

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

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

Absent: Hetzel, Stewart

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

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

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

All passed. Appropriate abstentions were made.

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

Joint Planning and Budget

Calendar of Regular Business

2019 – Establish Longstanding Structure for Strategic Planning

IRAP – Institutional Research, Assessment, & Planning

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

September

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

October

- Budget 101 (CFO)

November

- University Advancement Activities (Vice Chancellor for Advancement)

December

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

January

- NA

February

- Review of Capital Planning (CFO)

March

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

April

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

May

- NA

Other Possible Items Dependent on When Data is Released

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

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

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

Absent: Hansen, Hetzel, Kovari, Reichert, Richter

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

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

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

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

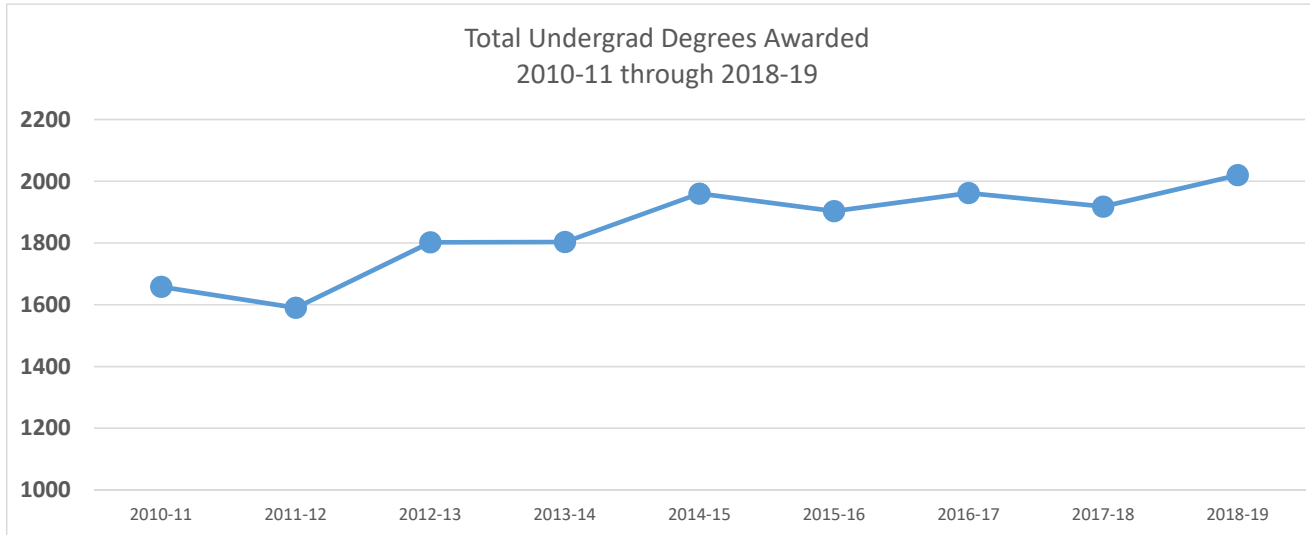
6. CFO's Update—N/A (Dr. Hetzel unable to attend)

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

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

9. Meeting adjourned at 1:52 PM.

UNIVERSITY *of* WISCONSIN LA CROSSE



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

Source: UWL Student Information System, UWLIR_ACAD_DEGV and STDNT_GRP5
 Saved at: N:\IR\CAMPUS REQUESTS\Enrollment Management Activities\Degree Production Summer Analysis
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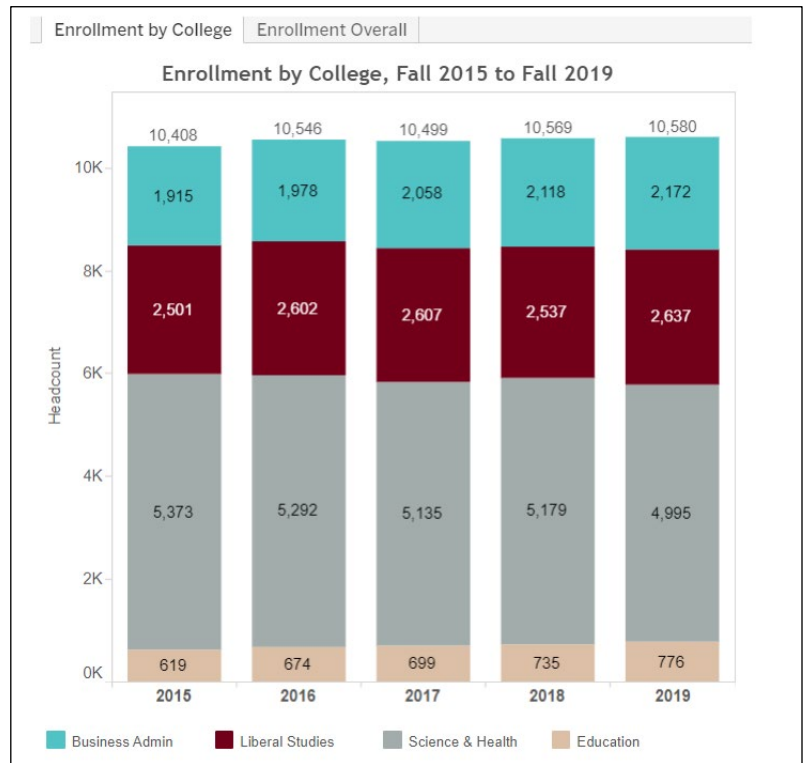
Office of Institutional Research, Assessment, and Planning
FALL 2019 ENROLLMENT SUMMARY – Sept 24, 2019

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

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

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

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



We awarded over 2,000 undergraduate degrees last year.

Some challenges:

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

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

Undergraduate Fund Allocations

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

128: Study Abroad

136: Remedial

189: online collaboratives, dual credit, ECCP

GRAD 131: Self-Supporting Programs

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

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

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

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

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

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

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

Absent: Figueroa, Morgan, Wycoff-Horn

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

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

2. Announcements/Updates-

1. Budget 101 will be moved to November 20th

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

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

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

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

4. CFO's Update –

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

5. Strategic Planning Update-None

6. New Business –

FY21 Budget Planning Forecast

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

FY20 Soaring Eagle Scholarship Funding

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

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

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

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

DRAFT FOR DISCUSSION ONLY

Table 1: FY21 Tuition & Segregated Fee Revenue Forecast

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

Table 2: FY21 Fund 131 GQA Budget Reduction Summary

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

Table 3: FY21 Budget Resource Offset Strategies

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

DRAFT FOR DISCUSSION ONLY

Table 1: FY19 Carryover Summary

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

Table 2: Soaring Eagle Scholarship Funding Options

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

University of Wisconsin-La Crosse



UWL Budget Overview Joint Planning & Budget

October 9, 2019



Fall 2019 Highlights at UWL

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

A Look at UWL Enrollment

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

Financial Challenges

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

Budget Planning for FY21

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

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

UWL Joint Planning and Budget Committee

Meeting Minutes

October 23, 2019

325 Graff Main Hall

Recorder: K Buchholz & C Carlson

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

Absent: B. Hetzel, T Richter.

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

Last Meeting Minutes were presented.

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

Announcements/Updates

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

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

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

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

Table 1: FY19 Educational Assistance Expenditures

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

Table 2: FY19 Educational Assistance Expenditures by Employee Classification

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

Table 3: Educational Assistance Budget

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

Table 4: Educational Assistance Budget Funding Sources

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

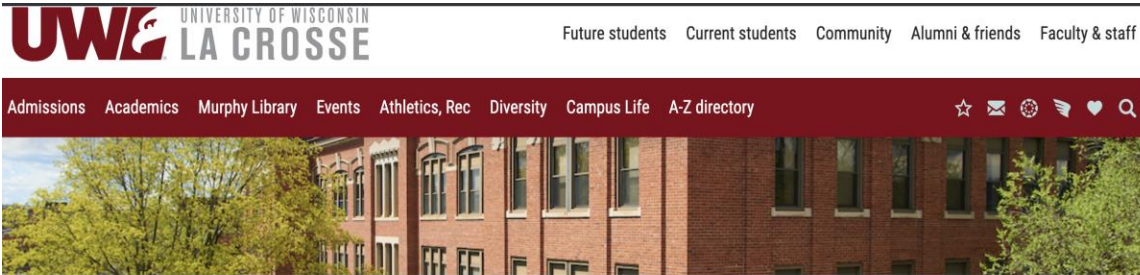


Strategic Planning 2020

Kate Parker
Special Assistant to the Provost-SP

SP Update October 2019

An overview of activities since January 2019



Sustaining Excellence

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

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

[VIEW THE REPORTS](#)

[GET THE UPDATES](#)

[LEARN ABOUT UWL](#)

INCREASING
COMMUNITY
ENGAGEMENT

UWL embraces

ACHIEVING
EXCELLENCE
THROUGH EQUITY
& DIVERSITY

INVESTING IN OUR
PEOPLE

UWL recognizes that
our status as a high

ADVANCING
TRANSFORMATIONAL
EDUCATION

High-impact teaching &

Community Engagement

Greg Reichert & Lisa Klein

New position: Community Engagement Coordinator

Forthcoming in Fall 2019

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

Equity & Diversity

Barbara Stewart & Roger Haro

Equity Liaison initiative

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

Inclusive Teaching Practices

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

Restorative Justice

- Training scheduled for Sp 2020

Transformational Education

Betsy Morgan & Tim Dale

General Education Reform

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

International Ed

- Internationalization of the curriculum & campus (ACE Laboratory)

Graduate Studies

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

Advising

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

Investing in Our People

Bob Hetzel & John Acardo

EEAT (Employee Engagement Action Team)

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

May 2020 Scenarios (Developed with JPB Exec November 2018)

#3

Office of Strategic Planning

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

#2

Existing Resources (Plus+)

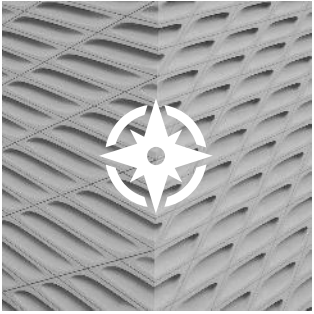
Make Different Use
of Existing Positions and
Offices

#1

SAP-SP

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

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



Focused progress

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



Workload

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



Accountability

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



Celebration

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



Growth

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



Pillars

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

Increasing Community Engagement



Advisory: Community Engagement Council



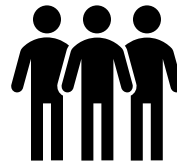
Investing in our People



Advisory: Joint Planning & Budget



Achieving Excellence through Equity & Diversity



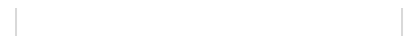
Advisory: D&I Directors Council



Transformational Education



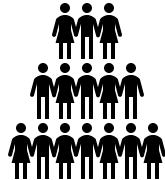
Various advisory groups





Soliciting Feedback

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



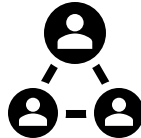
Governance Groups

Visiting governance groups in early Spring 2020.



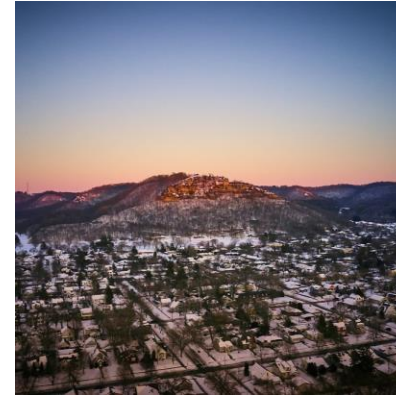
Campus

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



Departments/Units

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



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

Questions



University Relations

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wisconsin.edu • facebook.com/uwsystem • twitter.com/uwsystem

universityrelations@uwsa.edu or 608-263-1700

FOR IMMEDIATE RELEASE

October 17, 2019

News Release

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

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

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

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

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

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

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

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

The data also shows:

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

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

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

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

###

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

MEDIA CONTACT:

Mark Pitsch, UW System
608-265-3419, mpitsch@uwsa.edu
universityrelations@uwsa.edu

Fall Semester Enrollment Comparison with Prior Year

Preliminary

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

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

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

ENROLLMENT PROJECTIONS FOR UNIVERSITY OF WISCONSIN SYSTEM

Office of Policy Analysis and Research

September 19, 2019

Prepared by Daniel Younan, Andy LeBeau, and Mark Pioli



DRAFT

Introduction

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

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

Report Overview

This report is divided into several sections:

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

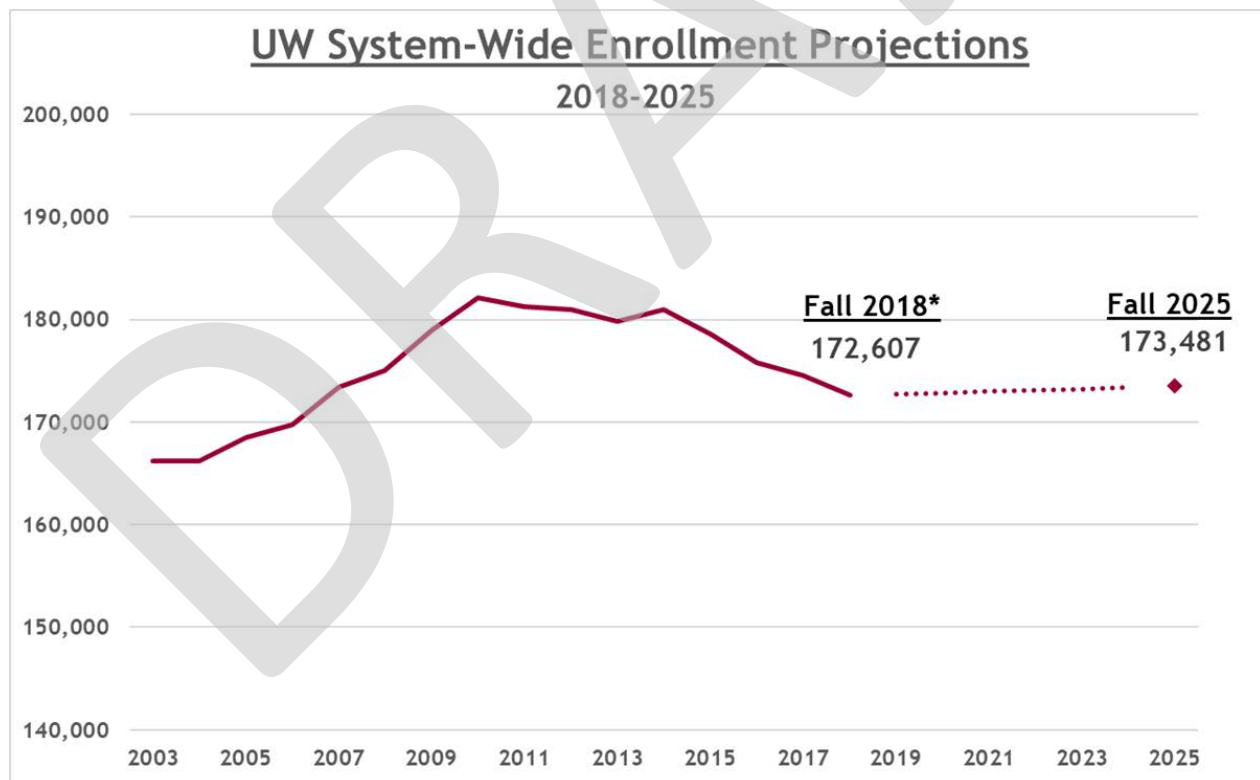
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Section 1: UWS Overall Projections and Context

DRAFT

UW System Institutional Enrollment Projections 2018-2025

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



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

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

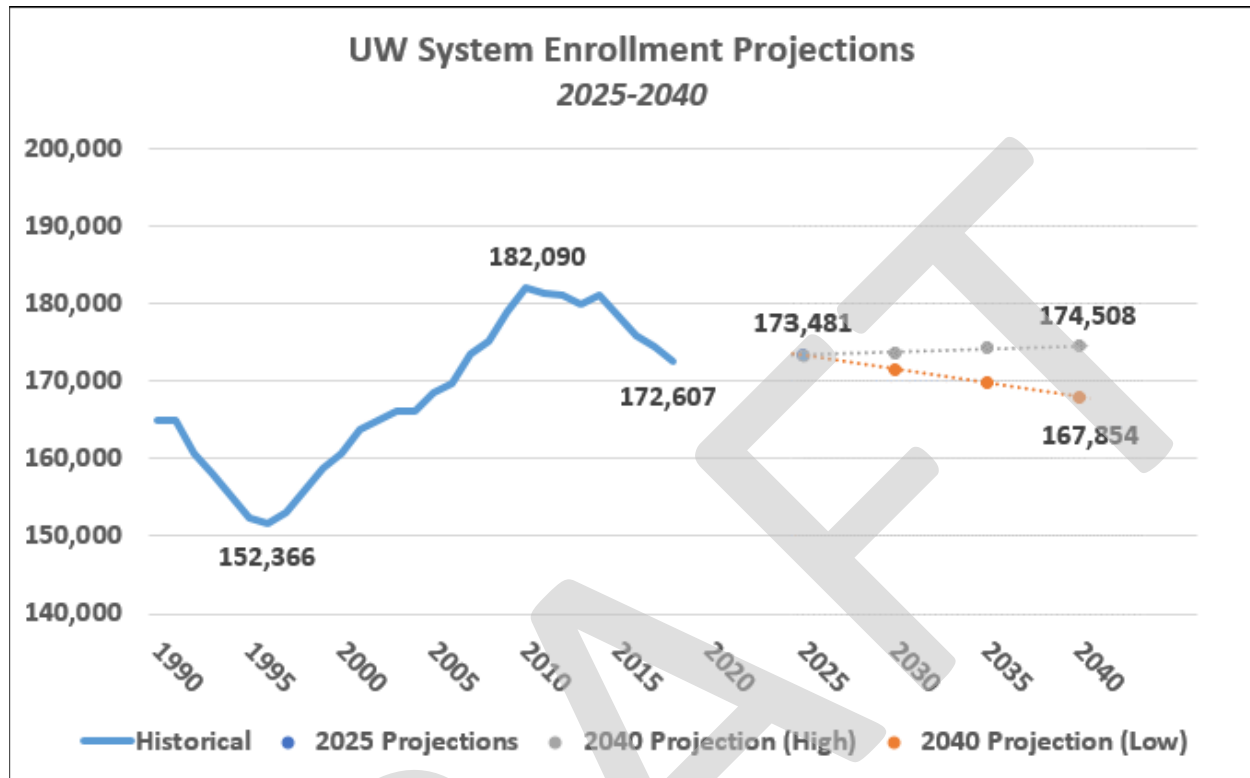
*To maintain continuity with historical data, headcounts for fall 2018 forward include dual enrollment at restructured institutions.

Notes on 2025 Projections

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

DRAFT

UW System System-wide Enrollment Projection 2025-2040



Notes on 2040 Projections

- Due to the increased challenge and uncertainty surrounding a 20-year forecast we only provide a system-wide total and, in doing so, also impose the following additional assumptions—we hold the level of out-of-state undergraduates constant at its 2025 projected value and further assume that the ratio of undergraduate-to-total will maintain its 2018 level. Our results therefore rest primarily on the following key factors: the number of Wisconsin residents projected for 2040, their age distribution, and their likelihood of enrolling in higher education.
- The 15-19 age group is projected to grow 1.8% by 2040, from 397,510 to 404,610. Similarly, the 20-24 age group outlook is relatively modest, with 0.9% growth expected to take place out to 2040. Later in this section we touch on the Wisconsin Department of Administration's statewide population projections for 15-24 year-olds. Further detail can also be found on the Wisconsin Department of Administration's website:

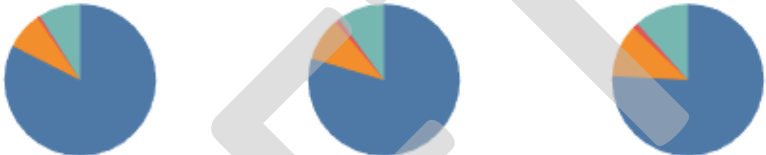
https://doa.wi.gov/Pages/LocalGovtsGrants/Population_Projections.aspx
- The high enrollment projection rests on maintaining the projected 2025 enrollment rates by broad age group out to 2040. The lower projection assumes a continued decline in Wisconsin resident enrollment rates, similar to those projected from 2018 to 2025.

Undergraduate Tuition Profile

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

Residency by Tuition Assessed

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



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

Regional Demographic Context and Considerations

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

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

Summary of Wisconsin's Regional Population Outlook

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

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

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

https://doa.wi.gov/Pages/LocalGovtsGrants/Population_Projections.aspx

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

WDA 1 - Southeast

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

WDA 2 - Milwaukee County

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

WDA 3 - Washington-Ozaukee-Waukesha

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

WDA 4 - Fox Valley

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

WDA 5 - Bay Area

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

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

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

WDA 6 - North Central

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

WDA 7 - Northwest

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

WDA 8 - West Central

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

WDA 9 - Western

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

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

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

WDA 10 - South Central

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

WDA 11 - Southwest

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

Wisconsin

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

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

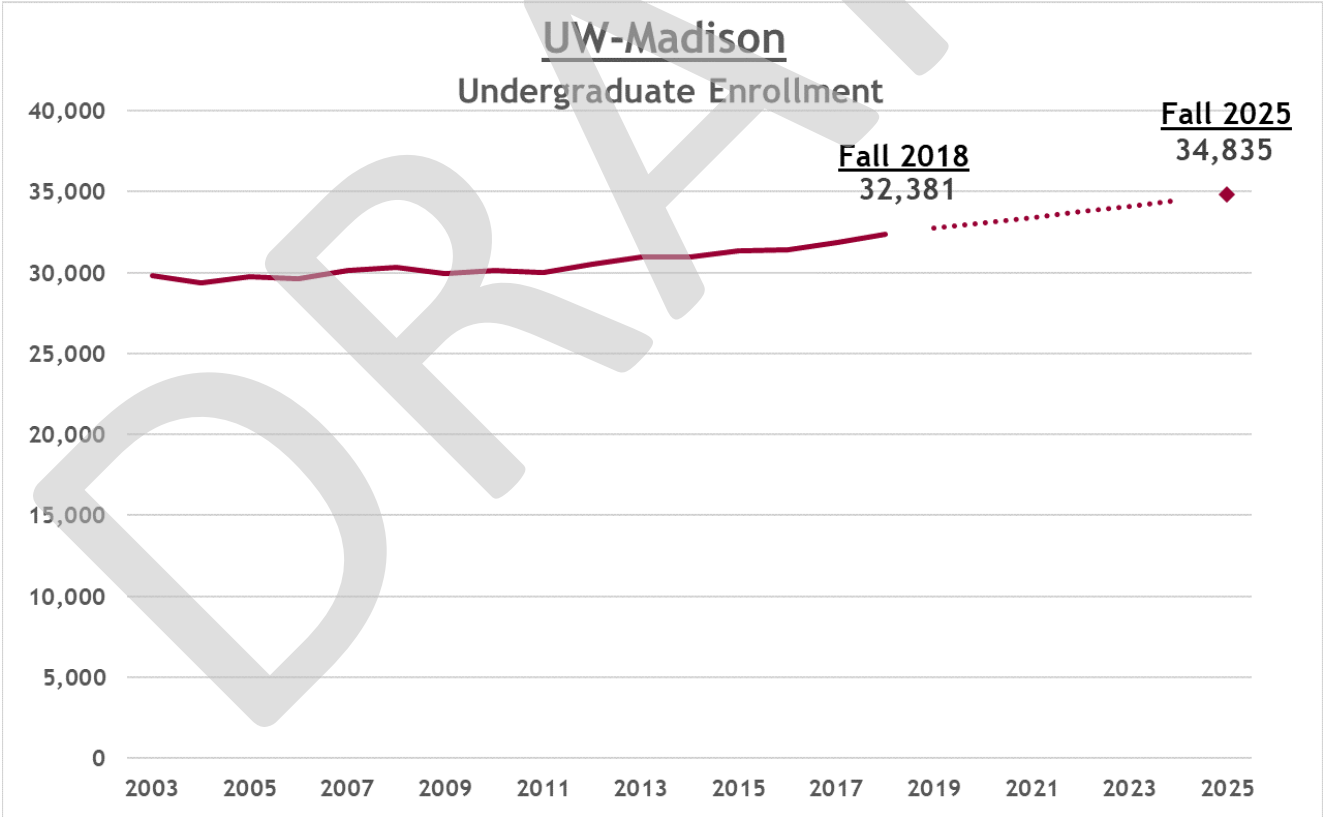
Section 2: Institutional Projections 2018-2025

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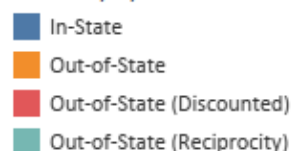
Institutional Results: UW-Madison

