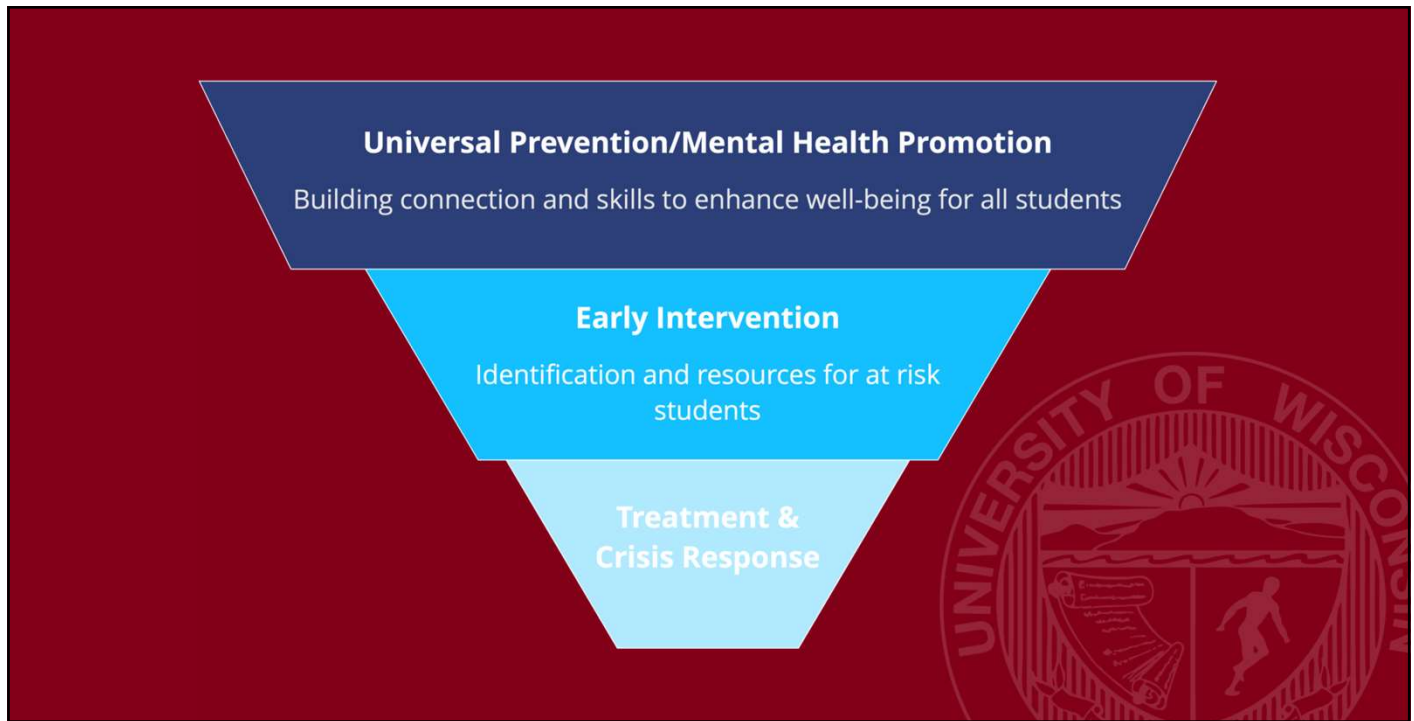
- Quality Initiative
  - "The institution designs and proposes its own Quality Initiative to suit its present concerns or aspirations."
  - HLC approved UWL's Minds Matter: 2022-2025

3

## Minds Matter: Public Health Approaches to Student Mental Health

The initiative focuses on a public health approach to promoting mental health with a focus on enhancing student success through increased attention to a healthy campus environment.

4



5

## Three Year Overview

- YEAR 1 (2023-2024)
  - Landscape Analysis
  - Streamlined & Focused Web Resources
- YEAR 2 (2023-2024)
  - Focus on Faculty/Staff Awareness of Resources for Students
- YEAR 3 (2024-2025)
  - Assessment
  - Maintenance

6

## Year 1: Landscape Analysis Employee Examples

- UWL Trainings/Development
  - RAs – Residence Hall trainings with CTC
  - Police – required mental health training
- Faculty/Staff
  - Kognito, joint CTC/CATL workshops



7

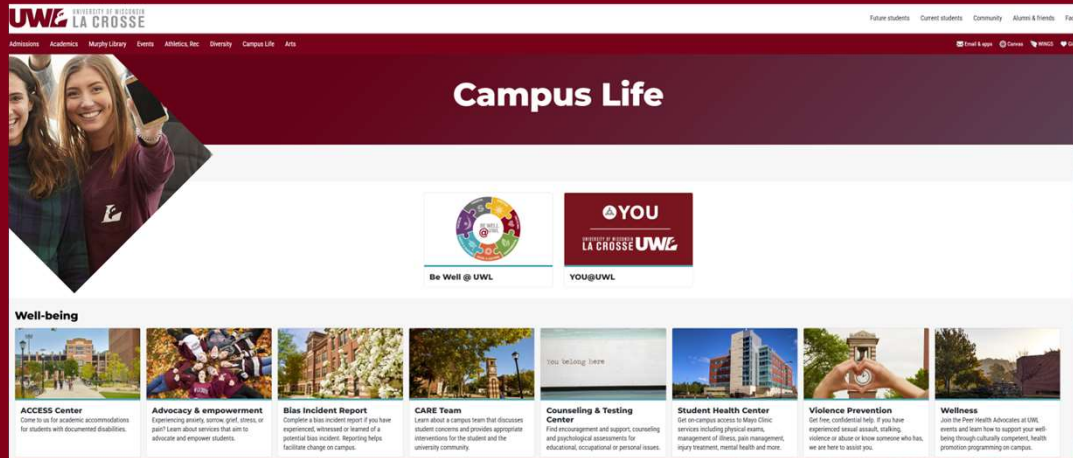
## Year 1: Landscape Analysis Student Examples

- What are students used to?
  - Feeder High Schools – Mental Health Resources
- Screenings
  - Athletes
- Curriculum – FYS100, Recreation Management etc.
- Co-Curriculum
  - You@
  - Rec Sports



8

## Year 1: Website (Canvas/Navigate)



9

## Year 2: Focus on Faculty Staff

**SURVEY –**  
main take-away –  
simplify directions  
to resources

**UWL**  
**MINDS MATTER**

**Helping a student in mental health distress**

**University Police (Emergency 608.789.9999)**  
Immediate need for physical assistance

**UWL Counseling and Testing Center (608.785.8073)**  
Business hours consultations about students  
Immediate help for students  
Establishing regular counseling care for students

**Office of Student Life (608.785.8062)**  
General referral for student in distress  
Student declines Counseling referral  
Student behavior indicates reason for concern

**Suicide and Crisis Lifeline (988)**  
24/7 nation-wide crisis response

**Help with assessing level of assistance**

### Helping distressed students

#### Does the student need IMMEDIATE assistance?

##### Yes

The student's conduct is clearly reckless, disorderly, dangerous or threatening and is suggestive of immediate harm to self or others in the community.

Call 911



Signs of a distressed student

##### Not sure

Indicators of distress are observed but severity is unclear. The interaction has left you feeling uneasy or concerned.

Contact Student Life or Counseling for a consultation.



When should I refer students?

##### No

There is no concern for the student's or others' immediate safety, but student is having significant academic and/or personal issues.

Refer to Student Life or an appropriate campus resource.



What to do when a student is disruptive

10



## Year 2: Wellness Week Campaign



Wellness Week occurs during the 6th week of classes in the Fall.

Each day of the week focuses on a different area of holistic wellness and is promoted primarily through social media aimed at students in terms of on-campus resources and self-help content from [YOU@UWL](https://you.uwlax.edu).

- **Monday:** Mindfulness and balance
- **Tuesday:** Academics and grades
- **Wednesday:** Sleep, stress and anxiety
- **Thursday:** Financial and basic needs
- **Friday:** Fitness and nutrition

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## Year 3: Assessment and Maintenance

- Students
  - Utilize current/regular surveys
    - NSSE
    - Residence Life
- Faculty/Staff
  - Assess in Spring 2023 & Fall 2024
    - 18 months later
    - Not longitudinal – two snapshots in time with many of the same people

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## Student Residence Life Survey

Students living in the residence halls complete a Fall (end-of-term) survey which included 5 items specific to Mental Health Issues.

Items included:

- *Ratings of their own level of well-being*
- *Rating of general student body well-being*
- *Knowledge of mental health resources*
- *Likelihood of seeking help when needed for mental health*
- *Possible obstacles to seeking treatment.*



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## Minds Matter: Survey of Faculty/Staff

**Focus: Faculty/Staff knowledge of student mental health and referrals for care.**

**Response Rates:**

**Spring 2023: 514/1255 or 41%**

**Fall 2024 : 473/1125 or 42%**

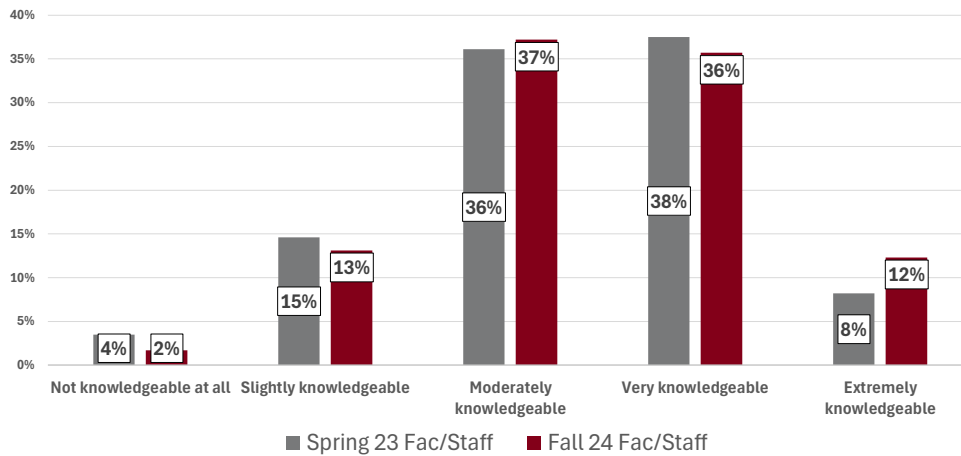


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## Fac/Staff Responses

Extent to which you feel knowledgeable about resources available to students with non-immediate mental health concerns



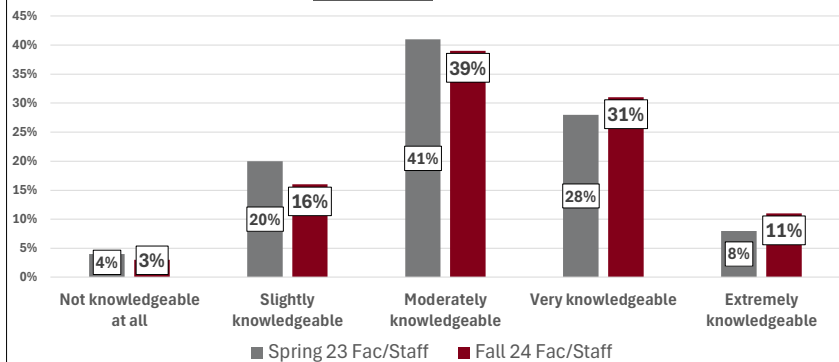
**Knowledge of Resources for Non-Immediate Mental Health Concerns**

15

UNIVERSITY OF WISCONSIN  
LA CROSSE **UWL**

## Fac/Staff Knowledge of Resources for Immediate Mental Health Concerns

Extent to which you feel knowledgeable about resources available to students with immediate crisis mental health concerns



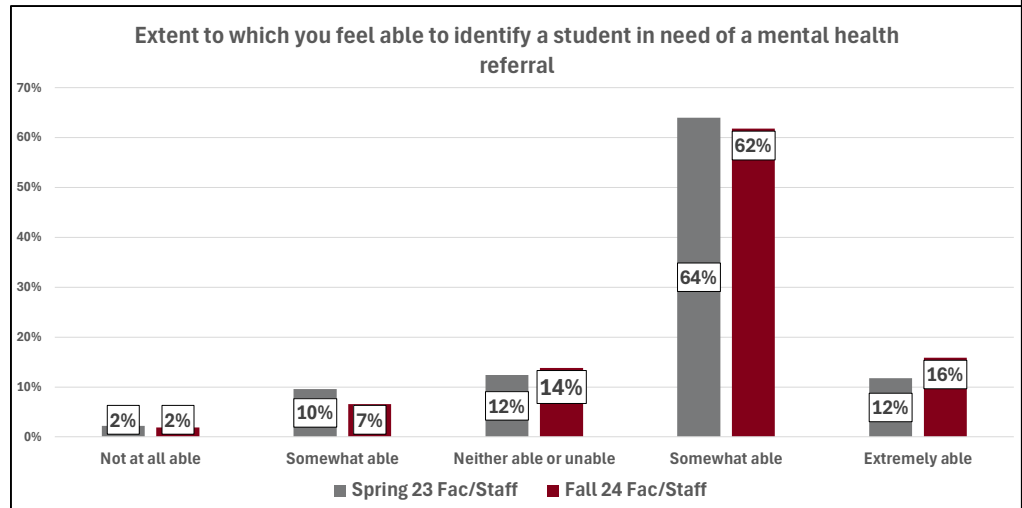
**Good levels overall – and an increase**

16

## Fac/Staff Responses

**Ability to Identify Students in Need of Mental Health Referral**

**Overall – good levels of ability**



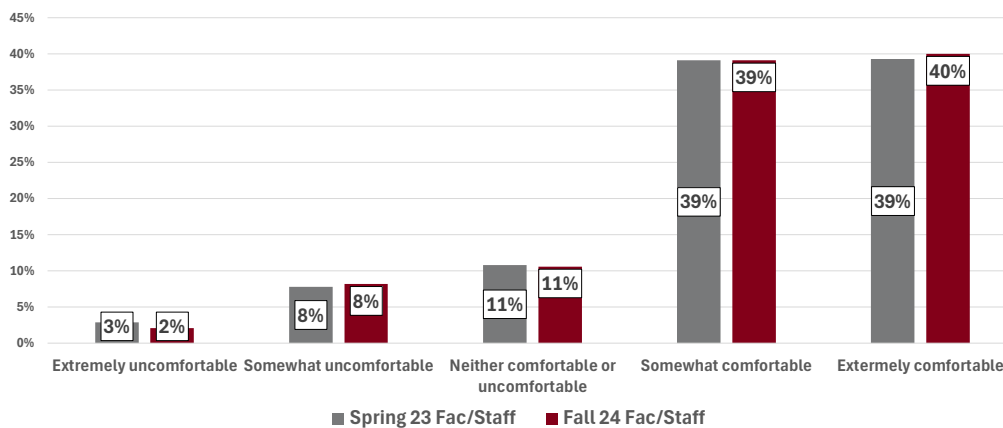
17

## Fac/Staff Responses

Please indicate the extent to which you feel comfortable referring students with mental health concerns to resources

**Comfort with Referring Students to Mental Health Resources**

**Overall – good levels of comfort**



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## Current Instructor Actions Related to Mental Health Resources

Across both Survey Periods (Spring 2023, Fall 2024):

- 30% of instructors indicated using class time to cover mental health resource information.
- Close to 60% of instructors have a mental health statement on their syllabus.
- About 35-40<sup>BMO</sup> instructors indicated other activities.
  - individual check-ins with students, providing resources on Canvas, mentioning resources during advising or one on one meetings, offering to walk students to the counseling center.



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## Fac/Staff Compared to Student Responses



20

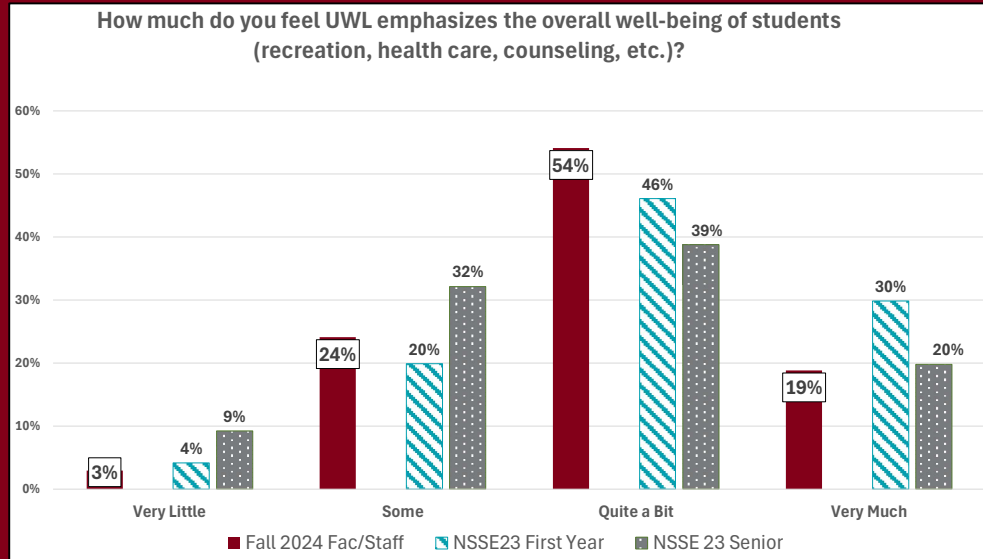
**BMO** [@Patrick Barlow] is this percent?

Betsy Morgan, 2024-12-08T21:20:17.858

**0 0** This is a count , 43 other responses in 2023 , 35 in 2025. Didnt do a deep code on what they said. Just some examples. mostly a lot of one to one efforts.

