Department Chairs Retreat
August 2017

From CCOET to CSOWG –
creating our future
Outline

• Our context
• CCOET: The 14/15 - 16/17 picture
• CSOWG: The 17/18 ~ picture
• From CCOET to CSOWG: Our future
Context and our future

Paradigm Shift

- Different Learning Modes
- Student Population
- Family Finance
- Career Outcomes ROI
- Competition
- Public Support/Perception & State Appropriations
School/colleges

Balanced budget

Academic planning
- Programs, minor, certificate etc
- Faculty size/employees
- Research
- Enrollment management (recruitment/retention)
- Fund-raising

Tuition

Largest %, enrollments, retention, 2% increase 2019

GPR

13% allocation, 2.5% reduction per year

Fund raising

Comprehensive campaign ($175 m)

Research $$

The ‘shock’

Budget cut
Tuition freeze
enrollments

Reduction

Balances employees

Stabilization

Balanced budget
New budget model

Tuition driven

Our future


SEM plan
Retention plan
Comprehensive Campaign
GPR re-allocation
Legislator
## UWM Financial Position

### UWM Financial Projections – Three Scenarios

<table>
<thead>
<tr>
<th></th>
<th>No SEM</th>
<th>Partial SEM</th>
<th>Full SEM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FY 17</td>
<td>FY 19</td>
<td>FY 21</td>
</tr>
<tr>
<td>Student Headcount</td>
<td>26,037</td>
<td>24,144</td>
<td>23,282</td>
</tr>
<tr>
<td>Total Revenues</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition</td>
<td></td>
<td></td>
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<tr>
<td>State GPR</td>
<td></td>
<td></td>
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<tr>
<td>Total Employees</td>
<td>3,120</td>
<td>2,929</td>
<td>2,751</td>
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<tr>
<td>Faculty</td>
<td>747</td>
<td>700</td>
<td>659</td>
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<tr>
<td>Student/Faculty</td>
<td>29</td>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$521</td>
<td>$496</td>
<td>$482</td>
</tr>
<tr>
<td>Salaries</td>
<td>$245</td>
<td>$230</td>
<td>$216</td>
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<tr>
<td>Net Operating Loss/Gain</td>
<td>($9)</td>
<td>($8)</td>
<td>($3)</td>
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<tr>
<td>Tuition/Other Funds Balances</td>
<td>$42</td>
<td>$32</td>
<td>$21</td>
</tr>
</tbody>
</table>

*All $ refer to millions.
Strategic opportunities, aspirations and key pathways (CSOWG)

- Outstanding learning environment
- Leader in community engagement
- Excellence in research

Budget cut
Tuition freeze
Realign CCOET
Reallocation

The ‘shock’

Reduction
Stabilization

Be an exceptional research university known for:
- Excellence in research and creative arts;
- Inter-disciplinary collaboration, including those in health, STEM and water fields; and
- Research partnerships that contribute to and benefit from UWM’s urban community.

Leader: Vice Provost for Research, Mark Harris
Group: Research Excellence Team
Action: Execute the Research Plan for Excellence, which aligns with the Strategic Opportunities statement, by forming work teams to address the following initial priorities:
1. Bring Teaching Assistant salaries to competitive levels.
2. Build the following into review and rewards processes:
   a. Implement workload policies that accommodate varying levels of a faculty member’s research and creative activity and provide accountability for faculty effort across research, teaching and service activities.
   b. Support a research culture that values a wide breadth and diverse modes of research and creative activity.
3. Adopt a team hiring strategy for some hires based upon multi-disciplinary, problem-solving based teams built on existing research strengths.
4. Use campus-wide research priorities to guide decisions for supporting programs and investing in new initiatives.
5. Modest increase in library funding to support research journal access.

The ‘shock’
- Budget cut
- Tuition freeze
- Enrollments

Reduction
- Realignment
- Reallocate

Stabilization
- Balanced budget
- New budget model

‘Our future’
- Tuition driven

Be an outstanding learning environment that prepares all undergraduate and graduate students to live and work in the global 21st century through:

• A continuum of quality educational experiences within and beyond the classroom that instill deep, critical imaginative thinking and understanding, cultural fluency, leadership skills, and an entrepreneurial mindset.

• Utilization of our urban setting, community partnerships and experiential learning opportunities.

