Chancellor’s Campus Organization and Effectiveness Team (CCOET)

Final Report

February 9, 2016
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INTRODUCTION

The Chancellor’s Campus Organization and Effectiveness Team (CCOET) was established early in the 2015-2016 academic year to address the looming financial shortfall in the campus budget and to suggest an array of options for the Chancellor to consider in resolving the crisis. CCOET was also asked to consider strategies that will better position the university for growth as the financial outlook improves.

CCOET, comprised of 29 faculty, students, and staff representing all areas of UWM’s community, were divided into a Primary Team (17 members) and Support Team (12 members). When warranted, these teams merged to create one working group. CCOET was asked to complete its work by February 2016.

The campus has no previous experience managing cuts or realignment of this magnitude. As such, CCOET felt that it was important to make the process as open, inclusive, and transparent as feasible. During October, CCOET met regularly, gathering data from the campus community via four listening sessions and amassing a plethora of research reports, best practices, suggestions, and questionnaire data, all of which has been loaded onto the campus budget website accessible to all. To aid inclusivity and transparency, all meetings were held in open forum and all minutes and associated information were posted to the website within days of the scheduled weekly meetings. Additionally, the CCOET co-chairs meet regularly to review discussions from previous meetings, to plan future meetings, and to document CCOET’s work.

By late November, weekly discussions of potential efficiencies and subsequent research and investigation had led the team to focus on three primary areas that the group believed could address the necessary campus changes that could broadly affect the budget shortfall. The primary options are not necessarily optimally strategic nor fair, but they can be further developed to yield maximum savings with the least amount of administrative and political complication, resistance, and disruption of services within the very short time available to resolve the crisis. These options preserve the basic tenets of UWM’s mission and best position the university for future growth and success.

In addition to the primary options, additional options were considered which warrant further consideration as they could also yield significant savings, but not without considerable effort within the limited time available. Furthermore, many suggestions of both efficiencies and initiatives generated by the campus community have been included. Many of these ideas have the potential for more modest yet certain savings over the next few years.

In total, the report provides a catalogue of options for consideration to address UWM’s budget shortfall over the next two years. CCOET hopes that the materials will help the Chancellor and his leadership team make strategic, reasoned decisions that will lead to efficiencies to manage the current fiscal crisis while preserving UWM’s mission and ongoing success.
CCOET has identified position control as one strategy to address the substantial structural deficit. It must be emphasized that position control is only a temporary strategy. Position control, alone, cannot be a permanent solution to the current structural deficit.

Position control refers to two ideas. The most common is the concept that the organizational structure is based on organizational positions. Position control is a control mechanism that requires periodic review within departments, schools, and business service units to ensure efficient use of personnel. The second use of position control is for budgetary purposes. In this iteration, all open positions undergo a rigorous review and approval process. According to the Education Advisory Board (EAB) (2014), an institution can use the position control process to “…assess positions as they become vacant, reclaim staffing dollars when appropriate, and potentially redeploy staffing lines to other units with greater needs” (p. 72). Thus, position control can be used to determine whether a vacant position should be filled in the same way, whether the position should be filled but re-defined, whether the responsibilities can be reassigned to currently filled positions, or whether the position should be reallocated.

Personnel costs are the highest budget item at any university. To control the budget, the process of identifying and creating a complete organizational chart along with job descriptions, metrics for positions, back-up training, business continuity and development plans is usually the first step in position control.

Although position control should not be considered a permanent solution to the structural deficit, it can be used to realize salary savings. In addition, it can be implemented as both a short-term strategy and a long-term strategy, albeit with different approaches. Positions subject to position control are those for which the appointment is greater than one year.

**Estimated Savings:**
Salary savings to be realized via position control will be somewhat of a “moving target,” depending on positions that are deemed “critical hires” and the salaries allocated to those positions. In the short-term, it might be necessary to define a “critical hire” as one that fulfills a vital campus function. A long-term strategy for consideration is to establish a salary savings target annually during the budget building process. The salary savings target can be set for the campus as a whole as well as for individual schools, colleges, and administrative units.

Estimated cumulative salary savings could be as much as $20-30 million in fiscal years (FY) 2016-2018; however, replacement costs for the same period need to be calculated. Any salary savings will be off-set by the need for strategic hires that must occur within the next 2-3 years and temporary hires to meet critical instructional needs. UWM payroll data from October 2014 through October 2015 show a payroll decrease of $10 million as a result of holding vacant positions open; however, such savings are not likely to be sustainable since the specific positions that will need to be filled are unknown. UWM data for the one-time savings for FY16 (the budget lapse year) reveals a net savings for salary and fringes for unfilled vacancies of $7.5 million.
Limitations & Consequences:
• Potential increases in administrative costs associated with position control.
• Holding vacant positions open for a designated period can be punitive. For example, units with multiple individuals approaching retirement or units who have, by nature of the positions, high turnover rates will be more limited in capacity.
• Position control reduces incentive for programmatic growth.
• Position control reduces unit heads’ budgetary authority and creative use salary savings for other operating budget needs.
• The time and expense required to recruit faculty and staff for approved positions will increase substantially.

Impact on Mission:
• Student recruitment and success efforts may be jeopardized due to loss of essential staff, increasing class sizes/advising loads, employee burnout from increased responsibilities, and increased time to rebuild the staff.
• Some programs will have insufficient faculty and staff to be sustainable, resulting in the elimination or suspension of programs.
• Research may be negatively impacted when positions that support research go unfilled, unfilled positions necessitate increased teaching loads for faculty and staff with research programs, or researchers leave UWM and cannot be replaced.
• Accreditation of some academic programs are jeopardized due to insufficient faculty and staff.
• Meeting compliance requirements are jeopardized due to insufficient staff.

Positive Outcomes:
• Establishing a process for holding vacant positions open for a set time and developing criteria to allocate vacant positions leads to common standards that are applied across units.
• Posting centrally made position control decisions, justifications, reallocations, recruitments, and counter-offers leads to increased transparency.
• Involving shared governance in developing criteria and shaping the process facilitates transparency.
• Position control can lead to increased accountability for decisions related to recruitment, retention, and student success.

Best & Promising Practices:
EAB (2014) provided information on practices related to the use of position control for non-faculty positions as a strategy to prioritize resources for various universities, including Webster University (St. Louis, MO), The College of St. Rose (Albany, NY), University of Alaska Fairbanks (Fairbanks, AK), University of Virginia (Charlottesville, VA), and Rensselaer Polytechnic Institute (Troy, NY), University of Windsor (Windsor, Ontario), Texas State University (San Marcos, TX), Alfred State College (SUNY College of Technology), Illinois Institute of Technology (Chicago, IL), Creighton University (Omaha, NE), Glendale Community College (Glendale, AZ) and the University of North Florida (Jacksonville, FL). Each university reported using position control practices to better manage staffing costs and to effectively prioritize the mission of the university. In each case, when a position became vacant, the position could be subject to a mandatory “hold open period” and would not be “blindly backfilled” (i.e., filled as it had been).
Although the described practices have been applied to non-faculty positions, it is important to note that the practices can and should be applied to faculty positions as well. In fact, faculty vacancies typically have an inherent one-year hold open period due to the recruitment process.
Additionally, described practices do not directly address reallocation of positions across units. Models of position control that have been implemented at other universities for faculty and staff positions must be carefully examined if the decision is made to develop and implement a position control process at UWM. In one example, Idaho State University implemented position control as part of the process of academic reorganization. The reorganization focused on combining the health-related colleges, which involved approximately one-third of the enrolled students. The position control process resulted in the reduction of over a half-dozen (approximately five percent) full-time faculty positions. The development of alternative revenue sources, including online course fees and more continuing education, followed. Data were not reported on savings resulting from position control or the positive and negative consequences of the practice.

I. Mandatory Hold Open Period.
   In the practice of a mandatory hold open period, the university holds all vacated, non-faculty positions open for a specified amount of time (typically 2 to 4 months) to capture one-time salary savings and to allow for a review of the position to determine the need for the position as it had been designed or the need to redesign the position. The practice includes establishing the duration of the hold open period, which allows time to realize salary savings and review of the position and responsibilities, and determine exceptions to the hold open period because of safety or efficiency concerns.

II. Role Redesign.
   A second practice identified by the EAB (2014) is the vacancy-triggered role redesign, in which any “as-was” non-faculty position request (a request to fill a position exactly as it was) is placed on hold while the unit leader is required to consider ways to efficiently redesign the role, including automating, eliminating, or reassigning associated tasks. Such a practice leads to a systematic review of staffing options and roles and responsibilities, and can be viewed as an opportunity to enhance efficiency and productivity.

III. Standardized Requisition Forms.
   A third practice is the use of a standardized requisition form. The form goes beyond standard forms required for recruitment requests and focuses on the criteria established for the position control process. Examples of forms that have been used at other universities can be found in the EAB (2014) document, Business Affairs Forum.

IV. Salary Savings Target.
   A final practice described by the EAB (2014) involves creating a salary savings target accomplished via the vacancy review process that uses a combination of holding positions open for an established period of time, redesigning roles, and eliminating unnecessary positions. This practice can involve determining a salary savings target annually for campus as well as for individual schools and colleges and administrative units.

Incentives:
Some incentives to consider include: (1) allowing a small percentage of the salary savings from holding a vacant position open to be retained by the unit; (2) tracking positions that a unit has given up over time and considering this data in central decisions pertaining to position control; and (3) developing strategies to assess and reward programmatic growth. The position control strategy can be used for strategic reinvestment by the campus to support the growth of new, high demand academic programs.
and sustainability of existing academic programs for which growth has been constrained by the lack of sufficient resources. The use of position control to incentivize and support growth of new and existing academic programs would likely result in greater centralized control of vacant positions and the need to establish decision-making criteria for strategic reinvestment.

**Implementation:**
The practice of position control is not a complete or absolute hiring freeze; rather, it can be implemented to allow flexibility, transparency, and accountability in the budgetary process, particularly regarding reviewing and filling vacant positions. Additionally, position control should incorporate practices that encourage programmatic innovations, alignment of positions with program goals, enhanced revenue generation, and increased efficiency of operations. Clear guidelines for position control and exceptions must be developed and applied consistently to ensure transparency. The same applies to the process of making counter offers for retention purposes. All decisions regarding recruitment for or reallocation of vacant positions must be based on guidelines with decisions and justifications available to the campus community.

**Guiding Questions:**
- Which individual or groups will be responsible for central administration of position control? The campus Resource Allocation Group or a similar shared governance group could be involved in developing the position control criteria and shaping the position control process.
- Will vacant positions be held open centrally, within the unit, or using a combination of central and unit control? Criteria must be developed for determining vacant positions that will be held open centrally and within units.
- How will the criteria for short-term and long-term position control be determined? Approaches for both short-term and long-term position control must be determined. For example, in short-term position control, a proportion of vacant positions could be held open and managed centrally while the remainder of positions could be managed within units.
- What constitutes an exception to the criteria? The model must have room for flexibility in terms of the time period designated to hold vacant positions open and the allocation of vacant positions across units.
- How will position control be incorporated into UWM’s new budget model?
- How will transparency regarding position control be ensured?
- What is the role of shared governance in position control?
- How will position control affect a unit’s ability to construct annual budgets and reallocate funds as needed?
- What will be the process for making counter offers as part of position control?
- What measures of accountability in the allocation of positions will be implemented to maintain the integrity in this process?

**Process:**
The process for implementation of position control must ensure that practices align with the new budget model. In addition, the process must include both short-term strategies and long-term strategies. As a short-term strategy, all faculty and staff positions that become vacant due to resignation, retirement, or death will be subject to the campus position control process. The short-term strategy should be in place for no more than 3 years. If there is a need to extend the position control beyond three years, a clear justification for the extension must be provided for review and discussion according to the appropriate governance processes. In addition to an
implementation plan, a position control dissolution plan must be developed. Such a transition plan is needed to ensure that filling of vacant positions remains strategic and revenue-based, thus avoiding a “glut” of hiring which could place units at risk for a new or additional structural deficit. During the transition phase, units must demonstrate that sufficient revenue has been generated and will continue to be generated to meet the expenses associated with filling vacant positions.

As a long-term strategy, position control will be managed via budgetary salary savings targets that are determined annually during the budget planning process for each unit and managed by the unit administration in collaboration with campus administration. This long-term strategy would capture short-term savings through payroll savings targets. This strategy intertwines with the new proposed budget development process (See Appendix A: Proposed Budget Model Implementation Process). In this model, the bottom “lane” labeled Resource Allocation Group would develop guidelines, having one of them be the tool of position control. As projections are developed, estimates would preliminarily guide the Resource Allocation Group to determine if payroll savings targets will be required to balance the overall budget. While estimates can change entering the budget year, an adjustment period would be most ideal as a one-time target shift to realign to actual vs. estimates related to payroll saving targets. This process hinges on the approval of the proposed new budget model, which is preliminarily projected to start in spring 2016 for the budget development of FY 2018 (Fall 2017/Spring 2018). The process must ensure transparency and consistency with regard to the development and application of criteria and justifications for opening positions for recruitment and making counter offers. All recruitments and justifications will be published on the CCOET or similar website.
II. ADMINISTRATIVE ORGANIZATION AND BALANCE

The pressure to do more with less has never been as strong as it is today with decreased funding from the state legislature, demands to keep tuition increases low, and societal need to educate a broader spectrum of students. To meet these challenges, UWM must strategically reposition itself to be effective at meeting its mission.

To respond to these calls to action, UWM must increase administrative efficiency and effectiveness at all levels, essentially saving costs while improving outcomes, as well as becoming more transparent to internal and external stakeholders. A number of principles should guide considerations of administrative organization:

- **Effectiveness**: Create shared accountability across units by clearly establishing service levels and clarifying expectations. Establish metrics for benchmarking and long-term performance reporting to help identify where resources can be claimed for more strategic purposes.
- **Efficiency**: Work to identify and implement cost saving opportunities by streamlining and improving organizational frameworks and business processes. Consider multiple strategies to achieve desired service levels, including rebalancing centralized and decentralized functions.
- **Sustainability**: Engender a culture that promotes creative solutions and collaborations, helping to find holistic solutions that consider both near and long term consequences with explicit consideration for return on investment.
- **Transparency**: Establish a means of gathering and sharing input from all campus constituents, with emphasis on both consumer and service provider perspectives and a process for periodically assessing administrative service quality.

**Estimated Savings:**
Overall savings depend on the extent to which the options outlined below are implemented. Complete implementation potentially could reduce UWM’s overall payroll in the $6-8 million range.