Patrick Barlow, 2024-12-09T19:25:39.006

## UWL Emphasis on Student Well-being

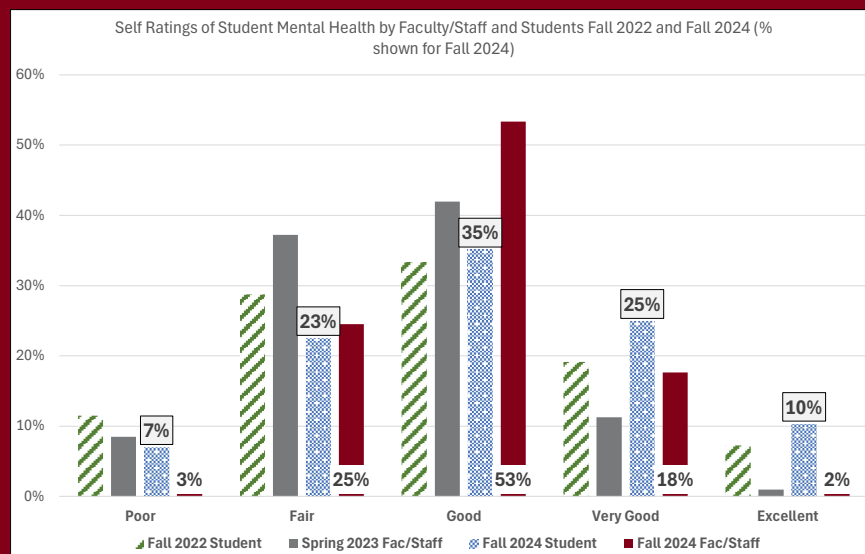


21

UNIVERSITY OF WISCONSIN  
**LA CROSSE UWL**

**Faculty/Staff and Student Self Ratings of Mental Health (Fall 2024 % indicated)**

**Students rated their mental health more positively than faculty/staff**



22

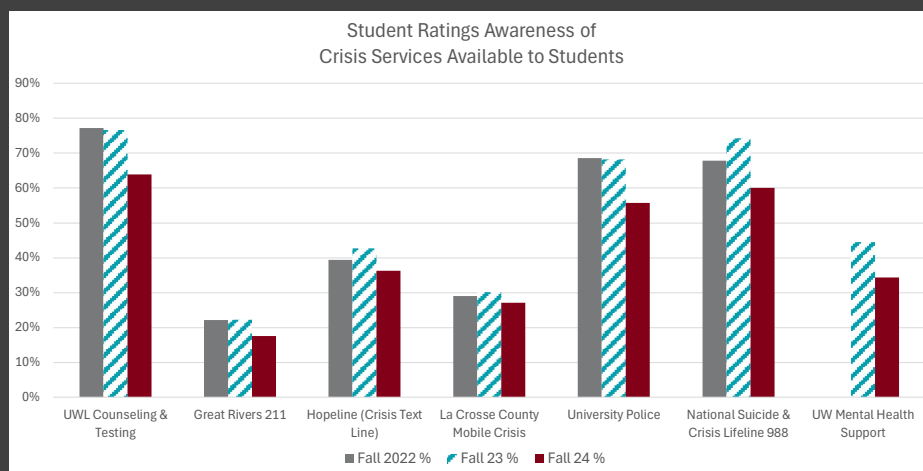
## Student Responses – Annual Res Life Assessment

- Note: Over-representative of first years (compared to sophomore, juniors, and seniors)

Response Rates of Students  
(Residence Life population of  
3200) - 60-80% '22-'24

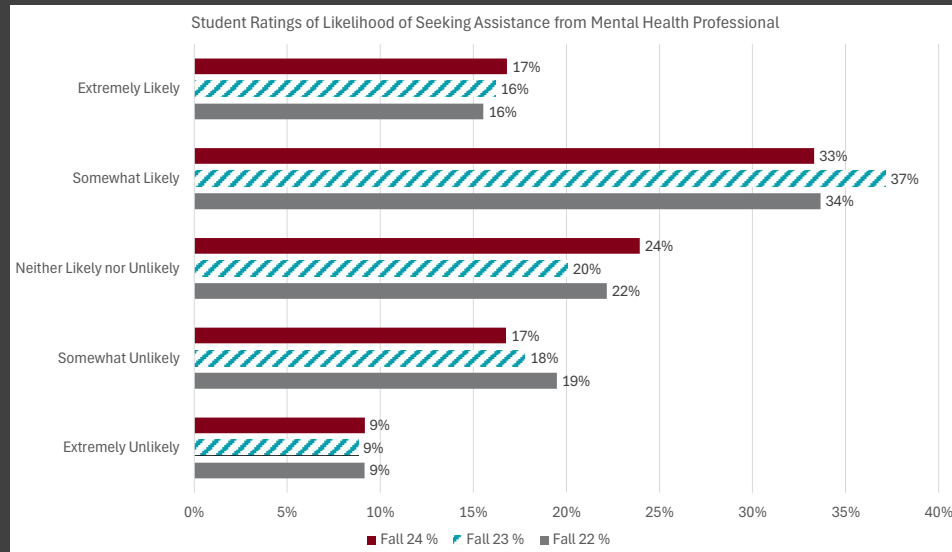
23

### Students Awareness of Crisis Resources

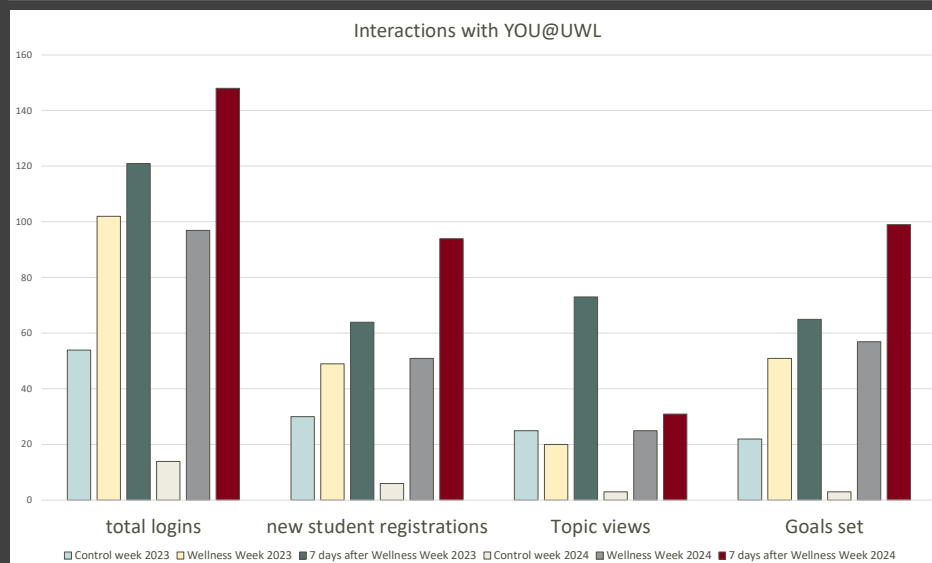


24

## Students Likelihood of Seeking Mental Health Help when Needed



25

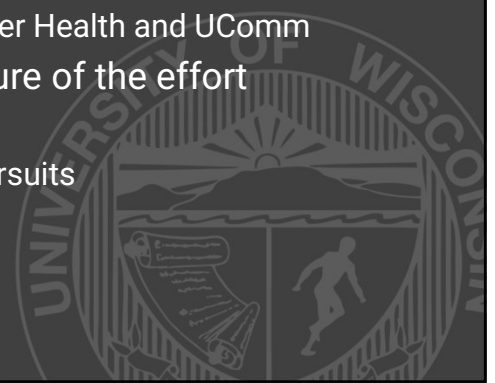


## YOU@UWL Participation and Impact of Wellness Week

26

## Overall appraisal of the quality initiative?

- A good choice for UWL to focus on mental health
- Improvements made in coordination of efforts
  - E.g. Collaboration of CTC, Wellness Coordinator, Peer Health and UComm
- Less evidence of the "overall" public health nature of the effort
- Goals: Increased focus on resilience
  - Building skills within academic and co-curricular pursuits



27

**Questions?  
Random Thoughts?  
Feedback?  
Memes?**



28



## Joint Planning &amp; Budget Committee Minutes

1:15 p.m., December 11, 2024

In person, Student Union 2310 – Senate Chambers

Guests may join via [MS Teams](#) [Meeting ID: 291 499 424 330      Passcode: XbKZZE]

Recorder: Galbraith

JPB Committee and Ex-Officio Members in Attendance: Achenreiner, Bearhart (via Teams), Beeby, Brooks, Engen, Ericson, Figueroa, Galbraith, Grattan, Grunwald (via Teams), Guyer (via Teams), Jax, Kim, Kunkel, Ladd-Winders, Latus, McAndrews (via Teams), Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Schweiger, Talbot (via Teams), Thomsen, Thoune, Trnka, Vinney, Walz (via Teams), Weston, Yu, Ziegelman

## Agenda:

1. Introduction of New Committee Member and Update
  - a. New member Andrew Ives, ACS
  - b. Change of student representatives
    - Vote for a new student representative on the Executive Committee (current student rep Emma Latus cannot attend spring meetings)
    - M/S/P that Avery Ladd-Winders serve as the new student rep
2. Approval of Meeting Minutes
  - a. 11/13/2024
    - M/S/P
3. Discuss frequently asked questions related to finance and budgeting (please see the *FAQs* file)
  - a. Contacted the leaders of the four different shared governance groups on November 15 and asked for three or so FAQs from their respective groups
    - Student Association, Faculty Senate, Academic Staff Council (ASC), University Staff Council (USC)
    - Got Q's from two groups (below), will follow up with the other two groups in the following weeks; comments were taken from JPB members regarding these items
    - Summary: CFO Pope said she can address SA's Q's in spring mostly; PV Morgan (and others) want to address the USC Q's but need a tuition increase/ steady enrollment to do so

Student Association (SA)

1. What are the top financial priorities for the upcoming fiscal year?
2. How is the success of financial investments measured?
3. Is there a plan in place if state funding were to decrease?

University Staff Council (USC)

1. Compression. Wages of staff that have been employed for several years matches the compensation of new hires. This creates a moral issue as well as a retention problem.
  2. Progression. University Staff welcomes the ability to better themselves for personal reasons as well as to benefit UWL and the campus community.
  3. Wages. As you mentioned, low wages continue to be a frustration. Right now, a Custodian at UWL starts at \$16.00 and could go to any local school district where the starting wage is at least \$19.00 with similar benefits. Likewise, an Admin Assistant at UWL can go to Western, La Crosse County or either of the local hospitals and start at \$5.00 - \$6.00 more per hour.
2. Agenda Items for Spring 2025
- a. Chancellor's preliminary plan for strategic planning (Chancellor)
    - Chancellor's vision, philosophy, and leadership style in planning and budgeting processes. Chancellor's expectations from the JPB Committee
    - Chancellor's preliminary plan for strategic planning
  - b. The Chief of Staff's role (Stacy Twite, Chief of Staff; 2/12 confirmed)
    - Introduction of the Chief of Staff's role. Responsibilities, preferred communication methods, role at the university and System levels
    - How the JPB could assist and what advice they can provide to the Chief of Staff and Chancellor's Office?
    - Any additional information the JPB Committee should learn about the Chief of Staff.
    - JPB Committee's additional suggestions and questions
  - c. Finance, Budget, & Capital Projects (Division of Administration and Finance; 3/12 confirmed)
    - Update of State and UW System budgets & capital projects
    - Capital budget projects and priority at UWL
    - Frequently asked questions related to finance and budgeting. This list of FAQs should be available at the end of this semester.
    - CFO's vision, philosophy, and leadership style in planning and budgeting processes. How the JPB could assist and what advice they can provide?
    - JPB Committee's additional suggestions and questions
  - d. Enrollment Forecasting and Planning for START and General Education & Enrollment Management (Provost's Office and Admission Office)
    - How is the enrollment target set? The question is more about prospective students' interest in certain majors and colleges. Did UWL set a number of students to admit for each college? Or did UWL admit students regardless of students' intended majors?
    - Projection and enrollment management for current students and the START program

- It would be helpful for the JPB to learn the level of coordination among offices and colleges for enrollment management.
- Projection and plan for the change of enrollment from the new General Education Program
- JPB Committee's additional suggestions and questions

3. Spring 2025 Meeting Dates for JPB (presenters in parentheses)

1/29/2025

2/12/2025: The Chief of Staff's role (Chief of Staff, confirmed)

2/26/2025

3/12/2025: Finance, Budget, & Capital Projects (CFO, confirmed)

3/26/2025

4/23/2025: Discussion of future JPB goals (tentative)

5/07/2025: Wrap-up & conclusion (tentative)

4. Chancellor's update

- Commencement is this Sunday- come join us!
- Keep people in mind who work on campus over the break
- Board of Regents meeting last week- response to the Deloitte Report on UWSA finances, two new programs approved
- Met with Sparta Chamber of Commerce (never had a UWL Chancellor there before)
- Talked about completion of Prairie Springs with legislators
- Budget process could be delayed
- Holiday Luncheon Dec. 12

5. Provost's update (ceded time since presenting later on)

6. CFO's update

- Will hear more as budget process continues
- For now, budget parameters are on Budget Office website
  - Composite fringe rate as part of transition to Workday does not impact the individual (if anyone gets questions)
  - Pay plan increase request is asking the State to cover the whole increase this time

7. Presentation: Minds Matter: Public Health Approaches to Student Mental Health (Provost and Crystal Champion, Counseling Services Director)

Summary:

- It was a good choice to focus on mental health
- Improvements were made in coordinating efforts across campus
- Less evidence of an "overall" public health nature of the effort
- Goals- increase the focus on resilience

Questions were then addressed from JPB

8. Adjournment at 2:41 pm

Minutes submitted by Anne Galbraith

**JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
3. To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL

**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Emma Latus, Student Association  
Tim McAndrews, Faculty  
Sandra Vinney, University Staff  
Chia-Chen Yu, Chair

## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., January 29, 2025

In person, Student Union 2310 – Senate Chambers

- Guests may join via [MS Teams](#) [Meeting ID: 293 219 754 141 Passcode: pnYM2W]

Recorder: Grattan

Alternate Recorder: Kim

## Agenda:

1. Introduction of New Committee Members and Updates
  - a. New members for replacement. Welcome!
    - Andrew Ives, ACS
    - Hailee Gray, Student Association
    - Sheri Craig, University Staff Council
  - b. Vote for a new USC representative on the Executive Committee
2. Approval of Meeting Minutes
  - a. 12/11/2024
3. Continue to discuss frequently asked questions related to finance and budgeting (please see the *FAQs* file)
  - a. Discuss Faculty Senate's and Academic Staff Council's (ASC) FAQs today (Student Association's and USC's FAQs were discussed in the December meeting)
4. Agenda Items for Spring 2025
  - a. The Chief of Staff's role (Stacy Twite, Chief of Staff; 2/12 confirmed)
    - Introduction of the Chief of Staff's role. Responsibilities, preferred communication methods, role at the university and System levels
    - How the JPB could assist and what advice they can provide to the Chief of Staff and Chancellor's Office?
    - Any additional information the JPB Committee should learn about the Chief of Staff.
    - JPB Committee's additional suggestions and questions
  - b. Finance, Budget, & Capital Projects (Division of Administration and Finance; 3/12 confirmed)
    - Update of State and UW System budgets & capital projects
    - Capital budget projects and priority at UWL
    - Frequently asked questions related to finance and budgeting. This list of FAQs should be available at the end of this semester.
    - CFO's vision, philosophy, and leadership style in planning and budgeting processes. How the JPB could assist and what advice they can provide?
    - JPB Committee's additional suggestions and questions
  - c. Enrollment Forecasting and Planning for START and General Education & Enrollment Management (Provost's Office and Admission Office)
    - How is the enrollment target set? The question is more about prospective students' interest in certain majors and colleges. Did UWL set a number of students to

admit for each college? Or did UWL admit students regardless of students' intended majors?

- Projection and enrollment management for current students and the START program
  - It would be helpful for the JPB to learn the level of coordination among offices and colleges for enrollment management.
  - Projection and plan for the change of enrollment from the new General Education Program
  - JPB Committee's additional suggestions and questions
5. Spring 2025 Meeting Dates for JPB (presenters in parentheses)  
1/29/2025  
2/12/2025: The Chief of Staff's role (Chief of Staff, confirmed)  
2/26/2025  
3/12/2025: Finance, Budget, & Capital Projects (CFO, confirmed)  
3/26/2025  
4/23/2025: Discussion of future JPB goals (tentative)  
5/07/2025: Wrap-up & conclusion (tentative)
6. Chancellor's update  
a. Updates on Strategic Planning
7. Provost's update
8. CFO's update
9. Adjournment

### **JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
3. To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL

### **JPB Executive Committee Members**

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Avery Ladd-Winders, Student Association  
Tim McAndrews, Faculty  
Vacant, University Staff  
Chia-Chen Yu, Chair

## FAQs Related to Finance and Budgeting

(last revised: 1/23/2025)

### I. Academic Staff Council (ASC)

1. **Career Progression** - (Similar to USC question). How can one progress in their current role without moving to a new role or leaving UWL? Salary, professional development, responsibilities are all included in the ask.
2. **Overload payments** for Academic Staff - Current policy (approved only by Faculty Senate) explicitly states that Academic Staff are not eligible for overload payments unless it is a Director position or above. Request for review of policy and consideration of the various vacancies that remain open for extended time where the work still needs to be done.
3. **Recruitment/Turnover** - What data does HR collect and how we can we use that to make informed budget and planning decisions? For example, how many qualified applicants are we getting for positions on campus? How many searches are failing due to low applicant pools? How many offers are declined? Do we have data on why? Have we done a review of our HR Communication to applicants in terms of best practices?
4. **Strategic Plan - 360 Evaluations**; And/or feedback for Cabinet members - What is the path for that?

Submitted by Lisa Weston and Pearl Bearhart, ASC Chairs, on behalf of the Academic Staff Council

### II. Faculty Senate

1. Where can I best access information updates on budget related topics such as:
  - Upcoming & ongoing capital building projects
  - News & status of system budget requests
  - Details about how the current budget and proposed budgets allocate funds  
(agreed: this is key)
2. I suspect most faculty don't know what they don't know about finance and budget, so they don't know what to ask about, or what concerns they should be prioritizing. Producing and distributing a one-page summary of new information, unresolved budget priorities, and upcoming events/decisions once a semester/year would be helpful.
3. Not counting salaries, what percent of the budget is spent directly on instruction? (i.e., new or replacement classroom equipment including classroom computers, fixing broken classroom equipment, renovating or modernizing classrooms, funding curriculum redesign grants, etc.)? And what is the breakdown of the percent of the budget that is spent **not** on instruction, and "indirectly" on instruction (and what are examples of what "indirect" means?)
4. Which of the departments/ units on campus are "self-funded", either fully or partially, and how are they expected to make the money needed to run their department/ unit?

Submitted by Greg Ormes, Chair of Faculty Senate, on behalf of the Faculty Senate

### **III. Student Association** (Discussed these Qs in the Dec. meeting)

1. What are the top financial priorities for the upcoming fiscal year?
2. How is the success of financial investments measured?
3. Is there a plan in place if state funding were to decrease?

Submitted by Emma Latus, President of UWL Student Association, on behalf of the Student Association

### **IV. University Staff Council (USC)** (Discussed these Qs in the Dec. meeting)

1. Compression. Wages of staff that have been employed for several years matches the compensation of new hires. This creates a moral issue as well as a retention problem.
2. Progression. University Staff welcomes the ability to better themselves for personal reasons as well as to benefit UWL and the campus community.
3. Wages. As you mentioned, low wages continue to be a frustration. Right now, a Custodian at UWL starts at \$16.00 and could go to any local school district where the starting wage is at least \$19.00 with similar benefits. Likewise, an Admin Assistant at UWL can go to Western, La Crosse County or either of the local hospitals and start at \$5.00 - \$6.00 more per hour.