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

Notes

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

Institutionally Provided Context

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

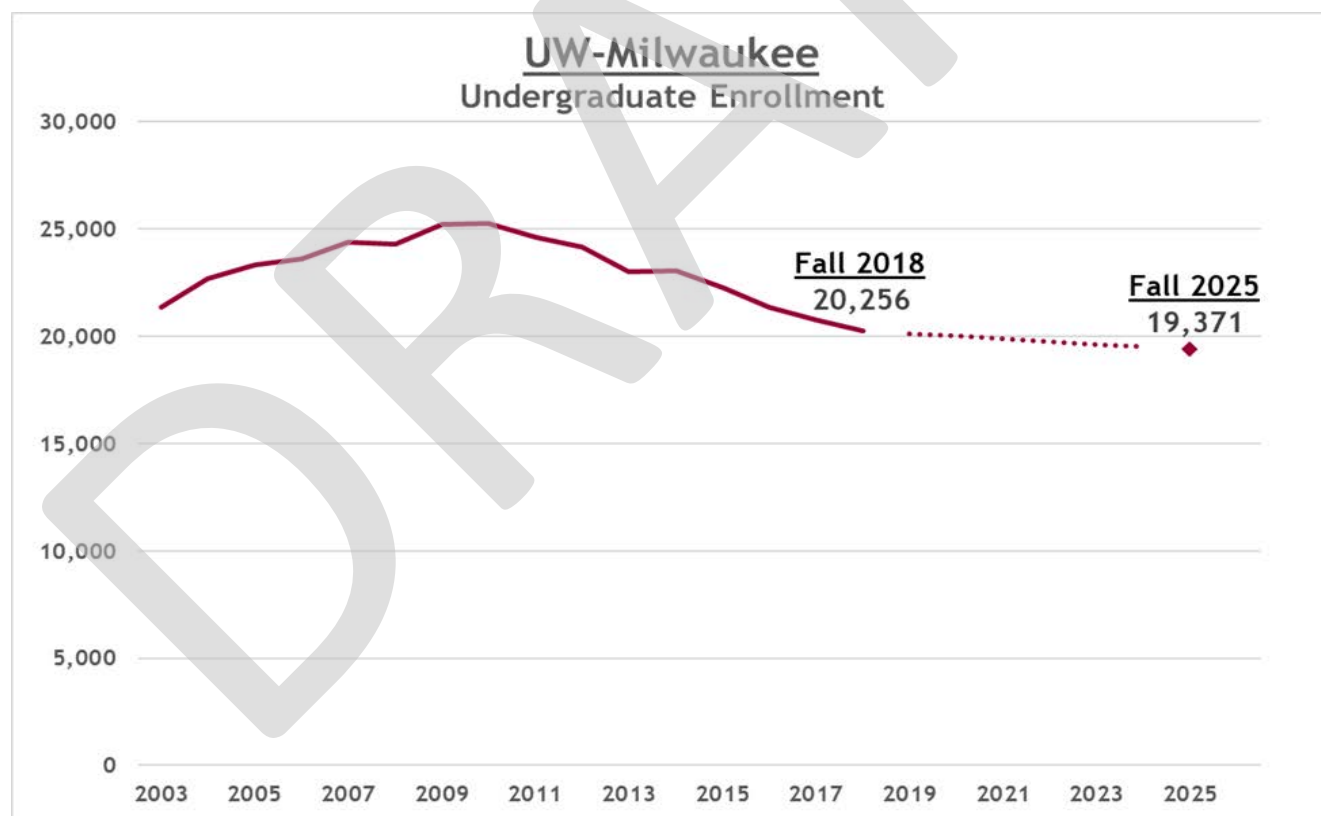
Institutionally Provided Projections

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

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

Institutional Results: UW-Milwaukee

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed

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



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

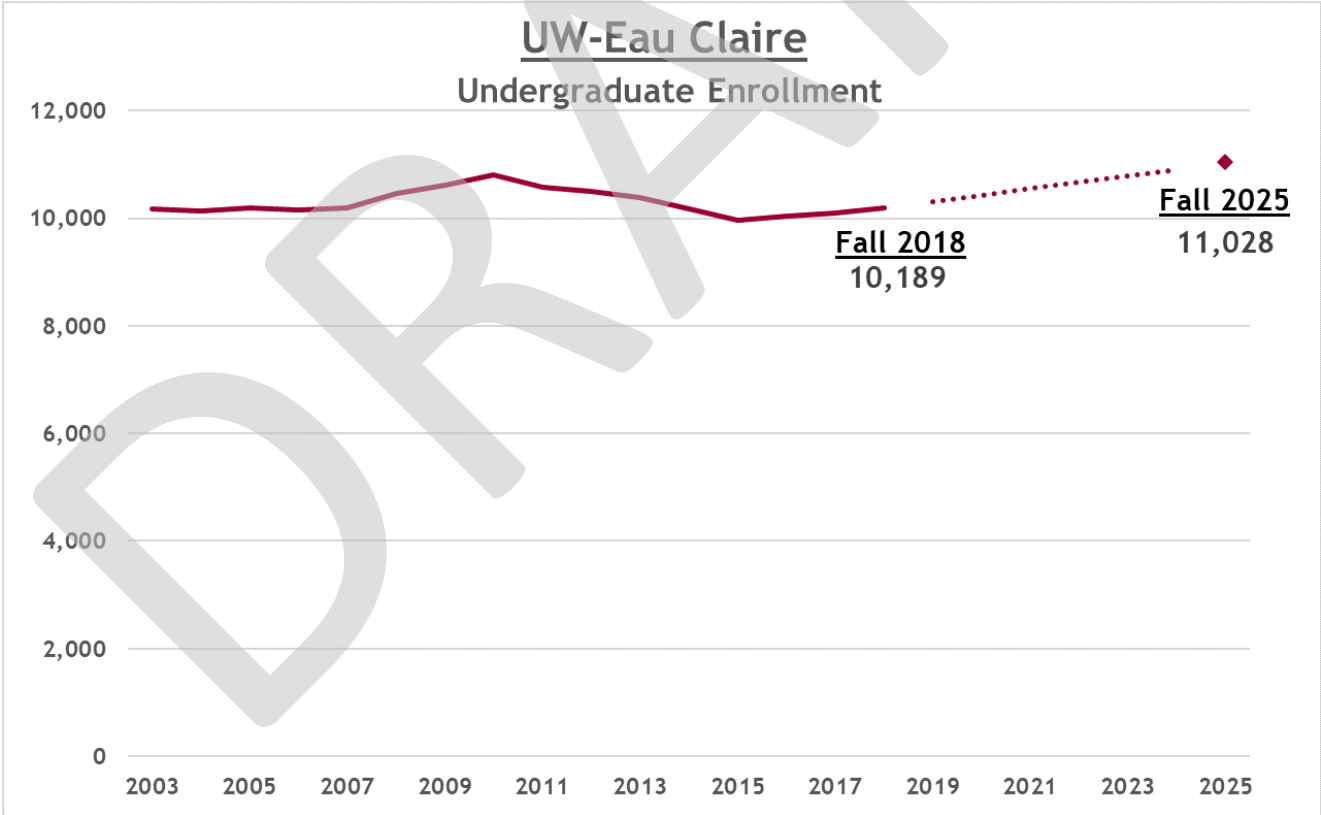
Notes

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

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

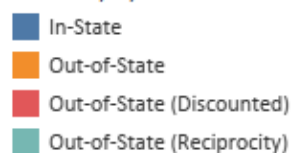
Institutional Results: UW-Eau Claire

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

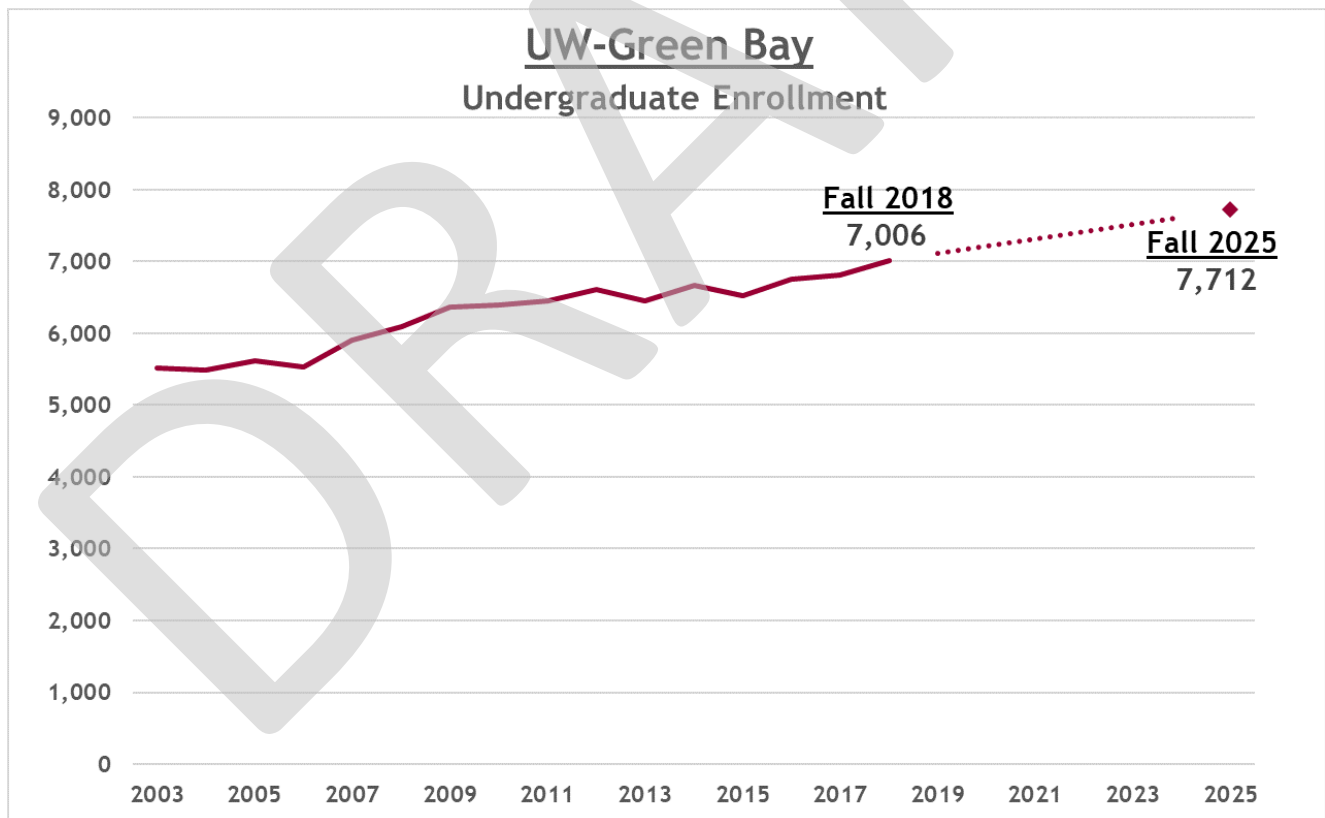
Notes

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

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

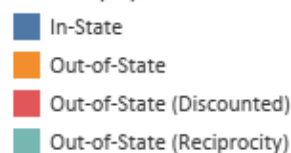
Institutional Results: UW-Green Bay

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

Notes

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

Institutionally Provided Context

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

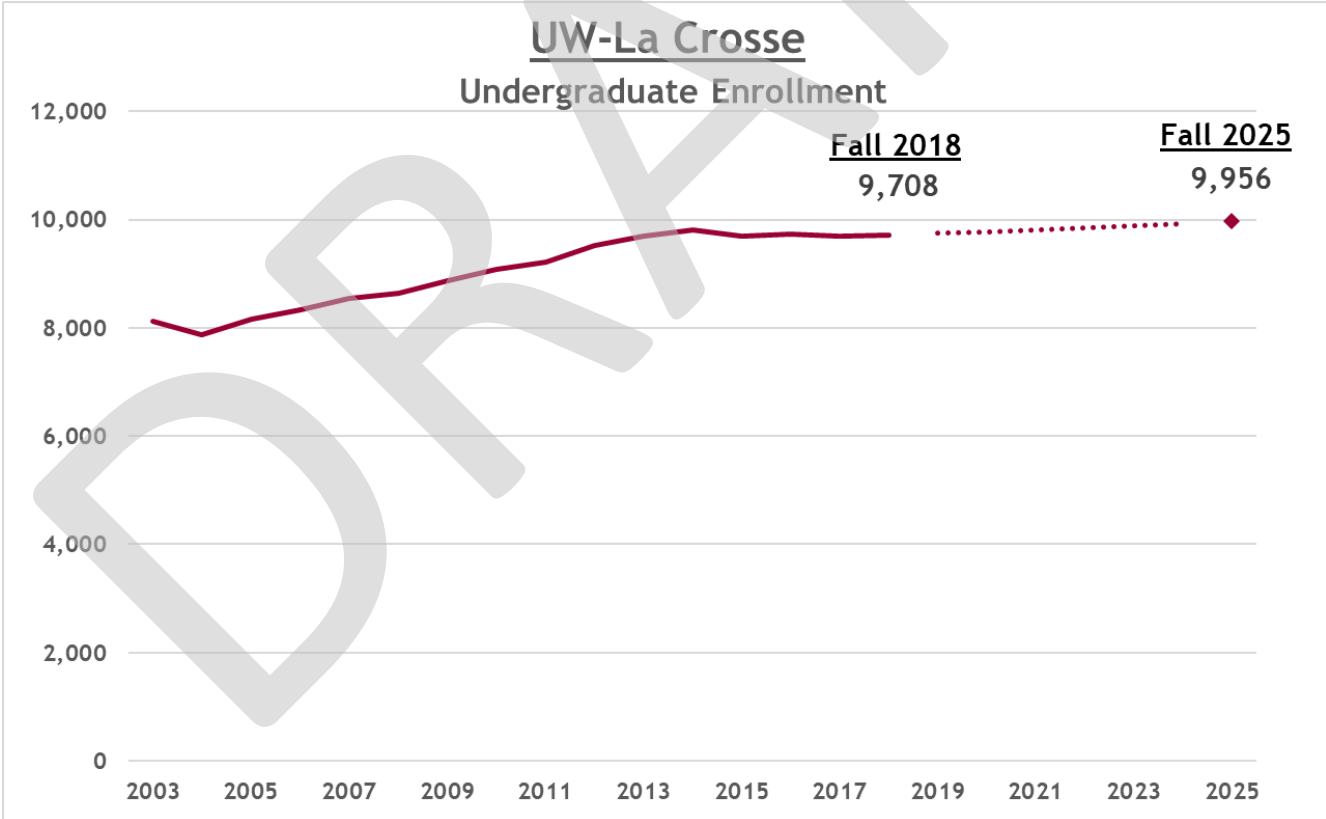
Institutionally Provided Projections

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

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

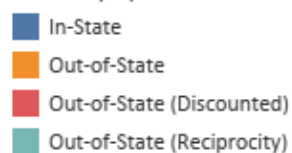
Institutional Results: UW-La Crosse

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

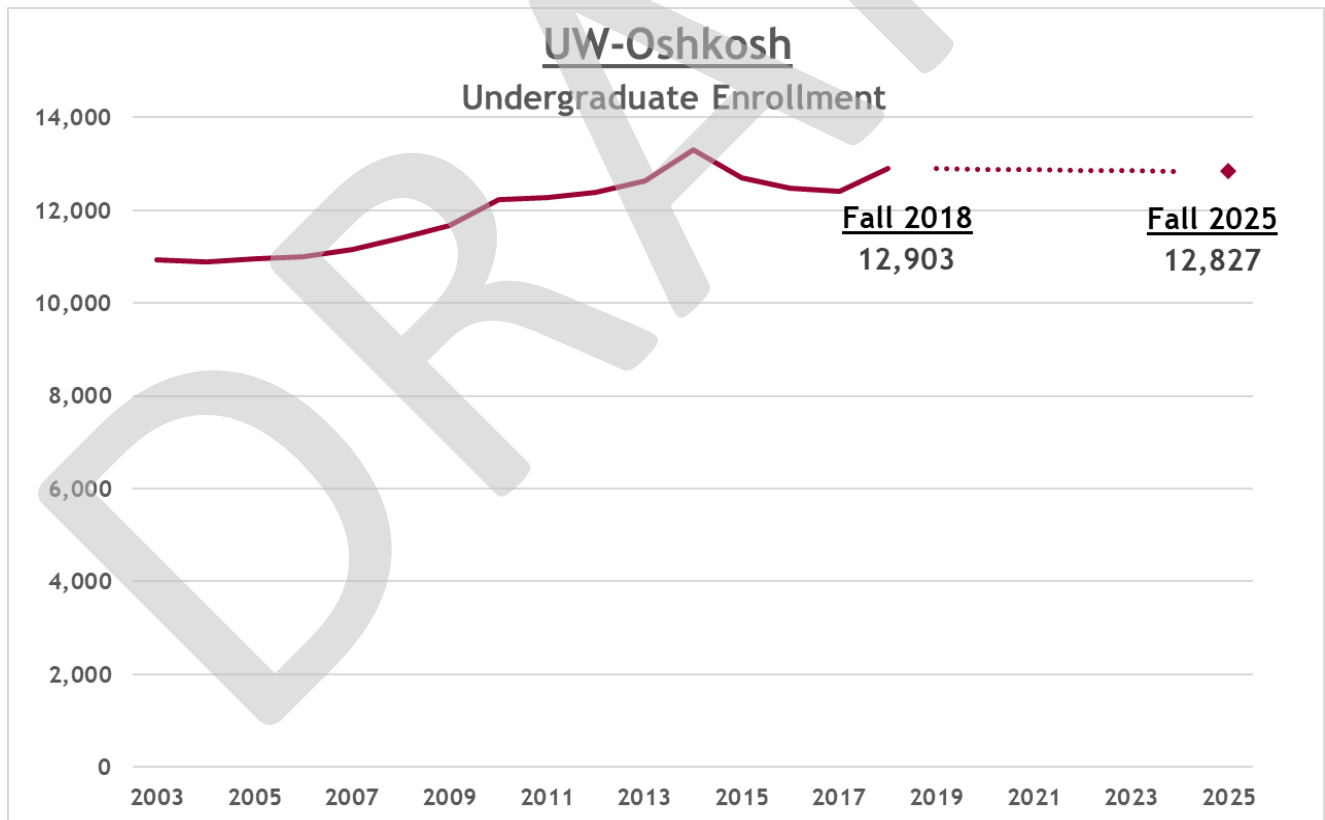
Notes

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

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

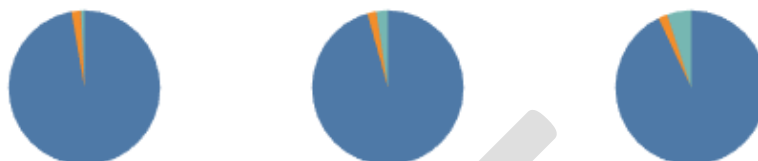
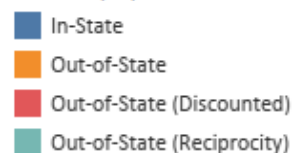
Institutional Results: UW-Oshkosh