**Limitations & Consequences:**
Any reorganization carries risks regarding effective implementation, which in general will depend significantly on the ability of staff to adjust to new roles, responsibilities, and reporting lines. Further, savings have the human cost of positions eliminated. To the extent that efficiencies that are gained will only partly offset the loss of positions, this will put a greater strain on remaining workers. Further, such reorganization would result in increased administrative spans for senior administrators.

**Impact on Mission:**
Firm implementation plans must take an objective, student-centered approach towards reorganization. Offices with direct student contact (e.g., as outlined below in Option III) must be treated carefully to ensure that student services are not degraded. Reduction of staff in other areas must be attentive to impacted stakeholders to minimize impact where possible.

**Best & Promising Practices:**

1. Implement explicit, intentional, outcome focused administrative metrics to ensure effectiveness, efficiency, sustainability, and transparency
   The transition to UWM’s new budget model will significantly increase transparency of unit
financial performance based enrollment, retention, and graduation metrics. However, little transparency exists regarding the effectiveness or efficiency of administrative activities at either the unit or campus levels. At the unit level, wide disparities in administrative support costs per degree granted cause need for further analysis. Investigating these disparities could lead to opportunities for further savings. Although the 2010 Goldwater Institute report suggested that UWM was administratively lean relative to peer institutions, this snapshot does not provide insight into whether UWM is currently lean. Furthermore, it does not offer insight regarding how administrative activities contribute towards fulfilling UWM’s mission, particularly achieving positive student outcomes.

The use of metrics to drive institutional performance appears to be a common feature among aspirational peers. Arizona State University Senior Vice President and Senior Planner Richard Stanley said the following in an email conversation, “The critical element in our transformation has been one that is simple to describe, but hard to implement. That is having a relatively simple set of practical aspirations for the institution, repeating them ad nauseam at all levels of the institution, replacing leaders and staff unable to adapt to a new and fast-paced world, and holding oneself accountable by reporting regularly on progress towards the important goals (enrollment, degrees, retention, graduation, and research activity) to the staff and faculty and the world.”

Explicit metrics tied to tangible outcomes are vital components of institutional improvement. The development and implementation of a set of administrative metrics should focus on the following:

- **Financial sustainability of the institution.** At minimum, this would include timely annual updates on the institutional operating margin, reserve levels, and ratio of state appropriation revenue to tuition/fee revenue.
- **Efficiency and effectiveness of UWM’s operations.** At minimum, this would include annual updates on efforts to de-bottleneck business and administrative processes; administrative costs per degree at the campus and unit level; and administrative expenditures relative to the size of the net tuition revenue pool.
- **External support.** At minimum, this would include annual updates regarding endowed assets and growth in endowment; growth in donors (including commitments); and private funds raised annually (commitments excluding revocable bequests), as well as other external sources of support.
- **Investment in campus facilities.** At minimum, this would include deferred maintenance burden; facility renewal and replacement reserves; operations and maintenance expenditures; and UW System capital appropriations amount.

These administrative metrics should be complemented by the development of metrics explicitly measuring UWM’s progress towards its mission, namely a spectrum of metrics capturing: student success; development of an educated workforce and engaged citizenry; growth in research and development enterprise; UWM’s contribution to enhanced social well-being; and telling/selling the UWM story. These metrics should be designed and implemented with a target application date of FY18 after appropriate governance input, with the explicit purpose to drive effectiveness at fulfilling UWM’s mission at all levels on campus.
At the unit level, one example of the application of such metrics is a critical examination of academic support costs (here salaries of dedicated unit-level administration and support; excludes department chairs) as a function of instructional staff, student credit hours (SCH’s) delivered or per degree granted. While the mode of instructional delivery must vary between schools and colleges, the rationale for widely varying administrative costs is not transparent. The table below, using data from Business and Financial Services, shows the academic support salaries for each of the academic units as a ratio of support to instructional full time equivalent (FTE), support salaries per instructional credit hour delivered and per degree delivered, and the salary savings that would be had by capping academic unit support salaries at either the campus average cost of $36.21/SCH or $4,983/degree (sum of BA/BS, Masters and PhD), along with a combination of the two approaches. Under this analysis, total savings by imposing caps on unit-level academic support range as a function of either support per SCH, support per degree, or a combination of these two approaches range from $2.5 million to $3.9 million ($2.9 million to $4.5 million including fringes).

At the campus level, non-academic support levels are most readily addressed through the new budget model. FY14 budget model testing suggests that 66% ($67 million) of the subvention pool is directed towards non-academic support. Possibilities for maintaining administrative efficiency include: (1) establishing the rate of 66% of the subvention pool directed towards non-academic support as a firm upper limit until UWM is again financially sustainable, and (2) establishing the “tax” rate of 40% needed to fund the subvention pool as a firm upper limit until UWM attains financial sustainability. These two actions will keep the ratio of administrative expenditures from rising as a proportion of overall campus expenditures, aligning administrative growth with overall growth in campus revenue.

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<thead>
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<th>FY15 Unit Support Payroll BFS Analysis</th>
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<th>$/SCH</th>
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<th>Savings Capping Support at Campus Average per SCH</th>
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The University of Minnesota has been identified as a model institution that successfully uses metrics. See the following documents for further consideration:


II. **Accelerate implementation of Integrated Support Services (ISS) project**

Shared Services is a way of organizing administrative functions to optimize the delivery of cost-effective, flexible, and reliable services to stakeholders (faculty, staff, and students). The basic principles underlying implementation of shared services are as follows:

- **Shared services must increase efficiency without sacrificing service quality.**
- **Stakeholders must have the opportunity to provide input.**
- **Changes in service arrangements must not negatively impact UWM’s core mission or the experiences of faculty, staff, and students.**

UWM has begun exploring the possibility of implementing a shared services approach to enhance administrative efficiency and effectiveness. The ISS project is an effort to design and implement a structure to provide administrative service excellence across UWM, focusing on the functions of finance and accounting, procurement, human resources, and information technology ([http://uwm.edu/issp](http://uwm.edu/issp)). Among other goals, it is intended to accomplish long-term service efficiencies, make better use of technology, and enhance professional development opportunities in administrative areas.

This option would accelerate the implementation of the ISS project following best practices identified by the ISS Project Committee, with a target date of FY2018 to coincide with the rollout of the new budget model. Long term (FY2020) expenditure savings should be targeted at 10% of accessible expenditures (excluding expenditures required for compliance, for example). This is consistent with EAB recommendations, with an overall salary savings target of $2 million by FY18 ($2.3 million with fringes). (See: Transforming University Services: Reinventing university services with a focus on efficiency).

Upfront costs may be needed for accelerated implementation to modernize and rationalize campus software structure. However, this path should significantly increase the effectiveness of overall campus services, improve employee morale by providing more accessible promotion paths, and reduce the risk of data breaches that expose student records. This should reduce long term liability expenses. Finally, CCOET recommends further study into the monetization of UWM services/expertise (particularly University Information Technology Services [UITS] and Human Resources [HR]) with smaller institutions in the UW System and elsewhere to turn services into a revenue center to the greatest extent possible.

Hanover Research offers additional information about implementation of shared services. See “Consolidation and shared services in higher education” at [http://tinyurl.com/jpkdday](http://tinyurl.com/jpkdday) for additional information.
III. Gather all aspects involving a student’s academic trajectory under one administrative line

UWM’s current structure supporting a student’s trajectory through their early college career is fragmented. A student may have contact with a variety of different support programs that are loosely connected and may be at odds with each other. For example, who should an undecided Hispanic female veteran seek out for academic support at UWM? From the larger perspective, operational issues arise from this fragmentation. Decisions made in student affairs units (e.g., changes in admissions portfolios or deals with particular vendors) impact academic units at the enrollment and programmatic levels. Under the current structure, communication is inhibited and decision makers are remote from consequences, leading to disagreements and inhibiting strategic allocation of resources.

Georgia State University, UWM’s aspirational peer, demonstrated remarkable increase in student success, suggesting two underlying factors: (1) relentless focus on using data to drive improvement in student outcomes and (2) having all student success units under a single administrative head, as shown below (see GSU’s post-consolidation organizational structure [http://consolidation.gsu.edu/committee/post-consolidation-structure/] and “Building a pathway to student success at Georgia State University” [http://tinyurl.com/jhxxw3u]). It should be noted that GSU made a significant investment of resources in this initiative, including the hiring of 42 additional advisors and the purchase of a new, common electronic records system.

Coupled with stronger links to Institutional Research, this cross-cutting functional structure can accelerate the data analysis process to develop strategic responses to improve student outcomes across a variety of student success domains. A similar model could be considered at UWM. This would presumably include gathering Undergraduate Admissions, Center for International Education, Financial Aid, Student Accounts, Registrar, and Career Planning and Resource Center under one administrative report within the Provost’s office.

Such reorganization will enhance consistent messaging and should be accompanied by transparent flow of student information through the Student Success Center, shared advising records, and so on. This process should be data driven and outcome measured.

These core functions could be augmented by placing programs such as learning communities, targeted/undecided intensive advising, bridge programs, cultural centers, diversity and inclusiveness centers, TRiO programs, Panther Academic Support Services,
Student Success Center, Military and Veterans Resource Center, Accessibility Resource Center and the Office of Undergraduate Research under the same administrative line, while retaining the individual identity of each of these valuable programs. This would allow scarce resources to be applied in the most effective manner consistent with mission-related outcomes. It must be recognized that this implementation will require moving additional support staff (e.g., UITS) as well as the offices themselves.

Expenditure savings from this restructuring would be relatively modest (targeting $1 million salary savings/year by FY18; $1.15 million including fringes), primarily due to increased span of administrative reports and consolidation of student success/advising functions. However, effectiveness is supported by potentially significant revenue generation from adopting a seamless strategic enrollment management perspective – each 1% increase in 2nd year retention enhances the tuition revenue stream by $700,000, and the ability to allocate resources seamlessly within this unit to enhance admissions will be vital to stabilizing and increasing UWM’s overall tuition revenue pool.

IV. Reduce/simplify senior level campus administration

UWM’s senior-level campus administration (positions at the Associate Vice Chancellor and above) has grown organically in support of the mission. For example, in FY2007 and FY2008 UWM had six Vice Chancellors and two Associate Vice Chancellors (respective October 2006 and October 2007 payrolls; source Business and Financial Services [BFS]), whereas currently campus has six Vice Chancellors and 8.75 Associate Vice Chancellors (October 2015 payroll; source BFS). Several of these Associate Vice Chancellors were conversions from existing Director positions. However, current resource constraints pose severe challenges. This growth in upper administration has not led to improved outcomes, as retention/graduation rates have remained steady over the past decade and enrollment has declined. Hence, whether the current intensity of senior level campus administration is optimal for accomplishing UWM’s mission needs closer examination.

This option would involve reducing the number of senior level campus administrators as part of an administrative reorganization that emphasizes effectiveness and is aligned with UWM’s mission, with a target implementation date of FY2018. This reorganization should be supported by a well-defined rationale for increasing effectiveness supported by metrics, and consistent with the overall goal to reduce the administrative burden at the campus level to one consistent with the severe mid-term revenue projections. Further, it must be implemented in a fashion where underrepresented groups on campus are not minimized. As campus expenditures shrink due to budget constraints, administration must respond. Estimated savings by reducing administrative levels to approximately 10 senior campus-level administrators are approximately $1 million in salary by FY18 ($1.15 million with fringes). Exact savings are dependent on the precise route of such a reduction due to administrators with back-up positions.

Incentives:

Restructuring of administrative processes at UWM must include incentives. For example, the University of Texas at Dallas requires academic deans to self-fund a portion of merit pay by creating a merit pool consisting of 1% of student credit hour revenue generated by the unit within their budgets. (see http://www.utdallas.edu/hr/compensation/standards/). A similar practice at UWM would generate a pool of approximately $2 million for merit adjustments each year.
At the campus level, a reasonable percentage of funds captured via position control (10-20%) could be designated toward rewarding efforts by current employees who effectively forward UWM’s mission. At a rate of approximately $10 million captured per year by position control, a merit pool of $1-2 million per year would be created. Such a merit pool should be accessible to all faculty and staff, consistent with governance. After an eight year period that included only two 1% annual pay increases for UWM employees, but otherwise no raises from the state compensation plan, such incentives are paramount.

Finally, efficiency and effectiveness measures that go beyond imposed cuts at the unit level should be rewarded. Some percentage (perhaps 25%) of expenditure reductions beyond levels imposed in response to the budget crisis should be returned to the relevant program/department/unit to reward employee effectiveness.

Given the severity of the budget situation, all merit adjustments should be done in the form of one-time merit payments (bonuses) until UWM regains financial sustainability. The linked document below suggests that other institutions have mechanisms for such adjustments. Similar policies could be developed for implementation at UWM.

**Implementation:**
Implementation of Option I will first require defining a reduced set of metrics, and gathering/testing the data that underlies these metrics. This will involve some effort on the part of BFS staff. Beyond this, unit and administrative office leadership will complete firm reviews of current support staff levels, compare those with units that operate more efficiently, and develop reduction plans that minimize impact on student outcomes and service levels. Implementation of Option II will require acceleration of the current committee work that supports the ISS Project, moving forward the overall implementation deadlines. Option III will require collaboration between offices under different administrative headings, along with the development of an overall strategic plan for the new streamlined unit. Discussions along these lines are already underway for the Strategic Enrollment Management process, and this reorganization should be viewed as a part of that effort. Implementation of Option IV lies mostly with the Chancellor, and will require a firm review of the expectations and effectiveness of the current upper administrative structure at UWM. Assuming changes are to be made, they should be done in a clearly articulated manner outlining the expectations for how the revised administrative structure maintains administrative effectiveness while increasing administrative efficiency.
III. CAMPUS ACADEMIC REORGANIZATION

UWM currently has 12 academic schools and colleges as well as a separate Graduate School, each with a dean, associate dean(s), and administrative support personnel. The academic schools and colleges are of vastly different sizes, serve student populations with diverse needs, and offer dissimilar levels of support to the students and varying levels of administrative service. These features result in potentially significant variations in the quality of student and employee experiences at UWM. In addition, over the years, silos have developed which have reduced collaboration between faculty and programs in different schools and colleges, resulting in duplication of courses, unexplored research synergies, and the potential stifling of the development of innovative programs of study for students.

A survey of peer urban institutions of similar or larger size to UWM has shown that for these schools, the number of schools and colleges (not including specialty schools such as medical schools) range between 7 and 10. This further suggests that UWM has more schools and colleges than ideal, and accordingly is carrying additional administrative costs.