Submitted by Kim Schliebe, Chair of University Staff Council (USC), on behalf of the USC



## Joint Planning &amp; Budget Committee Minutes

1:15 p.m., January 29, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via [MS Teams](#) [Meeting ID: 293 219 754 141 Passcode: pnYM2W]

Recorder: Grattan

JPB Committee and Ex-Officio Members in Attendance: Achenreiner, (via Teams) Bearhart (via Teams), Beeby, Brooks, Craig, Engen, Ericson, Figueroa, Galbraith, Grattan, Guyer, Ives, Jax, Kim, Kunkel, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Schweiger (via Teams), Talbot (via Teams), Thomsen, Trnka, Walz (via Teams), Weston, Yu

Excused: Thoun, Ziegelman

## Agenda:

1. Introduction of New Committee Members and Updates
  - a. New members for replacement. Welcome!
    - Andrew Ives, ACS
    - Hailee Gray, Student Association
    - Sheri Craig, University Staff Council
  - b. Vote for a new USC representative on the Executive Committee
    - Mary Grattan was elected to serve as the USC representative.
2. Approval of Meeting Minutes
  - a. 12/11/2024 – M/S/P
3. Continue to discuss frequently asked questions related to finance and budgeting (please see the *FAQs* file)
  - a. Discuss Faculty Senate's and Academic Staff Council's (ASC) FAQs today (Student Association's and USC's FAQs were discussed in the December meeting)
    - ASC clarified their FAQs
    - Faculty Senate will share updates on their FAQs at 2/12 meeting
    - All FAQs will be addressed by the appropriate Director(s) in upcoming meetings
4. Agenda Items for Spring 2025
  - a. The Chief of Staff's role (Stacy Twite, Chief of Staff; 2/12 confirmed)
    - Introduction of the Chief of Staff's role. Responsibilities, preferred communication methods, role at the university and System levels
    - How the JPB could assist and what advice they can provide to the Chief of Staff and Chancellor's Office?
    - Any additional information the JPB Committee should learn about the Chief of Staff.
    - JPB Committee's additional suggestions and questions
  - b. Finance, Budget, & Capital Projects (Division of Administration and Finance; 3/12 confirmed)
    - Update of State and UW System budgets & capital projects

- Capital budget projects and priority at UWL
  - Frequently asked questions related to finance and budgeting. This list of FAQs should be available at the end of this semester.
  - CFO's vision, philosophy, and leadership style in planning and budgeting processes. How the JPB could assist and what advice they can provide?
  - JPB Committee's additional suggestions and questions
- c. Enrollment Forecasting and Planning for START and General Education & Enrollment Management (Provost's Office and Admission Office)
- How is the enrollment target set? The question is more about prospective students' interest in certain majors and colleges. Did UWL set a number of students to admit for each college? Or did UWL admit students regardless of students' intended majors?
  - Projection and enrollment management for current students and the START program
  - It would be helpful for the JPB to learn the level of coordination among offices and colleges for enrollment management.
  - Projection and plan for the change of enrollment from the new General Education Program
  - JPB Committee's additional suggestions and questions
5. Spring 2025 Meeting Dates for JPB (presenters in parentheses)
- 1/29/2025
- 2/12/2025: The Chief of Staff's role (Chief of Staff, confirmed)
- 2/26/2025
- 3/12/2025: Finance, Budget, & Capital Projects (CFO, confirmed)
- 3/26/2025
- 4/23/2025: Discussion of future JPB goals (tentative)
- 5/07/2025: Wrap-up & conclusion (tentative)
6. Chancellor's update
- a. Welcome to the Spring semester. Stay focused on the mission of UWL to best support our students.
  - b. Items the Chancellor's Office is working on
    - i. Budget process at both the State and UWL levels
    - ii. Prairie Springs push, speaking to the community and legislature
    - iii. Preparing for HLC visit
    - iv. Returning enrollment is strong. Spring Transfer student goal was 90 and we admitted 132.
    - v. Looking at what affect Direct Admit Wisconsin will have on UWL enrollment in the future.
  - c. Update on Strategic Planning
    - i. Co-Chairs: Stacy Twite, Chief of Staff and Dr. Whitney George
    - ii. Additional Executive Committee members
      - 1. Enildo Delgado
      - 2. Nevin Heard
      - 3. Kim Schliebe

4. Andrew Scott
    5. Troy Richter
    6. Lisa Walker
  - iii. Timeline
    1. Winter – Committee formation and roadmap finalized
    2. Spring – SWOT analysis, data gathering and townhall
    3. Summer – External engagement, refining themes and begin drafting
    4. Fall – Draft pillars, goals, feedback and refinement
    5. Winter – Plan finalized (Dec 2026), endorsement request
  - iv. UWL will not be hiring an outside consultant.
7. Provost's update
  - a. Planning for START. Working through challenges related to students getting out early
  - b. Hiring challenges; salaries are the main issue
  - c. Working on advising holds so students don't miss their registration appointed time
  - d. Working with Faculty Senate on A.P. exams; how will they credits transfer to UWL
  - e. Reviewing enrollment trends in different programs
8. CFO's update
  - a. ATP/WORKDAY is coming. Please attend trainings available now. More formal training will be rolled out in March. Training will be based on your assigned roll.
  - b. WORKDAY cut over dates should be posted soon. There will be a black out period. End of year business services deadlines may be bumped up this year.
  - c. Name the new cadet, a double doodle has been added to the force and will start Feb 13, 2025
9. Adjournment: 2:15 pm

### **JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
3. To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL

### **JPB Executive Committee Members**

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Avery Ladd-Winders, Student Association  
Tim McAndrews, Faculty  
Mary Grattan, University Staff  
Chia-Chen Yu, Chair

## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., February 12, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via Teams [[Join the meeting now](#), Meeting ID: 215 410 043 365]

Passcode: sY2nW3Z3]

Recorder: Kim

Alternate Recorder: Kunkel

## Agenda:

1. Introduction of New Committee Member
  - a. New member Grant Hohman, Student Association. Welcome!
    - Replacement of Avery Ladd-Winders
  - b. Vote for a new student representative on the Executive Committee
2. Approval of Meeting Minutes
  - a. 1/29/2025
3. Continue to discuss frequently asked questions related to finance and budgeting (please see the *FAQs* file)
  - a. Discuss Faculty Senate's FAQs today (Student Association's, ASC's, and USC's FAQs were discussed in the December and January meetings)
4. Agenda Items for Spring 2025 (**newly added questions highlighted in yellow**)
  - a. The Chief of Staff's role (Stacy Twite, Chief of Staff; 2/12 confirmed)
    - Introduction of the Chief of Staff's role. Responsibilities, preferred communication methods, role at the university and System levels
    - How the JPB could assist and what advice they can provide to the Chief of Staff and Chancellor's Office?
    - **JPB's role in strategic planning**
    - Any additional information the JPB Committee should learn about the Chief of Staff.
    - JPB Committee's additional suggestions and questions
  - b. Finance, Budget, & Capital Projects (Division of Administration and Finance; 3/12 confirmed)
    - Update of State and UW System budgets & capital projects
    - Capital budget projects and priority at UWL
    - Frequently asked questions related to finance and budgeting. This list of FAQs should be available at the end of this semester.
    - CFO's vision, philosophy, and leadership style in planning and budgeting processes. How the JPB could assist and what advice they can provide?
    - JPB Committee's additional suggestions and questions
  - c. Enrollment Forecasting and Planning for START and General Education & Enrollment Management (Provost's Office and Admission Office)

- How is the enrollment target set? The question is more about prospective students' interest in certain majors and colleges. Did UWL set a number of students to admit for each college? Or did UWL admit students regardless of students' intended majors?
  - What is UWL's maximum capacity for incoming students and total enrollment? At what point?
  - Projection and enrollment management for current students and the START program
  - Does UWL have the data to show incoming students with credits, for the number of Advanced Placement (AP) credits and which courses? Good information to help plan sections and seats for General Education.
  - It would be helpful for the JPB to learn the level of coordination among offices and colleges for enrollment management.
  - Course sections: It would be helpful to know the number of sections and seats needed so the colleges and departments could reserve and/or allocate resources early before students start to register.
  - Projection and plan for the change of enrollment from the new General Education Program
  - JPB Committee's additional suggestions and questions
- d. Overall questions to the Chancellor, Provost, and CFO
- Financial impact if the \$855 million state budget request is not approved or partially approved
    - o UW System's and UWL's plans. How would UWL address the financial impact? Will the System give each institution the autonomy of funding strategies, e.g., increasing tuition? Any long-term plans and strategic priorities?
  - UWL's plan and preparation for the impact on DEI and federal grants and programs due to the President's executive orders. UW System's plan and guidelines?
  - Career progression for university and academic staff. Follow up and next steps?
5. Spring 2025 Meeting Dates for JPB (presenters in parentheses)  
 2/12/2025: The Chief of Staff's role (Chief of Staff, confirmed)  
 2/26/2025  
 3/12/2025: Finance, Budget, & Capital Projects (CFO, confirmed)  
 3/26/2025  
 4/23/2025: Discussion of future JPB goals (tentative)  
 5/07/2025: Wrap-up & conclusion (tentative)
6. Chancellor's update
7. Provost's update
8. CFO's update
9. Adjournment

**JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
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**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff

Ju Kim, Dean

**Vacant**, Student Association

Tim McAndrews, Faculty

Mary Grattan, University Staff

Chia-Chen Yu, Chair

## **FAQs Related to Finance and Budgeting**

(last revised: 2/7/2025)

### **I. Faculty Senate**

1. Where can I best access information updates on budget related topics such as:
  - Upcoming & ongoing capital building projects
  - News & status of system budget requests
  - Details about how the current budget and proposed budgets allocate funds  
(agreed: this is key)
2. I suspect most faculty don't know what they don't know about finance and budget, so they don't know what to ask about, or what concerns they should be prioritizing. Producing and distributing a one-page summary of new information, unresolved budget priorities, and upcoming events/decisions once a semester/year would be helpful.
3. Not counting salaries, what percent of the budget is spent directly on instruction? (i.e., new or replacement classroom equipment including classroom computers, fixing broken classroom equipment, renovating or modernizing classrooms, funding curriculum redesign grants, etc.)? And what is the breakdown of the percent of the budget that is spent **not** on instruction, and "indirectly" on instruction (and what are examples of what "indirect" means)?
4. Which of the departments/ units on campus are "self-funded", either fully or partially, and how are they expected to make the money needed to run their department/ unit?

Submitted by Greg Ormes, Chair of Faculty Senate, on behalf of the Faculty Senate

### **II. Academic Staff Council (ASC; Discussed these Qs in the January meeting)**

1. **Career Progression** - (Similar to USC question). How can one progress in their current role without moving to a new role or leaving UWL? Salary, professional development, responsibilities are all included in the ask.
2. **Overload payments** for Academic Staff - Current policy (approved only by Faculty Senate) explicitly states that Academic Staff are not eligible for overload payments unless it is a Director position or above. Request for review of policy and consideration of the various vacancies that remain open for extended time where the work still needs to be done.
3. **Recruitment/Turnover** - What data does HR collect and how we can we use that to make informed budget and planning decisions? For example, how many qualified applicants are we getting for positions on campus? How many searches are failing due to low applicant pools? How many offers are declined? Do we have data on why? Have we done a review of our HR Communication to applicants in terms of best practices?
4. **Strategic Plan - 360 Evaluations**; And/or feedback for Cabinet members - What is the path for that?

Submitted by Lisa Weston and Pearl Bearhart, ASC Chairs, on behalf of the Academic Staff Council

### **III. Student Association (Discussed these Qs in the Dec. meeting)**

1. What are the top financial priorities for the upcoming fiscal year?
2. How is the success of financial investments measured?
3. Is there a plan in place if state funding were to decrease?

Submitted by Emma Latus, President of UWL Student Association, on behalf of the Student Association

**IV. University Staff Council (USC)** (Discussed these Qs in the Dec. meeting)

1. Compression. Wages of staff that have been employed for several years matches the compensation of new hires. This creates a moral issue as well as a retention problem.
2. Progression. University Staff welcomes the ability to better themselves for personal reasons as well as to benefit UWL and the campus community.
3. Wages. As you mentioned, low wages continue to be a frustration. Right now, a Custodian at UWL starts at \$16.00 and could go to any local school district where the starting wage is at least \$19.00 with similar benefits. Likewise, an Admin Assistant at UWL can go to Western, La Crosse County or either of the local hospitals and start at \$5.00 - \$6.00 more per hour.

Submitted by Kim Schliebe, Chair of University Staff Council (USC), on behalf of the USC



## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., February 12, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via Teams [[Join the meeting now](#), Meeting ID: 215 410 043 365]

Passcode: sY2nW3Z3]

Recorder: Kim

JPB Committee and Ex-Officio Members in Attendance: Bearhart (via Teams), Brooks, Craig, Engen (via Teams), Ericson, Figueroa, Galbraith, Grattan, Gray, Grunwald, Guyer (via Teams), Hohman, Ives, Jax, Kim, Kunkel, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Schweiger, Talbot, Thomsen, Thoune, Trnka (via Teams), Walz (via Teams), Weston, Wycoff-Horn, Yu

Excused: Achenreiner, Beeby, Ziegelman

## Agenda:

1. Introduction of New Committee Member
  - a. New member Grant Hohman, Student Association. Welcome!
    - Replacement of Avery Ladd-Winders
  - b. Vote for a new student representative on the Executive Committee
    - Grant Hohman was elected to serve as the Student Association representative.
2. Approval of Meeting Minutes
  - a. 1/29/2025 – Motioned/Seconded/Passed
3. Continue to discuss frequently asked questions related to finance and budgeting (please see the *FAQs* file)
  - a. Discuss Faculty Senate's FAQs today (Student Association's, ASC's, and USC's FAQs were discussed in the December and January meetings)
    - Anne Galbraith clarified the Faculty Senate's FAQs.
    - Heather Talbot asked about the JPB's role.
    - Betsy Morgan reminded the JPB's role is to serve as an advisory to the Chancellor.
    - Chia-Chen Yu indicated that enrollment management would be invited to present.
4. Agenda Items for Spring 2025 (**newly added questions highlighted in yellow**)
  - a. The Chief of Staff's role (Stacy Twite, Chief of Staff; 2/12 confirmed)
    - Introduction of the Chief of Staff's role. Responsibilities, preferred communication methods, role at the university and System levels
    - How the JPB could assist and what advice they can provide to the Chief of Staff and Chancellor's Office?
    - **JPB's role in strategic planning**
    - Any additional information the JPB Committee should learn about the Chief of Staff.
    - JPB Committee's additional suggestions and questions

- Stacy Twite described her role as the Chief of Staff.
  - Her responsibilities include serving as a partner and advisor to the Chancellor, representing UWL positively, coordinating strategic alignment, and serving as the legislative liaison.
- b. Finance, Budget, & Capital Projects (Division of Administration and Finance; 3/12 confirmed)
- Update of State and UW System budgets & capital projects
  - Capital budget projects and priority at UWL
  - Frequently asked questions related to finance and budgeting. This list of FAQs should be available at the end of this semester.
  - CFO's vision, philosophy, and leadership style in planning and budgeting processes. How the JPB could assist and what advice they can provide?
  - JPB Committee's additional suggestions and questions
- c. Enrollment Forecasting and Planning for START and General Education & Enrollment Management (Provost's Office and Admission Office)
- How is the enrollment target set? The question is more about prospective students' interest in certain majors and colleges. Did UWL set a number of students to admit for each college? Or did UWL admit students regardless of students' intended majors?
  - What is UWL's maximum capacity for incoming students and total enrollment? At what point?
  - Projection and enrollment management for current students and the START program
  - Does UWL have the data to show incoming students with credits, for the number of Advanced Placement (AP) credits and which courses? Good information to help plan sections and seats for General Education.
  - It would be helpful for the JPB to learn the level of coordination among offices and colleges for enrollment management.
  - Course sections: It would be helpful to know the number of sections and seats needed so the colleges and departments could reserve and/or allocate resources early before students start to register.
  - Projection and plan for the change of enrollment from the new General Education Program
  - JPB Committee's additional suggestions and questions
- d. Overall questions to the Chancellor, Provost, and CFO
- Financial impact if the \$855 million state budget request is not approved or partially approved
    - o UW System's and UWL's plans. How would UWL address the financial impact? Will the System give each institution the autonomy of funding strategies, e.g., increasing tuition? Any long-term plans and strategic priorities?

- UWL's plan and preparation for the impact on DEI and federal grants and programs due to the President's executive orders. UW System's plan and guidelines?
- Career progression for university and academic staff. Follow up and next steps?

5. Spring 2025 Meeting Dates for JPB (presenters in parentheses)  
2/12/2025: The Chief of Staff's role (Chief of Staff, confirmed)  
2/26/2025  
3/12/2025: Finance, Budget, & Capital Projects (CFO, confirmed)  
3/26/2025  
4/23/2025: Discussion of future JPB goals (tentative)  
5/07/2025: Wrap-up & conclusion (tentative)

6. Chancellor's update

7. Provost's update

- a. Spring 2025 enrollment is strong
- b. Lots of hiring processes are ongoing in the spring semester
- c. Academic Affairs continues to face salary issues

8. CFO's update

- a. Workday will be rolled out soon.
- b. The first communication on the ATP/Workday cutover plan is expected to be out later this week.

9. Adjournment – 2:14 pm

### **JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
3. To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL

### **JPB Executive Committee Members**

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Grant Hohman, Student Association  
Tim McAndrews, Faculty  
Mary Grattan, University Staff  
Chia-Chen Yu, Chair

## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., March 12, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via Teams [[Join the meeting now](#), Meeting ID: 289 577 042 865

Passcode: mS33HZ7P]

Recorder: Kunkel

Alternate Recorder: McAndrews

## Agenda:

1. Approval of Meeting Minutes
  - a. 2/12/2025
2. Presentation: Finance, Budget, & Capital Projects (CFO & Division of Administration and Finance)
  - Update of State and UW System budgets & capital projects
  - Capital budget projects and priority at UWL
  - Frequently asked questions related to finance and budgeting
  - CFO's vision, philosophy, and leadership style in planning and budgeting processes. How the JPB could assist and what advice they can provide?
  - JPB Committee's additional suggestions and questions
3. Chancellor's update
4. Provost's update
5. CFO's update
6. Adjournment

**Future Meeting Dates in Spring 2025** (presenters in parentheses)

- 3/26/2025: Enrollment Planning (Provost's Office and Admissions, confirmed)
- 4/23/2025: Discussion of future JPB goals (tentative)
- 5/07/2025: Wrap-up & conclusion (tentative)

**Enrollment Planning (Provost's Office and Admissions, March 26, 2025)**

- How are new student enrollment targets set?
- What is the maximum number of new students that can be enrolled?
  - o Are students admitted based upon college/school and/or major?
- What is the maximum total enrollment?
- Provide an overview of coordination efforts with colleges and academic departments for planning courses/sections/seats and faculty/instructor needs.

- What is the impact on course/section/seat demands from transfer credit and credit earned via Advanced Placement (AP)?
- How will courses/section/seat demand change with the new General Education program?
- How are course sections/seats reserved for new freshmen and START?

### **Overall questions to the Chancellor, Provost, and CFO**

- Financial impact if the \$855 million state budget request is not approved or partially approved
  - o UW System's and UWL's plans. How would UWL address the financial impact? Will the System give each institution the autonomy of funding strategies, e.g., increasing tuition? Any long-term plans and strategic priorities?
- UWL's plan and preparation for the impact on DEI and federal grants and programs due to the President's executive orders. UW System's plan and guidelines?
- Career progression for university and academic staff. Follow up and next steps?