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

Notes

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

Institutionally Provided Context

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

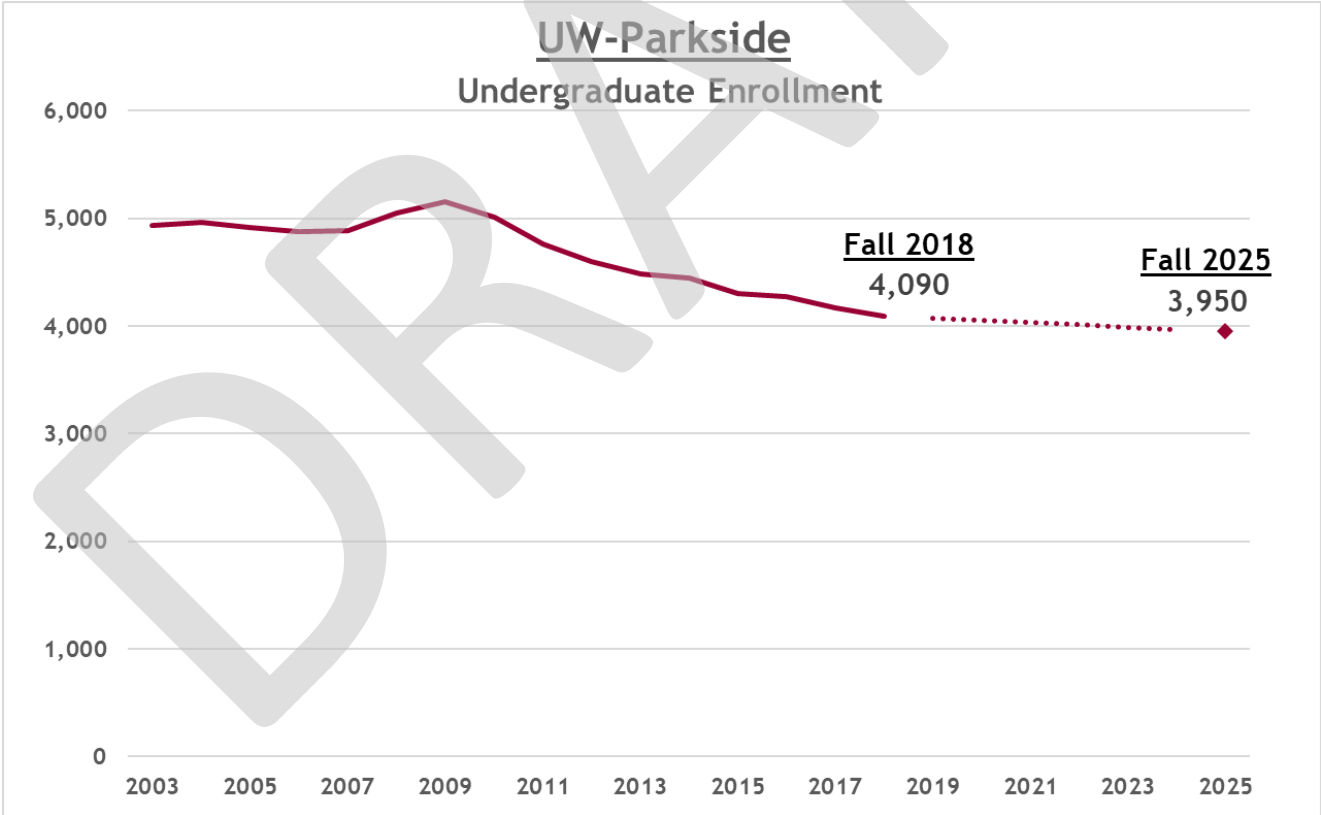
Institutionally Provided Projections

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

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

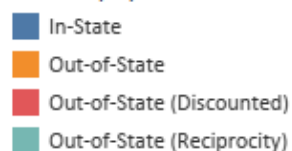
Institutional Results: UW-Parkside

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

Notes

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

Institutionally Provided Context

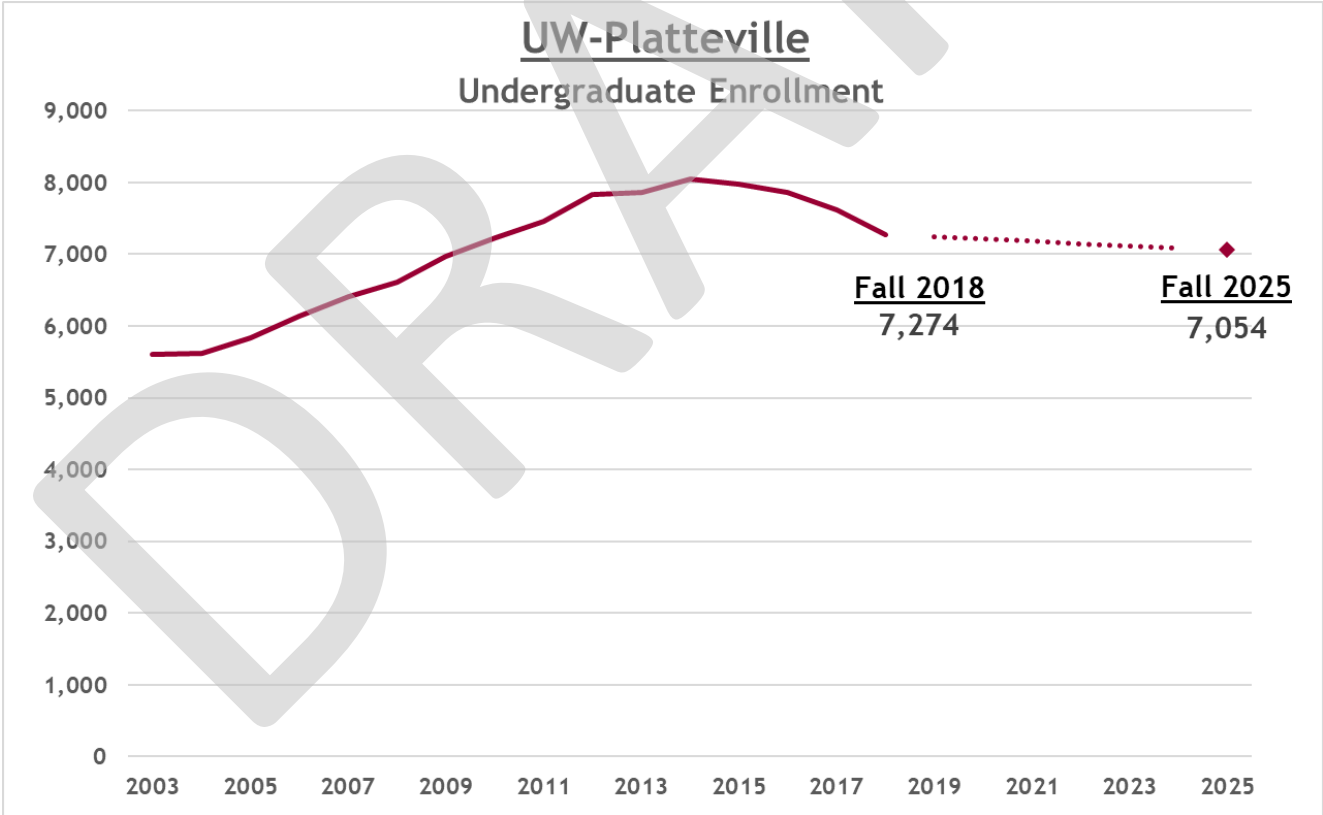
Institutionally Provided Projections

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

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

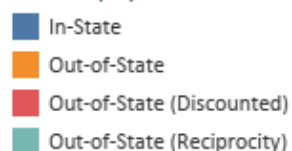
Institutional Results: UW-Platteville

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

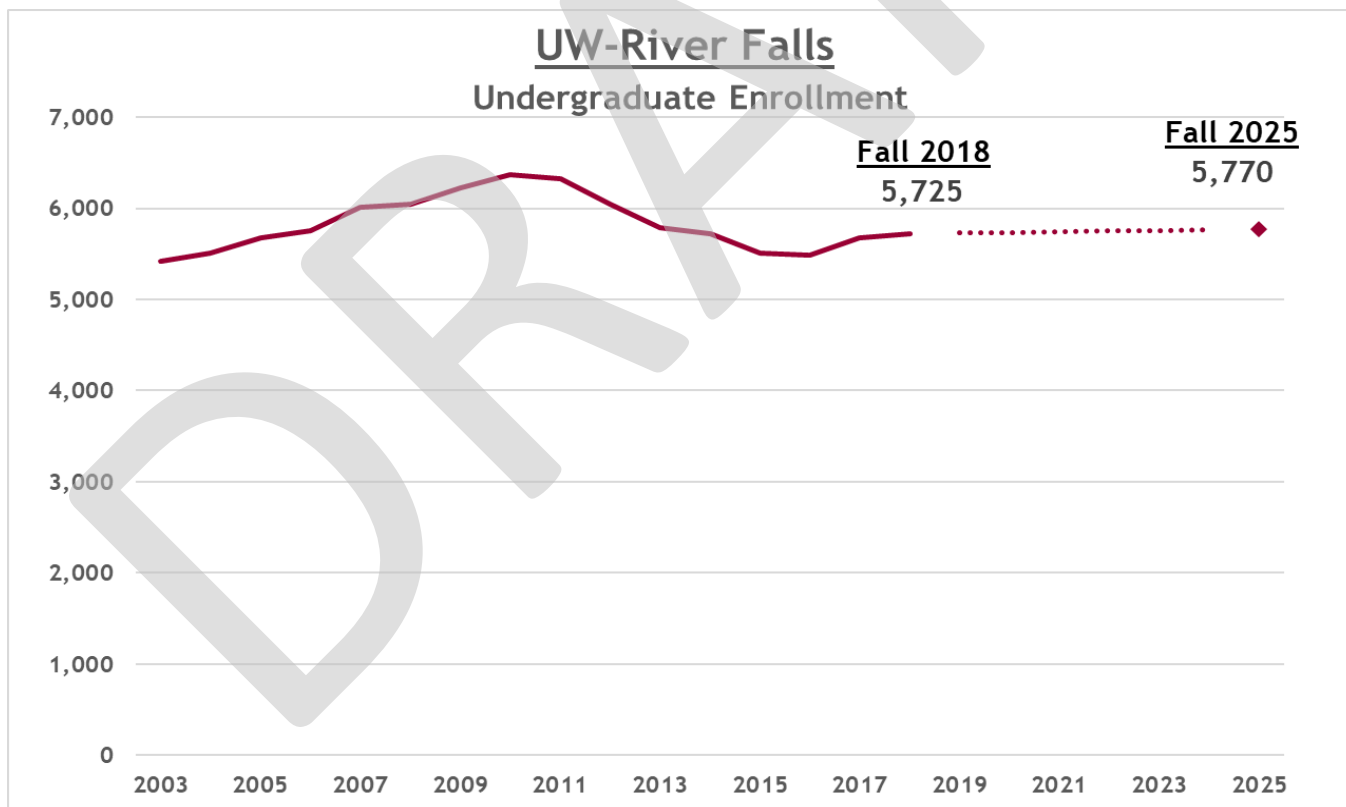
Notes

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

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

Institutional Results: UW-River Falls

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed

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



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

Notes

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

Institutionally Provided Context

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

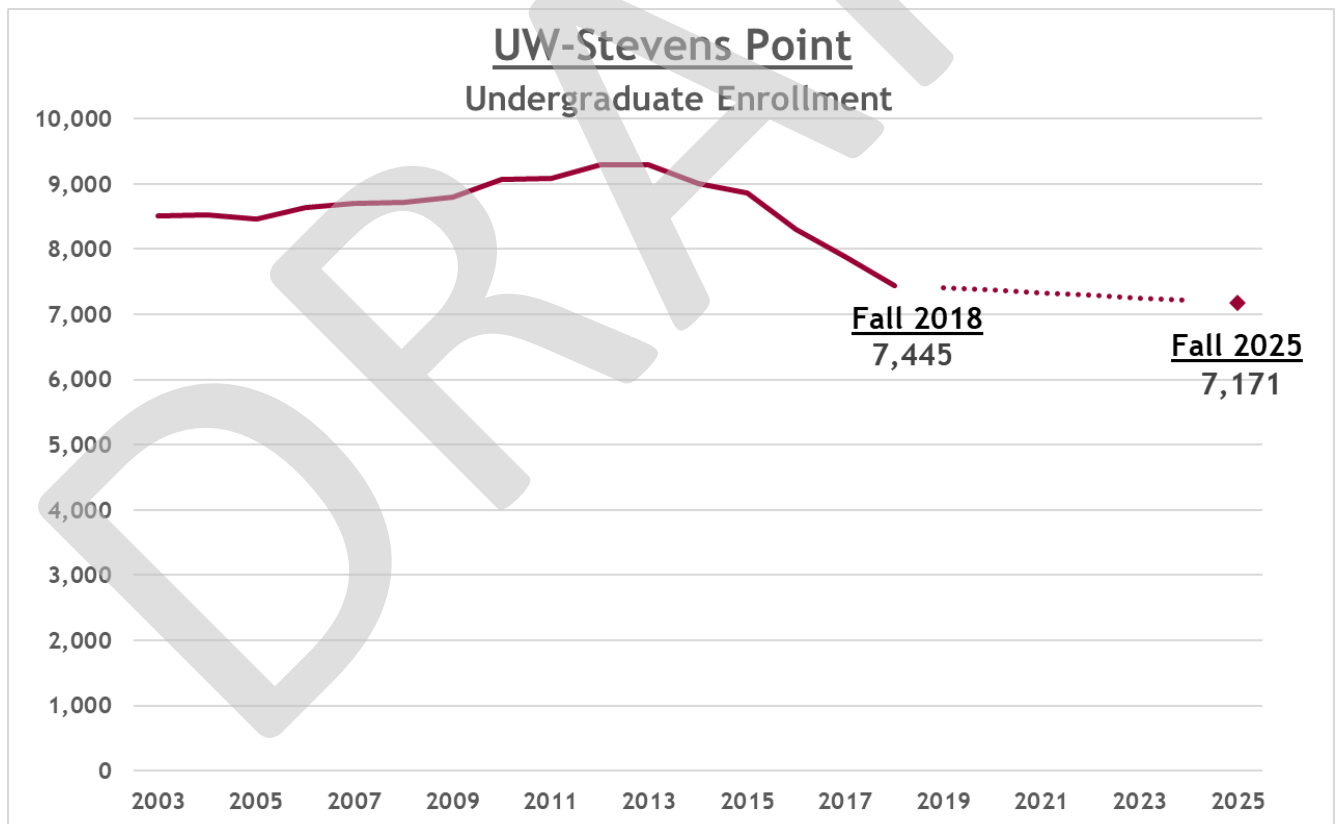
Institutionally Provided Projections

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

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

Institutional Results: UW-Stevens Point

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed

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



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

Notes

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

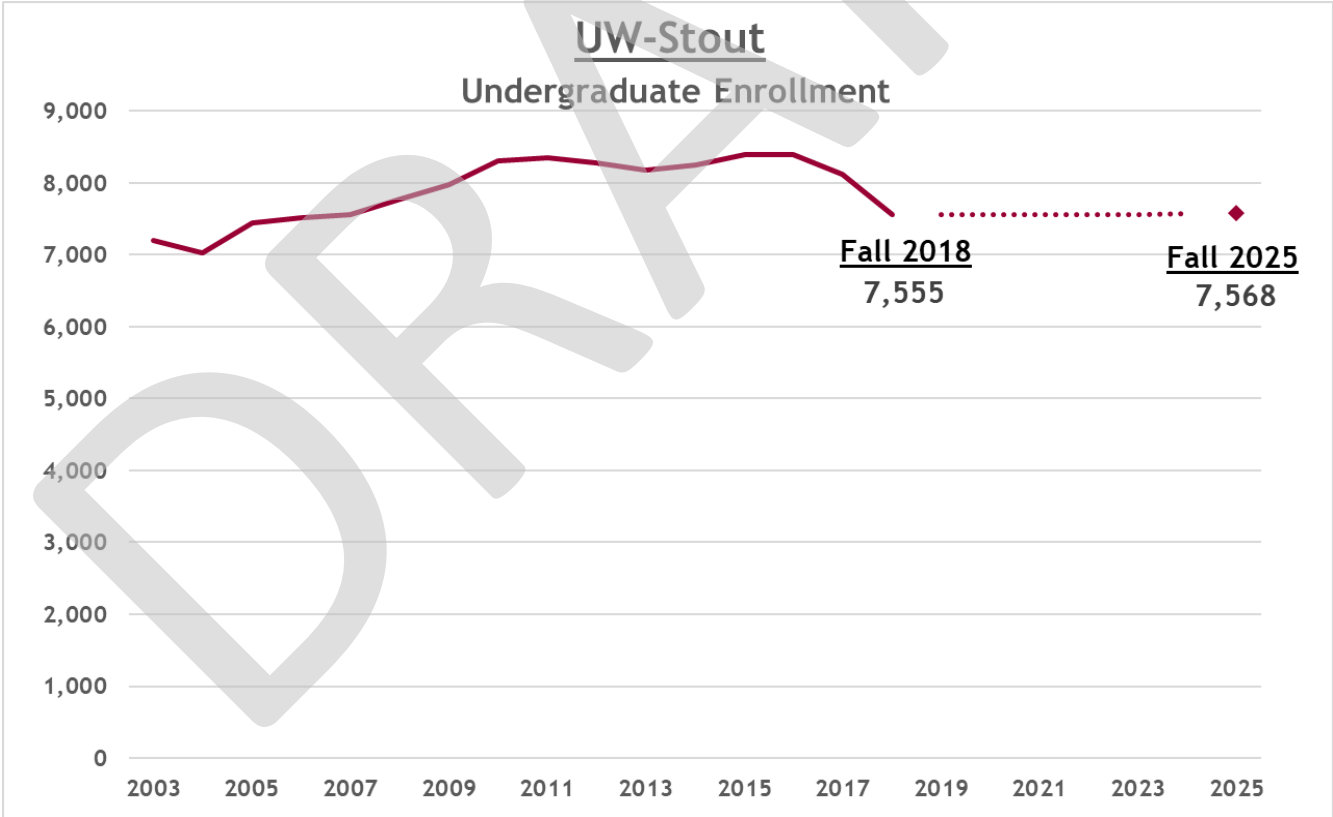
Institutionally Provided Context

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

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

Institutional Results: UW-Stout

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed

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



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

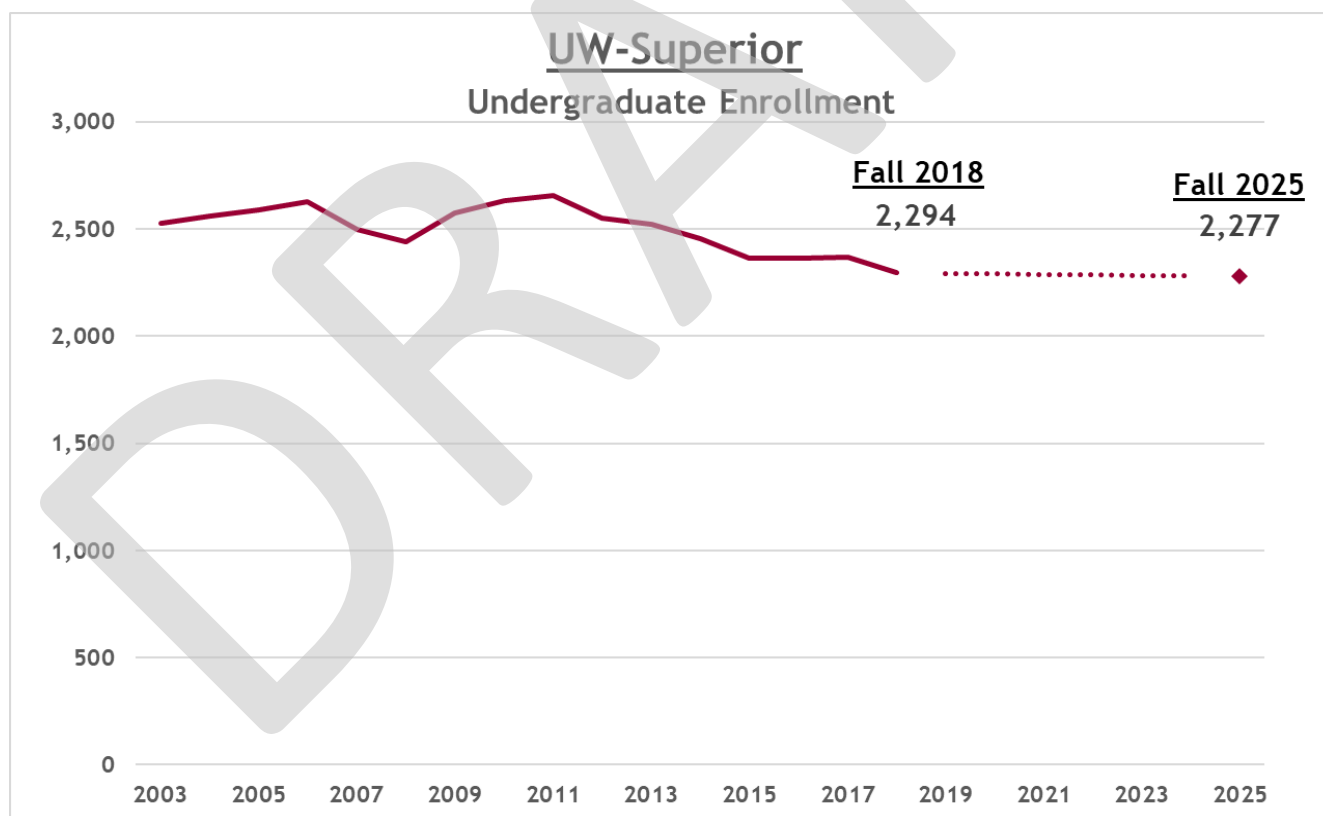
Notes

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

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

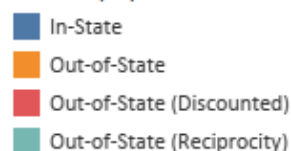
Institutional Results: UW-Superior

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

Notes

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

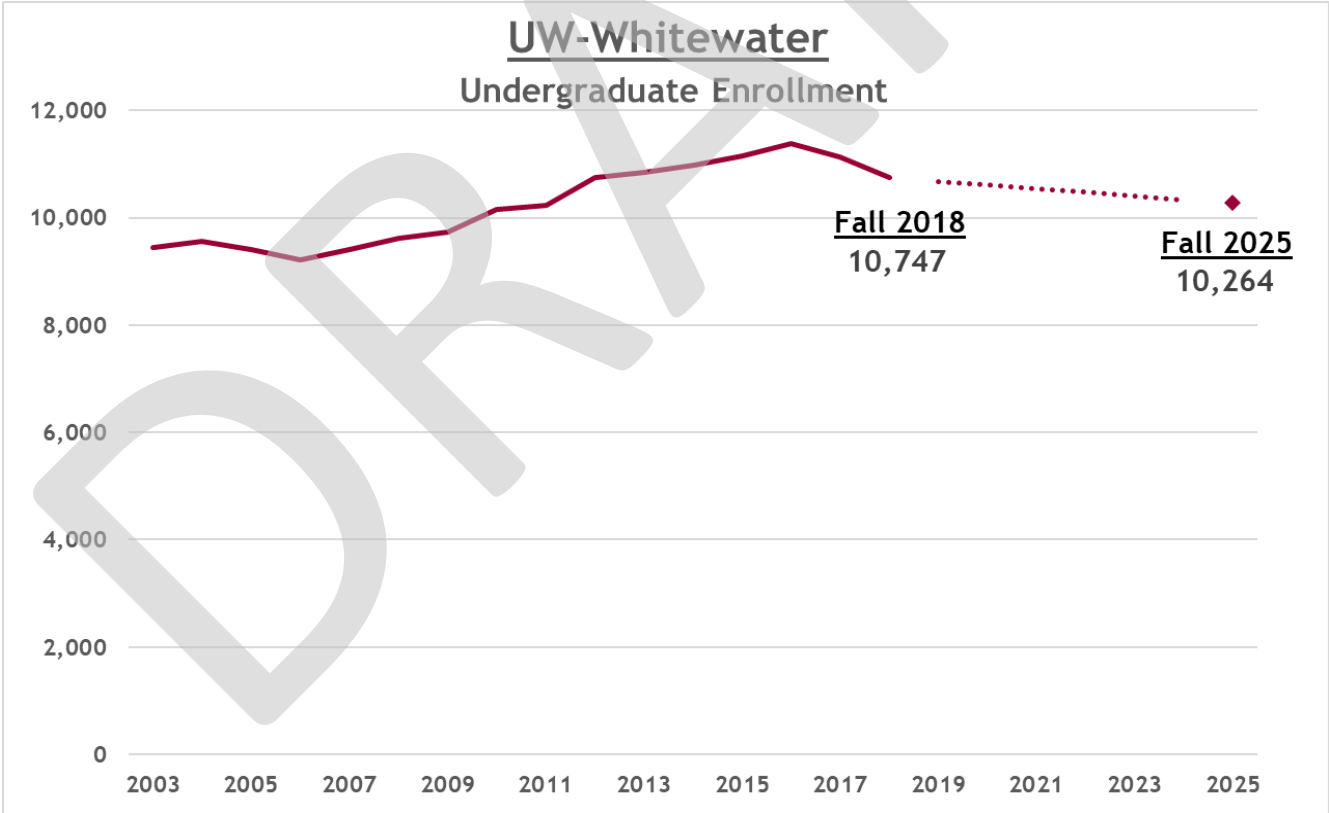
Institutionally Provided Context

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

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

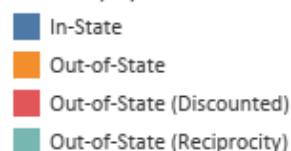
Institutional Results: UW-Whitewater

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



Undergraduate Tuition Profile*

Residency by Tuition Assessed



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

Notes

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

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

Section 3A: Methodology and Technical Detail

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Methodology

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

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

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

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

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

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

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

More detail on the SUR model.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Limitations of the Methodology

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

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

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

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

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

Seemingly Unrelated Regression Model Estimated Equation and Model Statistics

Coefficients for Part-Time Female

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

Coefficients for Full-Time Female Equation

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

System Weighted R-Squared = .99

Durbin Watson Part-Time Female Equation = 2.4

Durbin Watson Full-Time Female Equation = 2.4

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

Seemingly Unrelated Regression Model Estimated Equation and Model Statistics

Coefficients for Part-Time Male Equation

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

Coefficients for Full-Time Male Equation

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

System Weighted R-Squared = .99

Durbin Watson Part-Time Male Equation = 1.5

Durbin Watson Full-Time Male Equation = 2.6

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

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

Section 3B: Materials Provided by Institutions

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Materials Provided by UW-Green Bay

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UW-GREEN BAY ENROLLMENT PROJECTIONS Undergraduate Enrollment Headcount

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

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



UNIVERSITY of WISCONSIN
GREEN BAY

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

Materials Provided by UW-Oshkosh

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UWO ENROLLMENT MANAGEMENT MEMORANDUM

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

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

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

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

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

UWO Total UG Enrollment Expectations				
Fall 2021	Fall 2022	Fall 2023	Fall 2024	Fall 2025
12969	13381	13975	13975	13975

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

Materials Provided by UW-Parkside

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UW-Parkside Graduate Program Enrollment
Fall 2014 - Fall 2019

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

*Fall 2019 enrollment as of 8/18/2019

**Enrollment begins in Spring 2020

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Materials Provided by UW-River Falls

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1

**New
Freshman
Enrollment
Growth
2014-17**

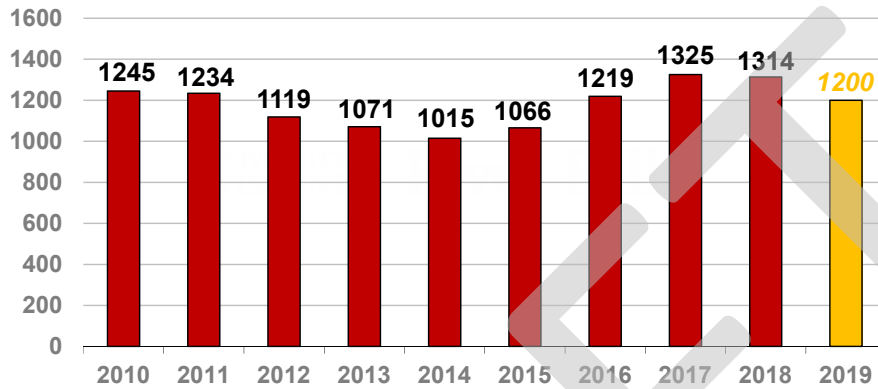
UW-River Falls	31%
UW-Green Bay	27%
UW-Parkside	13%
UW-Eau Claire	12%
UW-La Crosse	7%
UW-Madison	6%
UW-Superior	5%
UW-Stout	4%
UW-Stevens Point	-4%
UW-Whitewater	-6%
UW-Milwaukee	-6%
UW-Oshkosh	-11%
UW-Platteville	-16%
UW System	0%

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2

Number of New Freshmen Fall Semester

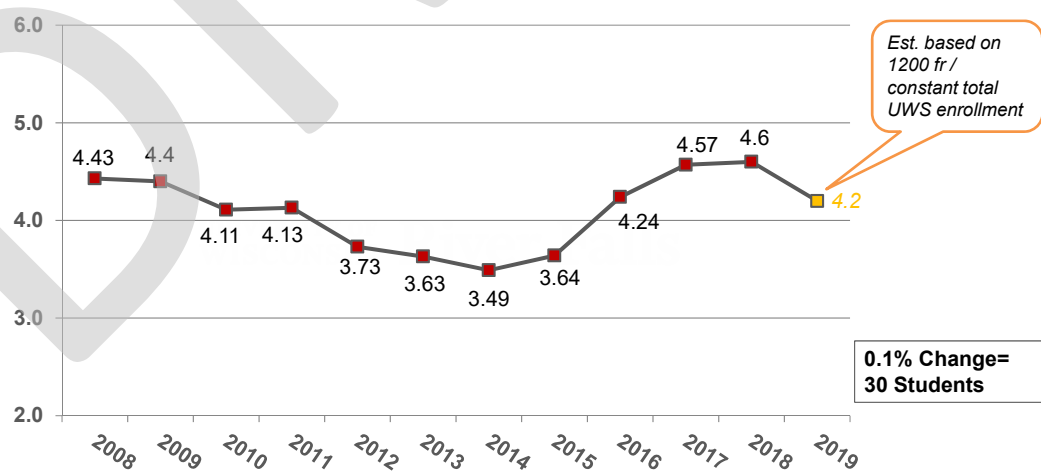


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3

UWRF New Freshmen: % Market Share



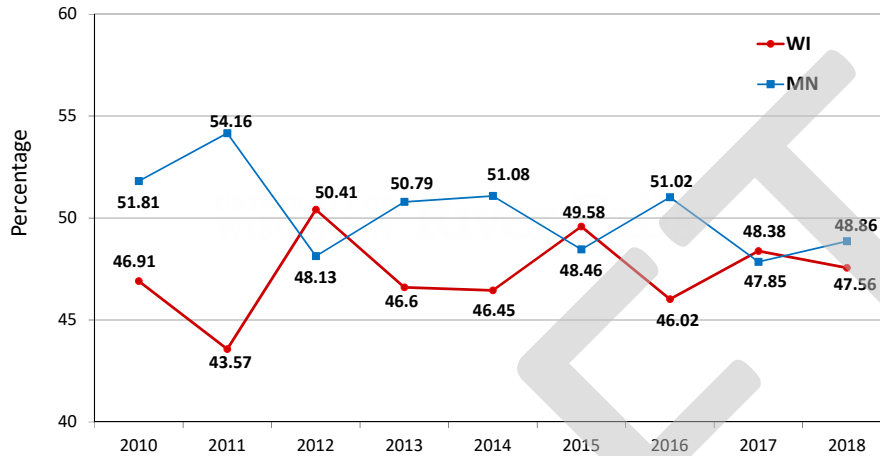
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4

New Freshmen as a Percentage

by State



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5

Enrollment in New Programs (since 2015)

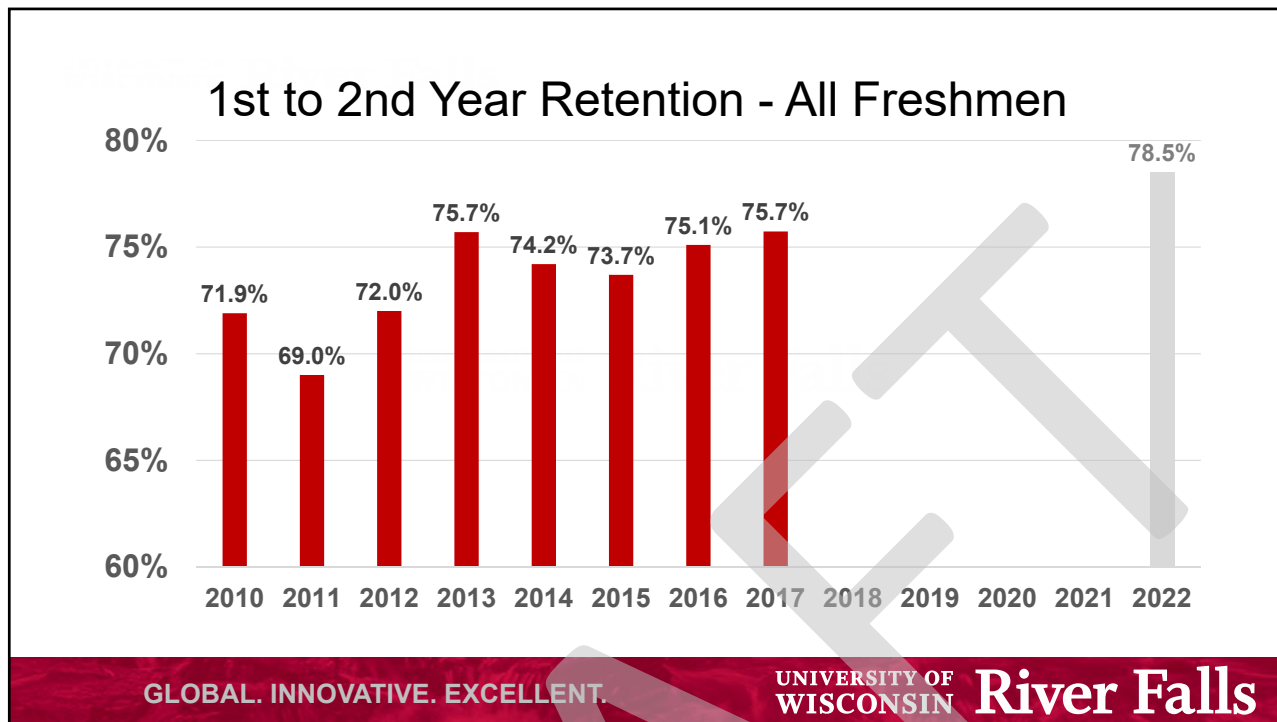
Total Enrollment: 0 → 276

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

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6



7

Reinvigorated Focus on Student Success

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

Opportunities:

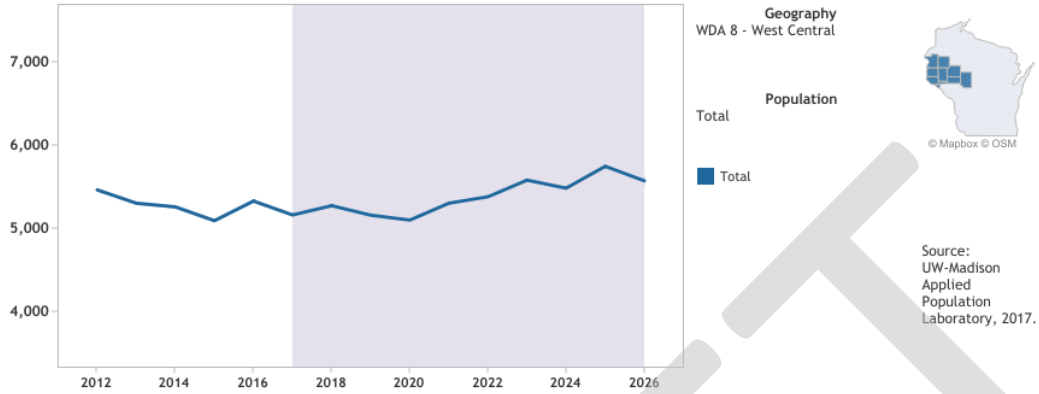
- EAB Navigate software
- \$15.1 million renovation of Rodli Hall Student Success Center (Jan. 2020)

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

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8

WISCONSIN HIGH SCHOOL GRADUATE PROJECTIONS 2017-2026



Geography
WDA 8 - West Central



Population

Total

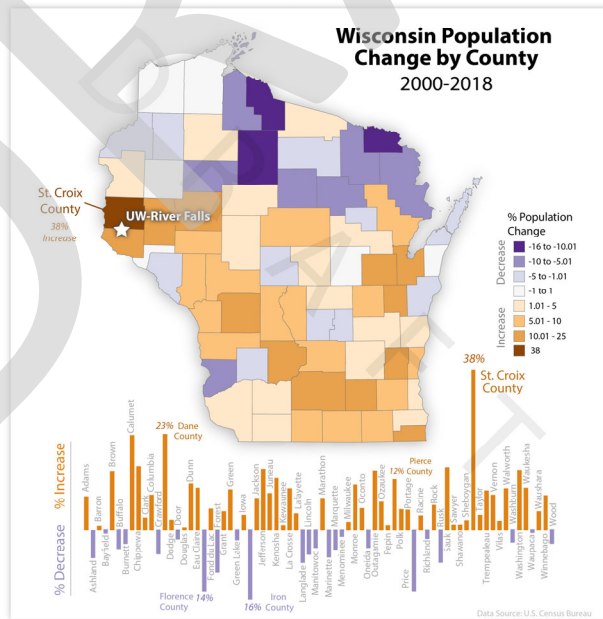
■ Total

Source:
UW-Madison
Applied
Population
Laboratory, 2017.