• Celebration of and support for our diverse student body.

**Leaders:** Chancellor’s Enrollment Management Action Team (CEMAT) Co-Chairs Provost Johannes Britz and Interim Director of Undergraduate Admissions Katie Miota

**Group(s):** Chancellor’s Enrollment Management Action Team (CEMAT) Executive Committee

**Action:** Using the Strategic Enrollment Management Plan, the Retention Plan, the Student Success Work Group (SSWG) plan and other relevant CEMAT-directed plans such as the efforts to align school/college and unit actions with student success, create a consolidated action plan with timelines, responsible parties and metrics for the “Outstanding Learning Environment”, noting the following prioritization of the SO items:

1. Strengthen the educational pipeline between UWM, high schools, technical schools and 2-year colleges and increase enrollment, retention and graduation rates.
2. Enhance our comprehensive student success network from admission through graduation.
3. Increase career planning, leadership development, and experiential learning opportunities.
4. Increase cross discipline, cultural, socioeconomic, and geographic dialogue, collaboration, and learning.

**The ‘shock’**

- Budget cut
- Tuition freeze
- Enrollments

**Reduction**

- Reduction
- Realign
- Reallocate

**Stabilization**

- Balanced budget
- New budget model

**‘Our future’**

- Tuition driven
- SEM, Advising, retention, student success working group, financial aid, faculty engagement, graduation rates, retention, achievement gap etc

**CEMAT executive committee**

**Outstanding learning environment**
Be a leader in community engagement to improve the quality of life in our region, Wisconsin and the world, accomplished through:
- Undergraduate and graduate students, faculty and staff who are entrepreneurial and engage in the community;
- Research that influences and enriches; and
- Alumni who power the economy.

Leaders: Vice Chancellor of Development and Alumni Relations Pat Borger
Vice Chancellor of Global Inclusion and Engagement Joan Prince
Vice Chancellor of University Relations and Communications Tom Luljak

Action: The named leaders will create an action plan or multiple plans which divide the pathways in logical groupings, to address the following pathways:
1. Increase faculty and staff participation in service learning; and
2. Increase undergraduate and graduate work experiences in alignment with regional opportunities.
3. Increase faculty and staff engagement, internally and externally.
4. Develop seamless connections with for-profit and non-for-profit organizations.
5. Increase alumni programming that advances the community engagement mission.
6. Develop communication and marketing initiatives that inform the public of the powerful impact UWM’s research, teaching and community service have on our communities and state.

The ‘shock’
- Budget cut
- Tuition freeze
- Enrollments

Reduction
- Realign
- Reallocate

Stabilization
- Balanced budget
- New budget model

Excellence in research
Leader in Community engagement
Outstanding learning environment
School/colleges
Academic offerings

SPC other

‘Our future’
Tuition driven

R 1

Higher Ed landscape and our future??

Performance based funding

Legislation

Outstanding learning environment

The ‘shock’

Budget cut
Tuition freeze
enrollments

Reduction

SPC
other

Industry
Foxconn etc

Community Role
/impact

Other??

Leadership

Tuition driven
CSOWG

Outstanding learning environment

Excellence in research

Outstanding learning environment

Leader in community engagement

School/
colleges

Human
Capacity
building

Infra-
structure

Excellence in
research

Balanced budget
New budget model

R 1

Reduction

Realign

Reallocate


‘Our future’

Leader in community engagement

Industry
Foxconn etc

Performance based
funding

Outstanding learning environment

Excellence in research

Leadership

Tuition driven
CSOWG
Strategic Drivers

- Outstanding Learning Environment
- Excellence in Research
- Leader in Community Engagement
**Context, Actions & Outcomes**

### Context/Issues
- Political – (e.g. funding, policy)
- Social unrest / divide(s)
- Sociocultural – attitudes toward college
- Public higher education funding

### Actions
- S/C work in teaching, research & engagement aligned w/ CSOWG goals, pathways, metrics
- Seizing strategic opportunities (long-term) / partnerships to support strategic drivers
- Driving home the case for investing in UWM
- Intensifying political lobbying & stakeholder communication

### Outcomes
- Strengthening UWM, city, region & state
- Elevating value of a college degree
- Magnifying R1 impact
- Retention & graduation rates
- Employment, graduate school options
- Budget support