### **JPB Goals for 2024-25**

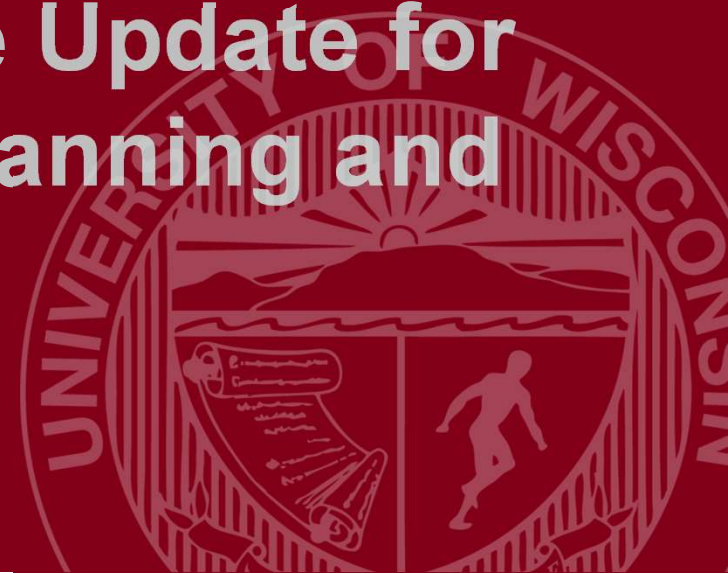
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Mary Grattan, University Staff  
Chia-Chen Yu, Chair



# Administration & Finance Update for Joint Planning and Budget



# Update of FY25 Budget & Capital Projects

- Anticipate a tuition surplus
  - FY25 Enrollment has been strong
  - Anticipated expenditures eliminated, shifted, or otherwise not hitting FY25
- Capital Projects currently underway are all on time and on budget – no major changes to report



# Update of FY26 Budget & Capital Projects

- Governor's Office has signaled strong support
  - February 18, 2025
  - \$855M for UW System
  - Pay Plan FY25 5%/FY26 4%
- Legislature has signaled less support
- Budget Due April 1
- JFC will likely start work in April





# Update of FY26 Budget & Capital Projects, Cont.

- Governor's Office Capital Budget Released 03/10
- Prairie Springs Completion remains a top capital priority for UWL and UWSA
- Other Projects



## Update of FY26 Budget & Capital Projects, Cont.

Type	UWL Requests	UWSA Request	Governor Budget
Major Project	PRAIRIE SPRINGS SCIENCE CENTER COMPLETION	\$194,466,000	\$194,466,000
Instruc. Space	MITCHELL HALL & MORRIS HALL LAB RENO	\$3,488,000	\$0
Minor Facilities G	MULTI-RES HALL FIRE SPRINKLER SYSTEM RETROFIT	\$7,226,000	\$7,226,000
Minor Facilities G	HEATING PLANT BOILER BURNER REPLACEMENTS	\$8,740,000	\$4,195,000
P&D	HEATING PLANT BOILER CAPACITY INCREASE PLANNING & DESIGN	\$527,000	\$527,000
P&D	MITCHELL HALL RENOVATION PLANNING & DESIGN	\$3,311,000	\$0

## FAQs:

- Compensation Related
- Data
  - UWL Budget Office Website: <https://www.uwlax.edu/budget/>
  - UWL Capital Planning Website: <https://www.uwlax.edu/planning-construction/>
  - UWSA Budget & Planning Website: <https://www.wisconsin.edu/budget-planning/>
  - UWSA Capital Planning & Budget Website: <https://www.wisconsin.edu/capital-planning/>
  - UWL Budget Policies and procedures: <https://www.uwlax.edu/budget/resources-useful-links/budget-policies-and-procedures/>
- Priorities and Plans



## FAQs: Instructional Spending

- All Divisions – 51.06%
  - 78.02% compensation related
  - 21.98% on S&E and Capital
- Academic Affairs – 48.95%
  - 93.51% compensation related
  - 6.49% S&E and Capital



## FAQs: Instructional Spending

Academic Affairs	S&E & Capital
Provost	2,995,761
SOE	348,455
CBA	327,279
CASSH	929,919
CSH	2,086,969
GEL	1,127,084
<b>Total Academic Affairs</b>	<b>7,815,467</b>



## FAQs: Self Funded

- Residence Life
- Parking
- Dosimetry
- Grants
- Anything not fully funded by GPR



# Budget & Planning Process

- CFO/CBO vision, philosophy and leadership style
- Budget and Planning Process
- JPB's Role





An aerial photograph of the University of the West of England (UWE) campus in Bristol, taken at sunset. The sun is low on the horizon, casting a warm, golden glow over the entire scene. The campus is a mix of modern and traditional architecture, with several large buildings and a central courtyard. In the foreground, there is a large sports field with a red running track and a green football pitch. To the left, there is a large parking lot filled with cars. The background shows the city of Bristol and the surrounding hills.

# ***Questions & Answers***



**Joint Planning & Budget Committee Meeting Minutes**  
**March 12, 2025**  
**Student Union 2310**

**Meeting called to order promptly at 1:15 p.m.**

**JPB Committee and Ex-Officio Members in Attendance:** Achenreiner, Bearhart (via Teams), Beeby, Brooks, Craig, Engen (via Teams), Ericson, Figueroa, Galbraith, Grattan, Gray, Grunwald, Hohman, Ives, Jax, Kim, Kunkel, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Schweiger (via Teams), Talbot, Thomsen, Thoun, Trnka, Walz, Weston, Wycoff-Horn, Yu

**Absent:** Guyer, Ziegelman (excused)

**Agenda:**

1. Approval of Minutes from February 12, 2025, as amended by the Committee Chair
  - Motion by Ives, second by Thoun, approved by voice vote
2. Presentation: Finance, Budget, & Capital Projects (Stephanie Pope, Chief Financial Officer & Vice Chancellor for Administration and Finance)
  - FY25 tuition surplus larger than expected due to strong enrollment
  - All underway capital projects on time and on budget
  - Less budget clarity for FY26 due to not knowing what budget will be
  - Governor signals strong support for UW System
  - Governor pay plan proposed at 5% for FY26 and 4% for FY27
  - Legislature signals less support than Governor
  - UWL budget due to UW System by April 1
  - Legislative Joint Finance Committee work likely will start in April
  - Governor's Capital Budget released on March 10, 2025
    - Prairie Springs remains top priority for UW System
    - UWL has other projects on list (i.e. residence hall fire sprinkler system, boiler burner replacements, and heating boiler capacity increase planning and design)
    - Mitchell Hall renovation not recommended by Governor
  - Follow-up budget questions and discussion followed.
  - Discussed distributed FAQs – Compensation-Related, Instructional Spending, Self-Funded Units
  - Provided data sources with web links
  - Current HR data sources are insufficient making it difficult to answer specific questions; however, Workday should address many of these shortcomings
  - Top future priorities will be informed by upcoming strategic planning process
  - Current priorities include Prairie Springs, state funding increase, employee compensation, and continuing academic excellence
  - UWL has very few financial investments beyond the Foundation

- No current plan for a decrease in funding; has not been indicated by either UWL or UW System
- Very difficult to determine what is spent on instruction
- 78% across university spent on compensation and 22% on S&E/capital expenses
- For Academic Affairs, 94% on compensation and 6.5% on S&E/capital expenses
- 49% spent of overall UWL budget spend in Academic Affairs; 51% on the rest of the university
- Total Academic Affairs S&E/capital expenses is \$7.8 million (~14% of university budget)
- UWL budget philosophy is on-par with most institutions across the country
- Self-funded units include auxiliaries like Residence Life and Parking, as well as several academic programs such as Dosimetry
  - Anything not fully funded by General Purpose Revenue (GPR)
- Self-funded programs are required to pay an administrative overhead
- Questions and discussion followed
- Vice Chancellor Pope's primary background is in Budget; currently has 24 years in higher education
- Prefers incremental budgeting model, used at UWL, because it is simple and transparent
- Importance of being strategic with spending
- UW System provides protections but also obligations
- Vision for JPB: an advisory group to the Chancellor that should be consulted when choices are present
- Further questions and discussion occurred
- JPB Chair thanked Vice Chancellor Pope for extensive comments and details and the committee applauded showing appreciation for the presentation

### 3. Chancellor Update

- Thanks to everyone for their hard work particularly during these uncertain and challenging times
- Closely monitoring federal and state developments. Will only send messages when final decisions occur as opposed to continual updates
- Spent time in Madison recently meeting with legislators about budget
- UWL has very positive impression at state capital
- Governor on campus yesterday and was impressed with UWL
- Meeting with local businesses and visiting adjacent communities
- Meeting with donors in Florida and Arizona
- Thanks to Deans for development work
- Various events happening on campus lately, such as National History Day, visual and performing arts, and athletics
- Men's basketball team is in the Division 3 "Sweet 16"
- Wrestling team, track and field, all in national championships
- Everyone seems ready for Spring Break! Encourages everyone to take time for themselves over the break

4. Provost Update
  - No substantive report
5. Chief Financial Officer Update
  - No report beyond earlier presentation

The JPB Chair provided a preview of upcoming meetings:

- 3/26/2025: Enrollment Planning
- 4/23/2025: Discussion of Future JPB Goals
- 5/07/2025: Wrap-up & Conclusion

**Adjournment at 2:32 p.m.**

Minutes submitted by Karl Kunkel

## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., March 26, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via Teams [[Join the meeting now](#), Meeting ID: 281 441 001 403

Passcode: et2Be66s]

Recorder: Newton

Alternate Recorder: Richter

## Agenda:

1. Approval of Meeting Minutes
  - a. 3/12/2025
2. Chancellor's update
3. Presentation: Enrollment Planning (Provost's Office and Admissions)
  - How are new student enrollment targets set?
  - What is the maximum number of new students that can be enrolled?
    - o Are students admitted based upon college/school and/or major?
  - What is the maximum total enrollment?
  - Provide an overview of coordination efforts with colleges and academic departments for planning courses/sections/seats and faculty/instructor needs.
  - What is the impact on course/section/seat demands from transfer credit and credit earned via Advanced Placement (AP)?
  - How will courses/section/seat demand change with the new General Education program?
  - How are course sections/seats reserved for new freshmen and START?
4. Presentation: Salary Study (CFO)
  - a. Data summaries and prompting questions for consideration between meetings
5. Provost's update
6. CFO's update
7. Adjournment

**Future Meeting Dates in Spring 2025** (presenters in parentheses)

- 4/23/2025: Discussion about the data of the salary study and the questions posed on the 3/26 meeting
- 5/07/2025: Update on the strategic plan (Stacy Twite and Whitney George, Co-Chairs of Strategic Plan Executive Committee, confirmed); Wrap-up & conclusion and future JPB goals (tentative)

**Overall questions to the Chancellor, Provost, and CFO**

- Financial impact if the \$855 million state budget request is not approved or partially approved
  - o UW System's and UWL's plans. How would UWL address the financial impact? Will the System give each institution the autonomy of funding strategies, e.g., increasing tuition? Any long-term plans and strategic priorities?
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**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Grant Hohman, Student Association  
Tim McAndrews, Faculty  
Mary Grattan, University Staff  
Chia-Chen Yu, Chair

# UWL Enrollment Planning

Presentation to Joint Planning & Budget  
March 26, 2025

Corey Sjoquist – Assistant Vice Chancellor for Admissions & Recruitment

Sandy Grunwald – Associate Vice Chancellor for Academic Affairs

Betsy Morgan – Provost and Vice Chancellor for Academic Affairs



**How are new student enrollment targets set?**



# Enrollment Target Setting Group

- Admissions & Recruitment (Corey Sjoquist)
- Academic Affairs (Sandy Grunwald)
- Budget (Emily Roraff)
- Institutional Research (Grace Engen)
- Residence Life (Jenni Brundage)
- VC for Administration & Finance (Stephanie Pope)
- VC for Academic Affairs (Betsy Morgan)
- VC for Student Affairs (Vitaliano Figueroa)





# Enrollment Target Setting Group

- Meets each September/October to establish:
  - First-year enrollment target for following fall
  - Transfer enrollment target for following fall
  - Transfer enrollment target for following spring



# Enrollment History

	Fall 2020	Spring 2021	Fall 2021	Spring 2022	Fall 2022	Spring 2023	Fall 2023	Spring 2024	Fall 2024	Spring 2025	Fall 2025
Total 10th Day	10,468	9,559	10,314	9,398	10,302	9,333	10,327	9,600	10,492	9,745	
First Year Target	2,175		2,150		2,150		2,200		2,225		2,225
First Year Actual	2,114		2,207		2,308		2,294		2,325		
Transfer Target	375	100	350	100	350	100	350	100	335	90	335
Transfer Actual	337	107	394	119	351	105	358	91	318	133	
1st Yr Retention	86%		84%		84%		87%		87%		

# Considerations

- Enrollment History
- Application Trends
- Universities of Wisconsin Information
- Housing Availability
- Class Seat Availability
- Budget Implications
- Ability to Serve Students
- Reasonable and Achievable Goals



**What is the maximum number of new students that can be enrolled?**



# New Student Class

- Fall 2024 First-Year Class: 2,325 Students
  - Largest first-year class in UWL history
- Fall 2024 Transfer Class: 318 Students
  - Decision to under enroll
- Impact of bed and class availability

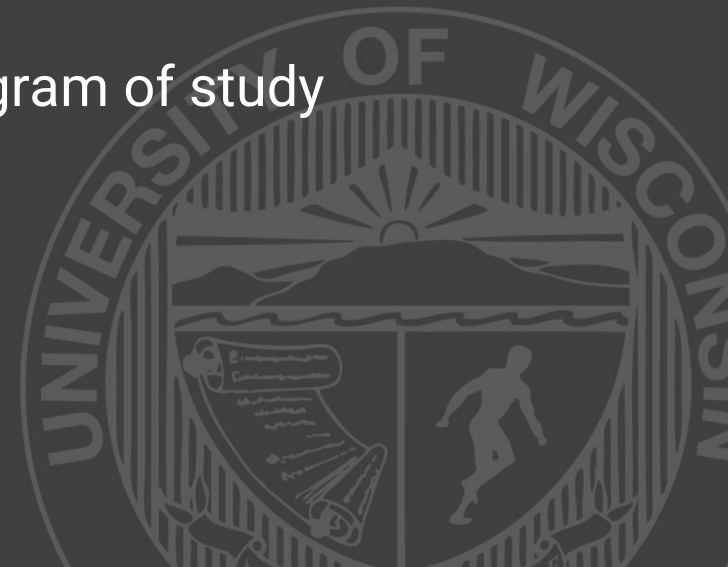


**Are students admitted based upon college/school and/or major?**



# No

- Regular Application Window (August 1 – February 1)
- Post-February 1
- Prospective students regularly change their program of study
- "Gaming the System"



**What is the maximum total enrollment?**





# A difficult question due to complex composition of UWL student body

## **Undergraduate**

- First-Year
- Transfer & Second-Degree
- Continuing

## **Non-Degree Seeking**

- Undergraduate & Graduate Special
- High School Special

## **Graduate**

- New
- Continuing
- Collaborative Programs
- Online Programs



**Provide an overview of coordination efforts with colleges and academic departments for planning courses/sections/seats and faculty/instructor needs.**



# Course Scheduling is Challenging

- If we offer a class, will they come? If not, then what?
- Will demand be too high? If so, then what?
- Will there be a classroom to fit the course needs?
- How can we forecast demand for this 100-level course? This 400-level course?
- How do we balance instructor request with student demand with other dept intersections?



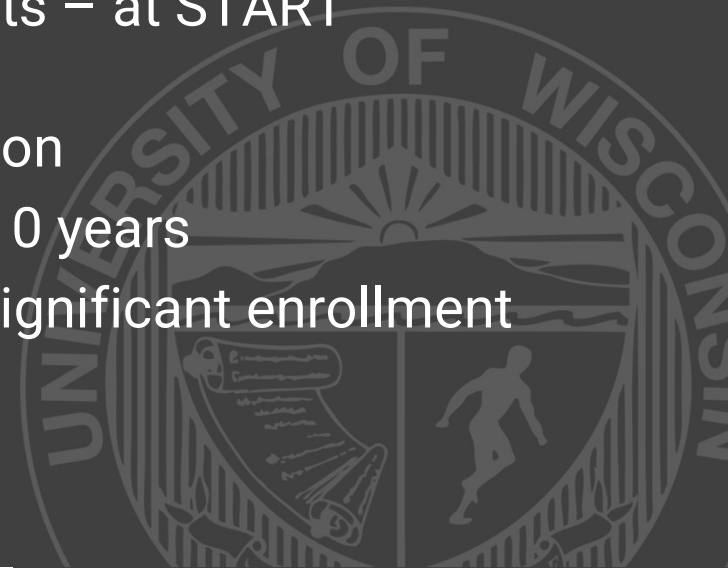
# Why is Course Scheduling Important?