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

9

Wisconsin Population Change by County 2000-2018

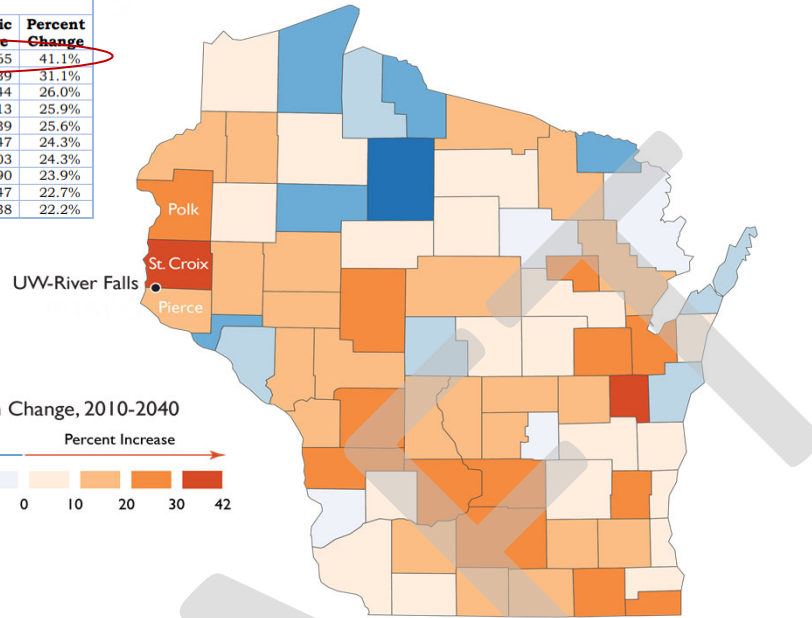


Map courtesy of the UW-River Falls Department of Geography and Geographic Information Systems.
Data source: <http://www.usa.com/rank/wisconsin-state-population-growth-rate-county-rank.htm>

10

Fastest Growing Counties (by Percent), 2010 - 2040

County Name	Census 2010	Projected 2040	Numeric Change	Percent Change
Saint Croix	84,345	119,010	34,665	41.1%
Calumet	48,971	64,210	15,239	31.1%
Kenosha	166,426	209,670	43,244	26.0%
Brown	248,007	312,320	64,313	25.9%
Sauk	61,976	77,815	15,839	25.6%
Dane	488,073	606,620	118,547	24.3%
Washington	131,887	163,890	32,003	24.3%
Clark	34,690	42,980	8,290	23.9%
Vernon	29,773	36,520	6,747	22.7%
Menominee	4,232	5,170	938	22.2%



11

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

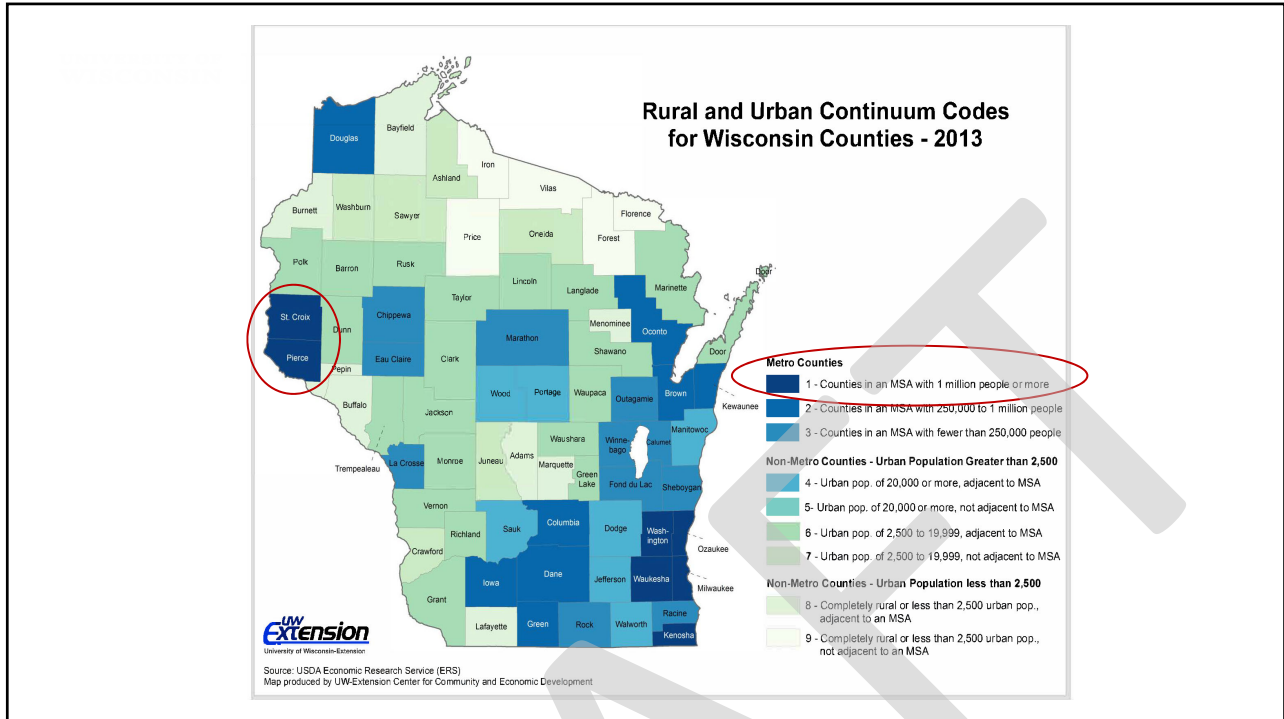
- **3.6 million** inhabitants
- **18** Fortune 500 companies
- **2nd** largest economy in the Midwest
- **15th** largest economy in the US



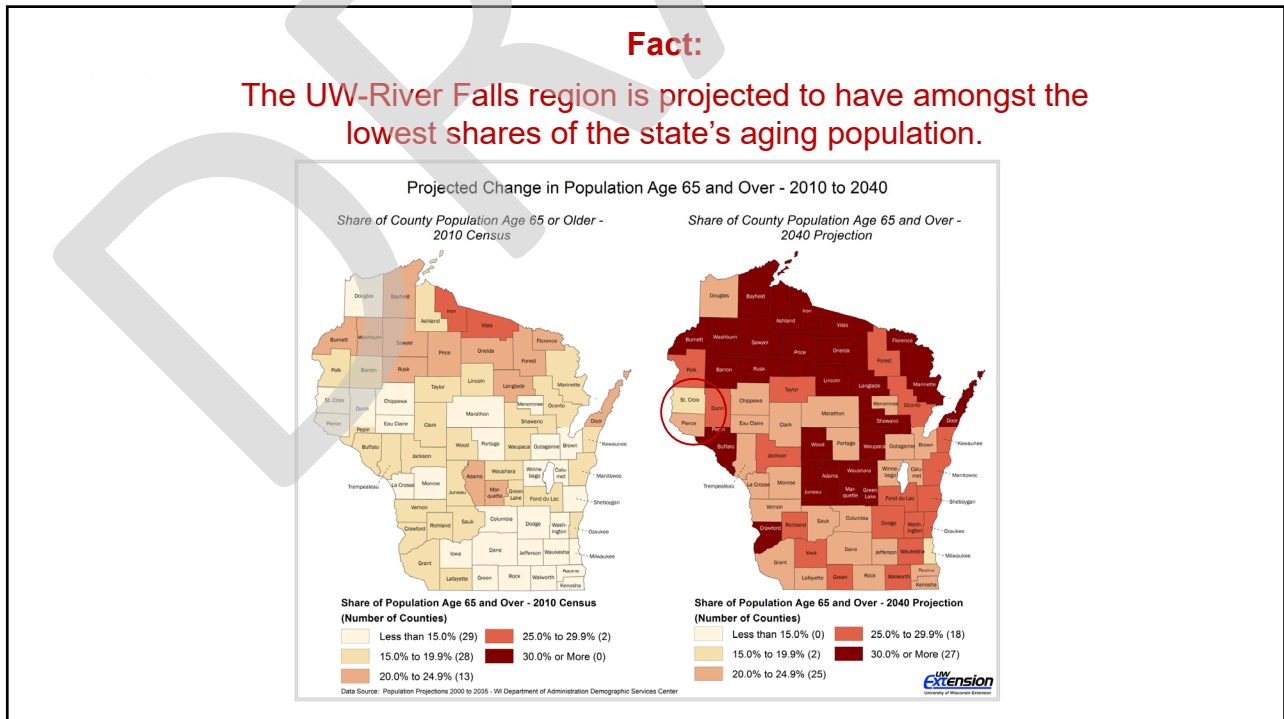
<https://www.bea.gov/data/gdp/gdp-metropolitan-area>

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

12

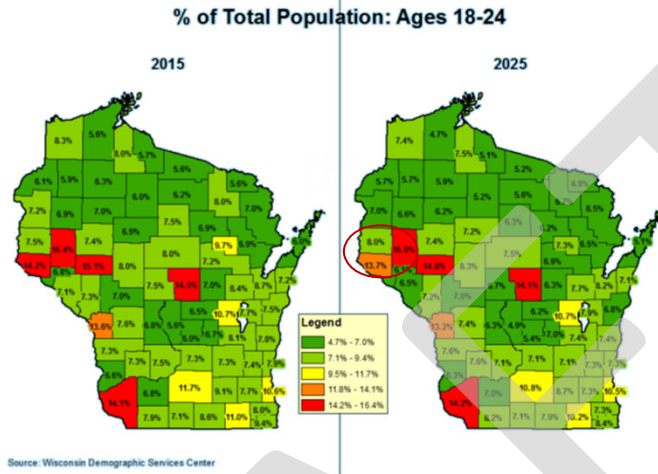


13



14

Fact: The UWRf region is one of the few in the state with recent and predicted future high growth in younger populations.





COWS

Equity
Sustainability
Democracy

Race in the Heartland

Wisconsin's Extreme Racial Disparity

OCTOBER 2019

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

Introduction

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

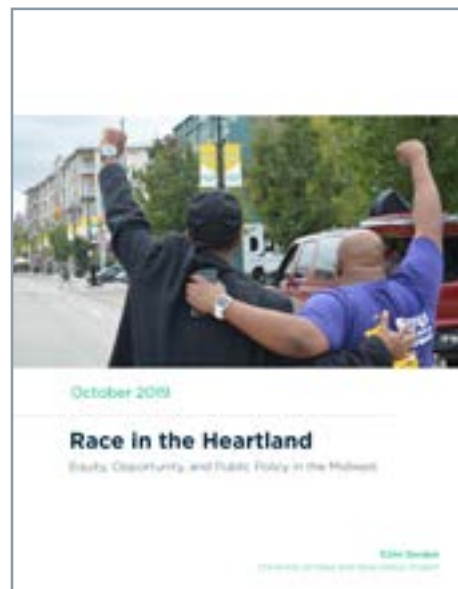
"...the Midwest is among the starkest settings for racial disparity or inequality. The result is a jarring juxtaposition: While Mid-western metros (Des Moines, Madison, Minneapolis) typically crowd the "best places to live" lists, they are also among the very worst places to live for African-Americans.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

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

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

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

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



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

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

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

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

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

Resources on Racial Inequality in Wisconsin

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

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

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

How Wisconsin Became the Home of Black Incarceration

by George Joseph for City Lab, 2016.

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

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

by the Wisconsin Council on Children and Families, 2014.

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

The Wisconsin Racial Disparities Project

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

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

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

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

INFANT MORTALITY: 4TH WORST

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

CHILD POVERTY: 4TH WORST

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

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

8TH GRADE MATH SCORES: WORST

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

OUT-OF-SCHOOL SUSPENSIONS: 2ND WORST

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

BACHELORS DEGREES: WORST

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

INCARCERATION: 2ND WORST

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

From Birth to the Ballot Box, continued



EMPLOYMENT: WORST

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

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

UNEMPLOYMENT: WORST

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

INCOME: 3RD WORST

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

HOME OWNERSHIP: 8TH WORST

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

VOTER PARTICIPATION: 3RD WORST

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

Policy Recommendations

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

Equal Opportunity in Education

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

Pay Equity

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

Making Work Possible

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

Restraining the Safety Net

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

Combatting Discrimination

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

Saving Places

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

Equity & Security

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

Conclusion

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

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



About COWS

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

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

Recorder: Stewart

Alternate Recorder: Stindt

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

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

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

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

7. New Business –

a. Listening session:

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

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

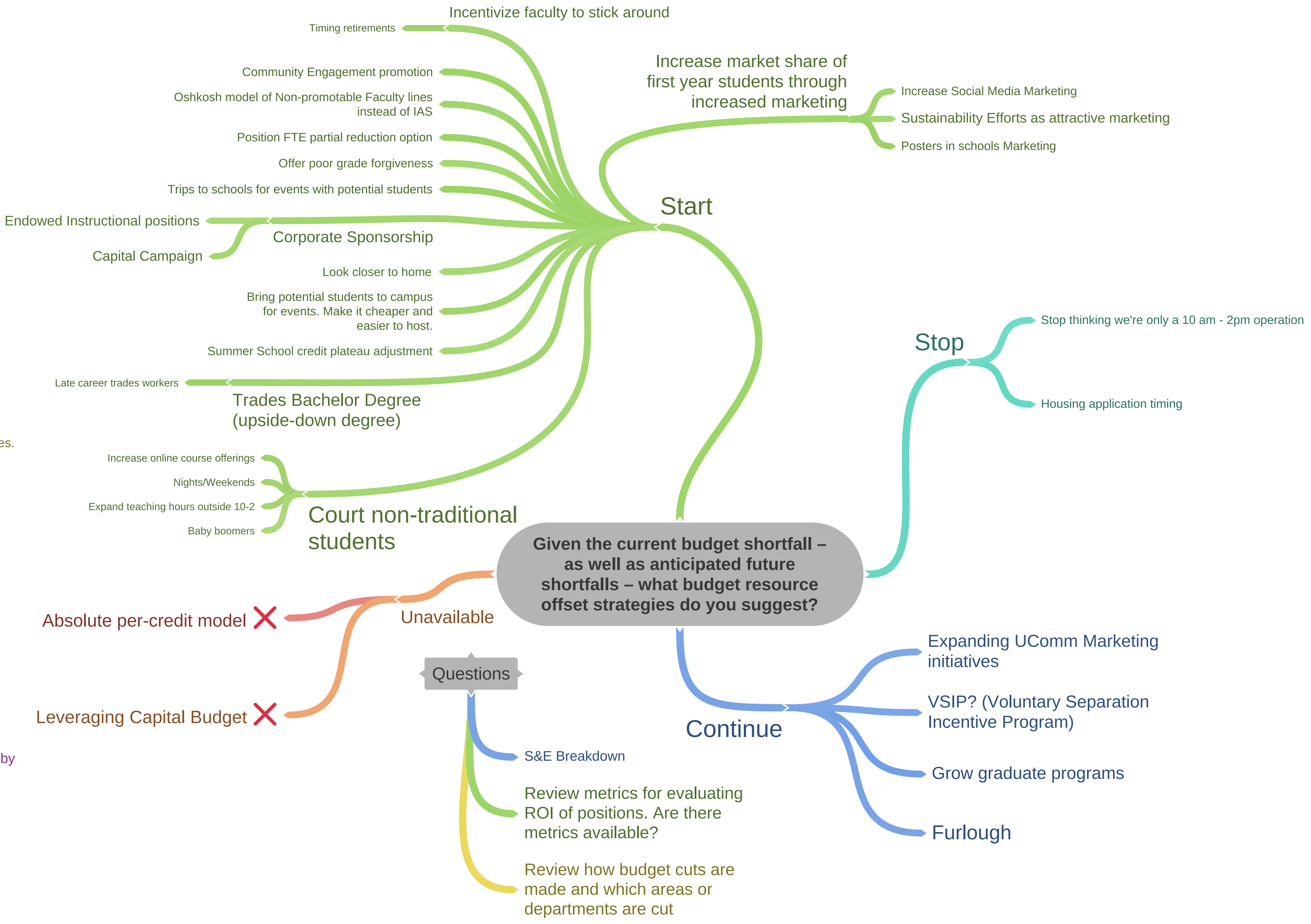
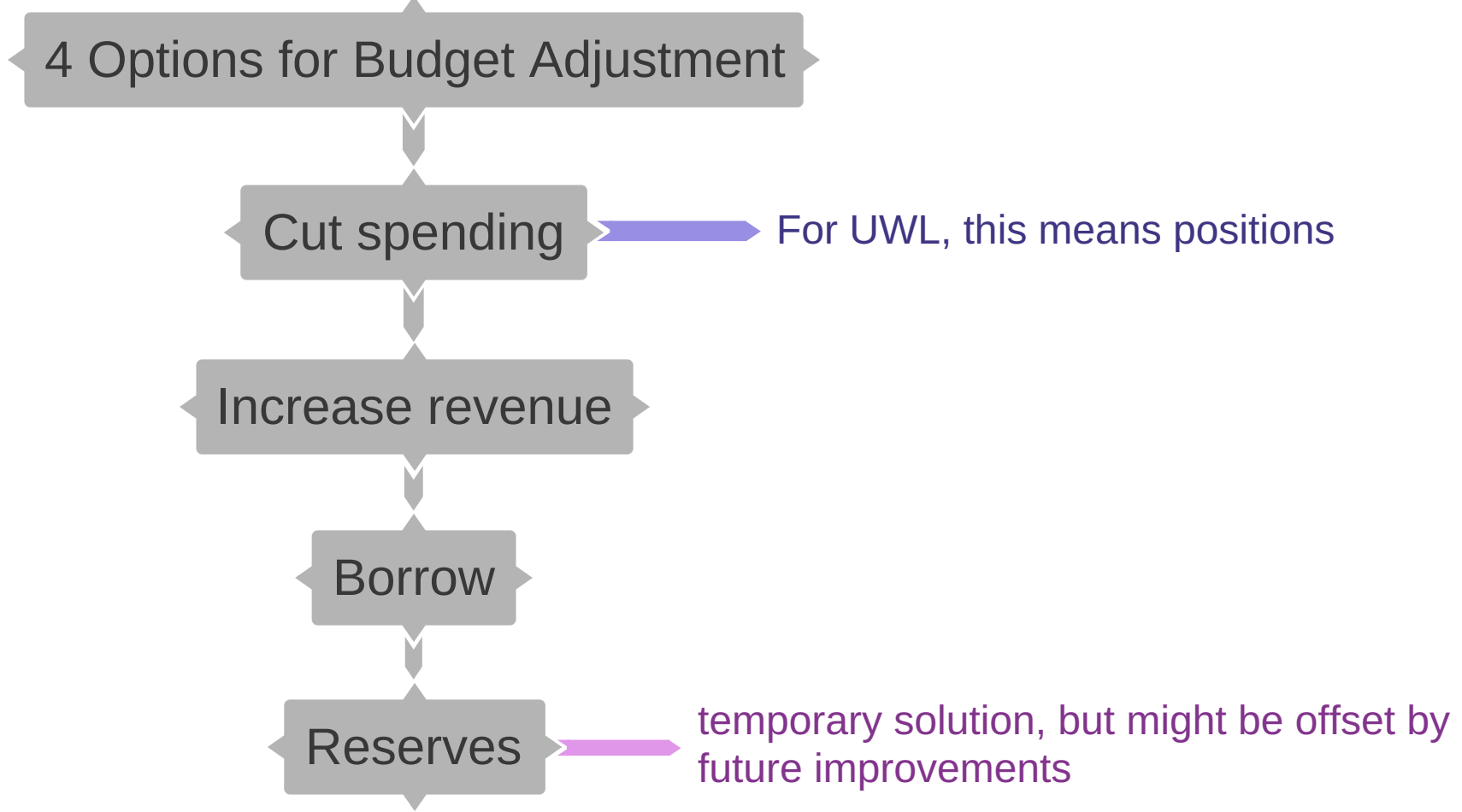
8. Adjournment

Meeting was adjourned 2:45 p.m.

Ground Rules

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

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



November 1, 2019

Dear Chancellor Gow,

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

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

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

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

Respectfully,

JPB Executive Committee

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

University of Wisconsin-La Crosse

Growth, Quality & Access

Differential Tuition Overview



**Joint Planning & Budget
Committee**

November 6, 2019



GQA Program History

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

GQA Program History (Con't.)

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

GQA Funding Model

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

GQA Program Implementation

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

FY20 GQA Program Summary

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

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

FY20 GQA Program Summary (Con't.)

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

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

GQA Fiscal Challenges

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

Questions & Answers

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

DRAFT FOR DISCUSSION ONLY

Table 1: GQA & Academic Initiatives Differential Tuition

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

Notes:

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

Table 2: GQA Budget Reduction Summary

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

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

Recorder: Stindt

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

Absent: Richter, Smith, C.

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

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

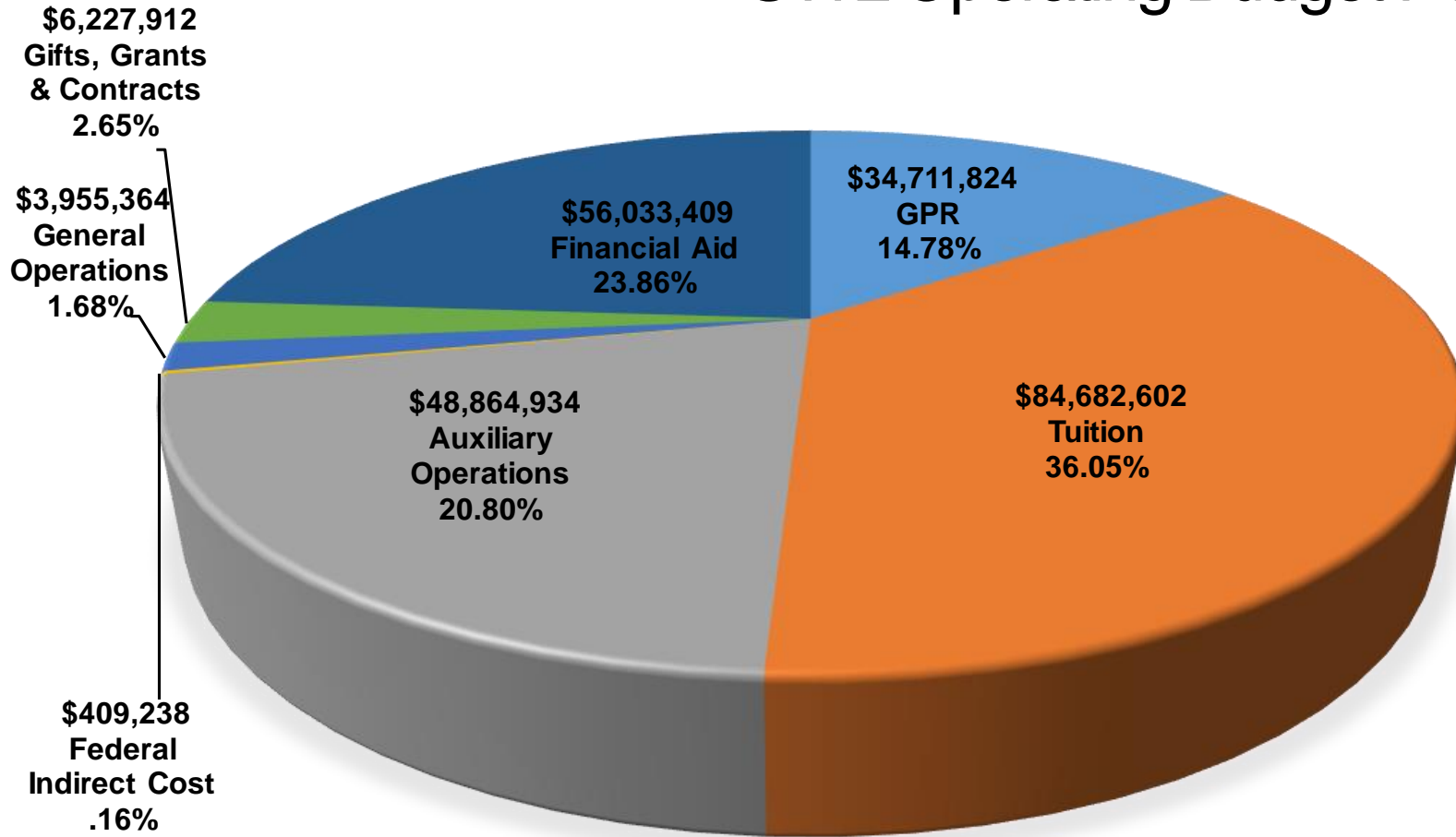
University of Wisconsin-La Crosse



Budget Planning & Review
Fiscal Year 2019-20



UWL Operating Budget FY20



UWL Budget: \$234,885,283



State Fund Appropriations

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

All Funds Budget by Division & College

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

All Funds Budget by Expenditure Function

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

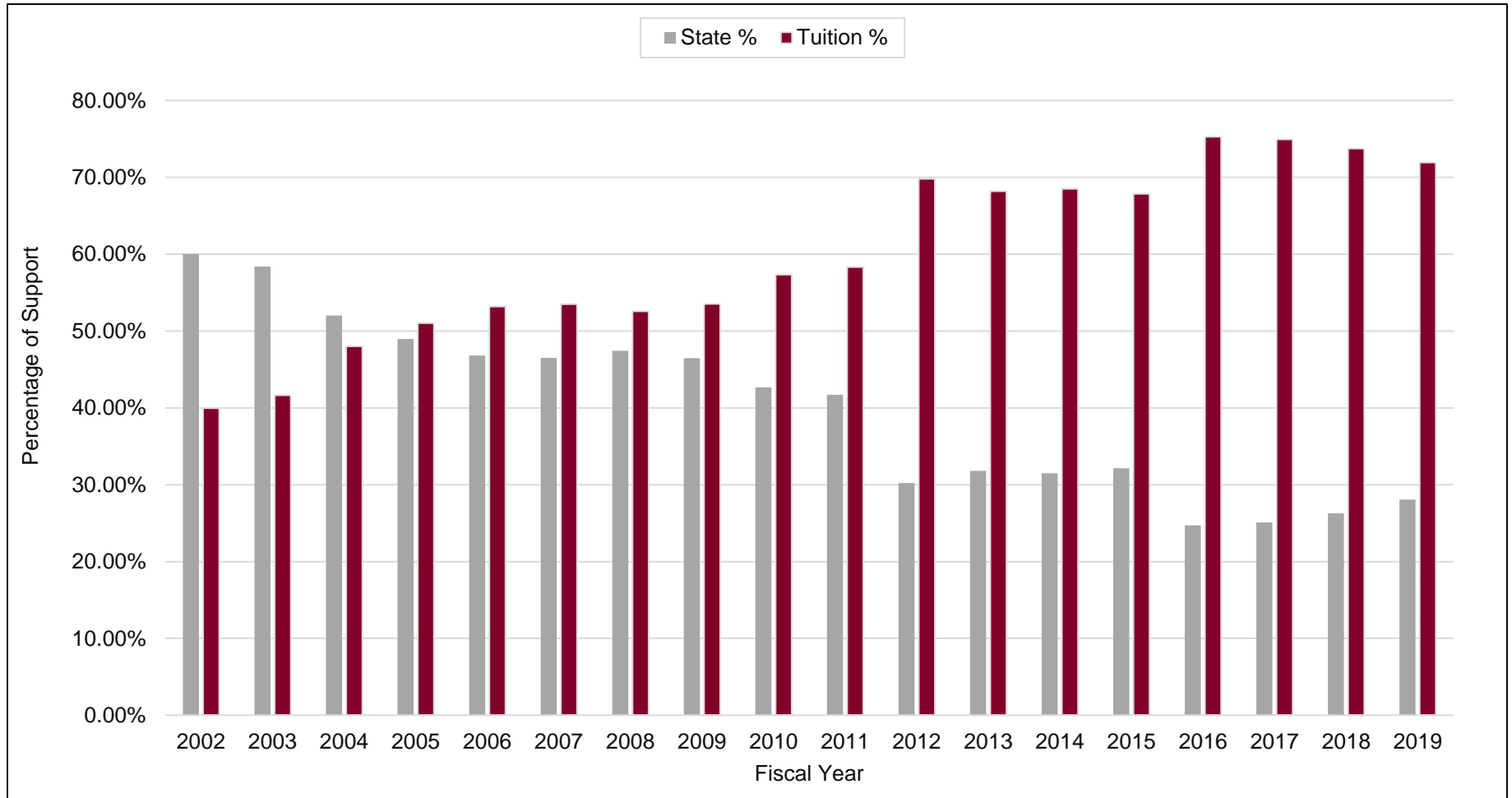
Biennial Budget Reduction History (M)

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

Resource Allocation History

Biennium	Amount (M)	Description
2003 & 2013	1.38	Academic Initiatives
2008-15	15.21	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	21.05	