In considering any academic reorganization, careful attention should be paid to UWM’s mission. As guiding principles reflecting that mission, any academic reorganization should improve, but at a minimum not harm, the student experience. Additionally, any academic reorganization should increase the likelihood of interdisciplinary research, instruction, and engagement activities. Furthermore, any academic reorganization should either decrease expenses or increase revenue, preferably both. Academic reorganization should further enable UWM to advance as a leader in offering students unique and innovative interdisciplinary experiences in research, instruction, and community engagement.

With these points in mind, CCOET presents the option that UWM leadership undertake a review of the campus academic organization, with a goal of reducing redundant services through creating approximately four clusters of schools and colleges and potentially reducing the number of academic departments and/or academic schools and colleges. This review process should formally include representatives from governance groups. Additional proposed actions are listed below in the “Process for Implementation.”

Estimated Savings:

The amount of savings to be achieved through a reorganization of academic units is dependent on the number of units affected. Campus academic reorganizations have been proposed or completed at other universities and the savings that have been reported range from $400,000 to $1,000,000 per reorganized unit. These reorganizations were generally done in response to fiscal problems. In addition to savings, it is anticipated that a well-designed academic reorganization can potentially increase interdisciplinary research, resulting in increased external grant funding, and can spur the development of inter-professional education through new and/or revised degree programs that could increase enrollment. Some examples are as follows.

- **University of Southern Maine**: Reduced the number of schools/colleges by three through consolidation. With three fewer deans and fewer larger departments, savings were estimated at $1.14 million - $1.38 million. (Comment: had significant controversy and a no confidence vote.)
- **Idaho State University**: Reduced the number of colleges by two. The savings were estimated at $900,000. (Comment: had significant controversy and a no confidence vote.)
- **San Francisco State University**: Proposed to reduce the number of colleges by 2 through consolidation. The estimated savings were $1 million. (Comment: Faculty developed counter-
• **University of Central Missouri**: Reduced the number of colleges from 5 to 4, and the number of departments from 33 to 25. The estimated savings was $612,000.

• **University of Arizona**: Created a College of Letters, Arts, & Sciences with an executive dean, combining 4 separate colleges (each with their own dean). The merging of services produced an estimated savings of $3.5 million.

These types of reorganizations, particularly when dictated from above, tend to meet great resistance from faculty, and do not always result in tremendous savings. Thus, a decision to initiate a campus reorganization should include an analysis of time and human toll in a shared governance model, impact on students, as well as potential financial savings.

Increased revenue from significant campus reorganization will likely take several years to be realized. The amount of increased revenue will depend on the interest and willingness of the faculty to collaborate with each other and campus leadership.

**Limitations & Consequences:**
CCOET identified a number of potential negative consequences, including the following.

- Accreditation of selected programs may be compromised.
- The merging of schools/colleges or units will require procedures for managing budget issues, including addressing structural deficit management.
- The merging of schools/colleges will have to address different curricular requirements.
- Staff anxiety regarding job security may increase. Campus morale may decrease.
- Faculty and staff may resist changes, and departures of personnel may ensue.
- The transition may result in a reduction of positive functioning in some units.
- There may be costs associated with redesigning systems for combined services.
- Clustering support services may struggle to gain clear direction/oversight as they might report to multiple deans.
- Current and potential donors may not support the loss of independence of named schools.
- Cost savings may be lower than projected with current lean staffing.
- Potential for loss of identity for some legacy schools and programs if grouped with other units.
- Communication challenges – both internal and external – may result during transition.
- Faculty may not buy-in or cooperate in the process.
- Strategy may not result in immediate budget relief.

**Impact on Mission:**
Ideally, if done properly, academic reorganization should aid UWM’s mission by providing a better educational experience for students and increasing research synergies. To enhance UWM’s mission, reorganization of academic units must be thoughtfully considered and implemented in an orderly fashion.

**Positive Outcomes:**
CCOET identified a number of positive benefits that can come about from academic department/unit reorganization, including the following. Reorganization could:

- improve student services, faculty cooperation, and coordination of support services;
- reduce duplication of courses;
- facilitate economies of scale for support units (e.g., student recruitment, HR, research support,
marketing, business functions, UITS);

- lead to the development of new programs that are attractive to students.
- potentially inform the hiring of people in new positions that are better suited to this new model as current employees depart;
- streamline the experience for students in similar programs;
- increase interdisciplinary science and the amount and quality of research;
- reduce administrative costs, particularly in smaller schools and colleges;
- increase interdisciplinary education opportunities;
- improve morale with decreased number of administrators, potential opportunities for new collaborations, and greater sharing of support staff during period of reduced staffing and position control.

**Incentives:**
The biggest potential roadblock to successful implementation of academic reorganization is likely to be a lack of support from faculty. Therefore, incentives should be offered to encourage unit reorganization. Some possible incentives include the following.

- Hold units that participate in campus academic reorganization harmless from negative fiscal impact through use of the subvention fund for a longer period of time than units that do not participate.
- Provide researchers who receive funding on inter-disciplinary research projects with larger percentages of the indirect cost return.
- Guarantee that staff whose jobs are lost due to well-done reorganization will be given an opportunity to interview for comparable jobs elsewhere on campus as they open.
- Determine a new model for allocating student credit hours and tuition revenue.

**Implementation:**
CCOET offers the option that academic reorganization, particularly with respect to support units, take place. Through consideration of the available information and combined experience of its members, CCOET identified several aspects of any potential reorganization as those likely to drive the decision making on the process: (1) it is likely that the cost savings will not justify a large-scale, top-down reorganization of schools and colleges; (2) most cost savings will occur from the combination of services that can be shared across campus units; (3) academic reorganization is most likely to be successful if it grows from a grass-roots faculty level; and (4) some small units may not be affordable as stand-alone units. Implementation of academic reorganization should be primarily the responsibility of the Provost and be done in consultation with the Academic Planning and Budget Committee. With this in mind, CCOET presents an option for campus leadership to undertake the following actions.

I. To begin the process, campus leadership should analyze the current organization of the campus, and identify schools/colleges/departments that may be better organized for future success and growth. Campus governance units should be engaged in this analysis.

II. Campus leadership should identify and implement incentives that promote reorganization of units.

III. Campus leadership should consider reorganizing the graduate program functions on campus. This can take the form of downsizing the Graduate School to a Graduate Program Office to oversee campus-wide graduate program issues, with the majority of current functions distributed to individual schools and colleges – particularly those functions that are duplicated at the Graduate School and the unit levels. Consideration must be given to
how much it may cost to build-up graduate program services in schools and colleges that currently do not have much support structure. A second form is to move the duplicated graduate program services currently in local schools/colleges into the Graduate School to free resources in individual schools and colleges.

IV. Campus leadership should consider merging of the School of Freshwater Sciences (SFS) with the College of Engineering and Applied Science (CEAS), School of Architecture and Urban Planning (SARUP), or the College of Letters and Science (L&S).

V. Campus leadership should consider merging of the Zilber School of Public Health (ZSPH) with the College of Health Science (CHS).

VI. Campus leadership should identify and develop clusters around schools and colleges that share considerable synergy in their education and research directions (e.g., School of Education [SOE] and Helen Bader School of Social Work [HBSSW], College of Nursing [CON] and College of Health Sciences/Zilber School of Public Health, College of Engineering and Applied Science and School of Architecture and Urban Planning). Incentivize these clusters to share services (e.g., student recruitment, human resources, research support, marketing, business functions, information technology), and to begin to increase cross-school cooperation of faculty on academic and research matters.

VII. The schools and colleges would maintain independent deans, and academic programs would remain as is—this would result in minimal negative impact to the student experience and the visibility of the schools and colleges. Such clustering will realize most of the cost savings (reductions in associate and assistant deans, supervisors, and potentially other personnel) that are likely to occur through academic reorganization without the full merger at the school and college level. Combining support services will be time intensive and cost savings may not be realized for a year or more. As schools and colleges become connected through common support services, faculty may increase interdisciplinary research and teaching, create new and exciting interdisciplinary programs, and eventually seek full merger of the units.

VIII. Campus leadership should encourage all departmentalized schools and colleges to analyze their particular departmental structures to determine if department mergers might be beneficial.

IX. To maintain momentum, leadership should encourage and incentivize changes driven primarily by faculty. For example, the Natural Sciences faculty in the College of Letters and Science have expressed interest in joining with the College of Engineering and Applied Science, and the School of Freshwater Science and the School of Architecture and Urban Planning have explored merging. (Changes might be undertaken at a departmental or school/college level).

Possible Campus Academic Reorganization:
As discussed above, CCOET proposes exploring the merging of the School of Freshwater Science and Zilber School of Public Health into other units. CCOET suggests that other mergers are driven by faculty and clustering similar units together to share services. Possible configurations are as follows:

I. 10 Schools and Colleges
This configuration keeps 10 schools and colleges as separate entities, each with a dean, but with unit clusters to combine services:
Cluster 1: L&S (minus Natural Sciences), Peck School of Arts (PSA)
Cluster 2: CON, Combined CHS/ZSPH
Cluster 3: SOE, HBSSW, LSB
Cluster 4: SARUP, SOIS, CEAS (plus Natural Sciences)/SFS

Alternatively, discussion ensued regarding a top-down reorganization approach. Many forms for campus academic reorganization were suggested. Many of these are creative and potentially beneficial to the campus. If this approach is chosen, CCOET recommends that campus governance committees be consulted to help develop a final form for campus academic reorganization.

Full mergers of schools and colleges would combine the academic programs, departments, and support services from multiple current schools and colleges into one school/college, with one dean, one combined budget, etc. While clustering of units may capture most cost reductions through merging units, some additional savings are possible through complete mergers of schools and colleges. Savings will be primarily in the reduction in salaries achieved through deans and associate deans reverting to their faculty positions (such individuals would not be paid a supplement for administrative work, and would revert to a 9-month contract), and in the cost savings achieved through the additional teaching responsibilities, and in decreases in the number of teaching academic staff. However, work performed by deans and associate deans would still need to be performed, potentially requiring additional staff and reducing the cost savings.

Additional issues regarding merging schools and colleges should be considered. For example, mechanisms for dividing budgets would need to be developed if different departments from the same school went to multiple merged schools/colleges. In addition, methods must be developed to account for positions not funded on GPR funds.

Below, three examples are offered of what final arrangement of units may look like. These are not the only possible arrangements, but are provided to suggest three types of scenarios.

II. Extreme Consolidation.
   This model consists of two colleges, each headed by a dean.
   - College of Letters and Sciences
   - College of the Professions

III. Combining of Current Schools and Colleges.
   Most schools and colleges merge in their current form. The sample arrangement can be modified if it is deemed more appropriate to keep a particular unit separate. Naming rights from individual college could be carried forward in each of these colleges.
   - **College of the Arts and Humanities**
     Consists of current Arts and Humanities programs from L&S and PSA
   - **College of Engineering, Architecture, and Sciences**
     Consists of CEAS, SARUP, SFS and Natural Sciences from L&S
   - **College of Health**
     Consists of CON, CHS, ZSPH
   - **College of Education and Social Welfare**
     Consists of SOE, HBSSW, appropriate Social Sciences departments from L&S, and SOIS
   - **School of Business and Entrepreneurship**
Consists of LSB and appropriate Social Sciences departments from L&S

IV. Advanced Departmental Restructuring
This arrangement is similar to arrangement III, but with more individual department relocation or reformation in the process.

- **School of Health**
  Comprises ZSPH, CON, and elements of the CHS

- **College of Education and Human Development**
  Combines SOE (reducing from 5 to 3 departments), adds Kinesiology, Communication Science and Disorders, Health Informatics and Administration, and Bioinformatics program from CEAS

- **College of Science, Technology, Engineering, & Math (STEM)**
  Combines, CEAS, SFS, and L&S Natural Sciences

- **College of Urban Public Policy**
  Combines HBSSW, and Departments of Public and Non-Profit Administration and Educational Policy and Community Studies

- **College of Liberal and Fine Arts**
  Combine PSA, L&S Humanities and Social Sciences Department

- **College of Business**
  Combines School of Business and SOIS

- **School of the Environment**
  Combines SARUP with environmental studies programs from across campus
SECONDARY OPTIONS

Based upon an extensive review of campus operations and feedback gathered from the campus community, CCOET focused on three primary options for strategic action to create efficiencies and improved organization in academic and administrative functions at UWM. However, during the Team’s deliberations, many other ideas were discussed which are still worthy of consideration.

To provide the broadest array of strategies for campus consideration, this section is divided into two parts. The first part outlines six strategies that could yield sizeable savings over time, but which would likely require considerable effort to implement and would, in some cases, incur significant opposition. Given the short time to implement efficiencies to address the pending budget shortfall, they were not considered viable for short term inclusion. They are, however, worthy of consideration for further study as longer term strategies.

The second part contains additional ideas and suggestions from the campus community generated from listening sessions, questionnaires, and other communication during the team’s extensive data gathering period. Each idea has been discussed by the team, who believes that some efficiencies could yield modest savings and are, therefore, worthy of further consideration in addition to the primary options. The secondary options are divided into two categories: efficiencies (including Physical Plant, Supplies and Equipment and Programs and Activities) and initiatives, which could help the campus yield potential gains in the future.
Each of these topics were explored by the team and are considered worthy of further consideration. They have the potential capacity to generate considerable efficiencies, but would require a great deal of administrative effort to implement, would likely generate considerable discussion and reaction and would take a longer time than is available to accomplish.

Reduction of Centers
A large number of centers and institutes on campus exist with a wide array of functions and budgets. A careful review of all centers based on alignment to UWM’s mission and cost effectiveness is a suggestion. Some work is already underway in the College of Letters and Science. Such a review may result in a center being eliminated, being maintained with a reduced budget, or being expanded with an increased budget as warranted.

Teaching Load/Work Load
A wide disparity in teaching loads exist across departments at UWM. Faculty workload is currently governed by FD 2027, (https://www4.uwm.edu/secu/docs/faculty/2027.pdf). The document divides faculty work responsibilities into 4 work units, roughly dividing a 40-hour work week into 4 ten hour segments. The document sets general standards for teaching, research and service, noting that “full-time faculty regularly will devote two of the four work units to group or equivalent instruction.” It continues “the two remaining work units will be distributed over the three areas so as to make best overall use of the faculty’s talents and abilities and to maximize their contributions to the University. In consideration of faculty career plans and the department or college mission, the two remaining units may fall into any of the three areas of research, service or teaching (inclusive of individual instruction course sections and advising).”

This language gives departments and programs the option of allocating additional faculty time to instruction, or allocating differential workloads among members of the departments. It further specifies that the responsibility for implementing and enforcing the policy resides at the departmental level, with review and approval by the dean. Workloads should be thoroughly monitored and enforced across campus. For example, a department may specify that each faculty member has a work unit designated for service, but not all faculty in the department may do the equivalent of 10 hours of service per week. Consistent enforcement of workloads may lead to reduced spending.