- Student Success – timely graduation
- Critical to Meet Needs of Students
- Instructor Equity
- Efficient use of Resources



# A Higher-Level Look at Course Registration

- Landscape is changing – student demographics, etc...
- Ensure enough and right classes for new students – at START students are still choosing their university
- Intersections between colleges that need attention
- Resources are more limited – tuition freeze for 10 years
- Challenging times for universities – many with significant enrollment challenges



# Course Registration Coordination Group

- Course Registration Coordination Group – meets monthly
  - Sandy Grunwald – AVC
  - TJ Brooks – Dean CBA
  - Marie Moeller – Assoc Dean CASSH
  - Robert Allen – iAssoc Dean CSH
  - Leanne Vigue – Registrar
  - Grace Engen – Director IRAP
- Review course registration needs, Share enrollment strategies in colleges, Identify data needs



# Chair/ADA Workshops in 2023 and 2024

## Workshop Goals

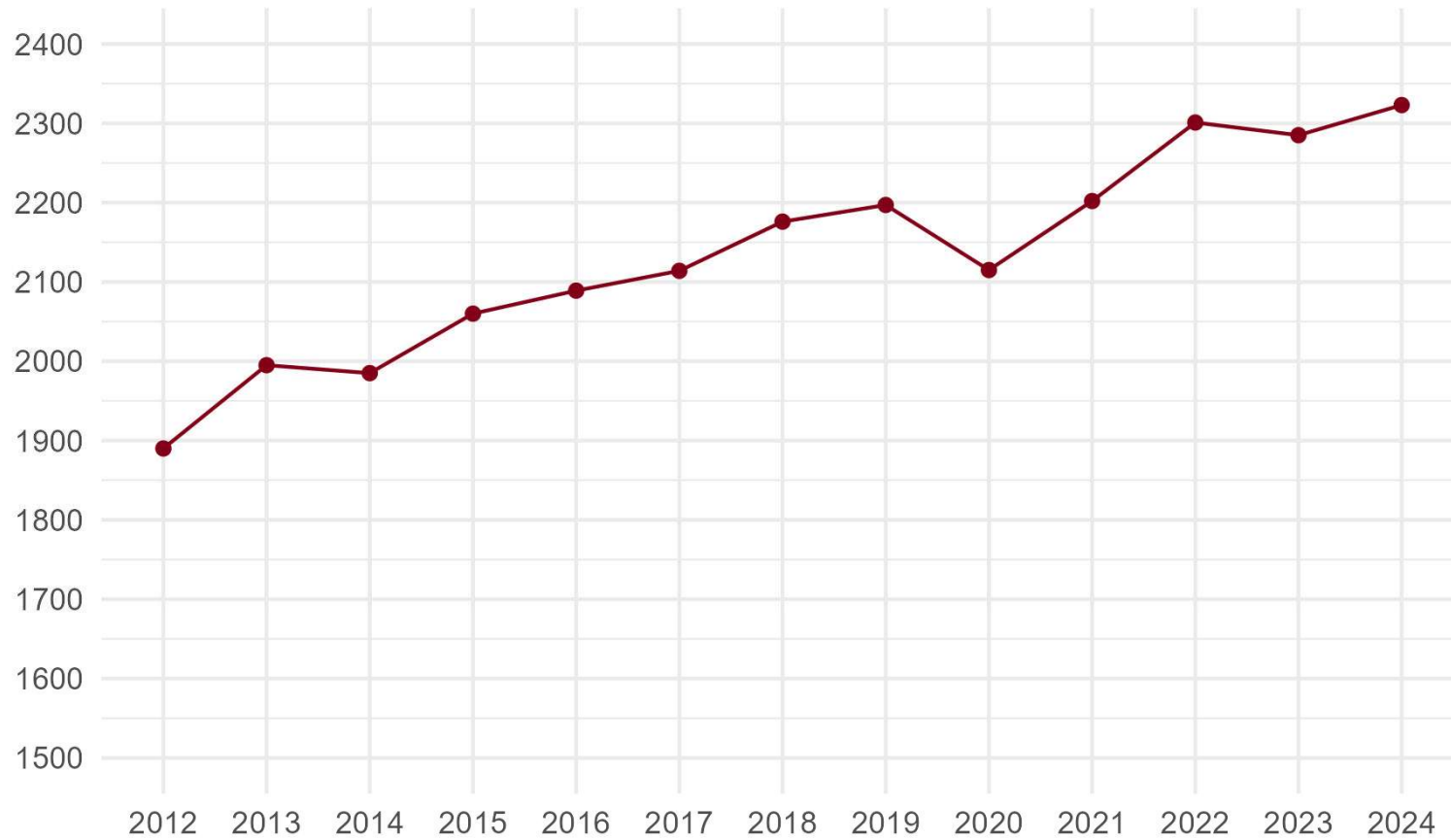
- Share information/resources related to course scheduling
- Share and learn from each other ideas, best practices, hints around course scheduling

## Workshop Topics

- UWL student population
- Data informed decision making
- Dashboards and Reports on Course and Student Enrollment
- WINGS – What info is helpful and how to find it
- Successes/Challenges with Enrollment Management
- Scheduling and rooming issues and strategies
- Timing decisions and Waitlists



## New First Year Student Cohort Size

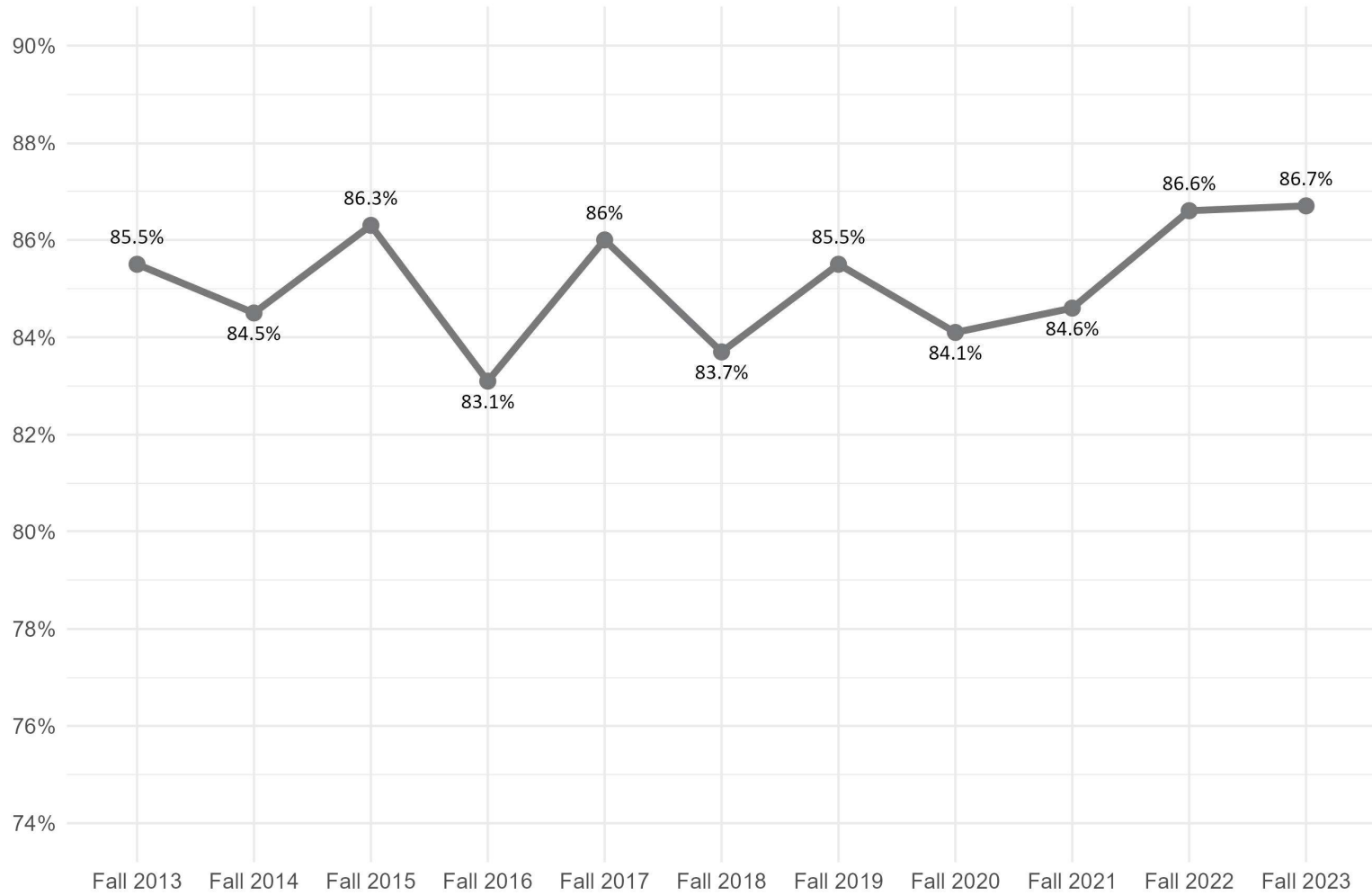


Cohort has grown by 433 students since 2012.

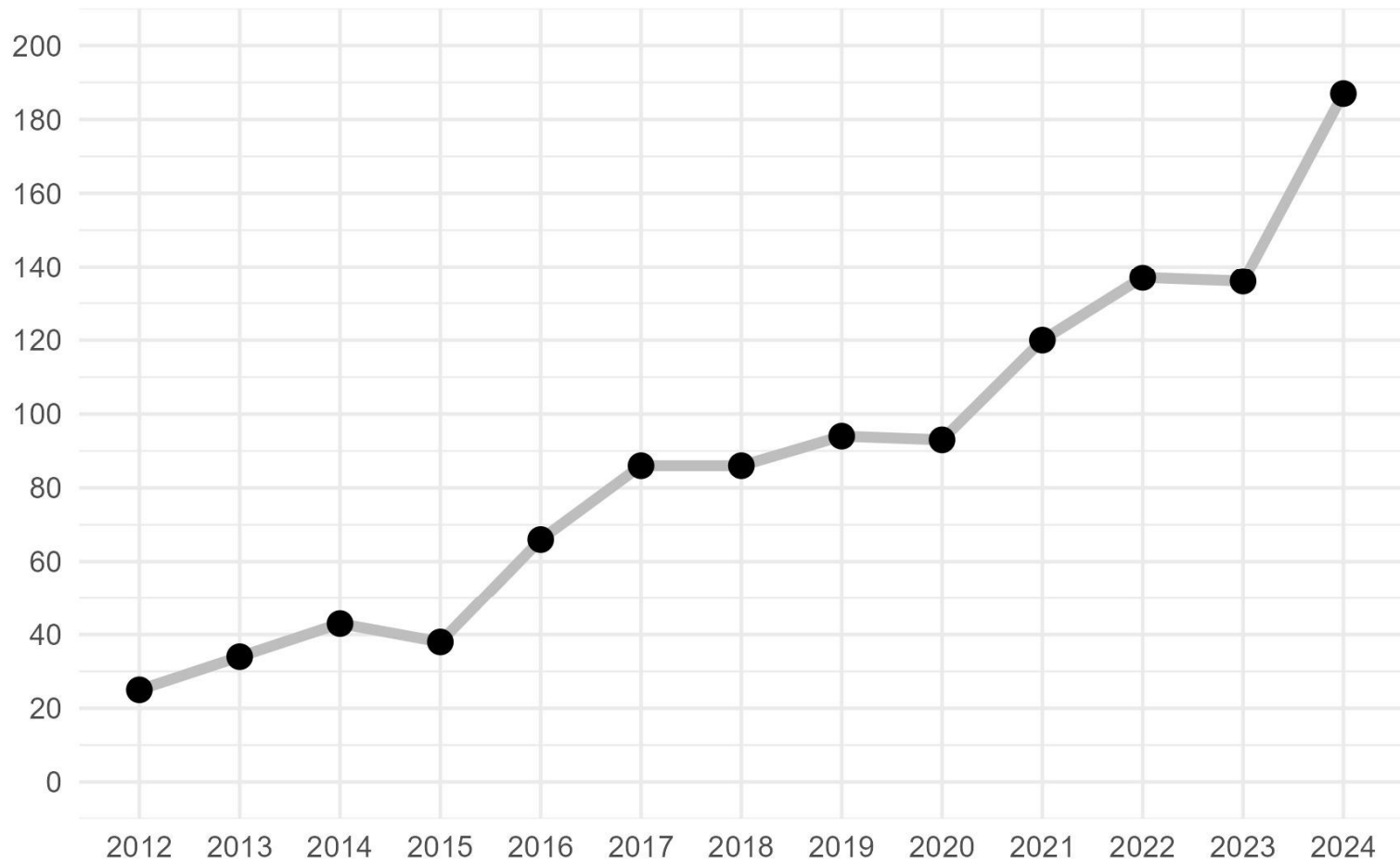




Retention Rate to Second Year by New Fall Cohort



**# New Students Entering UWL with Sophomore Status**



Nearly 75% of undergraduates graduate in four years or less, compared with about 62% five years ago.

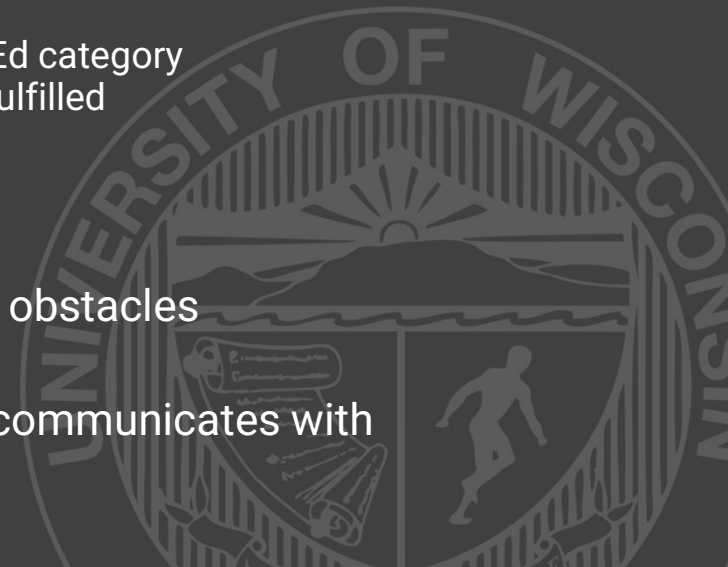
Students need classes in shortened timeframe.

Increased demand due to compression of time to degree.

Time to Degree			
Year of BA/BS	Headcount of Graduates**	Percent Earned BA/BS within 4 Years	Percent Earned BA/BS within 5 Years
2015-2016	1,399	55.5%	91.1%
2016-2017	1,428	57.4%	92.1%
2017-2018	1,435	59.2%	93.9%
2018-2019	1,569	61.5%	93.1%
2019-2020	1,587	63.1%	94.0%
2020-2021	1,577	65.6%	93.3%
2021-2022	1,590	69.2%	94.8%
2022-2023	1,634	71.1%	95.2%
2023-2024	1,579	74.7%	95.4%
*Only students' first undergraduate degree is counted.			
^Only includes graduates who were part of a new fall cohort.			

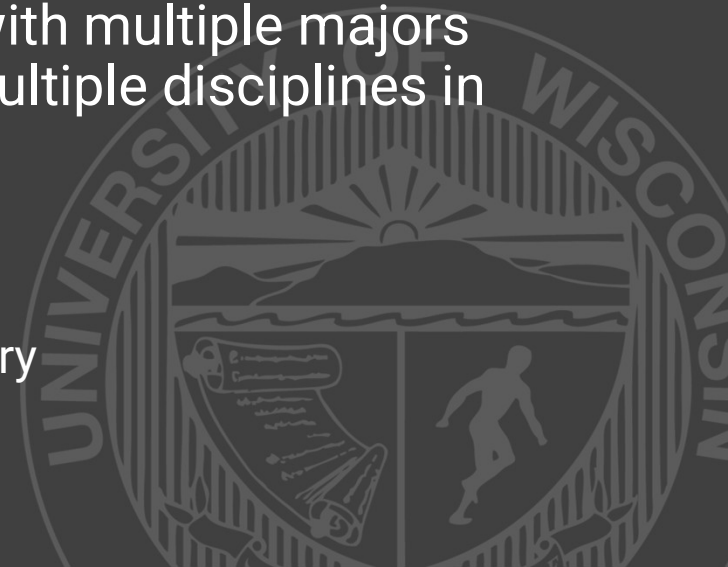
# Course Planning

- Planning and Monitoring Tools – IRAP Internal Data Dashboards
  - Historical Course Enrollment
  - Pinch Point Course Completion Status
  - Fill Rate Dashboard
  - Term Course Enrollment
  - Gen Ed Tables - # current UWL students who have not fulfilled Gen Ed category
  - New first year cohorts - % who come to UWL with Gen Ed category fulfilled
- Other Data as Needed
- Communication! – stressors in last registration cycle, current obstacles
- AVC works with College Offices on planning – college office communicates with department on need



# Levels of Courses – different planning

- Courses that are very major specific – (e.g. advanced Archaeology courses)
- Courses that are subject-specific but intersect with multiple majors (e.g. college-level (CBA), math courses (serve multiple disciplines in various colleges), etc...)
- General Education courses
  - Needed by most UG students
  - Connection between courses within a Gen Ed category
  - Connection between Gen Ed categories

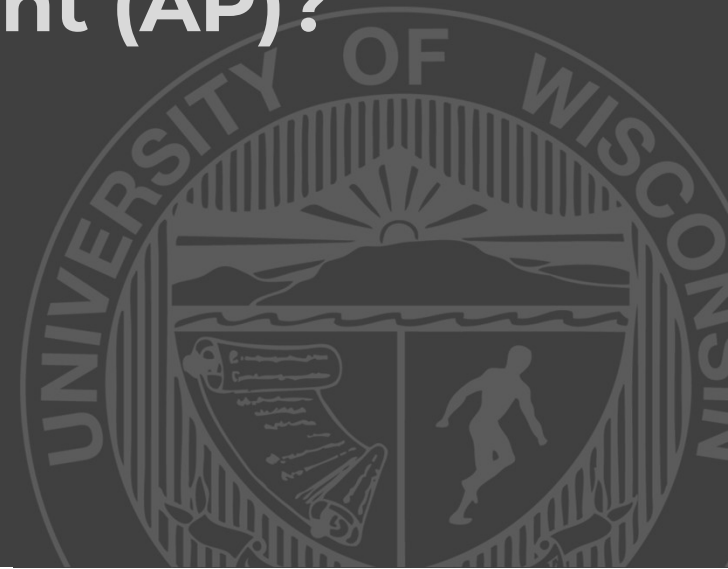


## Example – Gen Ed Arts category

- All seats filled with 3 days left in Fall 2022 registration cycle
- Large need by students - 1153 students with no courses taken, 5128 complete
- Response
  - Increased # seats
    - ART 102 (785 to 1130)
    - ESS 104 (315 to 380)
    - MUS 105 (375 to 560)
    - THA 110 (490 to 655)
  - Added Registration Cycle Buffer Days
- Current State – 628 students with no courses taken, 5788 complete



**What is the impact on course/section/seat demands from transfer credit and credit earned via Advanced Placement (AP)?**



# General Education Category Completion

GE Category	Number of Students	Percent of Cohort
GE00	9	0%
GE01-1	440	19%
GE01-2	354	15%
GE02-1	671	29%
GE02-2	251	11%
GE03	83	4%
GE04-1	126	6%
GE04-2	308	13%
GE05	457	20%
GE06	902	39%
GE07	147	6%
GE08	45	2%
GE09	34	1%

Impacts Gen Ed categories disproportionately

GE06 category – Self and Society

Vs

GE00, 03, 08 and 09 – First Year Seminar, Minority Cultures, Arts, Health & Well Being



**How will courses/section/seat demand change with the new General Education program?**



# General Education Program Crosswalk

- Some GE categories are not changing – GE01 (Communication) is now Gen Ed 1002 (Written Literacy) and 1003 (Spoken Literacy)
- Larger changes in others – GE02 (Mathematical/Logical Systems and Modern Languages), GE04-2 (Global & Multicultural Studies), GE06 (Self & Society)
- New categories – Gen Ed 1012 – The Planet that Sustains Us

ANT	202	ANT 202	GE04-2	Contemporary Global Is: GENED1012
ART	301	ART 301	GE04-2	World Art GENED1013
CHI	320	CHI 320	GE04-2	Intro to Chinese Civiliza: GENED1013
ECO	120	ECO 120	GE04-2	Global Macroeconomics: GENED1009
ENG	208	ENG 208	GE04-2	International Lit GENED1013
ENG	212	ENG 212	GE04-2	Search for Economic Jus GENED1013
ENV	101	ENV 101	GE04-2	Intro to Sustainability GENED1012
GEO	110	GEO 110	GE04-2	World Cultural Regions GENED1013
GEO	200	GEO 200	GE04-2	Conservation Global Env GENED1012
GEO	202	GEO 202	GE04-2	Contemporary Global Is: GENED1013
GEO	211	GEO 211	GE04-2	Global Climate Change GENED1012
GEO	340	GEO 340	GE04-2	Polar Environments GENED1012
HIS	202	HIS 202	GE04-2	Contemporary Global Is: GENED1013
HIS	360	HIS 360	GE04-2	Womn/Gender/Sexuality GENED1013
HMG	304	HMG 304	GE04-2	Hmong Heritage Lang: Ac GENED1013
MIC	130	MIC 130	GE04-2	Global Impac Infec Dise: GENED1012
MUS	205	MUS 205	GE04-2	Global Cultures in Music GENED1013
PHL	212	PHL 212	GE04-2	Search for Economic Jus GENED1013
PHL	336	PHL 336	GE04-2	Internatnl Multicultural GENED1013
PHL	349	PHL 349	GE04-2	Asian Philosophy GENED1013
PHY	142	PHY 142	GE04-2	Navigating Global Nucle GENED1012
POL	130	POL 130	GE04-2	Comparative Politics GENED1013
POL	202	POL 202	GE04-2	Contemporary Global Is: GENED1012
POL	244	POL 244	GE04-2	International Relations GENED1011
PSY	282	PSY 282	GE04-2	Cross-Cultural Psycholo GENED1013
SOC	202	SOC 202	GE04-2	Contemporary Global Is: GENED1013
THA	351	THA 351	GE04-2	World Theatre GENED1013