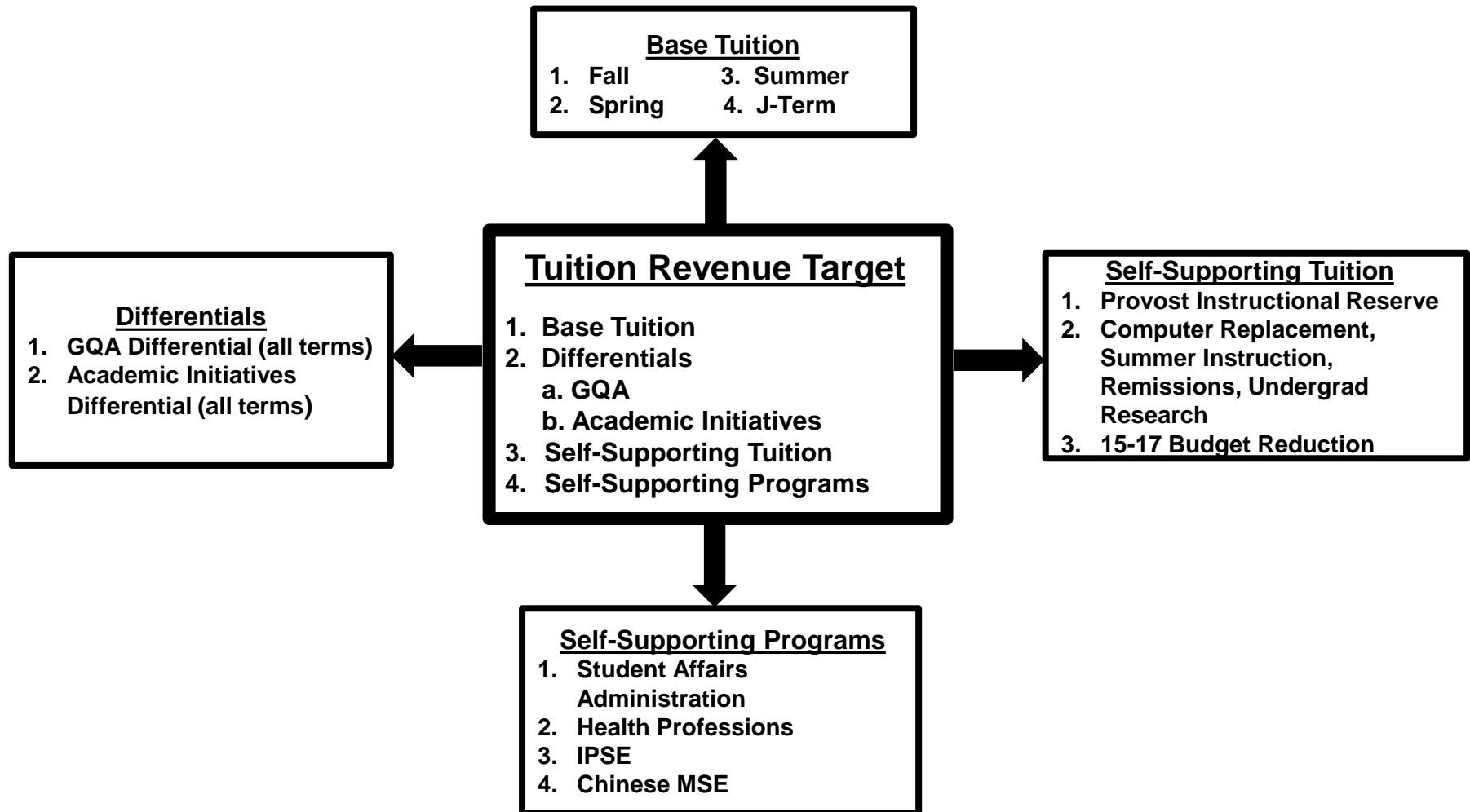
UWL GPR/Tuition Funding Support



Fiscal Year 2019-20



UWL Tuition Revenue Target



UWL Tuition Budget Summary

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

GQA Program Summary

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

Academic Initiatives

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

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%

Fiscal Year 2019-20



UWL Self-Funded Base Compensation

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

Fiscal Year 2019-20



UWL Self-Funded Lump Sum Compensation

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

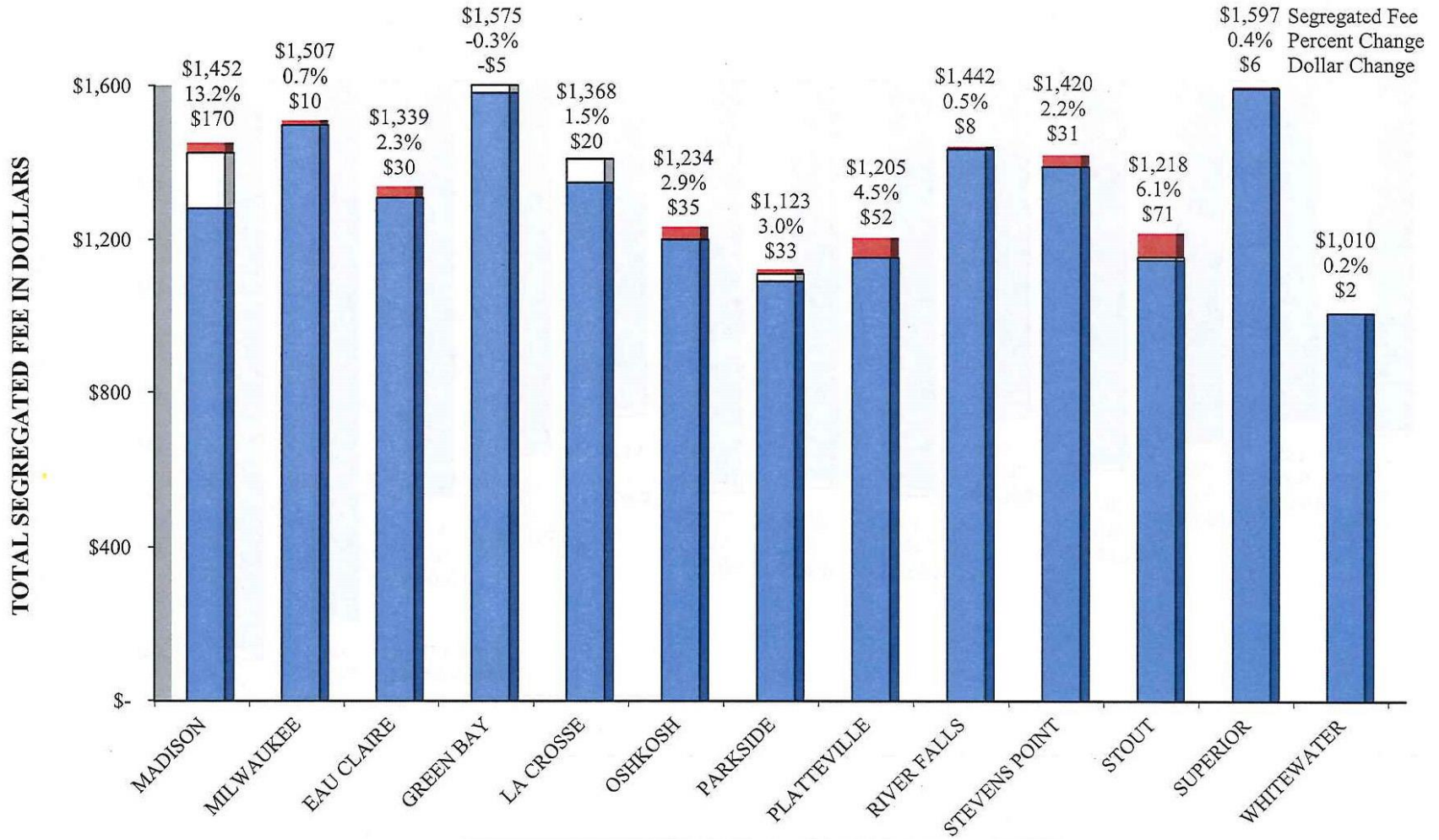
Fiscal Year 2019-20



Cost of Attendance Summary

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

UW System Segregated Fee Schedule FY19-20



UW System Room & Board Rates FY19-20



UW System Textbook Rental Rates

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

Challenges:

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

Opportunities:

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

Questions & Answers

Fiscal Year 2019-20



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

Recorder: Thoen

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

Absent: Fiegel, Smith, C.

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

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

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

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

Options for FY20 are:

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

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

Options for FY21 are:

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

Motion turned down to table this until the next meeting.

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

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

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

8. Adjournment

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

DRAFT FOR DISCUSSION ONLY

Table 1: FY19 Carryover Summary

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

Table 2: Soaring Eagle Scholarship Funding Options

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

Long-term Enrollment Taskforce

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

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

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

FY20 SOARING EAGLE SCHOLARSHIP FUNDING

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

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

FY21 SOARING EAGLE SCHOLARSHIP FUNDING

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

UW-L Joint Planning and Budget Committee

1:15 PM, March 11, 2020

150 Murphy Library

Recorder: Abellera

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

Absent: Fiegel, Figueroa, Sandheinrich, Stindt

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

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

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

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

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

- i. *How are student athletics funded?* Segregated fees, sometimes raising their own money, etc. LeaderShape operates on segregated fee funding; it is continuing and is considered in-state travel. Major conferences have been cancelled.
 - n. Formal communication will likely be through email

4. Provost's Update

- a. None

5. CFO's Update

- a. None

6. Strategic Planning Update

- a. None

7. New Business

- a. UWL Long-term Enrollment Taskforce – see PPT (TJ Brooks and Natalie Solverson)

- i. Group discussion question: what are your initial reflections on this information?
 - Focus on student needs and interest representation
 - Students of color will be an important population for recruitment and retention
 - Task force recommendations for housing issues: innovative short-term housing solutions. We don't have capacity to allow for first- and second-year students to live on campus.
 - ii. Discussion question: what information would you want considered to prioritize spending?
 - More adherence to our claimed values and the strategic plan
 - Strategic planning - we need to have a flexible plan, dedicated team working to think more broadly about these issues
 - Communities losing out when an institution takes a hit, looking toward at System planning
 - Recovering reserve loss as opposed to cuts
 - iii. Discussion question: what are the institution structures or processes necessary to provide the information from Part 2?
 - Is this an appropriate group to utilize in thinking through strategic financial planning?
 - iv. Send any comments and feedback to task force.

8. Adjournment

Motion to adjourn at 3:11 PM. M/S/P.

Agenda

UW-L Joint Planning and Budget Committee

1:15 PM, March 11, 2020

150 Murphy Library

Recorder: Abellera

Alternate Recorder: Abler

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

Long-term Enrollment Taskforce

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

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

Long Term Enrollment Task Force Report

Prepared for Joint Planning and Budget | March 2020

Sita Agterberg – Student Association

Taggert Brooks -- Economics

Enilda Delgado – Sociology/JPB

Bob Hetzel – VC for A&F

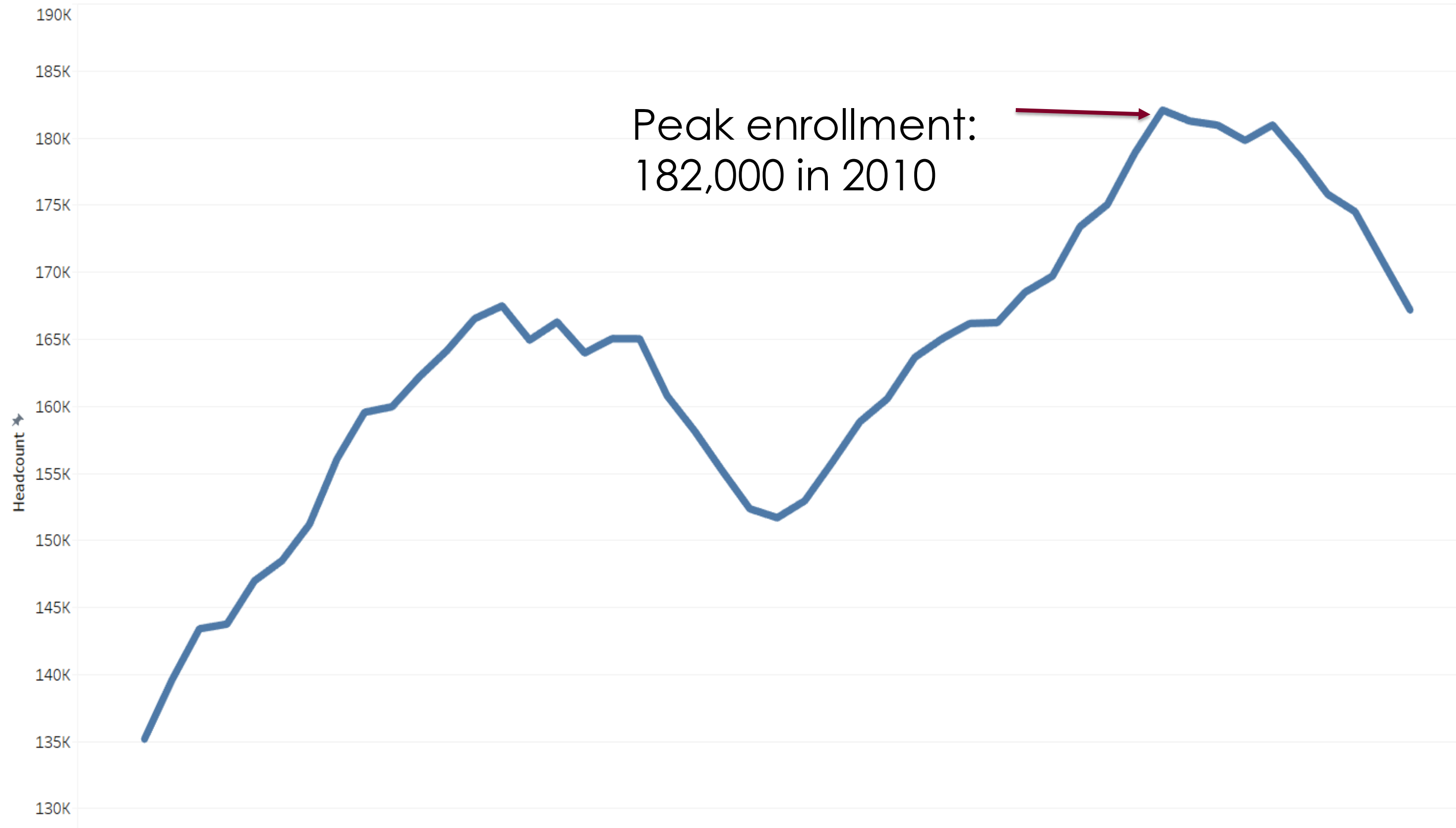
Corey Sjoquist -- Admissions

Natalie Solverson – IRAP

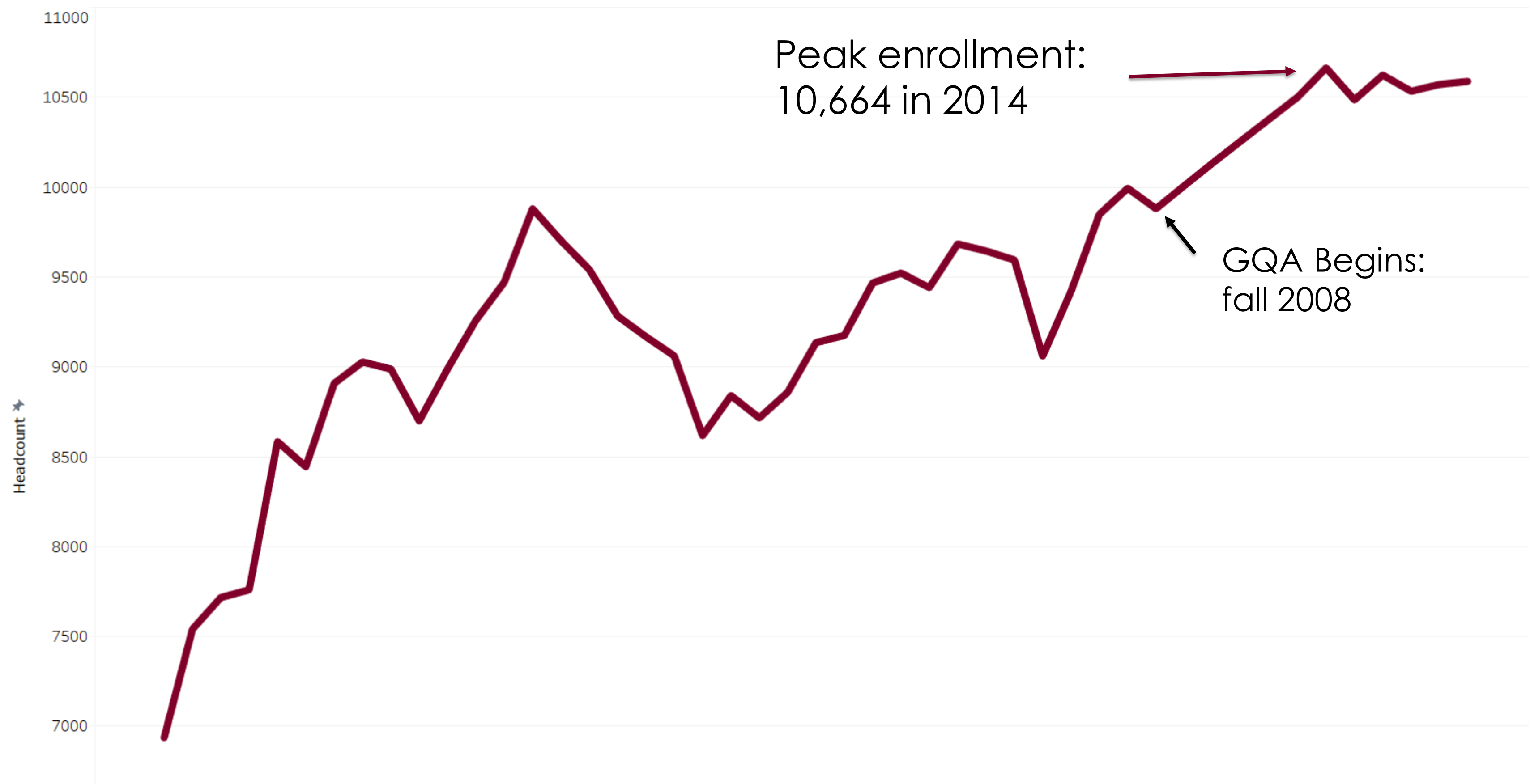
Barbara Stewart – D&I



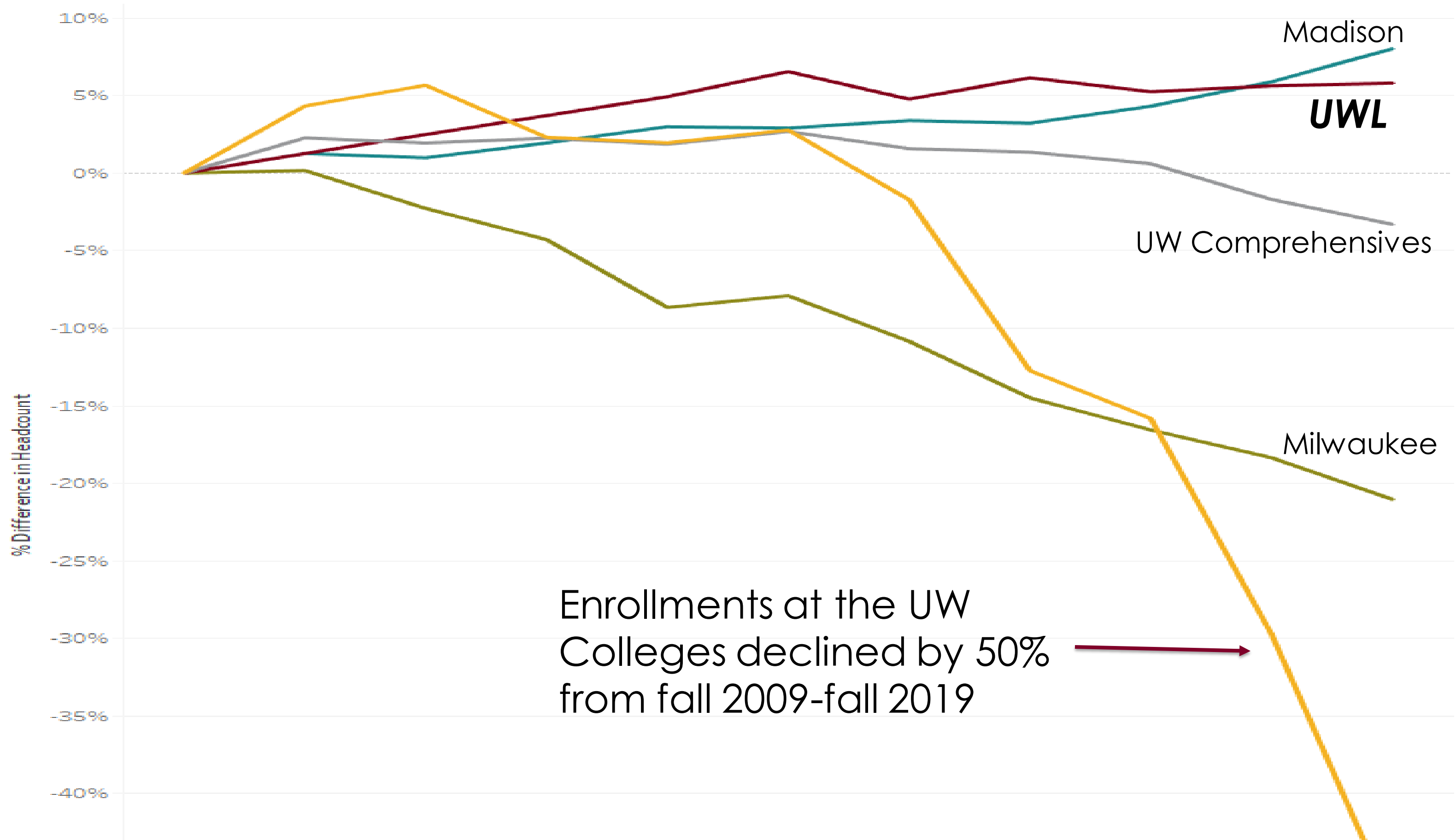
UW System Enrollment, 1973 to 2019



UWL Enrollment, 1973 to 2019



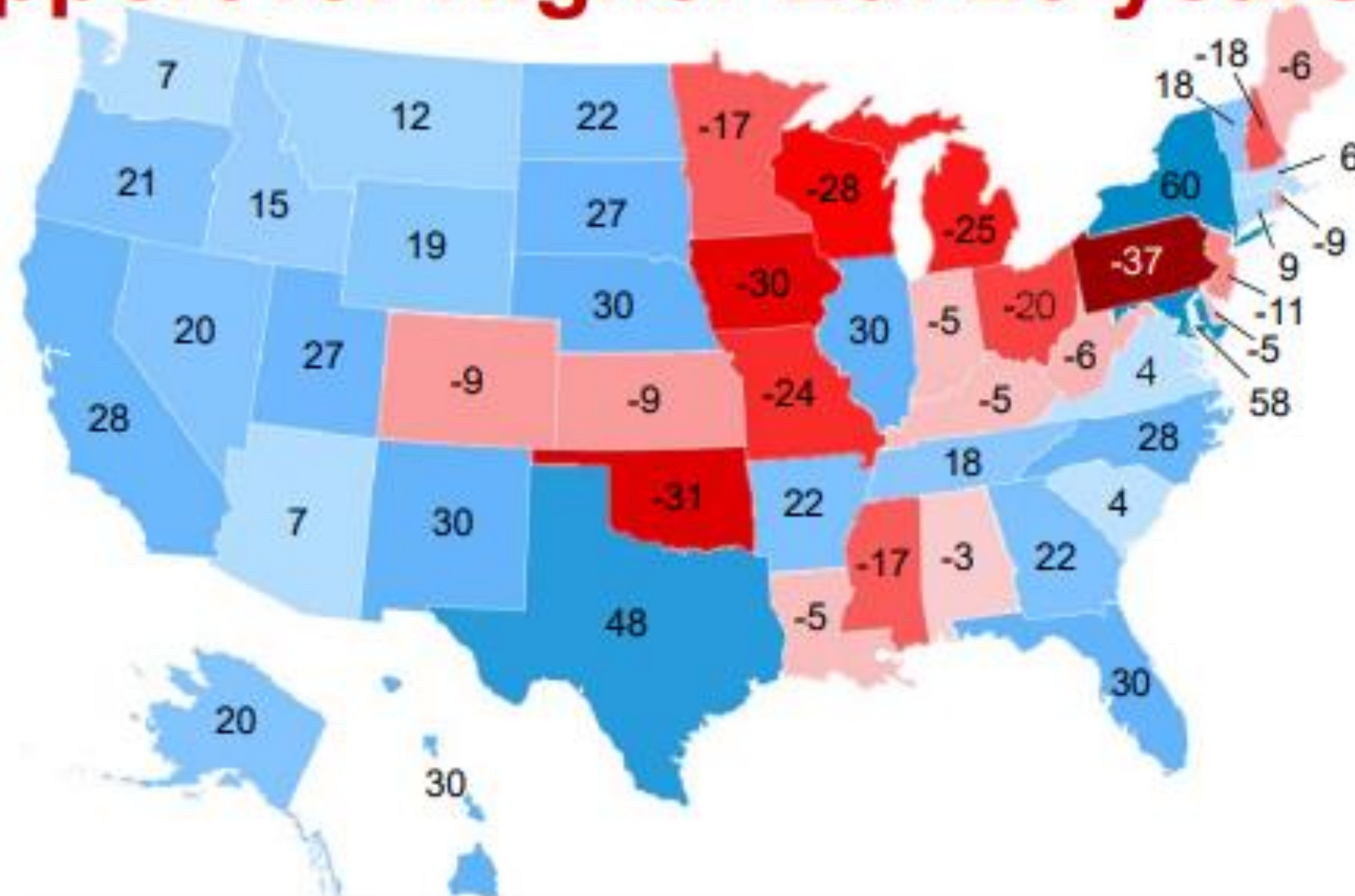
UW System Enrollment, 2009 to 2019 – % change by sector





State Support for Higher Ed: 20 years

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



Source: State Higher Education Finance, www.shfeo.org/projects/state-higher-education-finance/

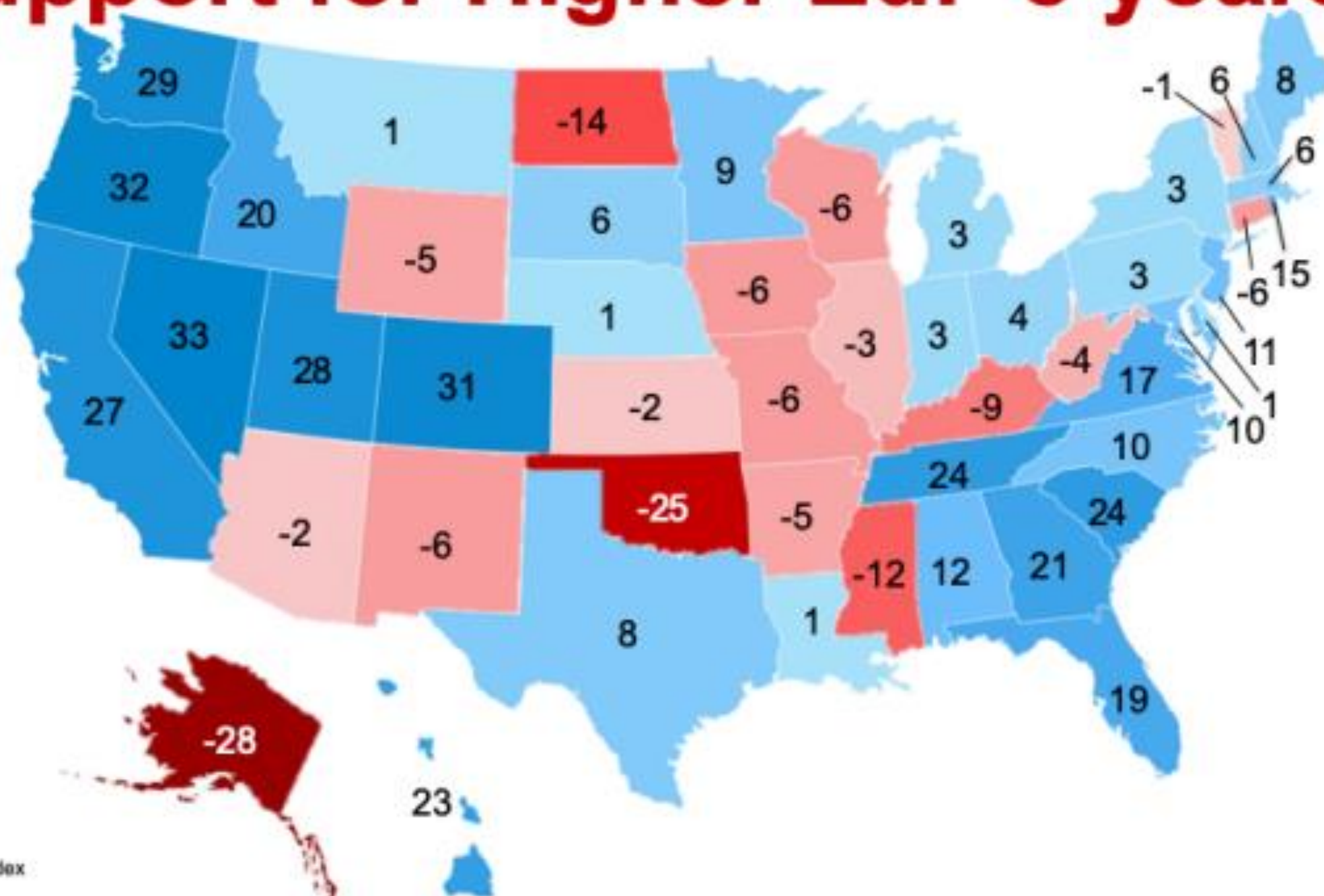
Cribbed from UW-Madison Rebecca Blank's February Presentation to the BOR