With this in mind, CCOET suggests that a review of current faculty workload in departments across campus be instituted by the Provost to determine if a review of the current policy is necessary or if the current implementation and enforcement of the current policy needs strengthening.

Segregated Fees
While use of segregated fees was beyond the remit of the team, they represent a significant part of UWM expenditure and should be reviewed separately for potential efficiencies. While not directly affecting the budget shortfall, reductions in segregated fee expenditures potentially could reduce fees to students, which could make cost of attendance more affordable, possibly increasing enrollment.

Currently a significant portion of segregated fees are charged back to the campus to support the general university functions. Thus, reduction in segregated fees may impact all campus units. Furthermore, reduction in segregated fees is not a guarantee of enrollment growth as enrollments have declined.
during recent tuition freezes.

Instead of cutting segregated fees, members of CCOET present the option to, instead, ensure that segregated fees are used strategically. One idea is that all segregated fee units are held to similar cuts as the rest of the campus to use savings to support the renovation of the Student Union or Norris Health Center. Additionally, segregated fee units could undergo unit reviews to find efficiencies and demonstrate outcomes. Savings could be redistributed toward units that can demonstrate they contribute significantly to student success (e.g. additional counselors at Norris Health Center). Another idea is to thoroughly examine all campus support units alongside UW System policies that govern segregated fees to determine which general purpose revenue (GPR) units could be funded by segregated fees. This may include career centers and cultural and inclusiveness centers. This option would potentially free GPR funds for other use.

Any idea must be brought to the Student Association as this campus governance unit is responsible for recommending the allocation of student segregated fees.

**Credit Plateau**

Like most UW System campuses, UWM currently uses a plateau system to assess tuition for both undergraduate and graduate students. Undergraduate students are charged per credit up to 12 credits. Between 12 and 18 credits, students pay the same tuition as a student taking 12 credits. The per credit rate is again charged for each credit over 18. In Fall 2015, 60% of undergraduate students were taking 13 or more credits.

Graduate students pay a per credit rate up to 8 credits; students taking more than 8 graduate credits are charged at the 8 credit rate. In Fall 2015, 42% of graduate students were taking 9 or more credits.

The impacts of increasing the current credit plateau should be reviewed, both from a financial and student success perspective. Any change in the credit plateau would require approval from the UW System Board of Regents. A preliminary analysis suggests that increasing the undergraduate credit plateau to 13 credits could generate an estimated additional $8 million to $9 million annually in tuition revenue. Increasing the graduate credit plateau to 9 credits could generate an estimated additional $1.5 million to $2 million annually. Also, research has supported that increasing the plateau floor by 1 unit increases retention since the plateau serves as a guide for students, propelling them to take more classes per semester.

**Buyouts, Sabbaticals, and Course Releases**

Course buyouts at reduced rates as well as the minimal replacement cost generated by sabbatical requests were discussed with regard to their impact on the overall effectiveness of the budget. Similarly, the perception of large numbers of course releases given for purposes not directly geared to student recruitment, retention, and education was raised as requiring budgetary review. The College of Letters and Science is currently undertaking some of this work.

**Furloughs**

Given the past few years of minimal to zero pay increases coupled with increased staff and faculty contributions to benefits, additional furloughs should only be considered as a last resort to prevent financial exigency. Temporary savings can be achieved, however, at a rate of $1 million each year for every day of furlough. Furloughs do not have to be administered equally across rank or pay rate.
Close Campus over Fall and Winter Break
Close the campus the day after Thanksgiving and between Christmas and New Years Holidays. Other campuses across the country close for green days during the winter break. If campus closes, the burden to staff offices would be reduced as all offices would be closed. Only essential duties would be ongoing during this time period. Employees could opt to take vacation for those days so they could be paid if they needed. This transition would require a review of contracts, determination of essential staff, and Human Resources efforts to coordinate payroll. To save money on facilities, essential staff could be centralized to a few main areas of campus. With vacation usage option, savings would be less than furloughs.
CAMPUS COMMUNITY SUGGESTIONS FOR FURTHER STUDY

Physical Plant

Eliminate Innovation Campus
Goals of Innovation Campus have not been realized yet. However, CCOET members are uncertain that stepping away from this would result in savings since commitments have already been made. The campus community seeks greater understanding (costs and benefits) of Innovation Campus. What agreements/financial pieces would make elimination untenable? CCOET suggests the chancellor to assign individual(s) who have no conflicts of interest to examine legal and financial implications of backing away from this property.

Panther Arena Naming Rights
This is a very costly initiative with little direct gains. This was a $3.4 million deal over the next 10 years. Since this deal is only in year one or two, savings could be in the millions. However, GPR funds were not used (Development and Student Affairs) so it would not directly help the deficit. Savings could help campus better fund/support other initiatives that advance the mission or reduce segregated fees. However, CCOET members are uncertain that backing out would result in savings since commitments are already made. CCOET suggests a review of the Panther Arena contract. Is this possible to back out?

Campus Vehicles
Campus members suggested vehicles could be used more efficiencies with greater oversight and sharing of services. The campus may have more vehicles than needed with overlapping services. Suggestion writers mentioned vehicles in Klotche, UWM Police Department, Be On the Safe Side (BOSS), Housing, and other Shuttles. They also mentioned vehicle misusage. Consolidation is partially being implemented with Parking and Transit now coordinating BOSS, University Housing, and campus, and parking shuttles. Additional savings could be made by reviewing shuttles for overlap, sharing vehicles that operate during opposite peak times, and reviewing BOSS’s taxi model for a neighborhood service route model.

Chancellor’s Residence
This campus building may be costly. The suggestion writer sees this benefit as an unnecessary fringe. CCOET is unsure about how this would help with deficit. Campus community members would like information about how the residence is funded, if a living allowance would be more feasible, etc.

Continuing Education Building
The lease for this building is an unnecessary cost. Additionally, main campus usage of Continuing Education is hindered from building strategic partnerships among faculty and staff by being so far away. What are the lease terms? Is it possible to back out? CCOET suggests looking into this and relocating Continuing Education units to other areas of campus.

Use High Efficiency Light bulbs/Explore other Lighting Options
Campus has inefficient lighting and over-lighting in some areas. Can the number of fluorescent bulbs in each fixture be reduced, use more dimmers, etc.? Lighting requirements were driven by unions in the past. CCOET suggests reexamining these requirements and conducting an audit to reduce bulbs. Additional changes could be phased in as fixtures/bulbs are replaced. This change would require up front staff time but would pay off over time. The Sustainability Office could lead this initiative, expanding on current efforts.
Heating & Cooling
Many buildings are old and inefficient. CCOET assumes a master plan/rating system exists of all campus buildings that show the level of maintenance needed, potential savings, and up front expenses to fix maintenance issues. If this does not exist, CCOET presents as an option, that one be created so improvements can be strategic for greatest outcomes in efficient heating and cooling. These projects often require significant up front costs. The Sustainability and Energy Office could lead such a plan.

Supplies and Equipment
Mass Advertisements in Campus Mail
Print materials are loosing effectiveness. Money could be saved on printing and staff time sorting mail. Campus could transition to an opt-in subscription to campus advertisements that is updated yearly and upon hire. List could be maintained electronically. Or, campus members could be directed to an all-campus email or website to find out about events. Consultation with Peck School of the Arts and Student Union could advance these efforts. Savings would be immediate with minimal staff effort.

Campus Phone Books & Print Materials
Eliminate campus phone books or create an opt-in system. Some offices receive one book per person when only one phone book may be needed for an entire office. CCOET suggests printing a reduced quantity and allowing units to pick them up as needed. Other materials also should be considered for reduced printing (e.g. alumni magazine), moving to an online version, or printing one per unit so members can pass it to colleagues once it is read. Coordination with Telecommunications, University Relations, and Alumni & Development could advance these efforts. Savings would be immediate with minimal staff effort.

Go Paperwork/Reduce Paperwork Shuffling
Shift the bulk of paper procedures to online forms. Prioritize high use paperwork first (e.g. travel expense reimbursement forms, add/drop forms, withdrawal forms). CCOET presents as an option to create a cross disciplinary paperless tech work group. Could also use student innovation. Could use Image Now software to implement this plan. Savings would not be immediate but would grow with time.

Reduce Phone Lines
Phone costs seem insignificant but add up when the totality of lines are considered. Each unit could conduct a phone audit to determine usage of lines and necessity. Consolidation could happen with shared lines and reception areas. Additionally, campus should look into renegotiating campus contract. The Center for International Education found that the campus spends $20 per month per landline, $7 per month per voicemail, and $5 per month for cell phones plus a per minute charge. Facilities could explore contract negotiations and coordinate unit audits. Savings would be immediate.

Mass Supply Ordering
Ordering supplies at once might lead to better negotiated better prices. Some universities run such operations through their bookstores. CCOET believe that the contract already offers strong rates without the requirement to maintain large inventory. Logistical costs could supersede potential savings.

Telecommuting
Employees whose job functions allowed them to telecommute could be encouraged to do so and then
share office space with another telecommuter. CCOET wonders if there will be a shortage of office space when positions are reduced. Also, what positions would this be appropriate for? Students are more successful when faculty/advisors/etc. are on campus. Is there data to support that telecommuting is productive? Yahoo ended their telecommuting option to help build morale, teamwork, etc. [http://www.fastcoexist.com/3020930/yahoo-says-that-killing-working-from-home-is-turning-out-perfectly](http://www.fastcoexist.com/3020930/yahoo-says-that-killing-working-from-home-is-turning-out-perfectly).

**Union TVs**
A suggestion was submitted to remove the Union TVs because no one watches them. Although all TVs might not be in ideal locations; this money has been spent already. Also, many TVs are used for student events, which are often held during evenings.

**Post Boxes**
Reduce the number of boxes campus maintains. Identify multiple post office boxes and department usage. Are they all needed? Can buildings share boxes? How much do they cost? Might be an easy change to implement. Would savings be significant? CCOET presents as an option that facilities explore this further.

**Programs and Activities**

**Consolidate Subscriptions**
Inventory professional association memberships and journal subscriptions across campus. Purchase campus subscriptions when possible to share resources, get package prices, eliminate redundancy, and reduce overall costs. Seek support of Library and Chancellor’s Cabinet to initiate this process.

**Condense Leave Reporting Process**
The leave reporting system, although electronic, is difficult to navigate and wastes time. However, this is run by UW System. UWM has little control over this. A campus professional could create an easy to follow tutorial or program “favorites” leave reporting pages for each type of classification.

**Continuing Education Courses**
Give faculty opportunity to teach Continuing Education courses as a part of their teaching load. Currently the separation may lead to duplication of courses. CCOET wonders how this would fit into faculty teaching and research needs. Continuing Education and Shared Governance Groups could explore the feasibility of this further.

**Consolidate Career Centers**
Consolidation of services could help pool strengths. A number of submissions proposed combining centers. This transition could help consolidate funds. Perhaps a jointly run office with Student Affairs and Lubar School of Business (and other colleges) could lead one Career Center. This would enable the campus to maintain business partnerships while helping students become career ready. This change would eliminate duplication while providing a more seamless service for students & business/community partners. Higher education faces a nationwide shortage of Career Center directors while pressure for centers to perform increases. Career services for students might be improved with one well staffed office. This change would require units to trust the quality of service from a centralized center and for new center to adequately meet campuses needs. Accreditation standards may require dedicated staff for certain degree programs. A transition plan would involve work from Career Planning and Resource Center Director, Vice Chancellor or Student Affairs, Lubar School of Business Dean, and College
of Engineering and Applied Science Dean. Implementation would take a year or more.

**Athletics**
Athletics consistently runs a deficit. Other campus that have cut athletics programs should be researched. How have they faired? The UWM community seeks greater understanding and transparency of funding for athletics and greater accountability for spending. What has triggered increasing costs? (travel, compliance?) Currently athletics is funded by both segregated fees and GPR funds. Can GPR funding be eliminated or reduced to lowest level possible? Could more of athletics be funded by alumni or foundation supported? One concern for cutting athletics is that Alumni would not support the campus. Howard Nixon (The Athletic Trap) found that most alum in nation would like decreased athletics; few who support it are vocal though. "The Business of Higher Ed., Volume 1" by Knapp and Siegel explore both drawbacks and benefits. CCOET is interested in understanding how changes would affect enrollment. Cutting athletics would take many years to implement. However, immediate savings could be realized if budgets are strictly controlled.

**Research Growth Initiative Fund**
This fund supports faculty research in anticipation that it will serve as seed money for future grants. This program should be reviewed on a yearly basis. Immediate savings could be realized if this program were cancelled for 1 to 2 years. CCOET presents as an option that the Provost explore this idea.

**Panther Fest**
Comments solely pertain to Panther Fest, the concert, not all of Fall Welcome. Research (George Kuh, Vincent Tinto, others) suggests that a student welcome/transition experience sets the tone for students and should have a scholarly/academic focus with small group participation and faculty involvement for student success and satisfaction. The Student Association should be consulted to determine if Panther Fest is the best way to welcome students to campus. CCOET presents the option to gather data from students about this event and looking into alternative welcome events that better support student success and make students feel welcome. Student Association support would be needed to eliminate this program and possibly support different welcome/transition events that better align with increased student success. Additionally, since this is student segregated fee funded it will likely not directly address the deficit. However, the elimination of Panther Fest could reduce segregated fees by a few dollars. The Student Association & Vice Chancellor of Student Affairs should be consulted to look at the cost, value, and impact of this program. This could be implemented as early as summer 2016.

**MAP-Works or EAB (Student Success Collaborative)**
Many suggestions have been made to cut/consolidate initiatives related to student success early alert systems (MAP-Works or Student Success Collaborative via EAB). CCOET members present an option to move to Student Success Collaborative operated through EAB. Other campuses have transitioned from Map-Works to SSC and have been pleased (contact Paul Thayer at Colorado State University). Regardless of what program is used, the entire campus must all commit to using one system to the fullest. CCOET presents the option for leadership to push integration to one system by the end of this academic year. Savings would be equivalent to the cost of the contract. CCOET offers this option for the Provosts Office and the Assistant Deans of Student Affairs in the Schools/Colleges to consider implementing this plan.

**Symbolic Administrator Pay Cut**
Campus community members are frustrated that higher salaried employees do not feel the weight of the wage freezes like lower paid employees. Symbolic cuts increase moral and demonstrate a "we are in this together" mindset for lower paid employees. It must be determined what percentage makes sense.
It could start during new contract year. Concerns are that administrators will have reduced morale and lower income which may push them to seek employment elsewhere. However, CCOET members suggest that they may receive more support and solidarity from campus community. This should be discussed by the Chancellor's Cabinet and Deans.