## Example – GE04-2

Courses now in GE1009,  
1011, 1012, and 1013

Requires awareness of  
these changes and new  
predictions



# Transfer Credit Based on new Gen Ed

## Transfer credit based on new general education program

Fall 2019 to Fall 2024 first-year cohorts

General Education Category		NF19	NF20	NF21	NF22	NF23	NF24
1004 Quantitative Reasoning	n	645	625	636	731	753	859
	% of cohort	29.5%	29.9%	28.9%	31.8%	33.0%	37.0%
1005 Ethnic Diversity	n	38	46	77	100	88	113
	% of cohort	1.7%	2.2%	3.5%	4.3%	3.9%	4.9%
1009 Social & Behavioral Studies	n	953	854	795	880	917	952
	% of cohort	43.6%	40.9%	36.1%	38.2%	40.1%	41.0%
1011 The Past that Defines Us	n	182	167	144	208	185	234
	% of cohort	8.3%	8.0%	6.5%	9.0%	8.1%	10.1%
1012 The Planet that Sustains Us	n	46	33	45	41	46	47
	% of cohort	2.1%	1.6%	2.0%	1.8%	2.0%	2.0%
1013 The Cultures of Our World	n	137	151	153	172	155	167
	% of cohort	6.3%	7.2%	7.0%	7.5%	6.8%	7.2%
Cohort Size*		2,188	2,090	2,201	2,301	2,285	2,323

\*full time new first-year students enrolled on fall day of record

**How are course sections/seats reserved for new freshmen and START?**



## START Saved Seats

- Number based on new student cohort size
- Based off last year's cohort needs
- Monitor also new 1st year class – college composition (started about 5 years ago) and major composition (started this year)
  - In flux till beginning of May after current students have enrolled for fall
  - Adjustments are made as needed closer to START



# Main Takeaways

- Complex Puzzle with moving pieces
- Data is critical to planning, monitoring, and adjusting
- Communication is critical



# Enrollment Management Repository

*Enhance the documentation of undergraduate enrollment management processes. This centralized digital hub will securely store and organize institutional knowledge, streamlining operations, improving cross-unit collaboration, and strengthening succession planning*

## Project Objectives

- Document Key Processes
- Identify Cross-Unit Dependencies
- Develop an Activity Timeline
- Establish a Centralized Repository





## General Education Completion Status

as of February 11, 2025

### NOTES

- Students are those who were enrolled in classes as of the date the report was created.
- Excludes students whose general education requirements have been waived.
- Excludes students seeking an Associate of Arts degree or a second bachelor's degree.
- Students who are currently enrolled in a course that completes a general education requirement are included in the "Complete" group.
- Students who are enrolled in a future term in a course that completes a general education requirement are included in the "Complete" group.
- Students with transfer credit that fulfills a general education requirement are included in the "Complete" group.

GE01-1 Communicating Effectively			
Level	Complete	Not Complete	Total
Freshman	1,229	284	1,513
Sophomore	2,129	89	2,218
Junior	2,169	24	2,193
Senior	2,668	4	2,672
<b>Total</b>	<b>8,195</b>	<b>401</b>	<b>8,596</b>

GE01-2 College Writing			
Level	Complete	Not Complete	Total
Freshman	1,302	211	1,513
Sophomore	2,136	82	2,218
Junior	2,184	9	2,193
Senior	2,666	6	2,672
<b>Total</b>	<b>8,288</b>	<b>308</b>	<b>8,596</b>

<b>GE02 Math and Logical Systems</b>				
<b>Level</b>	<b>Two Courses Complete</b>	<b>One Course Complete</b>	<b>No Courses Complete</b>	<b>Total</b>
Freshman	640	736	137	1,513
Sophomore	1,704	474	40	2,218
Junior	2,034	154	5	2,193
Senior	2,624	47	1	2,672
<b>Total</b>	<b>7,002</b>	<b>1,411</b>	<b>183</b>	<b>8,596</b>

<b>GE03 Minority Cultures</b>			
<b>Level</b>	<b>Complete</b>	<b>Not Complete</b>	<b>Total</b>
Freshman	847	666	1,513
Sophomore	1,777	441	2,218
Junior	2,039	154	2,193
Senior	2,617	55	2,672
<b>Total</b>	<b>7,280</b>	<b>1,316</b>	<b>8,596</b>

<b>GE04-1 World History</b>			
<b>Level</b>	<b>Complete</b>	<b>Not Complete</b>	<b>Total</b>
Freshman	968	545	1,513
Sophomore	1,835	383	2,218
Junior	2,070	123	2,193
Senior	2,624	48	2,672
<b>Total</b>	<b>7,497</b>	<b>1,099</b>	<b>8,596</b>

<b>GE04-2 Global and Multicultural Studies</b>			
<b>Level</b>	<b>Complete</b>	<b>Not Complete</b>	<b>Total</b>
Freshman	770	743	1,513
Sophomore	1,772	446	2,218
Junior	2,077	116	2,193
Senior	2,628	44	2,672
<b>Total</b>	<b>7,247</b>	<b>1,349</b>	<b>8,596</b>

<b>GE05 Natural Laboratory Science</b>			
<b>Level</b>	<b>Complete</b>	<b>Not Complete</b>	<b>Total</b>
Freshman	834	679	1,513
Sophomore	1,793	425	2,218
Junior	2,063	130	2,193
Senior	2,644	28	2,672
<b>Total</b>	<b>7,334</b>	<b>1,262</b>	<b>8,596</b>

<b>GE06 Self and Society</b>			
<b>Level</b>	<b>Complete</b>	<b>Not Complete</b>	<b>Total</b>
Freshman	1,107	406	1,513
Sophomore	2,109	109	2,218
Junior	2,156	37	2,193
Senior	2,668	4	2,672
<b>Total</b>	<b>8,040</b>	<b>556</b>	<b>8,596</b>

<b>GE07 Humanistic Studies (Literature)</b>			
<b>Level</b>	<b>Complete</b>	<b>Not Complete</b>	<b>Total</b>
Freshman	179	1,334	1,513
Sophomore	1,240	978	2,218
Junior	1,895	298	2,193
Senior	2,591	81	2,672
<b>Total</b>	<b>5,905</b>	<b>2,691</b>	<b>8,596</b>

<b>GE08 Arts</b>				
<b>Level</b>	<b>Two Courses Complete</b>	<b>One Course Complete</b>	<b>No Courses Complete</b>	<b>Total</b>
Freshman	255	839	419	1,513
Sophomore	1,186	854	178	2,218
Junior	1,789	382	22	2,193
Senior	2,558	105	9	2,672
<b>Total</b>	<b>5,788</b>	<b>2,180</b>	<b>628</b>	<b>8,596</b>

<b>GE09 Health and Physical Well-Being</b>			
<b>Level</b>	<b>Complete</b>	<b>Not Complete</b>	<b>Total</b>
Freshman	973	540	1,513
Sophomore	1,737	481	2,218
Junior	2,033	160	2,193
Senior	2,587	85	2,672
<b>Total</b>	<b>7,330</b>	<b>1,266</b>	<b>8,596</b>

- Prepared by: IRAP (blm)
- Source: advisement report table PS\_SAA\_ADB\_RESULTS and enrollment table PS\_STDNT\_ENRL
- Saved: C:General - IRAP-Campus Requests-General Education Completion



# Salary Study

Data and Discussion



# Salary Study

- Fall 2024 Data
- Comparators
  - CUPA
  - UWs
  - Identified
- Methodologies
  - Parity
    - 80%
    - 85%
    - 92%
  - Salary



## Parameter Possibilities

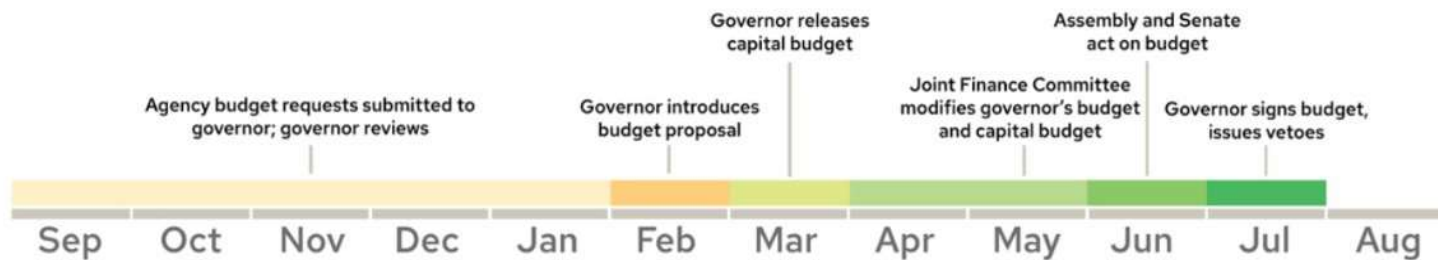
- Lowest Parity, Regardless of Pay
- Lowest Paid, Regardless of Parity
- Most Number of Employees (most people possible)
- Highest Per Person Impact (highest dollar per person)
- Lowest Paid AND Lowest Parity
- Lowest Parity AND Lowest Paid
- Other Options?



# Budget Cycle

## Timeline

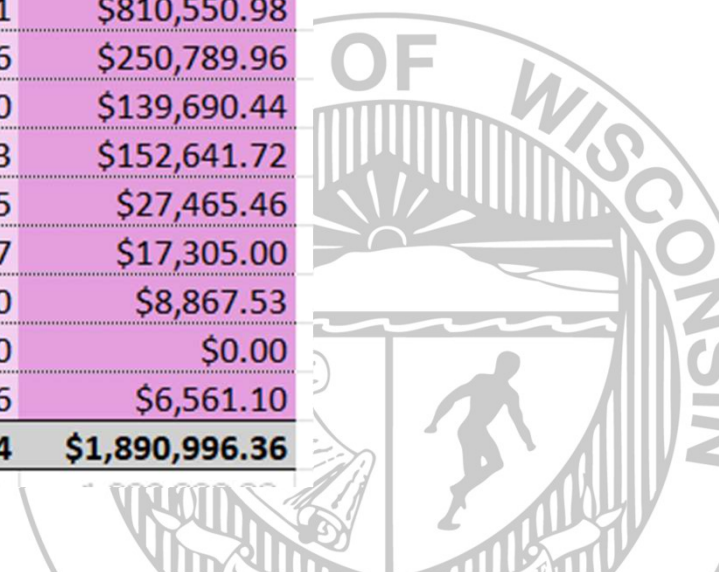
- **November (even-numbered year):** Agency budget request submitted to the governor. The governor reviews the request.
- **February (odd-numbered year):** Governor introduces budget proposal.
- **March:** Governor releases capital budget.
- ★ • **April – May:** Joint Finance Committee modifies governor's budget and capital budget.
- **June:** Assembly and Senate act on budget.
- **July:** Governor signs budgets; issues vetoes.





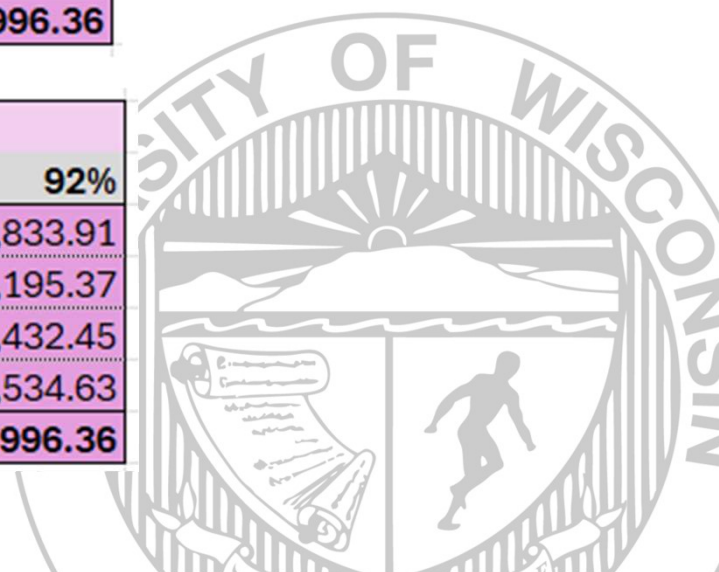
### Classification Review

Classification		85%	92%
NIAS	Non-Instructional Academic Staff	\$44,553.42	\$225,877.71
Staff	University Staff	\$15,330.10	\$113,183.04
LI	Limited	\$35,597.14	\$138,063.42
Faculty	Professor	\$271,336.51	\$810,550.98
Faculty	Associate Professor	\$35,980.66	\$250,789.96
Faculty	Assistant Professor	\$5,416.60	\$139,690.44
IAS	Teaching Professor	\$58,180.53	\$152,641.72
IAS	Teaching Associate Professor	\$1,180.95	\$27,465.46
IAS	Clinical Associate Professor	\$2,645.87	\$17,305.00
IAS	Teaching Assistant Professor	\$0.00	\$8,867.53
IAS	Clinical Professor	\$0.00	\$0.00
IAS	Clinical Assistant Professor	\$169.86	\$6,561.10
Total All		\$470,391.64	\$1,890,996.36



Total Parity Quartiles		
Quartile	85%	92%
Year 1	\$244,459.97	\$1,069,819.09
Year 2	\$133,152.00	\$475,974.29
Year 3	\$70,096.73	\$263,931.33
Year 4	\$22,682.94	\$81,271.65
<b>Totals</b>	<b>\$470,391.64</b>	<b>\$1,890,996.36</b>

Total Salary Quartiles		
Quartile	85%	92%
Year 1	\$35,517.96	\$287,833.91
Year 2	\$77,160.97	\$348,195.37
Year 3	\$256,496.75	\$813,432.45
Year 4	\$101,215.96	\$441,534.63
<b>Totals</b>	<b>\$470,391.64</b>	<b>\$1,890,996.36</b>



Fund	University Staff	Limited	Non-Instructional Academic Staff	Professor	Associate Professor	Assistant Professor	Teaching Professor	Teaching Associate Professor	Clinical Associate Professor	Teaching Assistant Professor	Clinical Professor	Clinical Assistant Professor	Totals
	To 85% Parity												
102	\$14,088.55	\$30,976.57	\$23,496.88	\$175,586.25	\$34,818.42	\$4,899.80	\$35,046.32	\$1,180.95	\$0.00	\$0.00	\$0.00	\$0.00	\$320,093.74
136	\$0.00	\$0.00	\$0.00	\$3,100.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,100.75
150	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
131	\$192.09	\$4,262.36	\$4,729.61	\$92,649.51	\$1,162.24	\$516.80	\$23,134.21	\$0.00	\$2,645.87	\$0.00	\$0.00	\$169.86	\$129,462.55
128	\$953.38	\$358.21	\$5,464.17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,775.76
144	\$96.08	\$0.00	\$2,795.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,891.73
233	\$0.00	\$0.00	\$5,496.54	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,496.54
402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
132	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
104	\$0.00	\$0.00	\$2,570.57	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,570.57
189	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
133	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$15,330.10</b>	<b>\$35,597.14</b>	<b>\$44,553.42</b>	<b>\$271,336.51</b>	<b>\$35,980.66</b>	<b>\$5,416.60</b>	<b>\$58,180.53</b>	<b>\$1,180.95</b>	<b>\$2,645.87</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$169.86</b>	<b>\$470,391.64</b>



Fund	University Staff	Limited	Non-Instructional Academic Staff	Professor	Associate Professor	Assistant Professor	Teaching Professor	Teaching Associate Professor	Clinical Associate Professor	Teaching Assistant Professor	Clinical Professor	Clinical Assistant Professor	Totals
	To 92% Parity												
102	\$85,026.73	\$116,504.01	\$122,444.98	\$571,732.60	\$210,693.59	\$118,954.78	\$86,849.85	\$15,210.68	\$0.00	\$6,708.22	\$0.00	\$0.00	\$1,334,125.44
136	\$1,868.23	\$334.24	\$1,783.40	\$6,859.21	\$0.00	\$0.00	\$0.00	\$1,005.68	\$0.00	\$0.00	\$0.00	\$0.00	\$11,850.76
150	\$0.00	\$0.00	\$353.40	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$353.40
131	\$4,806.85	\$11,712.21	\$25,540.30	\$230,911.12	\$38,752.95	\$20,735.66	\$64,220.24	\$11,249.10	\$17,305.00	\$2,159.31	\$0.00	\$6,561.10	\$433,953.84
128	\$16,243.85	\$2,117.13	\$33,453.66	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$51,814.64
144	\$789.30	\$2,987.08	\$16,716.66	\$0.00	\$1,343.42	\$0.00	\$1,571.63	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$23,408.09
233	\$0.00	\$4,408.75	\$11,304.76	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,713.51
402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
132	\$2,224.04	\$0.00	\$3,035.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,259.89
104	\$0.00	\$0.00	\$7,501.84	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,501.84
189	\$2,224.04	\$0.00	\$879.33	\$1,048.05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,151.42
133	\$0.00	\$0.00	\$2,863.53	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,863.53
<b>Total</b>	<b>\$113,183.04</b>	<b>\$138,063.42</b>	<b>\$225,877.71</b>	<b>\$810,550.98</b>	<b>\$250,789.96</b>	<b>\$139,690.44</b>	<b>\$152,641.72</b>	<b>\$27,465.46</b>	<b>\$17,305.00</b>	<b>\$8,867.53</b>	<b>\$0.00</b>	<b>\$6,561.10</b>	<b>\$1,890,996.36</b>

Classification Review		
Classification		80%
NIAS	Non-Instructional Academic Staff	\$10,062.94
Staff	University Staff	\$3,970.82
LI	Limited	\$9,992.50
Faculty	Professor	\$51,993.05
Faculty	Associate Professor	\$11,252.62
Faculty	Assistant Professor	\$0.00
IAS	Teaching Professor	\$12,406.48
IAS	Teaching Associate Professor	\$0.00
IAS	Clinical Associate Professor	\$0.00
IAS	Teaching Assistant Professor	\$0.00
IAS	Clinical Professor	\$0.00
IAS	Clinical Assistant Professor	\$0.00
Total All		\$99,678.41