State Support for Higher Ed: 5 years

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



Source: Grapevine FY2020 and Consumer Price Index



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

Long Term Enrollment Task Force

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



What We Forecasted

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



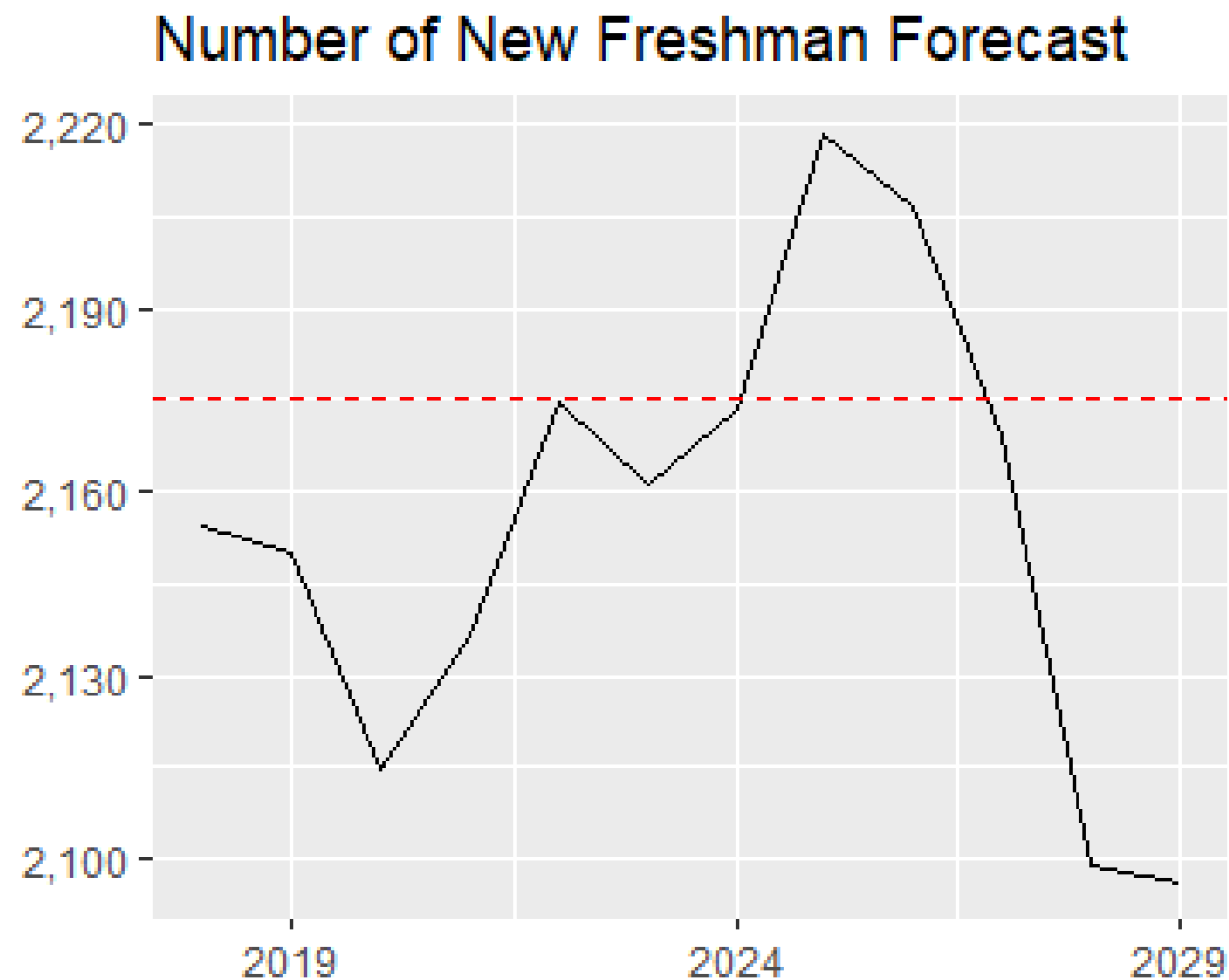
What We Assumed

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

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



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



Source: Authors Calculations

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

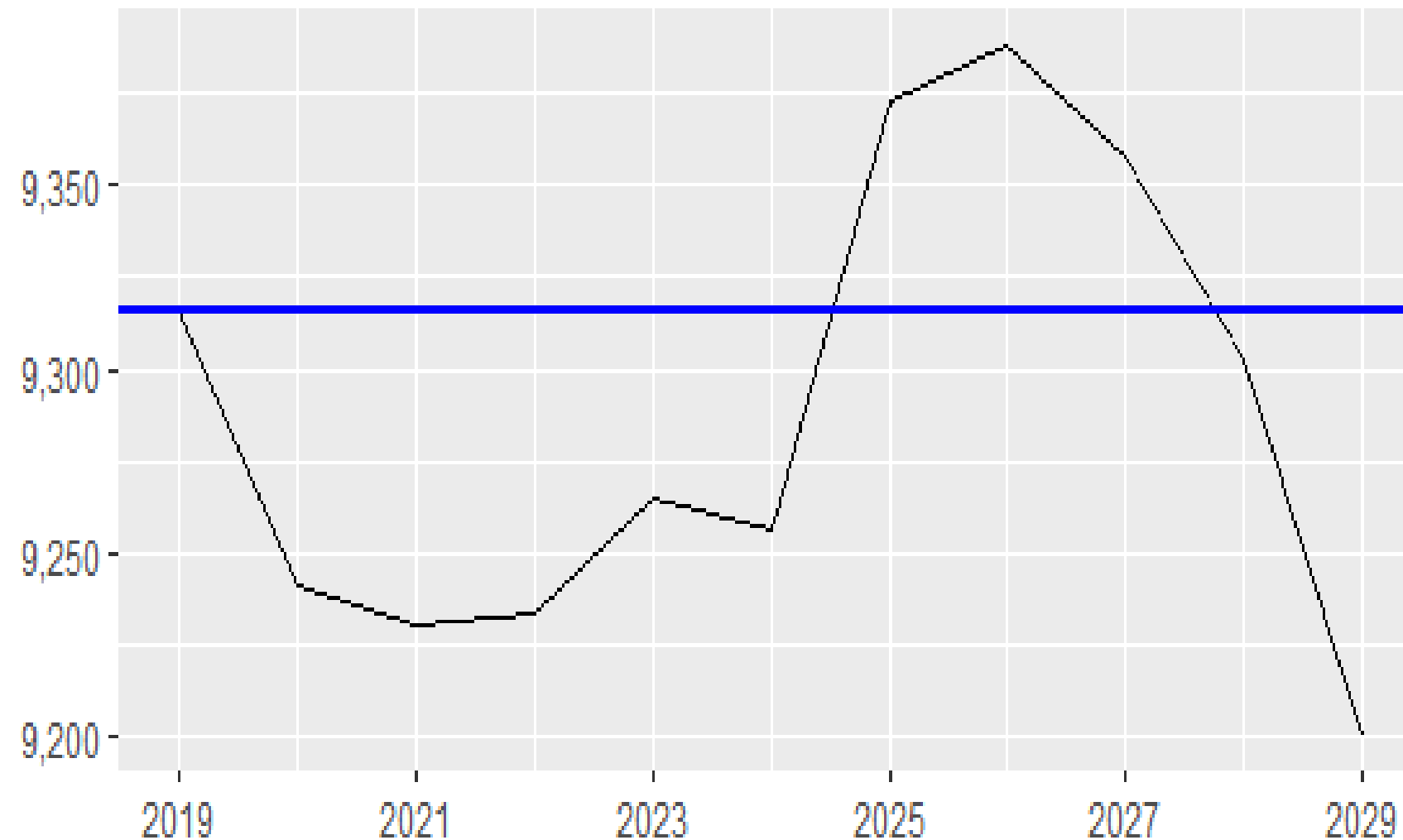
**Predicted high = 2200,
predicted low = 2100**

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



Related – Total Undergrad Degree Enrollment

Forecast Stock of Degree Seeking Ugrds



Source: Authors Calculations

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

*Blue line = predicted fall 2019 enrollment

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

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

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

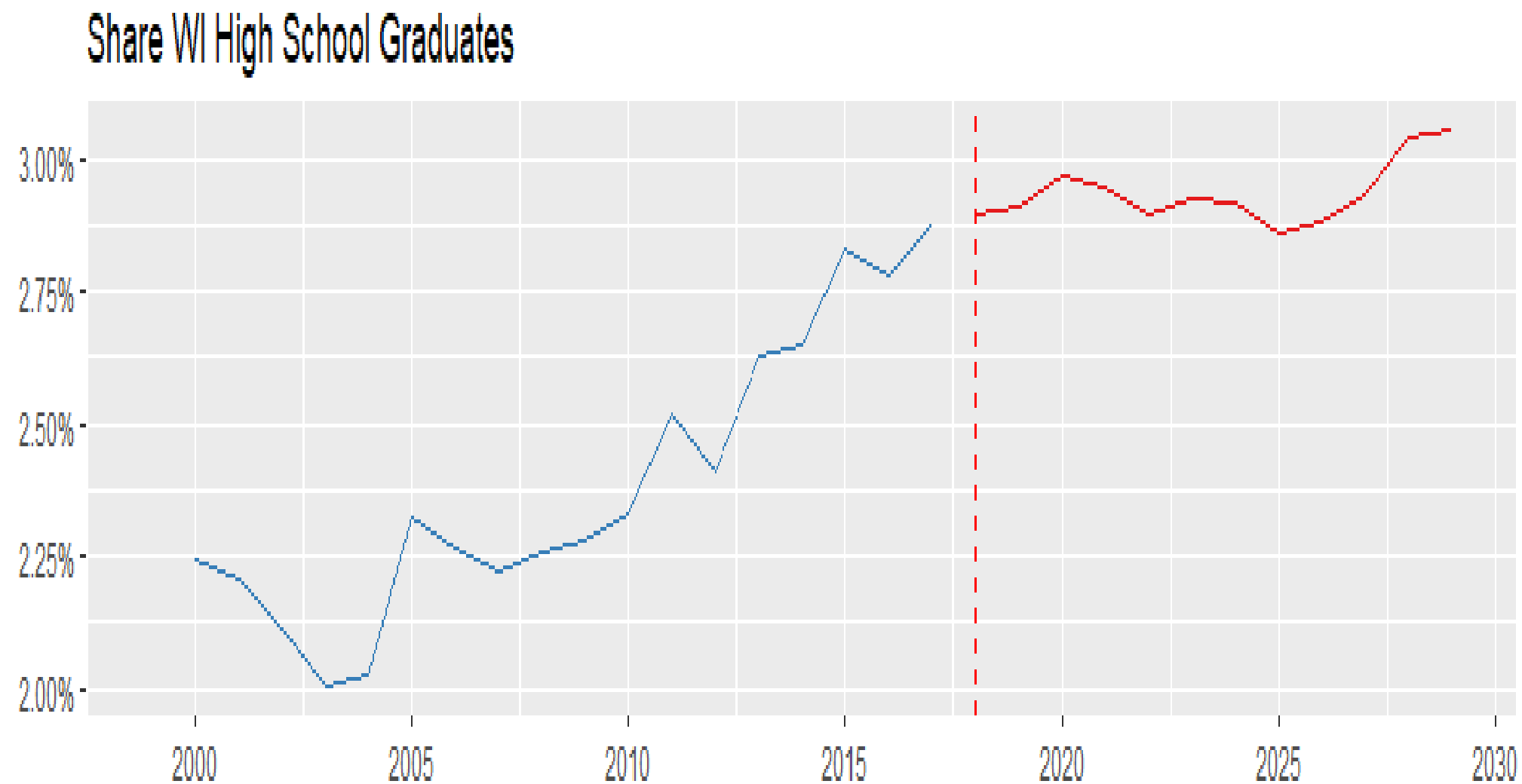


Again, a thing about FORECASTS

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



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



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

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

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

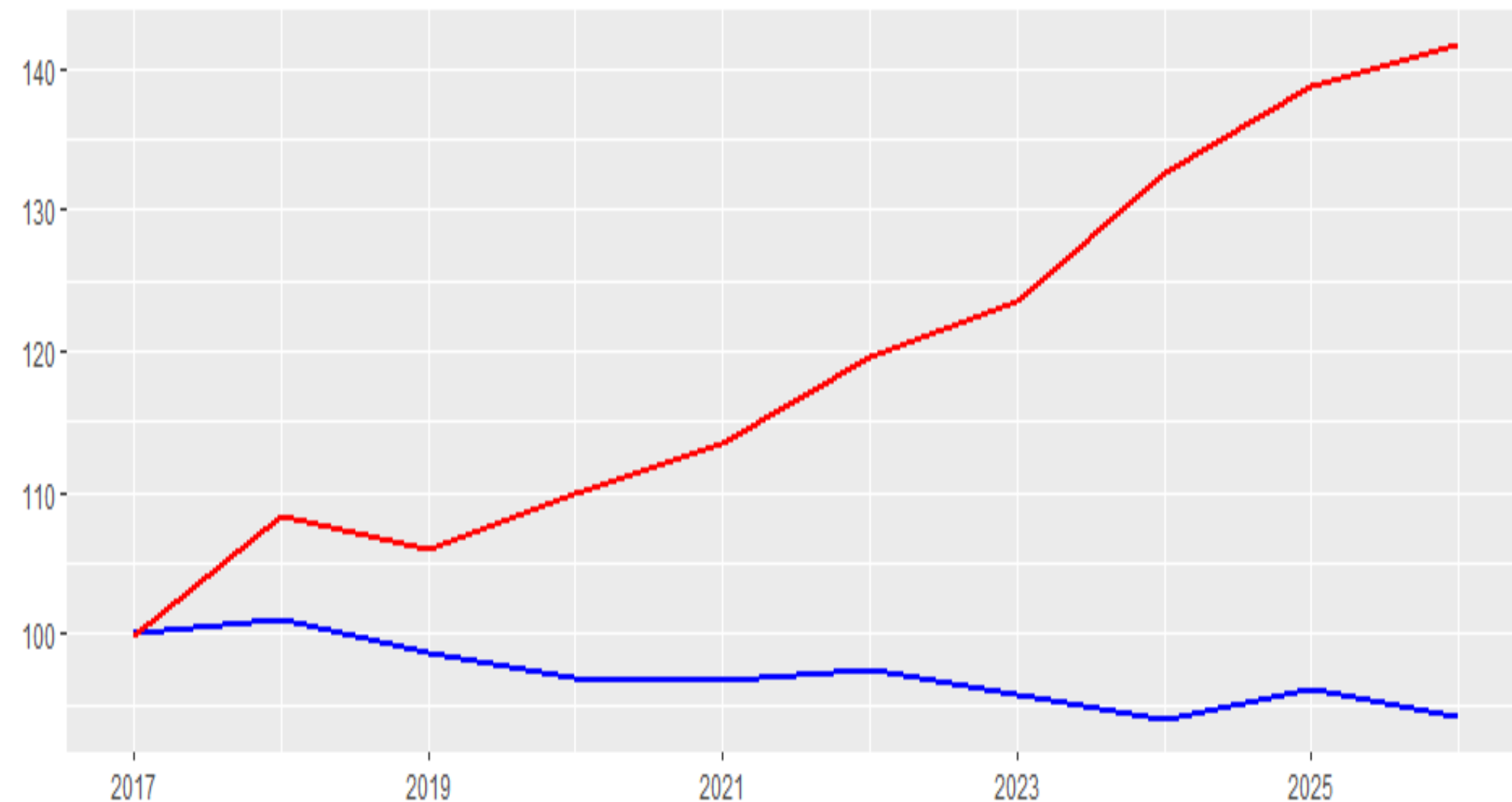
Source: Authors



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

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

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



Source: Authors Calculations from Applied Population Lab Data

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

(251 Wisconsin students of color, 1408 white students)



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

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

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

By Rich Kremer

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

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

UW-Oshkosh Offering Early Retirement Incentives To Faculty, Staff

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

By Rich Kremer

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

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

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

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

UW-Stevens Point Grapples With Budget Shortfalls, Changing Demographics

Chancellor Considers Plan To Eliminate 6 Majors, Restructure University

By Bridgit Bowden

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


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

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



Budget Planning FY21-24

14 October 2019

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



Budget Planning FY21-24

14 October 2019

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



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

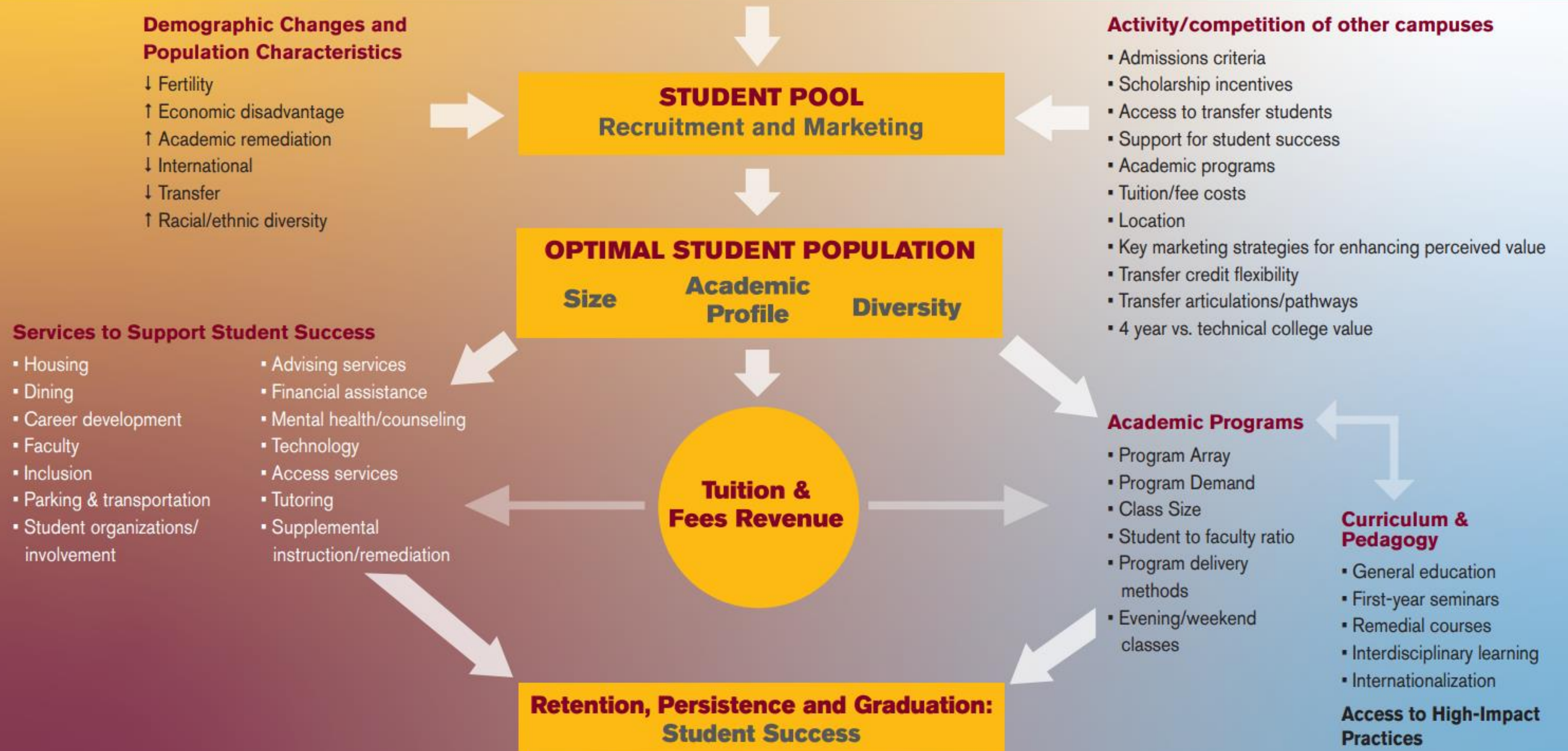
Item	Annual Amount	Amt/100 Students
Tuition	7,584.72	758,472
Segregated Fees	1,367.66	136,766
Room	3,921.00	392,100
Board	2,544.00	254,400

Total = \$1.54 Million

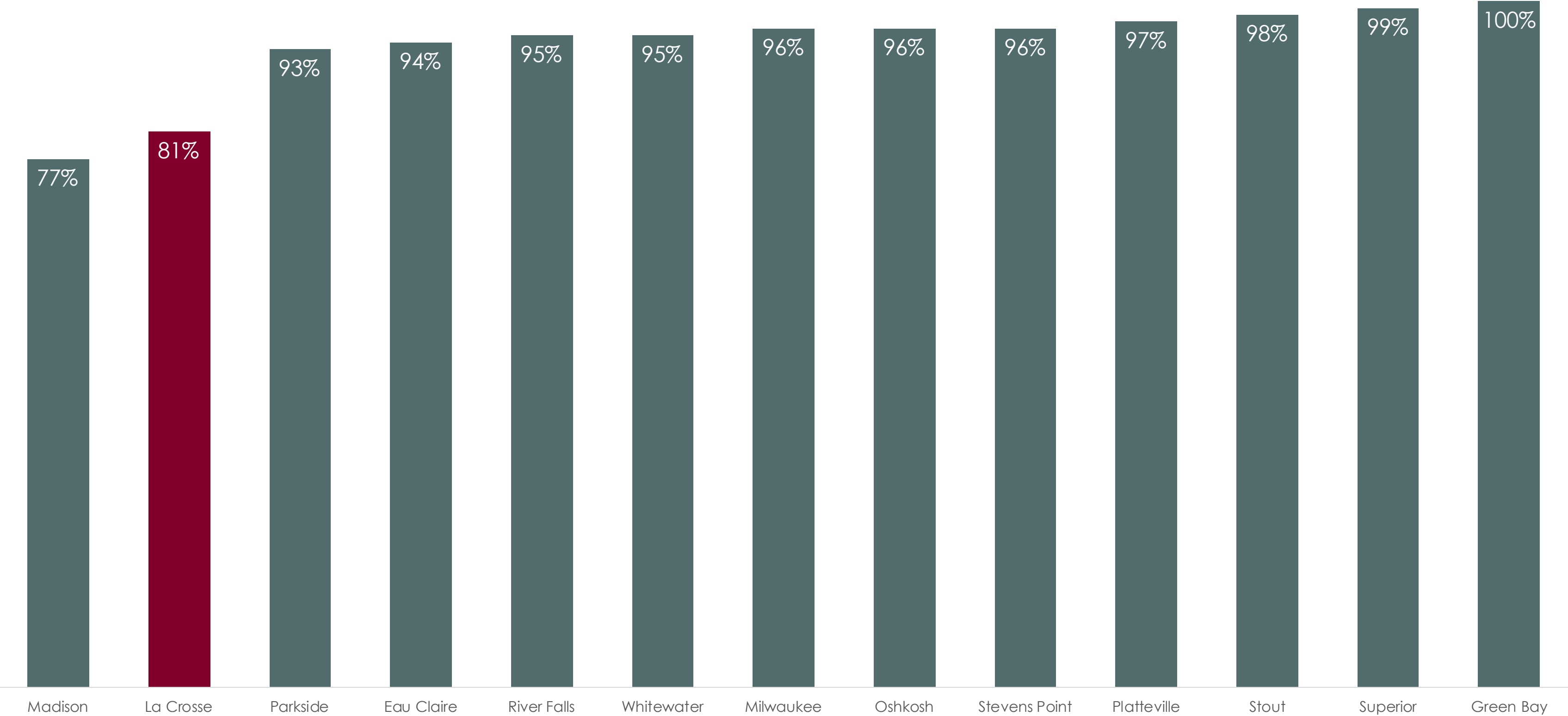


What kind of University do we want to be?

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



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



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

Recorder: Abler

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

Absent: Fiegel

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

1. Approval of Meeting Minutes from March 11, 2020 M/S/P
2. Chancellor's Update
Dealing with COVID-19-- Primary goal is protecting the health and safety of everyone
Fall semester—Deposits for housing and registration tracking like last year
Retention rates unknown
Orientation and summer registration likely online this year
Conversations regarding linking strategic planning with accreditation suspended due to pandemic
3. Provost's Update—Surveying students regarding late-summer graduation, maybe August 22nd?
Face-to-face summer courses limited to session III (July 20-August 28)
4. CFO's Update
COVID-19 Budget Planning Presentation (attached pdf), projected \$4.2 million shortfall FY21 to be addressed by reducing travel (\$1M), vacant position holdback (\$1M), using tuition reserves (\$1.8M) reducing purchases (\$500K), and carryover from FY20 (\$500K), no base budget cuts
Federal money (CARES Act) will bring UWL \$6.8 million, \$3.4 million must go directly to students, likely based on Pell grant eligibility and other factors, payments will be handled through financial aid office
Waiting for guidance from Education Secretary on how the remaining \$3.4 million can be used

Summer events (e.g track meet) on hold or cancelled
5. Strategic Planning Update- Dashboard: <https://www.uwlax.edu/info/strategic-plan/> (Solverson)
Natalie Solverson presented the dashboard metrics for each of the Strategic Plan pillars
6. New Business
FY20 Soaring Eagle Scholarships \$154K short, will be added in with other costs of COVID-19 now Cowley Phase II? Still on track but must convince legislature for next budget cycle
7. Future Steps--UWL Long-term Enrollment Taskforce
Taskforce presentations to governance groups postponed to fall, enrollment model STH by pandemic

Next meetings: 4/22, 4/29, 5/6
8. Adjournment-- Motion to adjourn at 2:58 PM M/S/P.

Agenda

UW-L Joint Planning and Budget Committee

1:15 PM, April 15, 2020

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

Recorder: Abler

Alternate Recorder: Agtenberg

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 - iii. How does our future enrollment management align with our strategic plan?
3. Chancellor's Update
 - a. Future of Strategic Planning update
4. Provost's Update
5. CFO's Update
6. Strategic Planning Update- Dashboard: <https://www.uwlax.edu/info/strategic-plan/> (Solverson)
7. New Business
 - a. Covid-19 Update (Hetzl)
 - i. CARES Act
 - b. Soaring Eagle Scholarship – FY20 (Hetzl)
8. Future Steps
 - a. UWL Long-term Enrollment Taskforce
9. Adjournment

University of Wisconsin-La Crosse



COVID-19 Budget Planning
Fiscal Year 2020-21

Discussion Overview

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

Fiscal Impact of COVID-19 for Spring Semester

Student Refunds:

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

Impact of COVID-19 Refunds

Delay of Capital Projects:

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

COVID-19 Budget Planning Assumptions

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

COVID-19 Budget Forecast for FY21

25M State Budget Lapse & 150 Less Students

1.108M State Budget Lapse

870K Summer Session Decrease

1.919M Enrollment Decrease

180K Application Fee Reduction

115K Indirect Cost Funding Decrease

4.192M Total Revenue Shortfall

COVID-19 Budget Forecast for FY21

Budget Shortfall Funding Recommendations

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

*Funding plan provides contingency for loss of 225 students

COVID-19 Budget Planning – Next Steps

Step 1: Monitor Key Enrollment Indicators

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

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

Questions & Answers



THE SECRETARY OF EDUCATION
WASHINGTON, DC 20202

April 9, 2020

Dear College and University Presidents:

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

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

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

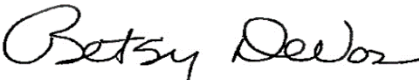
The CARES Act provides institutions with significant discretion on how to award this emergency assistance to students. This means that each institution may develop its own system and process for determining how to allocate these funds, which may include distributing the funds to all students or only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

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

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

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

Sincerely,



Betsy DeVos

DRAFT FOR DISCUSSION ONLY

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

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

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

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

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

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

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

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

April 9, 2020

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

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

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

Recorder: Agterberg Alternate Recorder: Clauss

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

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

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

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

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

Questions and Answers:

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

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

5. New Business

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

6. Adjournment

- a. Abler—Move to adjourn

COVID-19 Lost Revenue Tracking

UW - La Crosse

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

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

COVID-19 Out-of-Pocket Expense Tracking

UW - La Crosse

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

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\$278,616.41

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

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

Minutes
UW-L Joint Planning and Budget Committee
1:15 PM, April 29, 2020

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

Recorder: Clauss Alternate Recorder: Elkins

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

Missing: Abellera, Fiegel

1. Approval of Meeting Minutes from April 22, 2020 (Added Kelly & Kathy)

- a. Moved - Abler
- b. Second – Harris
- c. Approved – 25

2. Chancellor's Update

- a. Students can apply for CARE's Act Funding up and running
- b. Satisfactory/Unsatisfactory was created and students were notified
- c. UW-Madison just announced their furlough plan
- d. UWL does not need to furlough right now, but we may have to in the future
- e. What will our life look like when the Governor's Safer at Home is lifted?
 - i. We should know more next week
 - ii. There is a court case that will be decided soon that could have employees back as soon as May 11th
- f. The Fall is going to look different - Considerations
 - i. Will students move back to campus?