**Shorter Contracts**
Employees could work with the departments to shift 12 month contracts to shorter periods (e.g. 9 months). Perhaps employees could volunteer to be allowed to request shorter contracts. Additionally, CCOET offers the option that all new positions undergo a contract length evaluation. All units must justify length of contracts for all new hires. Perhaps this review could be included in the position control initiative. This play would take a few months to develop an opt in review system and would require great efforts from HR staff.

**Consolidate Unit Libraries.**
Consolidate or inventory unit libraries to main library. Move unit library staff to main library to use their infrastructure and resources. Staff would be relocated and serve as specialists of collections. This would reduce duplication of materials, increase collaboration, and open up space for labs, studios, small courses, meetings, and offices. CCOET suggests consulting with schools and colleges to ensure such a transition would not hinder work in specific units.

**Consolidate Advising Centers**
This change could provide improved services to students which could increase graduation rates. CCOET presents the option for UWM to modify the advising structure by examining models from other institutions. See *Academic Advising: A Comprehensive Handbook* by Grodon, Habley, and Grites. Many campuses have a hybrid model that highly include faculty in some way. This transition could eliminate or condense the need for administrators in each school/college. Although this would not lead to great savings, advising loads would be more evenlyed out to be in accordance with NACADA standards, and advisors would be cross trained and more familiar with advising in other areas. This may lead to greater student success. Implementation would take 1-2 years. Advising Work Group is leading this charge under the direction of the Provost's Office. This could be prioritized with more pressure to implement a plan within a given time frame.

**Cap Enrollments**
UWM grew fast and, with decreasing high school graduates, and was unable to maintain enrollments. If enrollment did not grow so large, current enrollments might seem stable rather than low. CCOET does not believe this idea will not solve the current deficit issue. A better idea would be to have a strategic enrollment plan aligned with budgets, staffing, and future student forecasting. CCOET offers the option for the Chancellor to prioritize a strategic enrollment plan.

**Assistant Dean of Student Affairs Positions**
Portions of these positions are duplicated within schools and colleges and Student Affairs. Furthermore, the titles are confusing to students and staff. Suggestion was submitted to move these positions to the Division of Student Affairs and eliminate some positions through attrition. Reassignment could provide more seamless operations based out of the Student Success Center (centralized advising) and Dean of Students office (student crisis support). Additionally, it would alleviate staffing challenges within these offices without increasing GPR spending. CCOET members inquire if these positions perform other functions in addition to advising, advisor supervision, orientation/recruitment, and student support? If so, considerations must be made for who would assume these other responsibilities within the schools.
and colleges.

**Merge Cultural Advising Centers**

Suggestions were submitted to better support students of diverse cultural backgrounds by separating the advising function from the campus support function of the cultural centers in Bolton Hall. Research supports that underrepresented students are more successful when they have a “sense of belonging” which can be increased through defined subgroup spaces on campus (see research by Harper, Museus, Quaye, Hurtado, Braxton, Kuh, etc.). Currently, units are staffed so thin that they are only able to perform academic advising functions. Thus, the support mission is lost. Suggestions are made to move advising back to schools and colleges and move centers under Student Affairs. Staff could have the option to serve as advisors or to lead the cultural centers from within student affairs focusing on programmatic initiatives. Offices could be staffed with one full time professional and graduate student. Funding offices within or partially within Student Affairs would reduce academic unit budget stress and lead to uniform advising loads. This proposal would not eliminate positions; rather, it would shift funding. CCOET presents this option which includes asking center directors to research the best support/advising models that serve students who have historically been marginalized in higher education.

Suggestions were also made to combine centers. However, such a model would minimize and devalue cultural differences. Students that are not from the majority culture may not feel that their individual culture(s) is not valued. All non-majority cultures would be combined into one center essentially “othering” students. This would also decrease the positive effect that cultural centers have on students. Centers offer students a safe space to express their individual identity without feeling stereotype threat (see Claude Steele). It enables students to find other students who may have had similar cultural experiences. To combine centers would result in a reduced benefit of creating a sense of belonging for students. When multicultural centers are formed, more often than not, one culture dominates and the positive effect for other cultures is lost.

**Consolidate Writing Center and Tutoring Center**

These units have similar missions. Suggestions were made to merge centers and eliminate a director position. Also, services might be more comprehensive and less confusing for students. For academic support, they would go to one office instead of two. CCOET offers the option to investigate the best models to offer academic support as there might be good reason to have separate entities.

**Eliminate Global Inclusion and Engagement**

Many comments suggested the elimination of this division. The campus is uncertain of what initiatives this office is championing and, therefore, it is seen as an office that can be absorbed into another unit. The campus seeks more information about efforts and outcomes of this unit. Campus must explore if global inclusion, diversity, and engagement are separate areas or if should they it be incorporated throughout campus units. Savings could be achieved by shifting priorities, responsibilities, positions, and units so that their goals are realized throughout campus.

**Consolidate Facilities Staff in FAA and SA**

This is seen as a duplication of administration of services. By combining units, some savings could be assumed with reduced duplication and better ability to hire more skilled/specialized staff. Such a transition would require figuring out how the revenue generating units would be funded in this model. Also, how has this worked on other campuses? How do other campuses find more efficiencies? CCOET offers the option to have a small working group examine other campuses to find savings at UWM.
Simplify Healthcare
This is beyond the scope of UWM and would have to be addressed within UW System. Governance groups review benefits each year.

Use Student Employees
Suggestions were submitted to consider hiring student employees instead of professionals if possible. This initiative would initially require increased supervision and training as students’ turnover more; however, it would help students feel more connected to UWM and it would increase their incomes, thus, increasing retention. It could also help make students more marketable upon graduation. UWM has highly competent students who could benefit from gaining work experience. UWM can do more to invest in student employment. Such a plan should have a GPA requirement for all student employees to ensure that academic success is the top priority. Student Affairs could be charged with creating a comprehensive training program for all student employees at the start of the Fall and Spring semesters. The Career Development Center could help create priority application deadlines to participate in training. Admissions and Registrar could advertise priority application deadlines when students are admitted. Units could opt into this broad training. More focused, unit specific training would take place with supervisors.

Counseling Collaboration
Can resources among School Psychology, Counseling Psychology, Clinical Psychology, and Norris Health Center be shared to offer more robust services for students and provide better clinical experiences for masters and PhD students. How do other campuses do this? What are space limitations?

Revenue Generating Initiatives

Charge Fees for Services
Suggestion writer shared that UWM has a glass shop, electrical shop, machine shop, etc. that provide services to PI’s. Some units charge fees while others do not. If all units charged fees, the shops could become sustainable from fees. Savings would not be significant but they might reduce GPR spending to rely more on funds from other types of accounts (research/grant funds). CCOET presents an option to have Facilities looks into this with particular attention on how this change would affect units that use the shops.

Lease Spaces/ Outsource
The campus should explore spaces and retailers that could generate revenue. Campus might consider hair stylists, flower shops, diverse foods, etc. Some campuses, such as Arizona State University, transitioned to more outsourcing to help generate funding. This initiative would take an initial investment to build infrastructure. Restaurant Operations and Auxiliary Services should be given charge to explore revenue generating retailers.

Community Workshops
Suggestions were made to promote learning by offering more workshops to the community. This could be a targeted initiative by Provost and deans to generate revenue. Can a process be created to connect faculty to Continuing Education using the expertise of faculty within the mission of Continuing Education? Assessments of information/training sought by the community would be helpful to determine which faculty and staff might be sought. Creation of an office/position would be needed to establish dedicated resources and tools for faculty and staff to streamline logistics of hosting events and
engaging with the greater community (marketing, scheduling spaces, sign up fees, etc.). CCOET presents an option to create and advertise a dedicated website where community members could make requests. Additionally, faculty/staff incentives could encourage collaboration. This would require up front expense for one position and IT support to create tools to help simplify and organize logistics to promote engagement. Ultimately, this would be a long-term revenue generator.

Rent Spaces
Suggestion writers present an option that dedicates more energy toward increasing revenues through event fees. The campus can rent meeting rooms, fields, parking lots, outdoor space, etc. to the public. To do this well, a dedicated professional would be needed to bring in business and coordinate logistics. Additionally, an audit must be conducted to find out if spaces are viable. Do spaces look good? Do groups want to rent spaces at UWM? Would space improvement be a good investment? Facilities staff and Union staff could lead this initiative. The Union Assistant Director, Mike Schmitt, previously did event management downtown.

Sell Assets at Surplus
This is already happening: http://www.swapauction.wisc.edu/ & https://www.facebook.com/UWMilwaukeeSurplus/?fref=ts

Sell Naming Rights
This is already happening. Foundation already works on this but this has been a challenge. Could better results be obtained with more dedicated resources or key personnel tasked with this role?

Growth & Enrollment Initiatives

Centralize Scholarship Administration
UWM has a decentralized system that is confusing to students and allows for scholarships to not be awarded strategically. With centralized scholarship administration, Financial Aid could maintain a website and submissions for all scholarships. They can help gather data to help schools and colleges make more informed decisions about who they award scholarships to and ease administrative burden on schools and colleges.

Increase International Student Enrollment
International students often pay full out-of-state tuition. The Chancellor’s Enrollment Management Action Team and Chancellor have discussed an International Student Enrollment Management plan. In addition to the numerous measures the Center for International Education is taking to increase enrollments, other campus units might also enhance these efforts. Perhaps stronger collaborations with Alumni & Development Office could improve recruitment. Alum who live in other countries could be accessed to help recruit.

Increase Non-traditional Students
Are students who are returning to school adequately supported with more night and weekend enrollment opportunities? A non-traditional student lounge could help students find others who are not traditional college aged. Adult student organizations, campus events, social media pages, etc. could be better promoted. Right now, this initiative is in the Student Success Center and Student Involvement Center and is under-supported.

Increase Courses Offered during Non-peak Times
More night and weekend courses would increase building utilization and increase enrollments without the space limitations of popular class times. More general education requirements (GERS) should also be offered during the early morning and evenings. Right now, students struggle to graduate on time because most classes are held between 11 a.m. and 2 p.m. Thus, sometimes students cannot get into required courses because course times overlap with other required courses. This change would also increase non-traditional students. Governance committees and academic departments could be charged to figure out a process to schedule classes and hold programs accountable to have scheduling options that graduate students on time with many scheduling options. A plan to schedule classes could be implemented in one year and increased enrollments could happen the following year. This would require collaboration from the Provost, Deans, Registrar, and governance committees.

**Improve Training**

Dedicated and expanded HR with targeted training could increase the capacity and skill level of all staff across campus. One to two dedicated positions could make a huge change in increasing services. Staff are needed to support programs such as onboarding, supervision training, sexual harassment, search and screen chair training, budgeting training, managing conflict/difficult employees. This also could minimize the burden on employee issues that UITS, HR, Equity and Diversity Services, and other units face as employees will be trained better. Over the course of one year, one to two staff members could be hired to develop and provide training. Implementation could begin by asking the campus to submit names of staff who are skilled in training and staff development to lead this initiative. Individuals on campus who may be skilled at getting workshops running could lead this initiative (Autumn Anfang in Student Affairs, Continuing Education instructors, Human Resources Staff, faculty in related fields).

**Application Process for Non-Degree Seeking Students**

A streamlined process would increase summer enrollment. Currently, students must first apply through the UW System common application. Once all materials are in, the application goes to the Graduate School and then forwarded for department approval. This can take weeks to months. Meanwhile, other universities can get non-degree seeking students enrolled within a day or two. This process should be streamlined so that PAWS access is granted as soon as transcripts are in. Consolidating a level or two of approval could streamline this process. Additionally, files should be reviewed within 24 to 48 hours. Faculty could still have permissions set for specific courses. Right now, by time an application is processed, classes have begun. This change would capture more individuals who are interested in taking a course but who are not familiar with the lengthy enrollment processes. It also might draw more students in to degree programs. It would also cater to educators who often do not look at taking licensure courses until the K-12 academic year is complete. Schools, Colleges, Registrar & UITS should be tasked with streamlining this process.

**Streamline GER's**

Given the new budget model, the campus might feel that the GER issue can finally be tackled with sincerity to simplify GER requirements which will boost retention/graduation rates. It would be a large process to review all GERS that are taught in different departments and consolidate. Departments would have to be willing to accept GERS outside of their programs. (e.g. consolidate stats courses). This would lead to less confusion for students and staff. Implementing this initiative would take multiple years. Incremental improvements could be made at the faculty level with cross disciplinary support from deans. However, until requirements are simplified for students, gains will be minimal. Provost and governance committees should lead this charge.

**Online Programs**
Suggestion writers assume that online programs increase tuition revenue without increasing the need for other services. Transitioning to online programs would have to be strategic by focusing on units that have data to support that they can grow online enrollments. Furthermore, is there a societal need for these programs (i.e. What is the career outlook for these areas?) Additionally, program implementation must be carefully examined. Sometimes teaching online is more time consuming and more expensive than face to face classes. Furthermore, quality control must be maintained since online instruction requires different teaching methods. Laura Pedrick leads these initiatives and would be appropriate to explore potential additional efforts.

Web-Based Student Services
This suggestion requests a database for students to enter their courses to see what they still need for various degrees. This would require investment into software which probably would be maintained by the Registrar. This initiative would require Initial up front costs but could increase success and graduation rates. Since course requirements are complicated, this service will not necessarily help students who want to change majors graduate quicker. GERs issues still must be addressed. With streamlined GERs, would this be necessary?

Roberto Hernandez Center
Chancellor shared that he in interesting in UWM becoming a Hispanic Serving Institution. By increasing resources, student success and enrollments may increase. What other resources, programs, models, and best practices exist that can increase services to students? This initiative will require initial up front investment. Perhaps the Roberto Hernandez Center could have funding/initiatives similar to Lesbian, Gay, Bisexual, Transgender Resource Center and the Military and Veterans Resource Center—both of which have helped UWM retain an image of being supportive to students of the respective identities, thus helping recruitment.

Request Donors to Fund Positions
This could help advance special initiatives. Implementation must be carefully explored and regulated so that the mission is not compromised by reliance on private industries for funding. Mechanisms to evaluate and regulate this initiative will be necessary so that private industry interests do not supersede institutional interests. This is probably not appropriate for faculty positions where academic freedom is paramount. Professors must not feel pressured to produce certain research results.