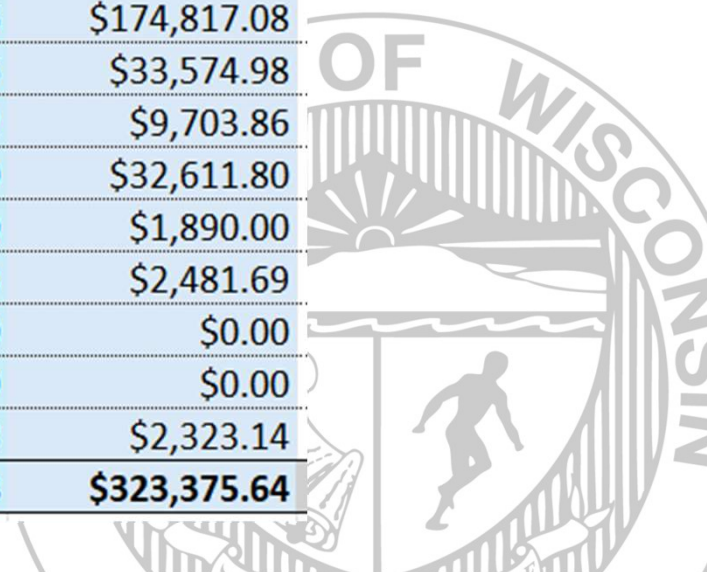


Fund	University Staff	Limited	Non-Instructional Academic Staff	Professor	Associate Professor	Assistant Professor	Teaching Professor	Teaching Associate Professor	Teaching Assistant Professor	Clinical Professor	Clinical Associate Professor	Clinical Assistant Professor	
	To 80% Parity												Totals
102	\$3,970.82	\$9,992.50	\$5,812.28	\$27,180.30	\$11,252.62	\$0.00	\$6,512.78	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$64,721.30
136	\$0.00	\$0.00	\$0.00	\$783.48	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$783.48
150	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
131	\$0.00	\$0.00	\$0.00	\$24,029.27	\$0.00	\$0.00	\$5,893.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$29,922.97
128	\$0.00	\$0.00	\$2,077.44	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,077.44
144	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
233	\$0.00	\$0.00	\$2,173.22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,173.22
402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
132	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
104	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
189	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
133	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$3,970.82	\$9,992.50	\$10,062.94	\$51,993.05	\$11,252.62	\$0.00	\$12,406.48	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$99,678.41



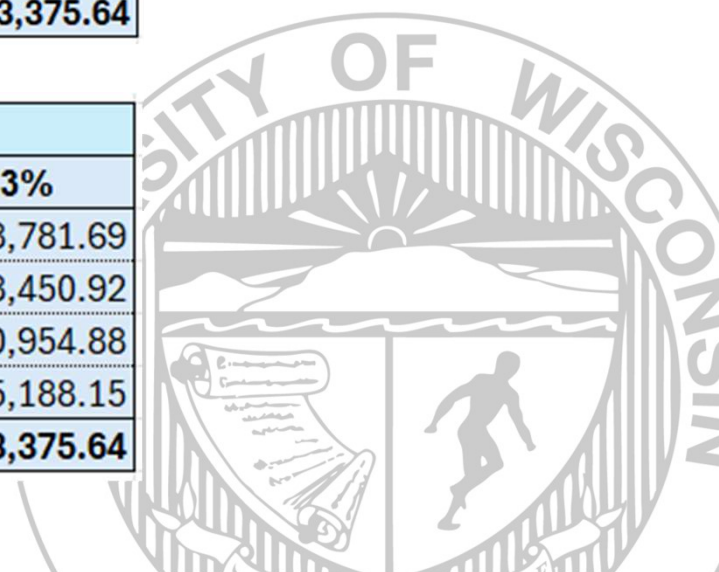
**Classification Review - Percent Increase for Under 85% Parity**

Classification		Cost 1%	Cost 3%
NIAS	Non-Instructional Academic Staff	\$9,113.42	\$27,340.27
Staff	University Staff	\$4,536.69	\$13,610.06
LI	Limited	\$8,340.92	\$25,022.76
Faculty	Professor	\$58,272.36	\$174,817.08
Faculty	Associate Professor	\$11,191.66	\$33,574.98
Faculty	Assistant Professor	\$3,234.62	\$9,703.86
IAS	Teaching Professor	\$10,870.60	\$32,611.80
IAS	Teaching Associate Professor	\$630.00	\$1,890.00
IAS	Clinical Associate Professor	\$827.23	\$2,481.69
IAS	Teaching Assistant Professor	\$0.00	\$0.00
IAS	Clinical Professor	\$0.00	\$0.00
IAS	Clinical Assistant Professor	\$774.38	\$2,323.14
<b>Total All</b>		<b>\$107,791.88</b>	<b>\$323,375.64</b>



Total Parity Quartiles		
Quartile	Cost 1%	Cost 3%
1st quartile	\$26,783.18	\$80,349.53
2nd quartile	\$23,822.45	\$71,467.34
3rd quartile	\$33,827.76	\$101,483.27
Max value	\$23,358.50	\$70,075.50
<b>Totals</b>	<b>\$107,791.88</b>	<b>\$323,375.64</b>

Total Salary Quartiles		
Quartile	Cost 1%	Cost 3%
1st quartile	\$9,593.90	\$28,781.69
2nd quartile	\$12,816.97	\$38,450.92
3rd quartile	\$16,984.96	\$50,954.88
Max value	\$68,396.05	\$205,188.15
<b>Totals</b>	<b>\$107,791.88</b>	<b>\$323,375.64</b>





Fund	University Staff	Limited	Non-Instructional Academic Staff	Professor	Associate Professor	Assistant Professor	Teaching Professor	Teaching Associate Professor	Clinical Associate Professor	Teaching Assistant Professor	Clinical Professor	Clinical Assistant Professor	Totals
	1% Increase for Under 85% Parity												
102	\$3,219.01	\$6,848.92	\$4,684.44	\$39,797.46	\$8,572.85	\$2,612.42	\$5,819.15	\$630.00	\$0.00	\$0.00	\$0.00	\$0.00	\$72,184.25
136	\$0.00	\$0.00	\$0.00	\$2,024.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,024.39
150	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
131	\$332.80	\$1,072.00	\$1,630.11	\$16,450.51	\$2,618.81	\$622.20	\$5,051.46	\$0.00	\$827.23	\$0.00	\$0.00	\$774.38	\$29,379.50
128	\$652.08	\$420.00	\$1,302.53	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,374.61
144	\$332.80	\$0.00	\$551.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$884.00
233	\$0.00	\$0.00	\$510.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$510.00
402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
132	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
104	\$0.00	\$0.00	\$435.14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$435.14
189	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
133	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$4,536.69</b>	<b>\$8,340.92</b>	<b>\$9,113.42</b>	<b>\$58,272.36</b>	<b>\$11,191.66</b>	<b>\$3,234.62</b>	<b>\$10,870.60</b>	<b>\$630.00</b>	<b>\$827.23</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$774.38</b>	<b>\$107,791.88</b>

Fund	University Staff	Limited	Non-Instructional Academic Staff	Professor	Associate Professor	Assistant Professor	Teaching Professor	Teaching Associate Professor	Clinical Associate Professor	Teaching Assistant Professor	Clinical Professor	Clinical Assistant Professor	Totals
	3% Increase for Under 85% Parity												
102	\$9,657.02	\$20,546.76	\$14,053.33	\$119,392.38	\$25,718.55	\$7,837.26	\$17,457.44	\$1,890.00	\$0.00	\$0.00	\$0.00	\$0.00	\$216,552.74
136	\$0.00	\$0.00	\$0.00	\$6,073.17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,073.17
150	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
131	\$998.40	\$3,216.00	\$4,890.33	\$49,351.53	\$7,856.43	\$1,866.60	\$15,154.37	\$0.00	\$2,481.69	\$0.00	\$0.00	\$2,323.14	\$88,138.49
128	\$1,956.24	\$1,260.00	\$3,907.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,123.84
144	\$998.40	\$0.00	\$1,653.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,652.00
233	\$0.00	\$0.00	\$1,530.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,530.00
402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
132	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
104	\$0.00	\$0.00	\$1,305.41	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,305.41
189	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
133	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$13,610.06</b>	<b>\$25,022.76</b>	<b>\$27,340.27</b>	<b>\$174,817.08</b>	<b>\$33,574.98</b>	<b>\$9,703.86</b>	<b>\$32,611.80</b>	<b>\$1,890.00</b>	<b>\$2,481.69</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,323.14</b>	<b>\$323,375.64</b>



### Classification Review

	Classification	\$20/hr	\$18/hr	\$17/hr
NIAS	Non-Instructional Academic Staff	\$12,499.80	\$3,639.00	\$1,559.00
Staff	University Staff	\$987,168.00	\$349,294.40	\$125,944.00
LI	Limited	\$0.00	\$0.00	\$0.00
Faculty	Professor	\$0.00	\$0.00	\$0.00
Faculty	Associate Professor	\$0.00	\$0.00	\$0.00
Faculty	Assistant Professor	\$0.00	\$0.00	\$0.00
IAS	Teaching Professor	\$0.00	\$0.00	\$0.00
IAS	Teaching Associate Professor	\$0.00	\$0.00	\$0.00
IAS	Clinical Associate Professor	\$0.00	\$0.00	\$0.00
IAS	Teaching Assistant Professor	\$0.00	\$0.00	\$0.00
IAS	Clinical Professor	\$0.00	\$0.00	\$0.00
IAS	Clinical Assistant Professor	\$0.00	\$0.00	\$0.00
<b>Total All</b>		<b>\$999,667.80</b>	<b>\$352,933.40</b>	<b>\$127,503.00</b>











## Classification Review

	Classification	\$20/hr & 80%	\$20/hr & 85%	\$20/hr & 92%
NIAS	Non-Instructional Academic Staff	\$22,562.74	\$55,559.84	\$238,377.51
Staff	University Staff	\$989,281.99	\$997,035.85	\$1,050,582.41
LI	Limited	\$9,992.50	\$35,597.14	\$138,063.42
Faculty	Professor	\$51,993.05	\$271,336.51	\$810,550.98
Faculty	Associate Professor	\$11,252.62	\$35,980.66	\$250,789.96
Faculty	Assistant Professor	\$0.00	\$5,416.60	\$139,690.44
IAS	Teaching Professor	\$12,406.48	\$58,180.53	\$152,641.72
IAS	Teaching Associate Professor	\$0.00	\$1,180.95	\$27,465.46
IAS	Teaching Assistant Professor	\$0.00	\$0.00	\$8,867.53
IAS	Clinical Professor	\$0.00	\$0.00	\$0.00
IAS	Clinical Associate Professor	\$0.00	\$2,645.87	\$17,305.00
IAS	Clinical Assistant Professor	\$0.00	\$169.86	\$6,561.10
<b>Total All</b>		<b>\$1,097,489.38</b>	<b>\$1,463,103.81</b>	<b>\$2,840,895.53</b>







Fund	University Staff	Limited	Non-Instructional Academic Staff	Professor	Associate Professor	Assistant Professor	Teaching Professor	Teaching Associate Professor	Teaching Assistant Professor	Clinical Professor	Clinical Associate Professor	Clinical Assistant Professor	Totals
	To \$20/hr minimum & 85% Parity												
102	\$586,093.67	\$30,976.57	\$26,096.88	\$175,586.25	\$34,818.42	\$4,899.80	\$35,046.32	\$1,180.95	\$0.00	\$0.00	\$0.00	\$0.00	\$894,698.86
136	\$7,654.40	\$0.00	\$0.00	\$3,100.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,755.15
150	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
131	\$98,425.60	\$4,262.36	\$4,729.61	\$92,649.51	\$1,162.24	\$516.80	\$23,134.21	\$0.00	\$0.00	\$0.00	\$2,645.87	\$169.86	\$227,696.06
128	\$291,342.18	\$358.21	\$13,870.59	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$305,570.98
144	\$8,320.00	\$0.00	\$2,795.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$11,115.65
233	\$0.00	\$0.00	\$5,496.54	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,496.54
402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
132	\$2,600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,600.00
104	\$0.00	\$0.00	\$2,570.57	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,570.57
189	\$2,600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,600.00
133	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$997,035.85</b>	<b>\$35,597.14</b>	<b>\$55,559.84</b>	<b>\$271,336.51</b>	<b>\$35,980.66</b>	<b>\$5,416.60</b>	<b>\$58,180.53</b>	<b>\$1,180.95</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,645.87</b>	<b>\$169.86</b>	<b>\$1,463,103.81</b>

Fund	University Staff	Limited	Non-Instructional Academic Staff	Professor	Associate Professor	Assistant Professor	Teaching Professor	Teaching Associate Professor	Teaching Assistant Professor	Clinical Professor	Clinical Associate Professor	Clinical Assistant Professor	Totals
	To \$20/hr minimum & 92% Parity												
102	\$632,221.79	\$116,504.01	\$125,044.98	\$571,732.60	\$210,693.59	\$118,954.78	\$86,849.85	\$15,210.68	\$6,708.22	\$0.00	\$0.00	\$0.00	\$1,883,920.50
136	\$7,654.40	\$334.24	\$1,783.40	\$6,859.21	\$0.00	\$0.00	\$0.00	\$1,005.68	\$0.00	\$0.00	\$0.00	\$0.00	\$17,636.93
150	\$0.00	\$0.00	\$353.40	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$353.40
131	\$100,168.75	\$11,712.21	\$25,540.30	\$230,911.12	\$38,752.95	\$20,735.66	\$64,220.24	\$11,249.10	\$2,159.31	\$0.00	\$17,305.00	\$6,561.10	\$529,315.74
128	\$297,017.47	\$2,117.13	\$43,353.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$342,488.06
144	\$8,320.00	\$2,987.08	\$16,716.66	\$0.00	\$1,343.42	\$0.00	\$1,571.63	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30,938.79
233	\$0.00	\$4,408.75	\$11,304.76	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,713.51
402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
132	\$2,600.00	\$0.00	\$3,035.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,635.85
104	\$0.00	\$0.00	\$7,501.84	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,501.84
189	\$2,600.00	\$0.00	\$879.33	\$1,048.05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,527.38
133	\$0.00	\$0.00	\$2,863.53	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,863.53
Total	\$1,050,582.41	\$138,063.42	\$238,377.51	\$810,550.98	\$250,789.96	\$139,690.44	\$152,641.72	\$27,465.46	\$8,867.53	\$0.00	\$17,305.00	\$6,561.10	\$2,840,895.53

**Joint Planning & Budget Committee Meeting Minutes**  
**March 26, 2025**  
**Student Union 2310**

**Meeting called to order promptly at 1:15 p.m.**

**JPB Committee and Ex-Officio Members in Attendance:** Achenreiner, Bearhart (via Teams), Beeby, Brooks, Craig, Engen, Ericson, Figueroa, Galbraith, Grunwald, Guyer, Hohman, Ives (via Teams), Jax, Kim, Kunkel, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Schweiger, Talbot (via Teams), Thomsen, Thoune, Trnka, Walz (via Teams), Weston, Wycoff-Horn, Yu, Ziegelman

**Excused:** Grattan, Gray

**Agenda:**

1. Approval of Minutes from March 12, 2025
  - Motion by Thoune, second by Craig, approved by voice vote.
2. Chancellor Update
  - During spring break spent some time advocating for Prairie Springs in Madison with legislators.
  - Joint finance hearings coming up across the state, Chancellor Beeby plans to attend one.
  - Strategic planning is moving forward.
  - Will be attending HLC conference and upcoming regents meeting. Will report back on highlights to this group.
3. Presentation: Salary Study (CFO)
  - CFO Pope shared data summaries on salary and comparatives.
  - Requested that the group review the data in the slides and be prepared to discuss in our next meeting parameters on how we might make salary adjustments if we get the budget increase we requested (we won't know what we will get until June/July at the earliest).
  - Questions/suggestions can go through executive committee. Chair Yu will send an email with instructions for how to channel this feedback.
  - Next meeting we will discuss this issue. Members should come prepared on April 23<sup>rd</sup> to discuss.
4. Presentation: Enrollment Planning (Provost's Office and Admissions)
  - Sandy Grunwald and Corey Sjoquist answered questions in the agenda with information in PowerPoint slides distributed to the committee prior to the meeting.

The JPB Chair provided a preview of upcoming meetings:

- 4/23/2025: Discussion about the data of the salary study

- 5/07/2025: Update on the strategic plan (Stacy Twite and Whitney George, Co-Chairs of Strategic Plan Executive Committee); Wrap-up & conclusion and future JPB goals

**Adjournment at 2:50 p.m.**

Minutes submitted by Joci Newton

## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., April 23, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via Teams [[Join the meeting now](#), Meeting ID: 251 937 346 072

Passcode: 8BK2Wa2A]

Recorder: Richter

Alternate Recorder: Schweiger

## Agenda:

1. Approval of Meeting Minutes
  - a. 3/26/2025
2. Discussion: Salary Study: How we might make salary adjustments if we get the budget increase we requested? (Q: Introduce the values at the beginning, Move 2d to 2a?)
  - a. Initial thoughts and questions
  - b. JPB Executive Committee
    - University Staff: Salary data used to make comparisons for the University Staff?
    - Other options in slide #3 in Salary Study PPT: Consider different models to address salary issues? e.g., centralized vs. partially decentralized for salary adjustments?
    - Discretionary funds used in the past: Strategies used historically to determine how the discretionary funds were distributed at UWL?
    - Salary adjustments: What and when do we know? and How much do we need?
  - c. Initial thoughts from the four shared governance groups
  - d. Bring forth the values of the university guiding conversations and decision-making (Andrew Ives)
  - e. Current Priorities and Needs at UWL regarding Salary Issues
    - What are the priorities to address salary issues? What are the critical issues and needs to address?
3. Chancellor's update
4. Provost's update
5. CFO's update
6. Adjournment

**Future Meeting Date in Spring 2025** (presenters in parentheses)

- 5/07/2025: Update on the strategic plan (Stacy Twite and Whitney George, Co-Chairs of Strategic Plan Executive Committee, confirmed); Wrap-up & conclusion and future JPB goals (tentative)

**JPB Executive Committee Members**



Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Grant Hohman, Student Association  
Tim McAndrews, Faculty  
Mary Grattan, University Staff  
Chia-Chen Yu, Chair

**JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
3. To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL



# Salary Study

Discussion



## Salary Study Data

- Amounts
  - Parity
    - 80%: \$99,678
    - 85%: \$470,392
    - 92%: \$1,890,996
  - Min Salary Rate
    - \$17: \$127,503
    - \$18: \$352,933
    - \$20: \$999,668
- Employees affected
  - Parity
    - 80%: 40
    - 85%: 148
    - 92%: 459
  - Min Salary Rate
    - \$17: 96
    - \$18: 123
    - \$20: 184





# Budget Cycle

## Timeline

- **November (even-numbered year):** Agency budget request submitted to the governor. The governor reviews the request.
- **February (odd-numbered year):** Governor introduces budget proposal.
- **March:** Governor releases capital budget.
- ★ • **April – May:** Joint Finance Committee modifies governor's budget and capital budget.
- **June:** Assembly and Senate act on budget.
- **July:** Governor signs budgets; issues vetoes.



## Parameter Possibilities

- Lowest Parity, Regardless of Pay



## Parameter Possibilities

- Lowest Paid, Regardless of Parity



## Parameter Possibilities

- Most Number of Employees (most people possible)



## Parameter Possibilities

- Highest Per Person Impact (highest dollar per person)



## Parameter Possibilities

- Lowest Paid AND Lowest Parity



## Parameter Possibilities

- Lowest Parity AND Lowest Paid



# Parameter Possibilities

- Other Options?





## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., April 23, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via Teams [[Join the meeting now](#), Meeting ID: 251 937 346 072]

Passcode: 8BK2Wa2A]

Recorder: Richter

Alternate Recorder: Schweiger

## JPB Committee and Ex-Officio Members in Attendance:

Achenreiner, Bearhart (Via Teams), Beeby, Brooks, Craig, Engen (Via Teams), Ericson, Figueroa, Galbraith, Grattan, Gray, Grunwald, Guyer, Hohman, Ives, Jax, Kim, Kunkel, McAndrews, Morgan, Narcotta-Welp, Newton, Pope, Richter, Roraff, Talbot (Via Teams), Thomsen, Thoune, Trnka, Weston, Wycoff-Horn, Yu

## Agenda:

1. Approval of Meeting Minutes M-Wycoff-Horn S-Ives Passed
  - a. 3/26/2025

Andrew Ives suggested discussing the 2d item before 2a MSP

Bring forth the values of the university guiding conversations and decision-making (Andrew Ives)

## 2.d Our Values

- ii. Mens Corpusque
  - iii. Diversity and Inclusion
  - iv. High Quality of Life/Work Management
  - v. Civic Engagement/The WI Idea
2. Discussion: Salary Study: How we might make salary adjustments if we get the budget increase we requested?
  - a. Initial thoughts and questions
  - b. JPB Executive Committee
    - i. University Staff: Salary data used to make comparisons for the University Staff? CUPA, UW System Schools, and some specific (outside) programs. Some are position dependent
    - ii. Other options in slide #3 in Salary Study PPT: Consider different models to address salary issues? e.g., centralized vs. partially decentralized for salary adjustments? Possible autonomy to individual units. What am I not thinking of? Across the board, nothing, what else is out there? Are there news ways to tackle this issue? Intend to keep centralized control. Need to keep it clean and equitable. May have some nuanced control. Could create bands of compensation.
    - iii. Discretionary funds used in the past: Strategies used historically to determine how the discretionary funds were distributed at UWL? Available for one time use, becomes available at some point, identify

funds, usually not a lot of money, STAR funds from UW System were an example of money allocated in the past, Faculty Senate made some decisions related to funding in the past to deal with inversion and compression. Some of the discretionary funds are “leftover” funds. Dollars that have not be used in Supplies and Expense, salaries from unstaffed positions. What funds can be used to fund one-time items? Fund type matters. Can’t use grant funds. Can’t use Capital Funds. Need to keep 102 and 128, 131 monies separated.

- iv. Salary adjustments: What and when do we know? and How much do we need? It is related to the State Budget. This is an unusual year. Both internal and federal actions. Good conversations happening at the Capital. Hope to hear more about the budget in July. We may not hear until later. What are UWL and UW System priorities. Each campus is having these conversations. Governor has supported 5%/4% raises for the 2 years of biennium. Will it be funded at full level? Merit and Market pay will be different. Will need to discuss priorities. Some limits on what the Chancellor can do with pay. Could this be another option, possible. Could we use pay plan monies more strategically? Lower paying and high turnover positions are a need to be discussed. Career Progression? Need to focus on global issue then discuss progression.
  - c. Initial thoughts from the four shared governance groups
    - i. Academic Staff Council encourages discussion on longevity, progression, more discretion given to deans and directors. Concern for those positions that are lowest paid, and those that have high turnover rates. Interest in using creative ways of leveraging pay plan. Can we study gaps related to identity? Salary savings from open positions-overload payments.
    - ii. University Staff-custodians lowest paid without creating compression,
    - iii. Faculty Senate-faculty specific, long-term balance of faculty and IAS, compression needs to be addressed, pay bumps after last promotion, merit based, longevity issue, hiring issues (low pay), how does also impact non-faculty, shouldn’t have to take second job to make ends meet, fair wage that is balanced, how is loyalty rewarded? Parity as it relates to turnover, why aren’t we striving for 100%,
    - iv. Student Senate-none
  - d. Current Priorities and Needs at UWL regarding Salary Issues
    - i. What are the priorities to address salary issues? What is equitable compensation? What is our plan when the money comes? Can we build the structure to make this happen? We should use our new strategic plan to determine priorities. How does student hourly wages impact other positions and pay? Do we act on what we think is important?
    - ii. What are the critical issues and needs to address?
3. Stephanie would welcome recommendations from JPB and thanked the JPB members for the discussion and ideas

4. Chancellor's update
  - a. VP from Madison here yesterday. Discussed challenges regarding compensation.
  - b. Busy time of the semester
  - c. Met with 16 legislators about Prairie Springs
  - d. Research in the Rotunda
  - e. HLC Conference in Chicago
  - f. Hosted a few Regents
  - g. Budget is a challenge
  - h. Federal action is a challenge
  - i. Monitoring our grants
  - j. Get involved with Strategic Planning
  - k. Inauguration
5. Provost's update

Grant funding elimination implications have been felt at UWL (TRIO, Adapted PE, etc.) staff costs and it could be immediate. What are the indirect costs? Need to tell our story and tell the impact to the community. No international students with VISA cancellations right now.
6. CFO's update

Construction Project on budget and maybe ahead of schedule

  - a. WIAA State Track meet planning
  - b. BOR approved auxiliary rates (housing, textbook, dining, parking, seg fees)
7. Adjournment

**Future Meeting Date in Spring 2025** (presenters in parentheses)

- 5/07/2025: Update on the strategic plan (Stacy Twite and Whitney George, Co-Chairs of Strategic Plan Executive Committee, confirmed); Wrap-up & conclusion and future JPB goals (tentative)

**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff  
Ju Kim, Dean  
Grant Hohman, Student Association  
Tim McAndrews, Faculty  
Mary Grattan, University Staff  
Chia-Chen Yu, Chair

**JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan
2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
3. To educate the university community on how the strategic plan, enrollment management, capital budget projects, and State of Wisconsin budget impact the current priorities and future planning of UWL



## Joint Planning &amp; Budget Committee Agenda

1:15 p.m., May 7, 2025

In person, Student Union 2310 – Senate Chambers

Guests may join via Teams [[Join the meeting now](#), Meeting ID: 259 549 139 25]

Passcode: 3Fx64Pw6]

Recorder: Schweiger

Alternate Recorder: Talbot

## Agenda:

1. Approval of Meeting Minutes
  - a. 4/23/2025
2. Strategic Plan (Stacy Twite and Whitney George, Co-Chairs of Strategic Plan Executive Committee)
  - a. Update
  - b. Executive Committee's Suggested Qs to Ask
    - Where are we now in strategic planning?
    - Timeline for specific activities in strategic planning
    - What is the roadmap for the strategic plan?
    - How are the roundtable sessions going?
    - How much participation (round table and survey)? What can JPB help?
    - This is the end of the semester, so we were wondering if the Strategic Plan Committee plans other work in the summer?
    - Where do we want to be in the next five years? This question is more for the Chancellor.
3. Potential Agenda Items and Topics Next Year: Suggestions
  - a. 1<sup>st</sup> meeting: Go over bylaws and discuss JPB Committee's charges
  - b. System budget and UWL capital budget projects: update
  - c. Strategic Plan: update
  - d. Enrollment status: update
  - e. Suggestions?
4. Chancellor's update
5. Provost's update
  - No report
6. CFO's update
  - No report
7. Adjournment

**JPB Goals for 2024-25**

1. To consider each agenda item in the context of its support for the strategic plan

2. To assist the University in planning for the next 3-5 years, budgeting to support that plan, and outlining longer-term planning needs
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**JPB Executive Committee Members**

Pearl Bearhart, Academic Staff

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# STRATEGIC PLAN: JOINT PLANNING & BUDGET

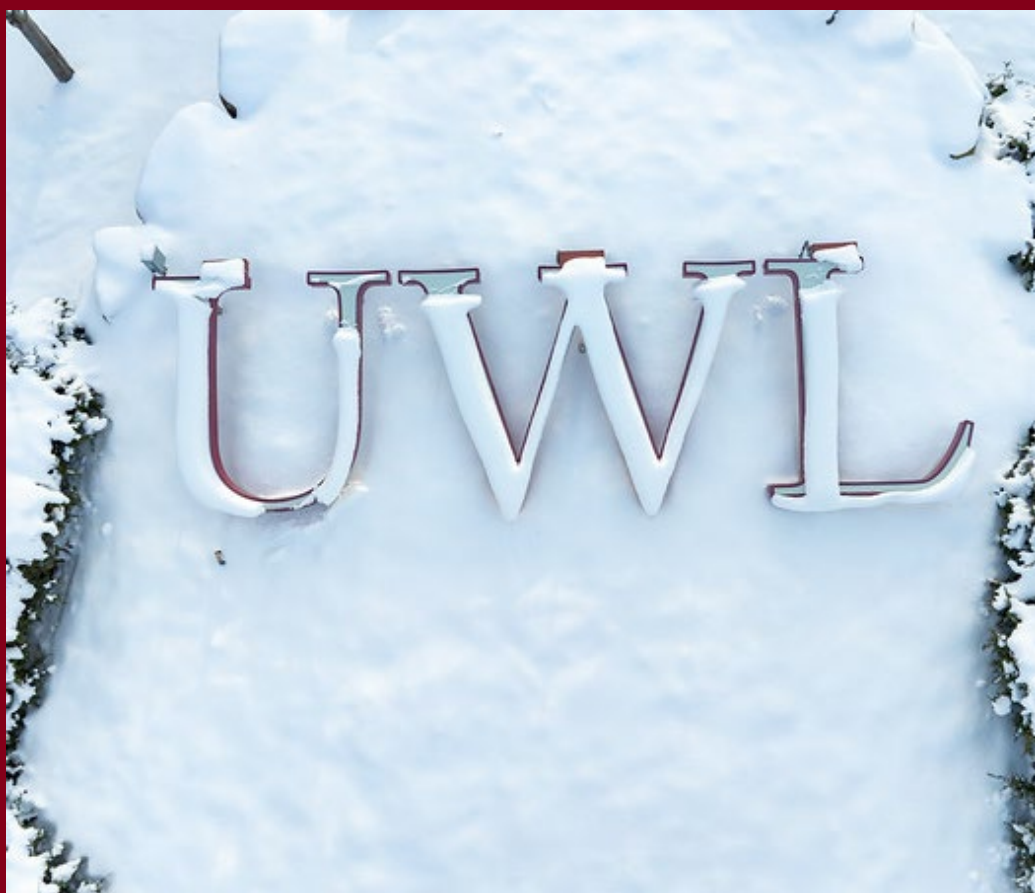


# Goals today

- Learn about the strategic planning process.
- Gather data and input to form the focus of the 2025-30 strategic plan pillars/goals.







# Strategic Planning 101

# What is a strategic plan?

- “Structured approach to anticipating the future and exploiting the inevitable. It is a means of establishing major directions for an organization and concentrating resources accordingly.”
- Umbrella direction “compass” for all campus – “every employee should have a direct line of sight between their work and the documented priorities of the organization.”
- 5-year plan: 2025-2030

# Why strategic planning?

- Shared vision – direction for all of campus to follow
- Decision making – set priorities
- Prepare for challenges, maximize opportunities
- Inspiration – what do we want the future to be
- HLC compliance








# UWL's last plan

2016 – Plan created

2019 – Pillars reviewed

2024 - endorsement of revised goals




### Sustaining Excellence

The UWL Strategic plan is comprised of four pillars which focus on students, community and employees. These campus priorities serve to guide our goals and actions steps. UWL initiated the current plan in 2016 with several updates including a 2024 governance endorsement of revised goals within each pillar. A new strategic planning process is expected during the 2024-2025 academic year.

#### INCREASING COMMUNITY ENGAGEMENT

UWL embraces community engagement as a key component to our teaching, scholarly, & service mission.


LATEST ACTIVITY ...



#### ACHIEVING EXCELLENCE THROUGH EQUITY & DIVERSITY

UWL is committed to being an equitable & welcoming community to maintain our status as a high quality & competitive university.


LATEST ACTIVITY ...



#### INVESTING IN OUR PEOPLE

UWL recognizes that our status as a high quality and competitive university depends on our faculty and staff.


LATEST ACTIVITY ...



#### ADVANCING TRANSFORMATIONAL EDUCATION

High-impact teaching & learning opportunities that are proven to aid student success across diverse backgrounds.

LATEST ACTIVITY ...



# Guiding Principles – SP Process

The 2025-2030 Strategic Plan builds upon the foundation of past initiatives, honoring the university's rich history while ensuring both short- and long-term institutional success. This plan is guided by the following core principles:

- **Community Engagement** – A successful strategic plan must reflect the voices of the entire UWL community and be shaped by those it serves.
- **Transparency** – The planning process will be open and accessible, ensuring clarity and trust among all stakeholders.
- **Accountability** – Decisions and actions will be grounded in a thorough, objective, and measurable process to uphold institutional integrity and effectiveness.



## UW-La Crosse Strategic Plan

### 2025-2030 Strategic Plan: Guiding Principles

For over a century, the University of Wisconsin-La Crosse has served as a pillar of its community, continually evolving to meet challenges and embracing change. As we look ahead, we seek to define our identity and set aspirational goals by asking: *What will UWL be in the next 5, 10, or 50 years?*

The 2025-2030 Strategic Plan builds upon the foundation of past initiatives, honoring the university's rich history while ensuring both short- and long-term institutional success.

The following guiding principles will shape our path forward, ensuring that UWL remains a dynamic, forward-thinking institution dedicated to excellence and innovation.

This plan is guided by the following core principles:

- **Community Engagement** – A successful strategic plan must reflect the voices of the entire UWL community and be shaped by those it serves.
- **Transparency** – The planning process will be open and accessible, ensuring clarity and trust among all stakeholders.
- **Accountability** – Decisions and actions will be grounded in a thorough, objective, and measurable process to uphold institutional integrity and effectiveness.

[Meet the Executive Committee](#)[Meet the Engagement Committee](#)[Previous 2016-2024 Strategic Plan](#)

[www.uwlax.edu/info/strategic-plan](http://www.uwlax.edu/info/strategic-plan)



Phase 1

Phase 2

Phase 3

Phase 4

Phase 5

## Phase 1: Assess the Landscape (January-March 2025)



+ Task A: Onboard Strategic Planning Team (January-February 2025)

+ Task B: Assess Institutional Context (January-March 2025)

+ Task C: Analyze Stakeholder Groups (February-March 2025)

[www.uwlax.edu/info/strategic-plan](http://www.uwlax.edu/info/strategic-plan)



# Assessment & data gathering

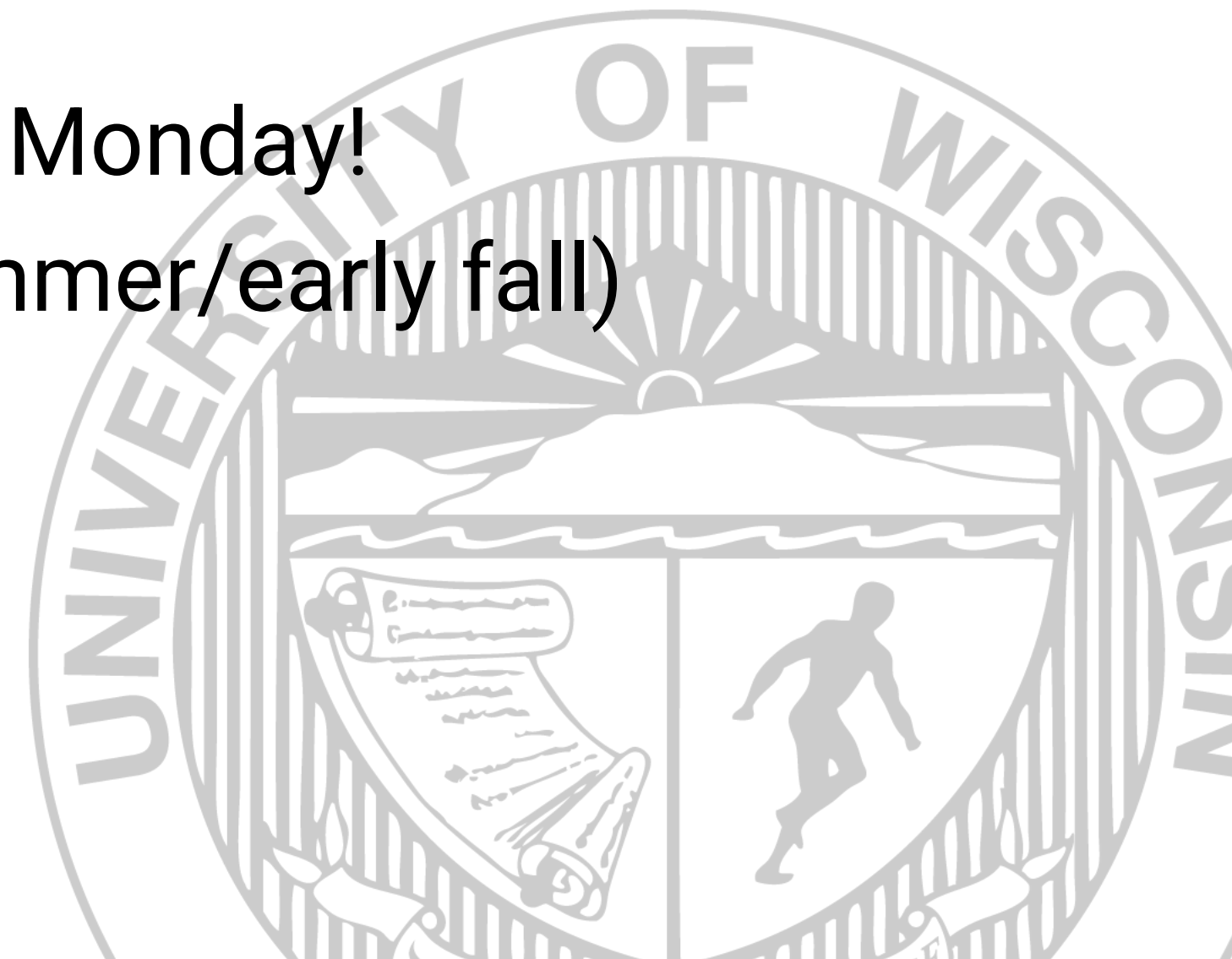


- Internal analysis & constituent engagement
  - 9+ round table sessions
  - SWOT analysis
- External landscape analysis
  - Competitors
  - Aspirants
  - Higher education landscape
- Historical data review

# Coming Up

Survey is out  
now!

- Round tables
  - 4 remaining in person sessions open to all campus (RSVP required)
  - Shared governance meetings
- Survey to campus + alumni + emeriti – released Monday!
- External community strategies (starting late summer/early fall)
  - Survey, other engagement
- Summer – data analysis by exec committee
- Fall – draft pillars, additional feedback



# Discussion



# Questions

- What were the successes and failures of the last strategic plan?
- Knowing this, how do you see this current plan being incorporated into the new plan? If at all?
- What is the impact of this strategic plan?







# Thank you

*Take the survey!*

[uwlax.edu/info/strategic-plan](http://uwlax.edu/info/strategic-plan)