3. Provost's Update

- a. It's been a hard week in Academic Affairs – We will be diminishing the IEE staff by half
 - i. We do expect study abroad to bounce back when the travel ban is lifted
- b. We need to be prepared to teach on-line in the Fall/Summer
 - i. Have secured funding for on-line teaching
 - ii. There will be more options for CATL trainings
- c. UComm have put together the “couch commencement”
 - i. It will go live on commencement day
- d. Nowicki: Was there an announcement about the IEE Staff?
 - i. IEE – taking care of study aboard and international students on campus
 - ii. The specifics of what is going on is not going to be announced
 - iii. Funding of those positions is 102 and fees from students

4. CFO's Update

a. Budget Lapse:

- i. Wisconsin Department of Administration (DOA) has announced the implementation of a 5% budget lapse (one-time budget cut) for all state agencies in the current fiscal year (FY2019-20) to offset the loss of state revenues due to the COVID-19 crisis. The 5% lapse for the UW System amounts to approximately \$46,829,000 (UWL 4% of that cut) with a one-time budget reduction of \$2,075,200 for UWL.

- We will receive more information from UW System soon.
- This is a cut to the current budget (FY19-20)
 - a. Therefore, before June 30th UWL will have to send \$2.1 Million to UW System
 - b. We are going to have to use our tuition reserve of \$1.8 Million, soft hiring freeze monies, travel savings
- Prepare for more cuts in the upcoming budgets – continuation of budget lapse
 - a. There will be a one-time last in FY 20
 - b. Most likely cut FY21-23 biennium

ii. Questions

- Milner: Are other state agencies getting cut or just higher ed? Because we are in good financial standings will we be hit harder?
 - a. All state agencies will be lapsed 5% of their GPR
 - b. I don't know if Pres. Cross will be looking at alternative lapse. I have not heard that is the direction they are going.
 - i. All 2-year campuses are struggling and are not sure how they will be lapses as a result
 - ii. We do need to be ready for a different approach
- Richter: Do we have idea of the savings from S&E accounts?
 - a. We do not know, because we have only been in suspension for two-three weeks. We are really holding the line on spending. We will have more information after the month of May. Hopefully it will be a big saving to increase our reserves to be able to help the lapses
- Kunkel: Is the \$2.1 Million lapses in addition to the \$4.8 Million that was projected?
 - a. This is included in the projection already presented. I planned on \$1 Million for the government lapse.
 - b. We have a 91% enrollment for Summer Session. The \$900,000 short I projected, will offset the \$1 million projected.
- Stint: Can you ballpark what type of furlough (how many days, etc) would be necessary to fund an additional 2 million lapses in FY 21?
 - a. 7 days of furlough for next year. We are not projecting to implement this.
- Elkins: Were the IEE staff furloughed or laid off?
 - a. We are using a combination of furloughs and reassignments.
 - b. Continuous, consecutive furloughs
- Delgado: It is hard to hear that we are not furloughed, however, there are furloughs happening?
 - a. Gow: There is not a campus wide furlough program, but there will be little things here and there. We are trying to reassign people in those positions. We are trying to save as many jobs as we can and are doing our best.
 - b. Morgan: Even within the unit, it is complicated. We have many things going on. Not everyone in IEE is furloughed. There are about four different things going on based on their job responsibilities.
- Delgado: Thank you for your efforts to investing in our people.
- b. Hetzel: There is going to be a lot of information that we will be receiving after the semester. We will be staying in touch with Shared Governance about budget cuts and stay informed of current status at UWL.

- i. Delgado: Has there been conversations around continuing JP&B into the summer?
 - We are in a unique situation and I think the JP&B Exec committee should discuss this option. I think it would be an excellent idea.
- c. Harris: Is there any discussion about voluntary furlough?
 - i. Hetzel: We though volunteer furlough is included in UW System policy; however, it was removed.
 - ii. Acardo: We learned yesterday the voluntary furlough due to many legal issues. There is a policy on unpaid leave, but it is different than voluntary furlough.

d. CARES Act funding:

- i. Congress passed in April - \$12.5 billion into 2 pools:
 - \$6.2 billion emergency financial aid grants for students
 - \$6.2 billion aid
 - UW System received \$94 Million
 - a. Students were notified yesterday about the grants process (\$3.4 Million)
 - i. Max \$1200 grant (3000 grants at max total)
 - b. Institutions can reimburse themselves that were encored during the COVID crisis (\$3.4 million)
 - i. We refund any department that we impacted by COVID
- ii. CARES Act Institutional Funds – Allocation Schedule
 - Expenditures & Refunds Explanations:
 - a. Athletics – travel
 - i. Don't have the ability to incur loss
 - b. IEE – study abroad coming home
 - c. Online Course Training – we would like to provide a stipend to faculty who take these courses and for those who are teaching these courses
 - i. Only about 40% of faculty have taken these courses
 - ii. We need more faculty taking these courses
 - d. Parking – provide refunds to students
 - i. We will be refunding faculty, staff
 - e. Rec – refund to students
 - f. RNA Test Supplies – Microbiology departments offered up RNA Test kits to Gundersen
 - g. Student Income Continuation –
 - h. Technology – hotspots and technology
 - i. Miscellaneous –
 - Additional Emergency Financial Aid Grant
 - a. After Expenditure & Refunds there is \$2.5 million left
 - b. Emergency Financial Aids Grants – addition to \$3.4 Million already granted
 - c. Res Life – refunds to students
 - d. Dining Services – refunds to students
 - i. Proportionate reimbursements
 - The cabinet is recommending Option #2 for Additional Emergency Financial Aid Grant
 - Abler: RNA Testing supplies came from Biology and Microbiology. Do the students know about the Emergency Financial Aid Grants and will they use it?

- a. Janke: We have already received over 600 applications since this morning. We plan on sending out a text message and believe that we will have the need. We can also use it through the next academic year.
- Richter: If the additional grant money in Option #2, why is the monies not separated into the Expenditures & Housing/Dining Refunds?
 - a. Hetzel: All these numbers are going to move over the next few months.
 - b. Richter: \$3 million reimbursements equal 21% of our budget and loss monies from this summer loss. We support numerous positions and I worry about a financial stable Res Life.
 - i. Hetzel: \$2.7 Million in reserves in Res Life... you will have a \$4.1 Million reserve at the end of FY19
 - ii. Richter: We are delaying renovations and will have to continue to delay building up reserves.
- Delgado: What are you looking for from the committee?
 - a. Hetzel: Always helpful to have an endorsement. We have a charge from Dept. of Education. It will be subject to audit and would be helpful to have your support. The numbers will continue to move and will be brought back to JP&B.
- Elkins: What is the rationale to the 25% vs. 50% options?
 - a. Hetzel: It feels like Res Life reimbursements of \$3 Million and delaying renovations and dining renovations. There is going to be more demand for Emergency Financial Aid Grants. Are we not supporting Res Life and Dining Services? Many institutions are not adding anything to the Emergency Financial Aid Grants.
- Milner: Is there any intersectionality between \$2.1 Million back to state and what we received here in CARES funding?
 - a. Hetzel: The CARES funding is only for cost incurred not going to be incurred. Parking refunds: \$39
- Harris: How does our CARES funding impact how we handle the lapse funding?
 - a. Hetzel: There is no impact. You cannot use the monies to fund the lapse. You can only use it with what we already incurred.
- Susan: Is there a way faculty and staff could elect to have parking refund go to student food bank?
- iii. Abler: ***Move to endorse Option #2: Additional Emergency Financial Aid Grant***
- iv. Second: Kelly
 - Milner, Kelly, Stindt, Nowicki, Harris, Kunkel, Sandheinrick, Elkins, Thoen, Smith, Agterberg, Nielsen, Hawkins, Hayes, Abler, Reichert, Wycoff-Horn, Figueroa, Hansen, Stewart, Richter

5. New Business

- a. Long-Term Enrollment Taskforce- Nominations (Elkins)
 - i. John Kovari and Becki Elkins were nominated: Kovari withdrew nomination
 - ***Approve Elkins to Long-Term Enrollment Taskforce:***
 - a. Richter, Nowicki, Sandheinrick, Harris, Stindt, Abler, Thoen, Kunkel, Kelley, Reichert, Figueroa, Delgado, Nielsen, Smith, Agterberg, Milner, Clauss
- b. Extending JP&B into summer:
 - i. Gow: Faculty are not on contract and cannot

- Elkins: We are in unusual circumstances
- ii. Gow: This is a formal committee and it would not be wise to say that people on 9 months contracts
 - Agterberg: I think it's important that we still meet personally and will have a new Pres/Vice Pres would be willing to work on in the summer and are being paid.
 - Stint: If there is some type of compromise to still meet weekly and not have the same voting power and get updates
 - Nowicki: Can we still meet through the month of May, since we are still on contract? We can revise afterwards to figure out the process.
 - Gow: When does the term begin on the new Student Association Pres/VP?
 - a. Agterberg: We will meet with them next week.
 - Hawkins: As the outgoing faculty senate VP, faculty will be working over the summer to prepare for the Fall. It is important to be informed.
 - a. Gow: This would be the only committee that would be meeting.
 - Milner: I think it would be good for a weekly town hall. I don't want to create another expectation to show up.
- iii. Delgado: I will convene the Exec committee to discuss moving the committee forward/through the summer.
- c. Gow: Please give some thoughts about how Fall semester could look like. If it can't be in person, what does that look like? How to we help folks feel safe coming back to campus if that is possible?

6. Adjournment

- a. Moved - Elkins
- b. Second - Delgado

University of Wisconsin-La Crosse
CARES Act Institutional Funds - Allocation Schedule
Fiscal Year 2019-20

DRAFT FOR DISCUSSION ONLY

Item	Option 1	Option 2	Option 3
CARES Act HEERF Institutional Funding	3,394,821	3,394,821	3,394,821
Less: Expenditure & Refund Reimbursement			
Athletics	(65,481)	(65,481)	(65,481)
International Education	(89,750)	(89,750)	(89,750)
Online Course Training	(250,000)	(250,000)	(250,000)
Parking	(153,276)	(153,276)	(153,276)
Recreational Eagle Center	(19,131)	(19,131)	(19,131)
RNA Test Supplies	(19,140)	(19,140)	(19,140)
Student Income Continuation	(225,600)	(225,600)	(225,600)
Technology Access & Equipment	(14,980)	(14,980)	(14,980)
Miscellaneous	(25,000)	(25,000)	(25,000)
Subtotal	(862,358)	(862,358)	(862,358)
Remaining Balance	2,532,463	2,532,463	2,532,463
ADDITIONAL EMERGENCY FINANCIAL AID GRANT OPTION	0%	25%	50%
Less: Emergency Grants + Housing/Dining Refunds			
Additional Emergency Financial Aid Grants	0	(633,116)	(1,266,232)
Residence Life: 2,992,435 Total Net Refund	(1,842,644)	(1,381,983)	(921,322)
Dining Services: 1,120,260 Total Net Refund	(689,819)	(517,365)	(344,910)
Subtotal	(2,532,463)	(2,532,463)	(2,532,463)
Balance	0	0	0

Notes:

1. Total CARES Act funding to UWL is \$6,789,642 with 50/50 split for Emergency Grants and Institutional Aid.
2. CARES: Coronavirus Aid, Relief, and Economic Security.
3. HEERF: Higher Education Emergency Relief Fund.

From: Secretary Brennan <JBrennan@wisconsin.gov>
Sent: Tuesday, April 28, 2020 9:20 PM
To: WI DL All State Employees <WIDLAllStateEmployees@wisconsin.gov>
Subject: COVID-19 Update

Dear State Employee Colleague,

The COVID-19 pandemic has had a fundamental impact on virtually every aspect of life, including how government operates. We asked you to help transform government in ways none of us thought we would have to do. There have been stories of innovation and creativity to ensure Wisconsin state government is still serving our residents. We are doing things differently every day, and circumstances may dictate that we continue to operate differently for an extended period of time.

The State's fiscal situation has also seen a dramatic change in recent weeks, and that too will have a significant impact on the way we do business for a longer period of time. While we entered this public health emergency in strong financial condition, the situation at both the state and federal level have changed dramatically since the Legislative Fiscal Bureau released its January 2020 revenue estimates and revised 2019-21 general fund condition. The impact of the crisis on the overall economic climate will reduce state revenues at the same time that we are facing dramatically increased costs to marshal all potential resources to fight COVID-19.

Wisconsin has received federal assistance to offset some of the additional costs that state and local governments have incurred due to the COVID-19 public health emergency, that assistance cannot be used to offset any loss of revenue that has occurred during this emergency. Given current economic indicators signal a national recession and weakness in state tax collections, the executive branch agencies will be making changes in fiscal year 2019-20 to best position the state financially for an unknown future.

In order to begin to offset the loss of state revenues, we will immediately implement a reduction of 5 percent to state operations GPR appropriations in executive branch agencies for fiscal year 2019-20. These reductions will improve the general fund balance for fiscal year 2019-20, providing additional cushion until the revenue picture for the biennium becomes clearer.

Part of our efforts include continuing some of the steps that were implemented several weeks ago. All state-sponsored out of state travel will be restricted unless deemed to be essential for COVID-19 response. We also will continue to maintain a hiring freeze, with exceptions for COVID-19 related positions and those deemed essential for continuing business functions. Additionally, we will be suspending the Discretionary Merit Compensation (DMC) Program and restricting the Discretionary Equity and Retention Award (DERA) Program for the remainder of the fiscal year.

People across our state – and in state government – are hurting, these are challenging days. We do not take these or any other steps lightly and will do everything we can to limit ongoing impact on all the state employees who continue to provide great service, but we also know that

waiting any longer to institute cost savings could have an even greater impact on our state's workforce in the months to come.

Over the course of the last 15 months, we have come to know and respect the ingenuity and innovative spirit of Wisconsin state employees. Over the last six weeks, you have shown resolve, courage, and an unbreakable Wisconsin spirit as we have accomplished great things to ensure that we carry out every critical state function under the most challenging conditions. And we have confidence that in the coming weeks, you will help provide creative ways to deliver services and perform while laying the groundwork to manage any revenue and budget challenges that COVID-19 puts in our path. We appreciate your dedication and commitment, and we look forward to meeting all the challenges together, head-on.

Sincerely,

Secretary Brennan



JOEL BRENNAN | Secretary
Department of Administration
Phone: (608) 266-1741



CARES Act: Federal Emergency Financial Aid Grants to Students UW La Crosse Program Administration (**DRAFT**)

Grant Application Process

1. Students will complete electronic application (Qualtrics survey) to include:
 - Name
 - Student ID number
 - UWL email address
 - Reason for request/COVID 19 related disruption
 - Food
 - Housing
 - Technology
 - Health
 - Course Materials
 - Childcare
 - Other
 - Life changes as a result of the COVID-10 pandemic:
 - Loss of job/reduced work hours
 - Childcare status
 - Courses moving to online format
 - Illness
 - Children not in school
 - Increased utility cost
 - Short narrative/explanation of situation (2-3 sentences max)
 - Grant amount requested
2. Upon submission of the application, student will receive message indicating the application is under review and they will receive a response within **5** working days if the FAO has a completed FAFSA. If no FAFSA on file, **7-10** days.
3. Electronic applications will be sent via email to the Financial Aid Office (FAO) for review and award determination.

Student Eligibility Requirements

1. Degree seeking
2. US Citizens*
3. Current enrollment of at least half time (UG – 6 credits and GR – 5 credits)
4. Eligible to receive Title IV funding – determined by the receipt of the FAFSA and meeting SAP
5. Demonstrates need associated to an expense(s) related to the disruption of campus operations due to the coronavirus (food, housing, technology, health, transportation, course materials, childcare, other)

Awarding and Disbursement Process

1. Electronic applications will be sent via email to the Financial Aid Office (FAO) for review and award determination. The FAO will review and then scan the application into the system, approve/deny grant requests. Grants will be awarded on a “First Come First Served” basis until the funding is exhausted.
2. If approved, a grant in the amount requested (not to exceed \$1,200) will be added to the student’s financial aid offer in WINGS, using the ‘Emergency Grant’ item type. An email communication will be sent to the student indicating the award amount along with disbursement information. If denied (by committee only), an email communication will be sent to the student indicating the reason for this action, and if appropriate, information on other resources/options.
3. During the daily process of ‘award authorization and disbursement’ on Monday/Wednesday/Friday (initiated by the FAO and the Cashier’s Office), the award amount will be disbursed to the student account in WINGS. The grant will bypass any existing account balance (due to the university) and be sent to the student’s personal bank account via the daily refund process (initiated by the Cashier’s Office). The funds should be available to the student within five working days of making the award. If the student has not set up the ACH process, a paper check will be printed and sent to the student.
4. The FAO would record information (shared spreadsheet) related to the individual student grant requests:
 - a. Student Name
 - b. Student ID Number
 - c. Grant Amount Request
 - d. Request Date
 - e. Request Reason (food, housing, etc.)
 - f. Grant Awarded
 - g. How the Award Amount was Calculated
 - h. Disbursement Date
 - i. Instructions Provided to Recipient

The information would be available to authorized users for information and reporting purposes.

Outreach and Awareness

1. New Qualtrics survey will be developed and replace the current institutional emergency grant application website.
2. An email will be sent to all eligible students from the **Provost's Office**, with information on the grant opportunity along with a link to the electronic survey.
3. Information/Links will be posted on the following UWL webpages
 - COVID 19 FAQ
 - Financial Aid Office
 - Student Life

4. The Financial Aid Office will create a Q and A page on the FAO website related to the emergency grant (eligibility, application process, etc.)

Reporting and Accounting

1. Business Services will report to the DoE (within 30 days of signing the Certificate and Agreement and every 45 days thereafter) how the grants were distributed to students, the amount of each grant awarded to each student, how the amount of each grant was calculated, and instructions given to students about the grants.
2. Business Services (Spencer Green) will draw down the Emergency Grant funds via G5 weekly or as needed.
3. Business Services (Spencer Green) will complete a monthly reconciliation of the funds comparing WINGS, Wisdom and G5.
4. The FAO (Louise Janke) will provide information to UW System as needed if the grant funds are not reported as part of the annual CDR submission.

Other Information/Questions

Recommend awarding as much of the \$3.4M in emergency grant funding to meet current student needs. Any remaining balance, plus the additional funding of \$633K (reallocated from the Institutional Costs funding pool), to be awarded in 2020-21.

Require clarification on funds being reported for tax purposes 1098T or 1099.

Require additional information on the reporting requirements.

Security for spreadsheet in the shared drive.

Outreach to students who do not qualify.

Minutes
UW-L Joint Planning and Budget Committee
1:15 PM, May 13, 2020
Virtual Meeting – via WebEx (<https://uwlax.webex.com/meet/edelgado>)

Recorder: Elkins Alternate Recorder: Fiegel

Present: Abler, Agtenberg, Clauss, Delgado, Elkins, Figuerora, Harris, Hawkins, Hayes, Hetzel, Kelly, Kovari, Kunkel, Milner, Morgan, Nielsen, Nowicki, Reichert, Richter, Sandheinrich, Smith, Stewart, Stindt, Thoen

Missing: Abellera, Fiegel, Hansen, Wycoff-Horn

1. Approval of Meeting Minutes from April 29, 2020

- a. Moved – Richter
- b. Second – Sandheinrich
- c. Approved - 21

2. Chancellor's Update

- a. President Cross's Blueprint has caused much discussion and disagreement. The Board is interested in hearing what individual campuses think.
- b. There will be a series of listening sessions – watch for the email announcing these sessions.
- c. President Cross did apologize for the way in which the Blueprint was released, including the lack of notification for campus leaders.
- d. There are many concerns related to the lack of attention to shared governance.

3. Provost's Update

- a. Not much to report – prefer to answer questions
- b. Program array
 - i. How do you handle it on campus? What do you do internally with a low-productivity campus? We handle this quite well
 - ii. What do you do with program duplication?
- c. These conversations do need to be had at a System level (but, not by a System-driven procedure) in order to determine a coherent approach to education in the state.
- d. Concerns about online education and the notion that these programs should be centralized at the System level. The truth is we have different types of online programs than those described in the Blueprint. Many of those programs are quite successful.

4. CFO's Update

- a. Wittig Hall renovations are coming along well
- b. Waiting for news from UWS to get more information on the state budget lapse. The Dept of Administration is still working out the details.
- c. We've also been given notice that we should expect another lapse after July 1st for FY21. Don't know the exact amount though we could anticipate it will be around 5%.
- d. Key enrollment indicators

Admissions Deposits:
2,252 ('20) vs. 2,285 ('19)
First Year Target: 2,175

Housing Deposits:
2,070 ('20) vs. 2,119 ('19)

Summer Session:
Summer 2020 enrollment is currently at 99.6% of Summer 2019

- e. Financial Aid is doing a tremendous job disseminating aid to students
CARES Act Emergency Financial Aid Grants as of May 13th
Student Awards: 2,006
Amount: \$1,796,352
- f. College of Business will move this summer
- g. Badger Street Mall is out for bid
- h. New UWL Fieldhouse – we're hopeful we'll be able to move forward

5. Q&A

- a. Barlow – How will decisions be made about when and how to re-open campus?
 - i. Morgan –
 - Student Health Director Abby Dayo and Campus Police Chief Alan Hill lead our COVID-19 operations team.
 - What happens if the System makes a decision that directly contradicts the county public health offices? We're worried about these kinds of questions. They are up in the air at the moment; but, they are informed approaches.
 - Can we be more strict than the recommendation? Yes – in general. We take the guidance from the System and then make the decision that works best for us.
- b. Stindt – [could not hear question]
 - i. Morgan - We would take their recommendations and send it directly to our operations team – to determine how we would operationalize those recommendations (if possible).
 - ii. Morgan - I want faculty to be designing for flexible instruction – because we might be in person, we might be online, or we might be in a hybrid format. We need to design good educational experiences whether we're all online, in person, or a mix of both.
- c. Kelly - How do we enforce students wearing masks in the classroom?
 - i. Morgan – we would need instruction from System legal on this. We don't know the answer to that yet.
 - ii. Abler – We do it for weapons now.
- d. Nowicki – What level of concern do you have for building projects being put on hold given the financial circumstances of the state?
 - i. Hetzel – There is no budgetary recision that is being considered for the current biennium. However, for the 21-23 biennium, our building projects are at risk. Two schools of thought – (a) the state should take on these projects as economic recovery items; (b) state cannot take on all of that indebtedness to pay for the bonds on all of those building projects.

- e. Delgado – Did the Regents know in advance that President Cross would send out the Blueprint Plan?
 - i. Woodmansee – Yes, we were aware of the general idea though we weren't familiar with the actual timelines. There will be a Board of Regents discussion of the plan in June although it's not clear whether it will be a vote on the plan.
- f. Kelly – Part of the reason for the Blueprint is COVID-19. In previous times, we've all taken a furlough rather than cutting full positions. Is that being considered?
 - i. Gow – I think it's likely that the state will impose furloughs for all state employees. That's why we're trying to avoid putting that forward as an institution right now. We're under 15 people who have been furloughed – and that's for specific amounts of time rather than widespread furlough programs.
- g. Bald – Update on presidential search
 - i. Morgan – Still moving forward but don't have details to share. The Blueprint release was very problematic for this search. The timing of the release, the lack of involvement of the individual campuses, the lack of shared governance, etc.
- h. Thomsen – How is admissions going on our other System campuses?
 - i. Sjoquist – Varies tremendously across campuses. Stevens Point and Platteville show improvement from where they had been. Schools running behind include UWEC, Milwaukee, Whitewater. UWGB is running on track – but remember they are at a 100% admit rate. Madison is running into difficulties trying to figure out how to run their mix. We're sitting in pretty good shape. We have 19 more transfers than we did at this time last year.
 - ii. Gow – Please convey our gratitude to your colleagues.
 - iii. Morgan – Eagle Ambassador program – we're going to ask folx to work with our rising sophomores over the summer – by texting them through EAB Navigate to check in with them. We're still where we should be in terms of returning students who are registered for fall courses.
- i. Delgado – ACT Scores have been waived for the coming year. What is the take on that?
 - i. Sjoquist – For Freshman Admission, there is a new test policy that moves us to a “test optional” admission policy – for all campuses except Madison. The ACT/SAT for UWL is one of multiple factors we use to make admissions decisions. It raises questions for us. It has the potential to disrupt our recruitment process – as we typically get a number of students through the process of students taking the tests and sharing their scores with us.
 - ii. Woodmansee – The ACT/SAT change is just for 2020-21 and 2021-22; not beyond.
 - iii. Sjoquist – All Wisconsin juniors took the exam before schools closed. We are not looking for as big a concern (in Wisconsin) for 20-21 but rather for the following year. Minnesota and Illinois had exams scheduled and cancelled this year. It could hurt us for the next round of admissions (not the current year). We need to help students understand that it is “test optional” not “test blind.” And, many other institutions to which these students will apply will still require test scores.
- j. Lozano – Updates in terms of numbers re: admissions and students of color?
 - i. Sjoquist – We are running a little behind last year – by 20-25 students.
- k. Kelly – Updates on placement tests for incoming students?