Recruit High School Guidance Counselors while recruiting Undergrads
A suggestion was made to take advantage of the time spent recruiting undergrads to also recruit professional counselors who work with high school students. However, careful attention must be paid so that UWM does not misrepresent interests, goals, and recruitment activities. If high school students are the purpose of an event, that must be the main focus. At the same time, UWM should encourage all K-12 employees to continue education at UWM. Staff should always present the best image of UWM.

Open a School of Dentistry, CRNA
It is not seen as feasible to open a school during immediate budget cuts because up front expenses are too expensive and enrollment growth will take years to realize.

Incentive Based Pay
A suggestion was made for administrators get bonuses with increasing enrollments. However, campus sentiment is to not increase administrator pay. This idea also is based on the assumption that employees are not working hard enough to boost enrollments. Compensating for performance could compromise...
the mission and encourage admitting students who are underprepared or who do not have funding. Additionally, staff may feel pressured to change standards, cut corners, compete for the same students with other schools and college within UWM to boost enrollments. It creates culture of competition within colleges rather than collaboration.
**Proposed Annual Budget Development Process - Draft 10112015**

**Divisions**
- Develop Priorities

**Office of Budget and Planning**
- Develop Resource Allocation Guidelines
- Develop Resource Allocation Guidelines

**Resource Allocation Group**
- Develop Resource Allocation Guidelines
- Resource Allocation Group Allocates Subvention Funds

**Divisions**
- Develop 6-year Gross Revenue Forecasts
- Develop 6-year Expense Forecasts
- Develop 6-year Gross Revenue Forecasts are processed through Budget Model for Base Allocations to Divisions
- 6-year Base Revenue Allocation Forecasts are combined into 6-year P&L Statements

**Office of Budget and Planning**
- Meet with campus leadership to finalize 6-year Plan
- Review and Balance P&L Statements
- Reconcile 2013-14 3270 budget with Final 6-year Forecast
- Reconcile 2017-18 3270 budget within 3270

**Resource Allocation Group’s Subvention Funding Allocation Added to P&L Statements**
- Review: Reviews Funding Allocation Recommendations and provides feedback
- Deliberation: A review of needs for Alignment with:
  1. Performance metrics
  2. Campus Strategic Priorities
  3. Resource allocation guidelines
- Decision: Recommended funding allocations
- Finalized: Final funding allocations

**Divisions**
- Develop Priorities
- Develop Priorities
- Meets in CFP

**Office of Budget and Planning**
- Reconcile 2017-18 3270 budget within 3270

**Resource Allocation Group**
- Reconcile 2017-18 3270 budget within 3270

**Divisions**
- Reconcile 2017-18 3270 budget within 3270
- Reconcile 2017-18 3270 budget within 3270
B. CCOET CHARGE

Develop recommendations and a coherent plan that will improve the organization and effectiveness of our campus to (a) better serve our students, southeastern Wisconsin and beyond, and (b) better position us to achieve our campus objectives in student success, research excellence and community partnerships and engagement. These strategic directions are important, and will also ask the team to advise on our work on culture and climate as well as visibility, brand and image. As part of this plan, I ask the team to:

- Propose meaningful large-scale efficiencies, structural, or budget reduction recommendations or confirm those already underway at the School/College, Divisional, and overall campus levels that will provide significant assistance in closing a $25-$30 million ongoing structural deficit (the combined impact of previous enrollment declines, large biennial budget cuts and a 4-year tuition freeze) in a realistic time frame in light of significantly reduced reserve balances;
- Develop recommendations for consolidating organizational units, potentially including combining schools and colleges; deleting functions; shrinking the size of departments, offices, and activities; and
- Outline any other key areas of improvement and priorities needed in organizational effectiveness and administrative processes (in all units). Some key areas of improvement and priorities are already underway, in which case this Team may emphasize or confirm that this work continues to be a priority for UWM.

In making recommendations, CCOET’s focus will be on the “big picture” view, as opposed to the granular examination of budgetary issues. While it is likely that there are many good ideas on how to save funds or find efficiencies in small scale ways, these discussions are not within the scope of CCOET’s work. Rather CCOET will examine the ideal structure, scale and organization of UWM as outlined in 1a-1c. For additional framework to the process outlined in 1a-1c, CCEOT should note the following questions:

- What does UWM do well, and how can these areas be organized to leverage current strengths to advance the priorities of UWM?
- What cuts can be made or efficiencies can be gained in order for UWM to live within its budget?
- In what areas should UWM invest to grow strategically?

The initial task is to make recommendations on a process for how the campus can be engaged in developing this plan. This process should include a timeline and address the charges listed above. The initial draft proposal is due Thursday, October 1, 2015 (tentative). Feedback will be given and I ask that the plan and recommendations be completed by February 15, 2016.

Responsibilities thereafter will include making recommendations needed to advance the campus’ organization, structure, and processes as outlined in 1.a-1.c and 2.

There should be mechanisms developed whereby suggestions will be gathered from faculty, staff, and student governance groups and individuals for consideration as recommendations are formed. In addition, important inputs include the draft campus strategic plan and the Panther teams that have been formed to advance plans in each of these and other areas. In addition, having a call for ideas, as well as engaging a wide variety of campus constituencies, both within and across campus units and disciplines, and community partnerships, donors, alumni and numerous others are examples of expected avenues to pursue.
CCOET Co-Chairs will provide at least bi-weekly updates to the sponsors, as well as monthly updates to the campus on a webpage and through a formal report. The Co-Chairs and sponsors will determine specific roles of the team and support team and schedule for work completion.
C. CCOET STRUCTURE AND MEMBERSHIP

Provost Johannes Britz, Vice Chancellor Robin Van Harpen and Chancellor Mark Mone will serve as sponsors of the team.

The preferred CCOET primary team membership size is approximately 15 people, and will be co-chaired by Dean Bob Greenstreet and University Committee Chair John Reisel.

The preferred CCOET support team membership size is 12 people, and will be co-chaired by Director Paula Rhyner and Professor Kyle Swanson.

The CCOET will be drawn from a subset of the Chancellor’s Biennial Budget Planning Task Force, supplemented by deans, cabinet members, faculty, staff and students.

Primary Team (co-chairs*):
Bob Beck
Rachel Buff
Stan Yasaitis
Hobart Davis
Nadya Fouad
Bob Greenstreet*
Mark Harris
Michael Laliberte
Sally Lundeen
Joan Prince
John Reisel*
Paul Roebber
Alan Shoho
Mike Sportiello
Rodney Swain
Jerry Tarrer
Brooke Thomas
Robin Weigert

Support Team (co-chairs*):
Pat Borger
Ewa Barczyk
Scott Emmons
Brian Hinshaw
Stephen Kennedy
Cindy Kluge
Sean Cornell
Amanda Obermeyer
Ron Perez
Kanti Prasad
Paula Rhyner*
Kyle Swanson*
D. GUIDING PRINCIPLES

CCOET Meeting Guiding Principles:
The University of Wisconsin-Milwaukee (UWM) faces significant fiscal challenges resulting from unprecedented base budget reductions, a 4 year tuition freeze and declining enrollments. In addressing such challenges, UWM must strive to preserve, enhance and where appropriate develop its strengths and increase efficiencies where possible, while incorporating reductions as necessary. Given that the primary mission of UWM is preparation of high quality undergraduate and graduate students, priority must be given to upholding this mission in designing and implementing fiscal changes. To that end, the Chancellor’s Campus Organization and Effectiveness Team (CCOET) recommends the following guiding principles, recognizing that the strategies necessary to implement them will be difficult.

I. Recruit and retain an inclusive and diverse student body, graduating the maximum number of undergraduate and graduate students.

II. Preserve, enhance and where appropriate develop programs and activities that are central to UWM’s stated mission and continued operation. (The relevant question: What are the impacts on Guiding Principle I if this program/activity did not exist?)

III. Preserve administrative functions that are pivotal to UWM’s continued operations. (The relevant question: What are the impacts on Guiding Principle I if this function did not exist?)

IV. Preserve, enhance and where appropriate develop mission-driven programs that generate significant net revenue.

V. Consolidate and collaborate where possible to maximize efficiencies.

VI. Implement cuts and reorganizations and enhancements rapidly but with a view toward sustainability, providing long-term solutions rather than quick fixes.

VII. Develop incentives to enhance outcomes and morale.

Implementation Guiding Principles:
CCOET is making several options for the Chancellor to consider in making the needed budget cuts for the 2018-2020 biennium. Just as CCOET espoused several principles in guiding our work, we would like to suggest that the implementation of the options for cuts be guided by the following principles, in no particular order:

I. Remember UWM’s mission: Remember that first, and foremost, we are committed to providing excellent educational programs for our students. We are an institution with a commitment that access be kept in the forefront of all decisions. We are a research university whose faculty conduct programs of basic and applied research.

II. Keep in mind that people’s lives will be affected: All of these decisions will affect the lives of the students and employees at UWM, directly and indirectly. Some people will not work here anymore, many people’s work will be changed materially, and everyone will be impacted by the changes. We recommend that decision makers take all possible avenues to
communicate with the UWM community about the actions that will be taken, and remember that even those who continue to be employed will be affected.

III. **Transparency:** There will be hard decisions to be made, and some will be unpopular, but we recommend that all decisions be made with the maximum transparency possible.

IV. **Communicate often and consistently:** We commend all the efforts that have gone into keeping the campus community informed, and recommend that all processes and decisions be communicated in multiple ways to the campus community.

V. **Attend to campus climate:** Campus climate and culture is one of the strategic initiatives, but the next several months will severely try the campus climate. All members of the leadership team should brainstorm ways that they can engage in supportive and positive climate activities, for example, such as listening to people’s concerns, finding ways to support members of the campus community non-monetarily, or providing training for supervisors to communicate civilly.
E. PLAN OF WORK (WEBSITE, FAQS, LISTENING SESSIONS, QUESTIONNAIRES)

A robust website was created and regularly updated to provide as much transparency as possible to the campus community. This website included meeting agendas, meeting minutes, names of primary and support team members, questionnaires for campus community members, frequently asked questions, and other news and information. The survey was distributed both on the website and at the listening sessions. For additional information please visit [http://uwm.edu/budget/ccoet/](http://uwm.edu/budget/ccoet/). The following documents are taken directly from the website.
Frequently Asked Questions

What is the difference between the Budget Planning Task Force (BPTF) and the Chancellor's Campus Organization and Effectiveness Team (CCOET)?
The BPTF was formed in the Spring Semester 2015 to specifically address the budget cuts imposed by the legislature for the 2015-2017 biennium. The CCOET has a broader and longer term mandate and is charged with providing recommendations to deal with the projected $30 million shortfall in UWM's budget that is likely to occur in two years.

The CCOET started meeting in early October. They are accepting feedback via listening sessions (in October) and an online survey, and will submit a report to the Chancellor in February 2016. The BPTF has finished its work and has submitted its recommendations to the Chancellor. It will be reactivated as necessary.

Who is represented on CCOET?
The members of the CCOET were drawn from faculty, staff, students, and administrators from across campus. Several members were drawn from the Budget Planning Task Force to ensure knowledge of and alignment with the budget circumstances. The membership is divided into a Primary Team and a Support Team, and the members of these teams are listed below. While every group and interest on campus is not directly represented on the CCOET, many of the members were chosen due to their roles in governance groups on campus. This membership directly connects them to many more individuals on campus. Furthermore, so that everyone on campus has an opportunity to be heard, any suggestions and feedback to the CCOET is welcome.

Primary Team:
- Robert Beck  CIO (Associate Vice Chancellor)  Cabinet
- Rachel Buff  History Associate Professor  Faculty
- Stan Yasaitis  Admissions & Recruiting  University Staff
- Hobart Davies  Psychology Professor  Faculty
- Nadya Fouad  Educational Psychology Professor  Faculty
- Robert Greenstreet  Architecture & Urban Planning Dean  Dean
- Mark Harris  Associate Vice Chancellor Academic Affairs  Cabinet
- Michael Laliberte  Vice Chancellor of Student Affairs  Cabinet
- Sally Lundeen  College of Nursing Dean  Dean
- Joan Prince  VC of Global Inclusion & Engagement  Cabinet
- John Reisel  Mechanical Engineering Professor  Faculty
- Paul Roebber  Assoc. Dean of the School of Freshwater Sciences  Dean
- Alan Shoho  School of Education Dean  Dean
- Mike Sportiello  College of L&S Senior; SA President  Student
- Rodney Swain  College of Letters & Science Dean  Dean
- Jerry Tarrer  Associate VC Business & Financial Services  Academic Staff
- Robin Weigert  Honors College Associate Director  Academic Staff

Support Team:
- Patricia Borger  VC of Development & Alumni Relations  Cabinet
- Ewa Barczyk  Golda Meir Library Director  Academic Staff
- Scott Emmons  Peck School of the Arts Dean  Dean
- Brian Hinshaw  Assistant Registrar  Academic Staff
How will the CCOET communicate with the campus community?

There are two primary mechanisms by which the CCOET will communicate:

- The CCOET website was established as a key mechanism for communication from the CCOET to the campus community and from the campus community to the CCOET. Meeting notes, Frequently Asked Questions (FAQs), and survey results will be posted to the website. Additionally, questions from the campus community can be submitted via the website.
- Members of the CCOET Primary Team and Support Team will share information with others in their respective units. Additionally, individuals can submit input, feedback, and questions to any member of the CCOET Primary Team and Support Team.

What happens at UWM if the projected budget shortfall is not adequately addressed?

According to projections, if UWM continues its current financial trajectory and all factors (enrollment, tuition, expenditures etc.) remain constant, UWM’s balances will fall below zero within two years. Should the campus’ balances fall into the negative, it is unlikely that there will be any bailout from the State or System. If we cannot create a plan to achieve positive net operating income by the end of the biennium, it may become necessary to declare financial exigency. The consequence of this would include extraordinarily negative publicity for the campus, potential impact on enrollment, as well as heightened potential for layoffs among faculty and staff.

What programs can and cannot be cut?

Generally, the only areas with limitations with regard to initial consideration for budget cuts are programs to the extent funded by external grant support and auxiliary units (units funded primarily with 128 funds). The campus is working separately with UW System and auxiliary units to determine the appropriate mechanisms and levels for “taxing” 128 funding. Auxiliary units are located primarily in Student Affairs and include Athletics, Norris Health Center, the UWM Union, Restaurant Operations, Children’s Learning Center, Office of Student Life, Student Life, University Recreation, Student Association Professional Staff and Senate Appropriations Committee, and Parking & Transit (Parking & Transit is in Finance and Administrative Affairs).

How can I be involved in the CCOET efforts?