- i. Sjoquist – Placement exams will be administered online. We’ve been told those will be ready by June 1st and possibly earlier.
- l. Kelly – There is a tremendous benefit of offering majors – in terms of helping attract and retain faculty who are passionate about their field.
- m. Delgado – Is there a deadline for students to apply for CARES Funding?
 - i. Janke – No. There is no deadline. The students who apply, though, will have to have experienced a disruption. We’re looking for additional guidance in terms of how it will apply for our new students.
 - ii. Delgado – Do you think we will use up all of the money allocated?
 - iii. Janke – Yes.
 - iv. Richter – Does a student need to be enrolled in summer courses to get funding?
 - v. Janke – Summer is called a cross-over field. As long as a student was enrolled in the spring and experienced a disruption, they would remain eligible even if they are not enrolled for summer.
- n. Delgado – How do we compare with other universities, if they have done similar types of surveys?
 - i. Morgan – Don’t have data directly connected to these questions. But, readings would suggest that nationally students aren’t thrilled with this spring’s experience. Survey is really designed to help CATL in terms of working with faculty. It’s concerning to have nearly 20% of your students saying this spring experience was entirely unsatisfactory.
- o. Clauss – Are we beginning to think about how to retain students if we can’t return in-person in the fall? Could we think about registering students for the Spring 2021 semester? What barriers can we remove to ensure students who cannot come back in the fall are still enrolled in the spring?
 - i. Morgan – We’re not there yet. It’s an interesting idea...will take it back to Sandy Grunwald.
- p. Delgado – Has a determination been made about the summer face-to-face courses?
 - i. Morgan – Haven’t made this decision yet. It’s also a social distancing question – it’s kind of a pilot of how we can make social distancing happen in these courses. We want to make that call by June 15th.
- q. Richter – What are the implications if we decide to just have 1 student per residence hall room? How do you decide who gets a room and who doesn’t?
 - i. Gow – Some of the local hotels have contacted us and indicated they would have space. We’ll have to very carefully think it through. It’s going to be very challenging to satisfy everyone. We’re going to keep working with our teams here to come up with policies and procedures for how we can safely house people and whether we can have courses on campus?
- r. Stuckey – What’s the option of having a hybrid model – so that students can decide whether they want to be in a classroom or not?
 - i. Morgan – We’re trying not to ask faculty to prepare two versions of the same class. Do we want them to be ready to shift options? Yes – but not on the basis of an individual student. We will work with individuals, but we don’t want faculty to have to prepare multiple versions of courses for individual students.
- s. Agterberg – How will we discourage students from socializing outside of classes?
 - i. Morgan –

- t. Elkins – What are folks thinking about the content of the Blueprint?
- i. Morgan – I'm very concerned about the timing of it. That wasn't helpful at all. We could have involved more voices in the conversation. I think most of the potential structures for how we accomplish what's in the plan are not in place.
 - ii. Gow – Three parts – academic programming/staffing, shared services, and online education
 - Online piece – I think that will probably continue to be developed as there is student demand for it.
 - Shared services – I think we might find ways to do some of this work collaboratively. There is much to explore here.
 - Academic programs – That's premised on a notion that we "can't be all things to all people." I would disagree that UWL is trying to do that. We've done an excellent job trying to leverage the original physical education and normal school history of UWL and have developed a strong health sciences program, etc. I would hope there wouldn't be much adjustment in our offerings. We have very few low-enrolled programs. I think that this point was designed more for the other comprehensives and not UWL.
 - iii. Grunwald – The way it was unveiled could contribute to doubt among prospective students – wondering if they should attend an institution or whether they should anticipate their program being cancelled.
 - iv. Kelly – The timing is horrible. It felt like a slap in the face to people who feel their job is threatened. I understand the System is facing economic problems. But, I don't like putting that on a few people. I'd rather have all of us take it on so that we try to protect everyone. The way you get through this is kindness.
 - v. Abler – It was really craven to use COVID-19 as a cover for this kind of power grab by System. Taking this out of the hands of the faculty is a violation of Chapter 36. This will kill System, if they do this. I know that's been the goal of a number of individuals on the Board of Regents – to do in state education. Our campus is going to pay for the good work we've done with our finances (i.e., Dr. Hetzel) by having to close programs in order to prop up the same programs at other institutions.
 - vi. Woodmansee – I was not aware that individuals at institutions – including faculty – were not aware of the Blueprint. I think other Board members also did not know that the Chancellors and Provosts did not know. We assumed that Provosts and Chancellors had been in communication on this topic.
 - vii. Harris – I'm concerned about the 2nd point of the Blueprint – consolidating IT, HR, etc. The efficiencies you can gain by consolidation can be offset by the robustness and agility you have in a decentralized system.
 - viii. Abler – About half of the problems we have with Business Services are the result of System issues; not our local processes / staff.
 - ix. Woodmansee – Would be happy to hear thoughts about the Blueprint. Send to owoodmansee@uwsa.edu.
- u. Clauss – How do we accommodate faculty / staff who are uncomfortable returning to campus?
- i. Hetzel – Last week, we brought back 150 people – mostly facilities staff. We've established workplace standards to address the COVID situation. Everyone has been

issued two masks. Everyone has a self-assessment re: their health that they must complete every day.

- June 1st – Phase 1 of a gradual bring-back of our employees – key individuals who need to be in their offices to complete their work.
- ii. Morgan – We still want anyone who can be working remotely to work remotely. That’s a relationship between the employee and their supervisor – to determine whether they can /should work remotely. We will then allow folx to return to the office to check mail / phones a few hours a week; some researchers will be able to get into labs; etc. Heavy emphasis on “can you do your work at home?” If your duties need to occur on campus and you aren’t comfortable, then that becomes a conversation between you, your supervisor and HR. We may ask for documentation, if necessary. We may use FMLA, if necessary. That will be negotiated with supervisors and HR.
- iii. Hetzel – Supervisor for each unit is monitoring the self-assessments that employees are taking each day. We’re using this as a pilot.
- iv. Morgan – Questions re: pre-existing conditions. The very first step is talking with your supervisor. If you can’t do your work remotely, we’ll then look at working with the supervisor and HR. It’s not going to be a blanket response but rather we’ll look at each individual’s situation on a case-by-case basis.
- v. Woodmansee – 5-Prong model being used at the Board for consideration of how to bring students back to campus. Key items include:
 - Testing
 - Tracking
 - Separating
 - Isolating
 - Protecting
- w. Stindt – We’ve only ever tested 150,000 individuals in the state; that’s a fraction of what we will need to be able to test overall. How will that happen?
 - i. Woodmansee – There has been a lot of discussion. System has been working with companies and looking at really inventive ways to mass test people. We’re hoping to look at that for the fall.

6. Dana and Sita are moving on. Cate Wiza will be joining for the future.

- a. Kudos from Chancellor Gow and JPB Chair Delgado.
- b. Lots of kudos and thanks from JPB members!

7. Adjournment

- a. Moved – Abler
- b. Second – Kelly



Blueprint for the University of Wisconsin System Beyond COVID-19

May 2020

Executive Summary

After the restructuring of 2017, the University of Wisconsin System is made up of 13 universities across 26 campuses. Each university attracts thousands of people every year, providing a major economic impact on their communities. We are one of the state's largest employers while serving approximately 170,000 students. Two of our universities, UW-Madison and UW-Milwaukee, are classified as Research I (R1), the highest rating for research universities by the Carnegie Classification of Institutions of Higher Education. The other 11 of our universities are classified as comprehensive institutions and are important pillars in their communities. They are major employers, connect deeply with the identity of each region, and support businesses and other organizations serving the region.

To address the significant costs of the COVID-19 pandemic, the University of Wisconsin System must play a more direct role in operations at the campus level to more rapidly achieve systemwide efficiencies. In the last several years, the UW System has made progress on the following:

- Changing academic programs at each university based on projected enrollment
- Aligning former UW Colleges campuses with UW universities through the recent restructuring effort
- Centralizing services that support campus operations through UW-Shared Services
- Offering collaborative online degrees through UW Extended Campus

Facing looming financial challenges, the UW System must quickly coordinate ongoing efforts in these areas to ensure the survival of its universities and mission. These efforts will need to be combined with other measures to ensure the UW System can continue to exist and provide world-class education, research, and outreach.



The University of Wisconsin System must refine the missions of its comprehensive universities to provide greater institutional distinctiveness and identity.

Rationale: Beginning with the premise that each of our comprehensive universities cannot continue to be “all things to all people” and be financially sustainable, each university must focus its resources on distinctive programs and collaborate with the System’s universities to serve the

state's needs across other programs. This will make them stronger, not weaker. In fact, the very futures of these universities depend on it. It is not a should-do; it is a must-do. It is not for "someday"—it is for now. These critically important universities are at risk because of the following:

- a. *Declining state investment:* The University of Wisconsin System's portion of the state budget has shrunk by six percent since the 2007-08 budget. Not only are prospects for significant budget increases from the state dim in the foreseeable future, but also, in the midst of the COVID-19 pandemic, the state is now seeking a five percent lapse for UW System for Fiscal Year 2020.
- b. *Tuition cashflow:* The comprehensive universities within the UW System – the comprehensives and what were formerly the two-year campuses – are most dependent on tuition and have experienced the most financial stress because of extended tuition freezes.
- c. *Demographics:* Demographic projections for the next two decades indicate fewer Wisconsin high school graduates overall and even fewer deciding to stay in rural or smaller communities.
- d. *Workforce:* Additional reductions in faculty and staff at some of the comprehensive universities will make it very difficult to continue providing the quality educational experience everyone expects from all of the University of Wisconsin institutions. Funding projections for the next decade suggest the critical mass of faculty and support staff needed to offer a quality educational experience in all programs will continue to be a pressing issue. Thus, our institutions will need to review the resources to be reallocated in support of a more distinctive identity and mission.

Over the last couple of years, UW System Administration has been working collaboratively with each comprehensive university to develop an understanding of projected enrollments and revenue estimates through 2026. The process used predictive tools to help each campus understand its probable future state and to incrementally make changes in their academic program offerings or array. The incremental process was designed to progressively create more university distinctiveness using traditional academic program analysis and evaluation models over time. Typically, these traditional academic program evaluation processes require broad engagement of university stakeholders and community members.

Unfortunately, the coronavirus crisis and the resulting economic impact require that we aggressively expedite this process. This work will need to be done this academic year and ready to implement in the fall of 2021. Taking more time will only create greater challenges for the comprehensive universities. The accelerated process must allow for assessing each academic degree program and each administrative program/service offered at each university, while providing an analysis of program quality, demand, potential, cost, and ultimately, alignment with the mission of the university.

Implementing the outcomes of this process will involve reallocating university and system resources, discontinuing some university programs, increased program collaboration between universities, and increasing investment in other programs. The need to focus comprehensive

university missions and link limited resources to the revised or updated university mission will create greater distinctiveness and identity for each university.

A comprehensive planning and prioritizing process that is mission-centric should yield:

- Identification of which, and in what ways, academic and administrative programs/services contribute to student success, faculty excellence, and institutional distinctiveness
- Strategic reallocation of resources and financial stability
- Identification of opportunities for generating new resources to strengthen and/or expand existing programs or to develop new programs

Recommendation: The UW System must implement a process for prioritizing and evaluating academic and administrative programs/services across comprehensive universities using modified traditional tools. Given the need to accomplish this significant change rather quickly while balancing the interests of the state with the interests of each university, UW System Administration must play a larger role than planned under the previous incremental strategy. The UW System must switch from the convener/collaborator/coordinator of this effort to the director and manager and must provide clear guidelines and mandates so that the comprehensive universities engage in this accelerated process of prioritization and evaluation of all of their programs. Ultimately, each university will need to submit to the Board of Regents a revised or updated mission statement.

Responsibility: Vice President for Academic and Student Affairs Anny Morrobel-Sosa, who has already been working with the Provosts at the comprehensive universities to accelerate the process of analyzing and evaluating programs.

Traditional models for evaluating and prioritizing university programs (see Massy¹, Dickeson², and Comstock and Booker³ models) should guide the process; however, they should be adapted to expedite the process of identifying the desired programs and offerings that will form the core of the revised or updated university mission statement.

Timeline: Evaluating and prioritizing programs should be completed prior to January 15, 2021. Revised or updated university mission statements should be submitted to the Board in March 2021 with implementation to begin in the fall of 2021. This is an aggressive timeline, but this is critically important to the future of the comprehensive universities and to the state of Wisconsin.

¹ Massy, W.F. Honoring the Trust: Quality and Cost Containment in Higher Education, p. 6. Figure contents quoted from source. Bolton MA: Anker Publishing, 2003.

² Dickeson, Robert. Prioritizing Academic Programs and Services: Reallocating Resources to Achieve Strategic Balance. Revised & Updated. New York: John Wiley & Sons, 2009.

³ Comstock, J. and Booker, K. "Self-Study Leveraging: The QPC Model for Comprehensive Academic Program Review," p. 1. A Collection of Papers on Self-Study and Institutional Improvement, Volume 1, Chapter 4, 2009.

»»» The University of Wisconsin System must consolidate and streamline common administrative operational functions.

Rationale: Too many variations exist in the way UW System institutions provide fundamental operational functions such as purchasing, human resources, IT, and basic business services. These variations are not only inefficient and costly but also risky because process variations increase the risk of errors. Many of these functions can now be performed off-site in one or more locations dispersed around the state. The need to have all aspects of each function performed individually on each campus is no longer necessary. Having expertise in specific functional areas rather than relying on one individual with responsibility for several functional areas will improve quality while also being more efficient.

Each comprehensive university is currently replicating, in a nonstandard fashion, the IT infrastructure needed to support many administrative functions and academic programs. This has resulted in overinvesting in IT systems, proliferating similar software solutions, and duplicating efforts to provide administrative functions. It creates complexities that do not support the missions of the comprehensives and increases the costs of new systems and services. These IT structures, developed over time, do not reflect the current environment and UW System's ability to provide much of this infrastructure and software as a service, managed in a consolidated organization.

When the UW System restructured and aligned each of the UW Colleges campuses to be part of a four-year university, UW System Administration methodically began developing the "shared services" unit now known as UW-Shared Services to serve all UW universities except UW-Madison and UW-Milwaukee. The process began by identifying functional processes that could be standardized and consolidated under a systemwide unit. The work has progressed, methodically engaging stakeholders while developing the optimal steps in each functional area. Because of the coronavirus crisis, UW System Administration must assume responsibility for expediting, directing, and managing what remains of this work. Fortunately, UW-Shared Services has almost completed identifying administrative operational and transactional functions to consolidate.

Recommendation: To expedite this process, UW System Administration must mandate that those already identified functional areas immediately begin the process of transitioning to UW-Shared Services. IT services must be rapidly assessed and consolidated to realize both initial savings, reduce future costs, and support services at scale across the comprehensive universities. Further, rather than engage all stakeholders in the optimal design and desired actions in each operation, as is currently being done, UW-Shared Services must immediately adopt a standardized process and implement it with the understanding that the optimal process design may happen at a later day. Standardization and a shift in oversight responsibility must occur quickly.

Responsibility: Vice President for Administration Robert Cramer, who has overseen centralization through UW-Shared Services.

Timeline: Complete the design and transition of identified functions to UW-Shared Services by June 2021. Complete the transition of IT functions by January 2022.



The University of Wisconsin System must create a unified strategic online education delivery model.

Rationale: Individual courses or full academic degree programs are typically delivered to two different student populations: 1) nontraditional or working adult students, who usually seek professional online academic programs and 2) traditional students, in usually on-campus environments taking face-to-face courses, who seek individual online courses to supplement and advance their progress and time to degree.

While UW Extended Campus has focused on serving the working or nontraditional student through intentionally designed and delivered online modality, the arrival of COVID-19 has required the sudden conversion of typical face-to-face courses to online or alternate delivery modes. The current experience has highlighted the necessity to improve the quality, effectiveness, and efficiency of all online or alternate delivery modes of our courses and academic degree programs.

“Nontraditional” working adults are the fastest growing and largest segment of the population seeking higher education—within Wisconsin and across the nation. The UW System is not a significant “player” in serving these students, despite the high-quality education our universities provide. In Wisconsin, the U.S. Census Bureau has estimated that 815,000 adults have some college attainment but no degree. The entire UW System captures only about 5 to 8 percent of the market share in the upper Midwest. This is largely because the UW System does not have a unified approach to online education, nor has it invested in mass marketing efforts like large out-of-state competitors. Instead, each university within the System develops and offers its own online courses and programs, creating duplication, limiting marketing capability, and confusing potential students. Working adult students are savvy shoppers who recognize brand quality, but they prioritize cost, convenience, and ease of use when they select where to enroll.

The University of Wisconsin System can and must be a dominant player in delivering online education, for the sake of our universities, future students, and the Wisconsin businesses and communities that rely on UW-educated talent. This is a critically important part of the future of higher education and of workforce development. Other national institutions have invested heavily in marketing their online programs while we have been hesitant. We must accelerate now, or risk being left behind, perhaps for good. With the right approach, we can and will become a leader in this field. An enormous demand exists for the excellence of a UW education if we can effectively deliver it to the market.

Our universities currently do not have the funds to provide the level of marketing needed to reach the working adult. However, UW Extended Campus already has capacities devoted to this

population in marketing, instructional design, media development, and student support. Demand-driven programming requires good market analysis and an integrated marketing system to effectively reach and serve today's working adult. Because UW Extended Campus programs are revenue neutral or revenue positive, each new program it approves must meet market demands.

In the early 2000s, the UW System established the Center for Learning Innovations to improve online program marketing, student support services, etc. It was a "fee-for-service" model in which the campuses contracted for specific services. Neither the Center for Learning Innovations nor the fee-for-service model were well-received. The model lacked the ability to rapidly scale up with demand and the marketing efforts faced numerous issues and challenges.

By creating a unified, strategic approach to delivering online education, the UW System can address shortcomings while serving a growing population of potential students.

Recommendation: The UW System must transition to a unified, strategic online education delivery model to better serve both nontraditional students who do not live on campus and traditional students who may live on campus and want to use this learning option.

1. *For traditional/on campus students:* Improve the quality (content, inclusive-minded pedagogy, and technology), effectiveness, and efficiency of individual courses and programs aimed at traditional students who may live on campus and who seek individual online courses to enhance their education and advance their progress/time to degree.
 - a. UW Extended Campus should expand the support it provides to campuses in instructional design and media development to assist in creating well-designed online courses and experiences for traditional/on campus students. UW Extended Campus should expand its student coaching model to assist campuses in providing direct support to students in the online environment.
 - b. These expansions should use a "train the trainer" approach to engage and build campus-based networks and capacities.
2. *For nontraditional/nonresidential students:* The UW Extended Campus collaborative degree model for nontraditional working adults should be expanded with the following additions:
 - a. UW System Administration should designate the collaborative model as the default approach to all new online degree and nondegree programs. UW System Administration would require any UW university to provide extensive justification for an online program offered only through its own university. Collaborations would continue to be opt-in; no campus would be required to participate.
 - b. UW System Administration should delegate the responsibility for determining potential or existing market demand to UW Extended Campus.
 - c. Any proposed online program offering should include a recommendation from UW Extended Campus as part of the presentation for program approval to the Board of Regents.

Responsibility: Vice President for Academic and Student Affairs Anny Morrobel-Sosa and Senior Associate Vice President/Executive Director for UW Extended Campus Aaron Brower.

Timeline Recommendation 1:

1. **Product development:** Complete four self-paced courses by the first week of June 2020. UW Extended Campus is currently developing three self-paced courses on online instruction and one self-paced course on the student coaching model of student support.
2. **Dissemination/adoption:** Product/deliverable is dependent on the number of users/adopters but should occur in June, July, and August 2020.
3. **Instructor and student support during semester:** Complete between September and December 2020.
4. **Continued growth in entire project:** Continue product development and dissemination/adoption during the 2020-21 academic year and ongoing.

Timeline Recommendation 2: Implement at the beginning of the new fiscal year, July 1, 2020.

**Faculty Senate Resolution in Response to President Cross's
"Blueprint for University of Wisconsin System Beyond COVID-19,"
released May 7th, 2020**

WHEREAS President Cross's proposed Blueprint indicates that the UW System should immediately shift "from the convener/collaborator/coordinator" model of engagement with the comprehensive institutions to serving as a "director and manager" in order to quickly revise campus mission statements, consolidate and eliminate programs across institutions, and to expand online collaborative offerings at the System level;

WHEREAS the Blueprint represents an abrupt departure from the intent of Wisconsin Statute 36.09 regarding the respective roles of the UW System administration, the UW Board of Regents, institutional leadership, and governance within institutions; it risks further erosion of confidence in the UW System and greater destabilization of our institutions by pushing a controversial, permanent restructuring to a quick conclusion during an ongoing pandemic;

WHEREAS the restructuring envisioned in the Blueprint is being proposed by a retiring UW System President in the midst of an ongoing search for their successor; the turmoil that it will create would be inherited by a new UW System President and would likely come to define their career;

WHEREAS the Blueprint was developed without consultation and lays out a timeline that will effectively prohibit the participation of campus leadership and shared governance groups (faculty, staff, students) in many decisions regarding the institutions that they know best;

WHEREAS pursuant to Wisconsin Statute 36.09(1)(a), the Board of Regents is to "promote the widest degree of institutional autonomy" for each of its institutions;

WHEREAS the faculty of each institution is charged by Wisconsin Statute, UW Board of Regents policy, and by prevailing practices with the duty to protect the integrity of each institution's academic programs in accordance with its unique institutional mission in service to its students, and pursuant to Wisconsin Statute 36.09 (4), "the faculty of each institution... shall have the primary responsibility for advising the chancellor regarding academic and educational activities;"

WHEREAS pursuant to UW System Administrative Policy 102 (3.4.1), "The uniqueness/redundancy of the program within the UW institution and across the UW System," is just one of seven principles that should be considered for evaluating academic programs; and is not more important than other principles that should be considered for evaluating academic programs such as "The quality of the program in the areas of teaching and learning, and the contributions of its faculty in research, creative activity, and service;"

WHEREAS the goal of financial balance is laudable, but the degree and duration of fiscal challenges remains unclear, and poorly-considered cuts to the academic programs that give our institutions their integrity and purpose -- best known to the stakeholders at each institution, including our students, their families, community members and the faculty and staff of the institutions -- would further degrade institutional fiscal security by risking enrollment declines and the retention of high-quality faculty and staff; and

WHEREAS shared governance is a fundamental, apolitical tenet of the UW System that promotes institutional stability and public confidence, carrying through the cyclic shifts in financial and political fortunes of the State, and because meaningful shared governance processes at each institution contribute to decisions that are best able to serve the needs of our regional campuses, the UW System, and the State, and to fulfill the promise of the Wisconsin Idea on behalf of all Wisconsin citizens.

THEREFORE, BE IT RESOLVED THAT the Faculty Senate of the University of Wisconsin-La Crosse calls on the Board of Regents to:

- Respect institutional autonomy and the role of shared governance (faculty, staff, students) in decision making affecting the structure, academic program array, online collaborative offerings, and mission of every UW institution;
- Support formal, ongoing, and robust consultation with the shared governance groups (faculty, staff, students) of each university with a focus on maintaining and enhancing quality academic instruction; and
- Delay consideration of the proposed Blueprint until a new UW System President can engage with all UW system stakeholders in shaping a plan for the future of the System that limits unnecessary disruption.

This resolution was endorsed on May 12th, 2020, by the University of Wisconsin-La Crosse Faculty Senate Executive Committee: Dr. Natalie Eschenbaum (Chair), Dr. Taviare Hawkins (Vice-Chair), Dr. Bradley Seebach (Secretary), and Dr. Darci Thoune (At-Large).

Student Survey UWL - S 2020

May 11th 2020, Preliminary Results (n = 1126; ~ 10% of the student body responding – good approximation to the campus at large in terms of college/school & level in school).

Notes: The survey does not close until the end of May. The open-ended responses will be coded this summer. The survey was purposely designed to only ask about level in school and college/school rather than full demographics in order to increase anonymity and due to concerns about the ability to generalize from findings associated with smaller demographic groups).

With which school/college do you most identify?

#	Answer	%	Count
1	Science & Health	50.18%	565
2	Arts, Social Sciences, and Humanities	23.45%	264
3	Business Administration	15.90%	179
4	School of Education	10.48%	118
	Total	100%	1126

What is your class status or level?

#	Answer	%	Count
1	First year	23.61%	267
2	Sophomore	21.75%	246
3	Junior	26.44%	299
4	Senior (or senior +)	22.55%	255
5	Graduate Student	5.66%	64
	Total	100%	1131

Q3 - Which of the following technological issues have been a significant challenge for you since the transition to remote learning? (Check all that apply.)

#	Answer	%	Count
1	Instructor difficulties or lack of familiarity with required technologies or applications	24.44%	566
3	Unclear expectations around which technologies and applications I am required to use	15.98%	370
4	My access to reliable internet/service	13.04%	302
2	My own difficulties or lack of familiarity with required technologies or applications	11.36%	263
9	I did not experience technological issues	10.62%	246
7	My access to library resources	10.19%	236
6	My access to specialized software (e.g., Adobe products, statistical packages)	9.11%	211
5	My access to a reliable digital device (e.g., laptop, mobile device)	2.98%	69
8	Other (please specify):	2.29%	53

Q4 - Which of the following learning/educational issues have been a significant challenge for you since the transition to remote learning? (Check all that apply.)

#	Answer	%	Count
4	Personal preference for face-to-face learning	14.27%	853
6	Difficulty focusing or paying attention to remote instruction or activities	13.52%	808
5	Course lessons or activities that haven't translated well to a remote environment	13.33%	797
9	Personal motivation/desire to complete coursework	13.18%	788
8	Increased workload due to online format	12.68%	758
2	Unclear expectations around course/assignment requirements	11.75%	702
10	Unrealistic timelines for when assignments/exams are due	5.52%	330
7	Instructor availability/responsiveness	4.99%	298
1	Participating in synchronous classes (e.g., live-streaming lectures or video conferencing at a set time)	4.94%	295
3	Competing class meetings and schedules across courses	4.07%	243
11	Other (please specify):	1.34%	80
12	I did not experience learning/educational issues through the transition to remote learning.	0.42%	25

Q6 - Which of the following teaching-related practices created a significant challenge for your learning this semester after the transition to remote learning? (Check all that apply.)

#	Answer	%	Count
3	Too little communication by the instructor to students	23.44%	577
4	Insufficient time to complete timed tests	15.84%	390
6	Insufficient level of support by instructor for questions regarding course material	13.85%	341
7	Required course activities set at times outside the original class period	12.67%	312
5	Too many different video conference platforms used by instructors	11.05%	272
9	None of these	7.51%	185
2	Instructors not using Canvas	7.27%	179
1	Too many synchronous classes (e.g., live-streaming lectures or video conferencing at a set time)	4.39%	108
8	Other (please specify):	3.98%	98

Q7 - What are your biggest concerns with the transition to remote learning this semester? (Check all that apply.)

#	Answer	%	Count
1	Performing well in class (academically)	21.69%	889
7	Missing out on extracurricular/on-campus activities	18.49%	758
4	Not being able to see classmates	17.22%	706
5	Not being able to communicate with instructors	16.98%	696
6	Possible delays in graduating/completing my program	7.73%	317
3	Changes to grading structures (e.g., drop dates, pass/fail)	7.20%	295
2	Completing my internship or practicum requirements	4.98%	204
8	Security/privacy in taking online exams	2.68%	110
9	Other (please specify):	2.10%	86
10	None of these	0.93%	38
	Total	100%	4099

Q5 - Which of the following teaching-related practices created a significant benefit for your learning this semester after the transition to remote learning? (Check all that apply.)

#	Answer	%	Count
1	The ability to complete assignments/exams during a wider time window	27.28%	734
7	Ability to self pace completion of coursework	23.71%	638
8	Being provided regular updates about course assignments/deadlines	18.95%	510
3	The ability to communicate with classmates about the course materials	9.77%	263
2	The ability to connect informally/socially with classmates (e.g., optional discussions via videoconferencing during class time).	8.84%	238
6	None of these	5.46%	147
4	Increased access to your instructors	5.09%	137
5	Other	0.89%	24

Q8 - Which of the following concerns related to COVID-19 (or exacerbated by COVID-19) have created significant barriers to your academic goals this semester. (Check all that apply.)

#	Answer	%	Count
4	Mental health concerns	22.19%	757
1	Financial concerns	17.44%	595
7	Increased responsibilities for family members	12.51%	427
8	Impact of COVID-19 on your family or friends	12.46%	425
5	Physical health concerns	12.40%	423
6	Increased work hours	8.41%	287
2	Housing concerns	7.47%	255
10	None of these	3.40%	116
3	Food insecurity	2.55%	87
9	Other (please specify)	1.17%	40
	Total	100%	3412

Q9 - Please rate the following aspects of UWL's emergency transition to online/remote teaching (Lower number = higher satisfaction)

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	My instructors' efforts to support my learning.	1.00	5.00	2.12	1.05	1.10	1129
2	The quality of the course materials provided	1.00	5.00	2.61	1.07	1.15	1128
3	My overall educational experience this semester	1.00	5.00	3.31	1.19	1.43	1127
4	Instructors and staff concern regarding my well-being	1.00	5.00	2.01	1.10	1.20	1125
5	My access to support resources	1.00	5.00	2.58	1.05	1.10	1128
6	UWL's changes to academic policies to respond to student needs/concerns	1.00	5.00	2.44	1.08	1.16	1125

#	Question	Extremely satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Extremely dissatisfied	Mean *
1	My instructors' efforts to support my learning.	29.41%	46.50%	10.01%	10.89%	3.19%	2.12
2	The quality of the course materials provided	11.97%	44.41%	19.24%	19.68%	4.70%	2.61
3	My overall educational experience this semester	6.21%	25.20%	16.95%	34.87%	16.77%	3.31
4	Instructors and staff concern regarding my well-being	40.89%	32.27%	14.40%	9.42%	3.02%	2.01
5	My access to support resources	15.25%	33.95%	33.07%	12.77%	4.96%	2.58
6	UWL's changes to academic policies to respond to student needs/concerns	19.47%	37.60%	27.47%	10.13%	5.33%	2.44

*lower number = higher satisfaction