All UWM students, faculty, and staff are encouraged to become involved with the CCOET efforts. To that end, the CCOET has identified several strategies to facilitate campus-wide engagement. The strategies include:

- The CCOET website was established to provide a central site for all CCOET information: http://uwm.edu/chancellor/chancellors-campus-organization-effectiveness-team-ccoet/
- Open meetings of the CCOET Primary Team and Support Team to the campus community. The meetings of each team are scheduled for alternate Wednesdays from 3:00 p.m. until 5:00 p.m. in the Chapman Hall Regents Room. The meetings are listed as open meetings via the UWM
Secretary of the University website. The agenda for each meeting is posted as well. Following each meeting, meeting notes are posted to the CCOET website.

- Input and feedback can be provided to any member of the CCOET Primary Team or Support Team. The members for each team can be found at the CCOET website.
- Members of the campus community can share input and ideas during one or more of the scheduled Listening Sessions. The date, time, and location for each Listening Session can be found on the CCOET website.
- Members of the campus community are invited to share input via a survey on efficiency ideas and opportunity ideas. Copies of the survey are available at each Listening Session. In addition, a Qualtrics version of the survey is available via the CCOET website.

**When will we have a clear timeline about when we need to reduce the spending and by how much (or increase the revenue) to avoid going in the red?**

These are the steps in chronological order:

  Divisions provided the details of their cuts to the BPTF on November 6. BPTF will summarize and announce these details later in November.
  The divisions’ decisions about these cuts are due to the BPTF on December 23, 2015 and will be compiled and provided shortly thereafter.
- CCOET’s recommendations, which will focus on big picture savings and revenue-generation ideas, are due mid-February 2016. In the subsequent weeks, the Chancellor will review the recommendations and make final decisions.
**Listening Sessions**

To assist in addressing the long-term campus budget situation and to help better position UWM moving forward, Chancellor Mone has created the Chancellor’s Campus Organization and Effective Team (CCOET). CCOET has been charged with exploring all possibilities for improving campus operational efficiencies and organization for the purpose of relieving current budget pressures and to strengthen UWM. As part of these efforts, CCOET is seeking input from the entire campus community, including faculty, academic staff, university staff, and students. CCOET wants to hear your suggestions regarding the campus organizational structure and ideas for gaining efficiency in UWM’s operations. CCOET will be holding four listening sessions to provide all interested parties the opportunity to present their ideas. The dates and times of these sessions are:

Thursday, Oct. 15: Union Cinema (Noon - 2:30 p.m.)

Monday, Oct. 19: Union Ballroom West (6 - 8 p.m.)

Tuesday, Oct. 20: Union Cinema (9 - 11:30 a.m.)

Friday, Oct. 23: Union Ballroom West (2:30 - 5 p.m.)

In addition, if you are unable to provide your input at one of these listening sessions, a website will be available for you to use to present your ideas to CCOET. Further details on that website will be forthcoming.
Questionnaires

Listening Session Efficiencies and Opportunities Survey

Efficiency Ideas
Please use the following questions to guide your responses:
1. What ideas do you have for combining programs?
2. Where do you see opportunities for collaboration that might help to create efficiencies?
3. Where do you see duplication of effort?

Opportunity Ideas
Please use the following questions to guide your responses:
1. Where should we invest to help focus our efforts?
2. Where are our growth opportunities?
3. How can we increase our revenues?
Survey for Academic Reorganization

During the listening sessions and in subsequent discussions, CCOET has received a number of suggestions for reorganization of academic and administrative units on the campus. These suggestions have been published on the website but, as we continue to discuss options that both strengthen the academic mission of UWM and make economic sense, we are anxious to explore the full range of possibilities. If you have additional ideas on how the combination of either academic or administrative units will benefit our mission in the future, please share them with the CCOET team in this survey. Please respond by 5pm on Monday, December 21st.

To which Academic Unit/Department do you currently belong?

UWM currently has the following schools/colleges:
1) School of Architecture and Urban Planning
2) Peck School of the Arts
3) Lubar School of Business
4) School of Continuing Education
5) School of Education
6) College of Engineering and Applied Science
7) School of Freshwater Science
8) Graduate School
9) College of Health Sciences
10) School of Information Sciences
11) College of Letters and Science
12) College of Nursing
13) Zilber School of Public Health
14) Helen Bader School of Social Welfare

In your opinion, what is the ideal number of schools/colleges for UWM to have?
14 is fine
11-13
8-10
5-7
fewer than 5

Would your current unit/department benefit from enhanced formal or informal instructional or research collaborations with other units (unit = other schools or colleges)?
1) Definitely not
2) Probably not
3) Neutral
4) Probably yes
5) Definitely yes

Should a reorganization take place affecting your Unit/Department, which (if any) Units/Departments should be grouped together with you? (see list below)
Note: You may select more than one

School of Architecture and Urban Planning
Peck School of the Arts
PSOA - Art and Design
PSOA - Dance
PSOA - Film
PSOA - Music
PSOA - Theatre
PSOA - Inter-Arts

Lubar School of Business
School of Continuing Education
School of Education
SOE - Administrative Leadership
SOE - Curriculum and Instruction
SOE - Educational Policy and Community Standards
SOE - Educational Psychology
SOE - Exceptional Education

College of Engineering & Applied Science
CEAS - Civil and Environmental Engineering
CEAS - Computer Science
CEAS - Electrical Engineering
CEAS - Industrial and Manufacturing Engineering
CEAS - Material Science and Engineering
CEAS Mechanical Engineering

School of Freshwater Sciences
Graduate School
College of Health Sciences
CHS - Biomedical Sciences
CHS - Communication Sciences and Disorders
CHS - Health Informatics and Administration
CHS - Kinesiology
CHS - Occupational Science and Technology

School of Information Studies
College of Letters & Science
L&S - Art History
L&S - Communication
L&S - English
L&S - Foreign Languages and Literature
L&S - French, Italian and Comparative Literature
L&S - Philosophy
L&S - Spanish and Portuguese
L&S - Translation and Interpreting Studies
L&S - Women and Gender Studies
L&S - Biological Sciences
L&S - Chemistry and Biochemistry
L&S - Geosciences
L&S - Mathematical Sciences
L&S - Physics
L&S - Africology
L&S - Anthropology
L&S - Economics
L&S - Geography
L&S - History
L&S - Journalism, Advertising, and Media Studies
L&S - Linguistics
L&S - Political Science
L&S - Psychology
L&S - Public and Non-Profit Administration
L&S - Sociology

College of Nursing
Joseph J. Zilber School of Public Health
Helen Bader School of Social Welfare
HBSSW - Criminal Justice
HBSSW - Social Work

Brief comments:
Thank you for submitting your feedback. This concludes the survey.
Statement of the American Association of University Professors – UWM Chapter

Principles of Organization and Effectiveness
Presented to CCOET in November of 2015

The graduate students, academic staff and faculty of UWM’s AAUP chapter call on CCOET to recognize and prioritize the vital role of teaching and research in both generating revenue and promoting the university’s core mission while working to balance the university’s budget. We call on CCOET to abide by the following principles in its work:

1. Make protecting employment of staff and faculty the first priority of any reorganization.
2. Uphold AAUP-compliant practice on tenure, indefinite status, and shared governance.
3. Any changes to compensation, whether through salary cuts or furloughs, should do the least harm. Those earning more should contribute more.
4. In keeping with the research mission of UWM, work to raise graduate stipends as well as to make salaries of faculty and staff competitive.
5. Protect racial, ethnic, gender and sexual diversity among faculty, administration, students and staff.
6. Education is a right: students at UWM have a right to affordable college education. Ensure that in restructuring the university, costs are not passed on to students.
Statement of the UWM Distinguished Professors

Presented to CCOET, Chancellor Mone, and UW System about Research and the Budget Cuts

We Distinguished Professors come to you as members of a remarkably strong faculty that has taken root at UWM despite the historical lack of state support. As a group, we are officially charged with actively promoting and encouraging the research and creative activities of all UW Milwaukee faculty, which is what provides students at all levels with cutting-edge course work, and also charged with promoting undergraduate and graduate student recruitment. Budget cuts coupled with tuition freezes over the last several years have already made both research and recruitment difficult. UWM lags far behind its peers in support for research, faculty and staff salaries, and stipends for graduate students, which means that it loses faculty, staff, and students to universities in other states where support for public education remains stronger. Thus many of the best and brightest, who could help Wisconsin prosper in the knowledge economy of the present and future, either leave or never come to Wisconsin in the first place. The latest round of budget cuts makes this situation even worse, and they hit UWM just as it is trying to build research infrastructure in many areas of immediate concern to the state and its citizens.

UWM serves as a key intellectual and creative force for our state and community, providing an irreplaceable resource for the social, economic, environmental, and cultural prosperity of Milwaukee and the surrounding area. Its faculty, students, staff, and alumni address and solve problems and issues with local to global dimensions, and we graduate more Wisconsin residents than any other campus in the state. The Distinguished Professors Committee of UWM has thus endorsed unanimously the following statement of principles and recommendations to guide the budget allocation process of 2016 and beyond, and allow UWM to retain its key role.

Principles
In this time of severe budget compression, it is paramount that the preservation, sustenance, and elevation of UWM’s academic core be the central goal of the budget and related strategic planning. Only through a vibrant academic program can the campus Strategic Vision will be fulfilled: “We will be a top-tier research university that is the best place to learn and work for students, faculty and staff, and that is a leading driver for sustainable prosperity.” As faculty at UWM who have spent our careers advancing knowledge, and who have brought millions of dollars in grants and contracts into the state to support the university and its students, we know that research and creative activity is what drives the whole academic enterprise, as seen in the figure below:
Although they are more difficult to quantify than student tuition dollars, research and creative activity provide the dynamic foundation and structure for excellent student learning experiences at both the undergraduate and graduate levels, and are thus the ultimate source of those tuition dollars. Working with their teachers and mentors at the frontiers of knowledge, UWM students become well prepared for the 21st century knowledge-based society. Moreover, research infuses community engagement with expertise, allowing a broad range of community and business concerns to be addressed through powerful partnerships. Local, regional, institutional and private support grow as residents, organizations, and businesses understand that UWM is a powerful research university critical for their future that educates students for excellence.

The only way to continue these benefits is to retain and strengthen the superb faculty and staff who make research and creative activity and the education of students possible. This will also provide the only way to meet the Strategic Initiatives in the draft Strategic Plan, including: the development of a top-tier research environment that promotes growing research impact; the creation of a “Milwaukee Experience” to make UWM a destination campus that engages students and supports their development; the improvement of pathways for partnerships/collaborations with the local community and businesses; the delivery of relevant, innovative, engaging and distinctive academic programs; strengthening and expanding UWM’s support within the region and across the state.

Recommendations

1. We urge the CCOET to develop its budget recommendations, and Chancellor Mone and UW-System to make decisions about the budget, based on the understanding that UWM is a research university and that all we do as an academic institution flows from that identity and its expression in the sciences, humanities, arts, and professions. Concretely, this means sparing the academic core of the university from budget cuts in order to preserve UWM’s future, as cuts in the core would lead to an impoverished research base from which to pursue innovation and progress. Thus, all cuts must come from units that do not directly handle the core academic teaching and research mission, or through administrative reorganization that will shrink the
budget, and may, in fact, enhance possibilities for research by allowing faculty and graduate students to work across what are now artificial boundaries rather than be stymied by them.

2. We urge the CCOET, Chancellor Mone, and UWS to strengthen UWM as a research university by raising the stipends of graduate teaching assistants to the national averages of their respective fields so that we can attract uniformly high quality graduate students in sufficient numbers to sustain and grow UWM as a research university. This is our first priority for budget enhancements.

Competitive stipends will solve several problems:
- They would provide the quality and numbers of graduate students needed to restore and then develop our graduate programs. Right now we are in a death spiral because programs cannot compete for such students, and we have a much-reduced ability to recruit bright minds to bolster Wisconsin’s economy and pursue innovation and progress.
- High quality graduate students will encourage top-flight faculty to stay and commit to UWM, as well as to consider coming to UWM in the first place.
- An improvement in graduate student quality will lead to increased extramural funding and academic recognition for UWM.
- High quality TAs mean enhanced undergraduate teaching and research, in which TAs commonly provide some supervision. The outcome will stimulate our primary aim to provide excellent education for all of our students.
- As both the research excellence and quality of our graduating undergraduate and graduate students climb, UWM will secure its key aim to be recognized by students/parents and the public as a destination campus. This realization will stabilize student numbers, an absolutely critical outcome, and stimulate donations from institutions and private donors.

Providing an increase in graduate assistant stipends is essential to maintaining our position as a research university rather than a comprehensive. Limiting a research mission to one public university, and that not in the state’s major metropolitan area, will place Wisconsin in the lowest tier of states, disastrous in today's knowledge economy.
G. GROUP AND INDIVIDUAL STATEMENTS

Individual Statement A:
Chancellor’s Campus Organization & Effectiveness (CCOET) support and primary teams were divided into 3 teams that worked independently on the following areas:

3. Position Control
4. Administrative Organization and Balance
5. Academic Reorganization

Each of the teams was not aware of what the other teams were drafting and were not asked to provide feedback on each other’s drafts. The CCOET committee members received the agenda (attached) for the January 20, 2016 meeting at 12:53 pm on Tuesday, January 19, 2016 and a "Final Draft Report" (attached) at 1:43 pm on Tuesday January 19, 2016. Due to prior commitments, I did not start reviewing the "Final Draft Report" until Tuesday night but I jotted down areas that I wanted to discuss with the Committee during the last agenda item (“Discussion of overall Draft Report strategy and plans for further refinement”). Unfortunately, another meeting prevented me from attending the CCOET meeting, but I was sure that there would be other opportunities to discuss the draft report with the group given the great significance of this report.

To my surprise and concern, there was only that brief Committee discussion of the complete draft report on January 20, 2016, no other group opportunities were provided and the upcoming Wednesday January 27, 2016 scheduled meeting was canceled via an email at 8:22 am on Tuesday, January 26, 2016 (the email further indicated that “there are no more CCOET meetings scheduled at this point”). It was suggested that I write up my concerns to be included in the CCOET report as a “minority report”. While I have other concerns, I will focus these comments on the basic issue of the selection of academic units to be merged without following the process outlined by the committee.

The team that worked on “Academic Reorganization” suggested a framework to be used by the campus leadership to explore academic reorganizations, namely B.3.E.I and B.3.E.II:

B.3.E.I.
"To begin the process, campus leadership should analyze the current organization of the campus, and identify schools/colleges/departments that may be better organized for future success and growth of the campus. Campus governance units should be engaged in this analysis."

B.3.E.II.
"Campus leadership should identify and implement incentives that promote reorganization of units."

Unfortunately, the team that worked on “Academic Reorganization” chose to disregard its own recommendation to the campus by proposing B.3.E.IV and B.3.E.V:

B.3.E.IV:
“Campus leadership should consider merging of the School of Freshwater Sciences with CEAS, SARUP, or L&S.”
B.3.E.V: "Campus leadership should consider merging of the Zilber School of Public Health with the College of Health Sciences.”

This double standard is unfortunate more so since no factual evidence is presented to support B.3.E.IV and B.3.E.V, these recommendations are incompatible with the process that is recommended, the units that were singled out were not engaged to ascertain the viability of these recommendations. The mergers that are suggested to the campus leadership in B.3.E.IV and B.3.E.V are treated as fait accompli and liberally incorporated throughout the document e.g. "CHS/ZSPH" (rather than CHS, ZSPH); "CCOET proposes exploring the merging of SFS and ZSPH into other units, while having other mergers driven by faculty" (an unsupported double standard); "Combined College of Health Sciences/School of Public Health" (rather than College of Health Sciences, Joseph J. Zilber School of Public Health).

It is stated in B.3.E. (4): “some small units may not be affordable from an administrative view as stand-alone units,” but no metric is defined as to what is a “small-unit” (e.g. based on faculty/staff size? based on budget? based on size of budget deficit?). The implicit assumption is that a not-so-small-unit is acceptable even though perhaps some not-so-small-unit(s) may be running deficits sometimes very large deficits, or may not be as efficient as small-units. This non-strategic focus is most unfortunate and could steer the discussion into an adversarial terrain.

It is unfortunate that as a member of CCOET that my participation in the final report has been reduced to submitting a minority report. This situation is in stark contrast to the Chancellor’s charge to engage in a transparent process, using the best financial and modeling data available to make viable and strategic recommendations for the campus. I hope that going forward, a strategic process that applies uniformly would be developed and followed.

Respectfully submitted

Ronald Perez
Chancellor’s Campus Organization & Effectiveness Team (CCOET) Support Team Member

Attachment: As Stated
CCOET Primary & Support Team Agenda January 20, 2016

1. Approval of minutes of previous meeting.

2. Reading of Draft Report document and subgroups’ work plan of action.

3. Break into Position Control, Administrative Organization and Balance, Campus Reorganization and Parking Lot subgroups. Review and expand draft reports and continue to address the following questions in each area:
   a. ESTIMATED SAVINGS
      • How accurate are the estimates?
      • What is the method of calculation?
      • What other factors should be considered?
      • What other information do we need?
   b. CONSEQUENCES
      • What are the negative consequences of pursuing the strategy?
      • What will we lose and what impact will it have on UWM’s mission?
      • What positive consequences might be realized? (Less bureaucracy, greater academic synergy etc.)
   c. BEST PRACTICES
      • Where has the strategy been implemented on other campuses?
      • What were the successful outcomes?
      • What were the unintended outcomes?
      • What were the pitfalls?
      • Which ideas are transferrable to UWM?
   d. PROCEDURES TO MINIMIZE DAMAGE TO UWM’s MISSION
      • What can we do to limit or avoid negative consequences? (Phased change, pilot change etc.)
   e. INCENTIVES
      • What incentives can be developed that reward positive change that result in economy and stronger performance?
   f. PROCESS FOR IMPLEMENTATION
      • If the strategy is adopted, what procedural steps should be followed for successful implementation?

4. Discussion of overall Draft Report strategy and plans for further refinement.

5. Adjournment
Coupled with stronger links to Institutional Research, this cross-cutting functional structure can accelerate the data analysis process to develop strategic responses to improve student outcomes across a variety of student success domains. A similar model could be considered at UWM. This would presumably include gathering Undergraduate Admissions, Center for International Education, Financial Aid, Student Accounts, Registrar, and Career Planning and Resource Center under one administrative report within the Provost's office.

Such reorganization will enhance consistent messaging and should be accompanied by transparent flow of student information through the Student Success Center.

The Report erroneously conflates International Student & Scholar Services (ISSS) with the Center for International Education (CIE). This shows a profound misunderstanding of both CIE and ISSS, just one unit within CIE. CIE is a comprehensive International Center under the direction of the University’s Chief International Officer, the Vice Provost for International Education. CIE is engaged broadly in campus internationalization and offers support for faculty engaged in international research, domestic students studying and doing internships abroad, international interdisciplinary conferences and publications, community outreach on global issues, K-12 international education outreach, the Global Studies interdisciplinary majors, area and international studies majors, as well as the work with international students, scholars and faculty done by ISSS.

Not only does this model grossly misunderstand the comprehensive international work of CIE, it too narrowly imagines the work of the part of CIE represented in the graphic above, International Student & Scholar Services. While part of ISSS is international admissions and part of ISSS is international student immigration advising, ISSS has broader responsibilities that extend beyond the realm of student services and go to the heart of the UWM’s teaching and research mission. ISSS collaborates with faculty, departments, Schools and Colleges to sponsor international visiting scholars, researchers, and post-docs, as well as UWM international faculty thorough the permanent residency (aka “Green Card”) process. Many of UWM’s top faculty have at one time been “clients” of ISSS and their ability to conduct their critical research and share their expertise with UWM students was directly as a result of visa expertise cultivated within ISSS and nurtured by CIE.
Additionally, student immigration status information cannot become part of a “transparent flow of student information through the Student Success Center (report page 13, second to last paragraph).” Immigration status information is protected and is more similar to health records than to records of grades, advising records, etc. The Department of Homeland Security (DHS) authorizes specific, vetted individuals to act as “Designated School Officials” and those are the individuals entrusted with the student immigration status advising and regulatory compliance management on behalf of the institution. UWM’s DSOs reside in ISSS at CIE. These are more reasons that even ISSS does not align with the proposed model.

I suggest removing CIE from the list of units above (see highlighted area).

Page 33: The final report reads:

*Increase International Student Enrollment*

*International students often pay full out-of-state tuition. The Chancellor’s Enrollment Management Action Team and Chancellor have discussed an International Student Enrollment Management plan. In addition to the numerous measures the Center for International Education is taking to increase enrollments, other campus units might also enhance these efforts. Perhaps stronger collaborations with Alumni & Development Office could improve recruitment. Alum who live in other countries could be accessed to help recruit.*

This was part of the parking lot, which I worked on. I do not know how the part about Alumni got in there and I would suggest removing it. It is weak and not founded on understanding of the issues involved with international recruitment and areas that are being used and explored, not to mention have been successfully used to increase international students at UWM. There are far better ways to enhance international student recruitment, as the work of CIE over the past decade has shown. International student numbers have been consistently growing as a result of a combination of approaches taken by CIE, including building the UWM brand overseas through recruitment fairs, university, sponsoring agency, and government partnerships, building relationships with higher education agents worldwide, among others. We will hopefully soon see a new pathway program that will further increase UWM’s international student numbers.
Individual Statement C:

Chancellor Mone,

I write this on behalf of the Student Association in our advocacy and representation of students. While I do have several specific thoughts on the options that the Chancellor’s Campus Organization and Effectiveness Team (CCOET) is providing, I have less issue with the specific options provided, but a much larger issue with the general strategy that was used to develop those options.

The Budget Planning Task Force (BPTF), of which I was also part, was tasked to find a large sum of money for the first year of the cut. We used whatever available funds we could to preserve all parts of our mission in the best way we could. After that, CCOET was tasked to find a sustainable, best way forward for UWM in how to solve our structural deficit.

As a student of this university, and as someone who has been part of the budget-cutting process since the very beginning of this biennium, I understand any way forward in this situation is bad for students. Of course, we may find some true efficiencies along the way, but overall, removing millions of dollars from our budget is sure to have a negative impact. Having said that, these particular recommendations leave UWM worse off than it has to be, because of the way this problem was approached: we’ve attempted to preserve the “old UWM” we are used to, and as a result, we risk seriously compromising the quality of UWM’s student success and research. Instead of making UWM smaller in our scope of what we excel at, we’ve slashed all parts of this university equally, attempting to preserve most every activity we’ve ever done. That is, instead of knocking down walls to create a newer, smaller, high-quality UWM, we’ve let those outdated walls stand and removed the valuable innards that those walls were built to protect.

Let me be very clear: what I am not saying is that UWM cannot be a student-oriented, access institution, as well as a world-renown research university. I’ve seen firsthand the value of UWM’s programs that support UWM’s access mission as both a student leader and as an orientation leader over this summer. Furthermore, I’ve experienced over the last two and a half years both the educational and societal value UWM’s research adds to the UWM and our community as a student who partakes in undergraduate research.

What I am saying is that there exist a variety of programs here that do not benefit enough students to warrant their expenditures with our current structural deficit in mind. There exists a
variety of majors or programs that few students take classes in, yet cost the university large sums of money to keep open. To me, the way forward is clear: a more specific, narrowed conception of what UWM is. It’s that, or relegate ourselves to a lower tier of student success, research, and community engagement. Personally, I don’t blame CCOET for the direction we took with such a short time frame, as we were told not to consider program modification.

With that in mind, I ask for your support in some guiding principles, in addition to the implementation principles CCOET developed. Firstly, is that students continue, as they have been, to be involved in any implementation discussions. Students were given seats on the Budget Planning Task Force as well as CCOET, and a mutual respect and understanding was developed between all parties. We thank you for including us thus far, and simply ask for that to continue.

Secondly, I ask you to continue to maintain good practices in how segregated fees are used at UWM. Segregated fees should not be used to fund essential or academic-producing activities at UWM, according to regent policy. The allocable segregated fee has been determined by countless hours of student work, whereas the non-allocable segregated fee is set at the administrative level. Shifting any more cost onto this segregated fee is against the very spirit of segregated fees, as well as bad for students, as it is, fundamentally, an increase in the cost of college. Options within the CCOET Final Report recommend using segregated fees to pay for certain activities or services currently funded with GPR funds, and I hope you reject these.

One particular option that “some members” support is shifting career, cultural, and inclusiveness centers onto segregated fees. I could not oppose this more, as all three of these services are essential to the successful mission and values of UWM. We cannot uphold student success as a core value if we don’t consider career, cultural, and inclusiveness fundamental pillars of student success. Furthermore, in respect to the cultural and inclusiveness centers, I worry that already marginalized groups will be further marginalized by this shift in funding, as they would be shifted to a more fickle funding pattern, as individual segregated fee allocations must be approved by both students and the Board of Regents every year. I would also like to explicitly point out that CCOET recognizes Student Association’s role in determining the allocable segregated fee.
Student Association is interested in further researching the pros and cons of credit plateaus, and the effects it would have on retention effects of both full time and part time students. I would like to thank the members of CCOET that were very explicit to mention that this would be considered under close communication and dialogue with the Student Association.

Several members of Student Association have both positive and negative thoughts about different ideas within the possible plans for campus academic reorganization. We understand some of these were included only to provide as holistic approach as possible, and have little chance of being implemented. Nonetheless, we look to be included in these discussions.

Student Association has cultivated deep personal and professional relationships with the faculty, staff, and administration this last year. We are excited to continue the tradition of shared governance in a productive, dialogue-focused manner.

I believe UWM’s mission as both an access and research university both can and needs to be preserved for the people of this city, state, and region. It’s no secret that our students go off and accomplish incredible things, or that our research saves lives. I have no doubt that UW-Milwaukee will emerge from this tough financial time as a leader of this state. I just hope we do so sooner rather than later in a way that upholds our mission of access and research, as well as our focuses of student success, community engagement, and inclusiveness.

Mike Sportiello
Student Body President
University of Wisconsin-Milwaukee
Individual Statement D:

Important questions have been raised during the CCOET meetings about the possibility of reducing student segregated fees. I share the following information to increase the campus understanding of segregated fees, provide additional context, and discuss possible impacts of reduced segregated fees.

1. Through the governance process, the Student Association requests the campus to provide specific services to support students while attending UWM. To obtain these services, students are charged segregated fees with full expectation that the university will provide the requested services.

2. Each year a critical review of student segregated fees occurs from October through June. Each unit presents and justifies its operating budget through a shared governance process via the Student Association. This budget is reviewed and approved by the Chancellor and UW System with final approval by the Board of Regents.

3. Segregated fees fund the approved operating budgets. The budgets change from year to year due to changes in campus and UWS service charges, rent changes, changes in fringe benefits, and, for units such as University Recreation and the Union, infrastructure needs such as HVAC and track replacements among others.

4. Some components of segregated fees are “pass throughs” to students. For example: UPASS (student bus pass) is $90.20 per student per year (6.8%) and Municipal Services $8.50 per student per year.

5. Allocable segregated fees (student services determined specifically by the students) is $333.31 per student per year (25%)

6. Many students come to UWM because of the services available to them. For example, UWM has a 1st class Children’s Center and renowned Military Veterans Resource Center. UWM is also a nationally ranked LGBT friendly campus in part, due to the strength of the LGBT Resource Center among others (such as Peck School of the Arts’ initiatives). Athletics also brings students to UWM. If programs are reduced, students may go elsewhere. Thus, reducing services may negatively impact enrollment.

7. Like many units on campus, a number of positions funded by segregated fees have been unfilled or eliminated in response to operating budget reductions. In many units, staffing reductions immediately jeopardize essential student services (i.e. if a Counselor at Norris or a lead teacher at the Children’s Center leaves, services to students are immediately lost).

8. Over the past years of accumulating budget cut allocations, segregated fees have increased to support these significant allocations. Recently, most of these direct allocations were shifted to auxiliary units or to segregated fee funded units via other alternative reductions (Rent, GPR reduced, or GPR removed). To manage allocations, segregated fee units and auxiliary units have reduced operating budgets. Annually, over $1.7 million in is returned to campus via direct budget cuts and via “the campus expansion fee” to address GPR reductions at UWM. This is in addition to annual fees for municipal services, common systems, UW System assessments, and so on.

All members of the campus community feel the effects of budget cuts, including all units in the Division of Student Affairs. Any considerations to cut segregated fees will eliminate services to students, as a number of cuts have already occurred. Additionally, cuts to segregated fees will negatively affect all units on campus, as illustrated in point 8 above.

During this period when our campus already faces overwhelming budget challenges, we should not recommend additional budget cuts. The option to cut segregated fees is counter to the mission of CCOET.

Regards,

Rebecca Freer
**Individual Statement E:**

The section on “Teaching Load” in the CCOET Suggestions for Further Study is not as strong as I thought we discussed. This should really be a consideration of “Workload Policy” with sufficient flexibility for a research institution. This may require the adoption of a different workload policy that is less linked to the 4 unit model. I would suggest adding to the last paragraph that one of the options beyond enforcement or revision, is the development of a new Workload Policy to replace the teaching load approach.

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