2030 Implementation Team Report
February 1, 2021

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I. Introduction

The current time period is one of extraordinary challenge for institutions of higher education and UWM has not been immune from the effects of those challenges. A steady decline in state revenue coupled with a decade-long tuition freeze has reshaped our financial resources, a situation made more difficult by the Covid-19 crisis. Declining student enrollment has foreshadowed a reality that may be exacerbated by predicted future demographic changes in college-aged students. Social and political upheavals have brought more urgent calls for diversity and equity to the fore. And these challenges come during a time when some voices in society question the value of a college degree. These forces align to make the present time one in which we must acknowledge the need for change.

It is in this atmosphere that Chancellor Mark Mone assembled the 2030 Task Force, which worked from October 2019 to May 2020 to reply to the Chancellor's charge to imagine what UWM should look like in 10 years. The Task Force report made a series of recommendations aimed at making a UWM education distinctive in the highly competitive higher education marketplace and maintaining the campus' reputation as a leading research university. In October 2020, Chancellor Mone created the 2030 Implementation Team, a group of approximately 100 students, faculty, and staff from across campus. This group came together to discuss and map implementation strategies for a series of specific recommendations for change on campus around four main themes: Reforming the Undergraduate Experience, Creating a Radically Welcoming Campus Environment, Realigning Schools and Colleges, and Maintaining Research Excellence. After several months of research, collaboration across campus, and evaluation of potential paths, the 2030 Implementation Team puts forward a plan for activity that seeks to realize the vision laid out in the 2030 Task Force report.

Given that the forces influencing higher education and UWM are not new, our campus has been engaged in improvement and evolution for several years. Our campus community is smaller, leaner, and more nimble than it was even 10 years ago. Various groups and units on campus have undertaken activities to strengthen undergraduate education and promote the success of all students. We have efforts underway to make our campus community more diverse, more equitable, and more inclusive. The continued strength of our graduate education and research profile are recognized by our Carnegie R1 status. It is crucial to acknowledge that the recommendations in this report build on a foundation that has been laid by several recent campus initiatives. In turn, the recommendations provide a baseline for implementation of the institutional changes that are needed.

Moving forward, changing UWM will require the focused efforts of both campus leadership and the entire community. Campus leadership should commit to (1) integrating existing activities with the 2030 Implementation Team recommendations to achieve optimal organization and execution of these goals, (2) prioritizing resource allocations for key activities and positions to ensure that implementation of the recommendations is achieved, (3) ensuring that adopted recommendations have sufficient commitment behind them so that they can be realized; and (4) sustaining oversight and commitment to ensure continued evolution of these efforts to meet future needs. Faculty and staff have important leadership roles to play in carrying out these recommendations as well. They will need to be open to changing UWM in light of current and future challenges. They will need to engage throughout this process because significant aspects of this work will require the engagement and support of formal governance bodies, as well as department and unit-level work to implement changes. It is the case that successful changes to campus will only be realized when all community members are engaged and working together.

Implementing the reforms recommended by the 2030 Implementation Team provides an opportunity to consider how to best use the campus community's resources (time and money). At the same time, we must be realistic about the time and effort that implementation it will take. Faculty and staff have taken on additional uncompensated burdens on their time and expertise in recent years and are approaching (or are at) their limits for absorbing more work and responsibility. Several of the recommendations offered here require investment of financial resources and staff positions if they are to be successful. Thus, implementation of 2030 recommendations will require campus leadership to prioritize activities and decide how to best invest time and financial resources. Simply expecting people to take on additional roles and responsibilities will not suffice, and financial resources are limited. Thus, some activities will need to be curtailed or terminated.

As the state of Wisconsin's only urban public research university, UWM plays an important and distinctive role in southeastern Wisconsin and the state as a whole. We are uniquely positioned to pursue both an access mission and a high-level research mission. Our campus offers students a unique opportunity to live and learn in the state's largest city, with all that it has to offer. It gives students access to national and international employers, whether in business, industry, non-profits, the arts, health care, or education, among others. UWM has a strong foundation on which to build so that we can continue our evolution while retaining our distinctive identity and purpose. The 2030 Implementation Team's recommendations are intended to give shape and focus to the next phase of that evolution. At a broad level, the recommendations seek to make UWM more student-centric and more engaged with its community. These are naturally aligned with our mission of serving southeastern Wisconsin through our educational and scholarly activities.

This report is broken into three sections: (1) recommendations for seven major initiatives to implement the key points of the report; (2) a brief outline of the recommendations in the individual group reports; and (3) a list of the members of the various groups. The outline merely lists group recommendations. More details are provided in the individual group reports in the appendices which present the essential research, background, rationale, and details regarding the proposed initiatives. We encourage readers to consult these reports.

II. Recommended Initiatives

1. Becoming a Student-Centric University

A number of efforts are currently underway to provide more support for students. Collectively they focus various activities on providing services and supports for students in a manner that is centered on a student's needs and access to supports. In general, these initiatives can be implemented within a year. They involve the cooperation of multiple high-level units (Academic Affairs, Student Affairs, Finance & Administrative Affairs).

The major components are distributed among the Radically Welcoming Institution (RWI) and Revising the Undergraduate Experience (RUE) reports:

- Pathways to Success (RWI)
    - Collaborate to Create a Cohesive Pathway to UWM
    - Pre-College (Automatic Admission, K-12 outreach, high-achieving students)
    - Map student's Pathways to Graduation
- College Affordability (RWI)
    - Scholarships (Portal, Need-Based, State of Wisconsin Tuition Grants)
    - FAFSA and Financial Wellness program
    - Retention and Emergency Grants
- Student-Centric Experience (RUE)
    - Coordinated Advising and Support Structure
    - Training and Technology for Student Services
    - Unique Student-Centric UWM Experience

This initiative is clearly of primary importance for UWM's future. It will be essential to be more student-centered in all of our dealings with students and to provide effective and seamless support for them.

Implementation

- Lead: We recommend that oversight and coordination of these efforts be combined under one person at the Associate Vice Chancellor level for whom this is their primary (or only) job.
- Partners on Initiative: Advising, Enrollment Management, Student Affairs, Academic Affairs, Finance & Administrative Affairs, UITS, Development
- Resources:
    - This initiative will require the time and commitment of a number of people spread across various units. While many of the parts are in development, these need to be coordinated and presented in a manner that is student-centered.
    - Additional staff (1-2) will be needed to carry these programs into the future.
- Timeline: Most aspects can be implemented within 6-12 months

2. Revising the Curriculum

UWM's core curriculum has developed to include a variety of University, College and Program requirements that can be difficult to navigate, impede student progress, and discourage academic collaboration. Some of these issues arise from history and others from financial considerations. These

should not prevent us from aligning the core curriculum to common learning outcomes and removing the barriers students face.

The importance of this effort is to (1) focus the General Education program explicitly on developing students' lifetime skills and abilities; and (2) break down barriers to students' progress and reduce time/credits to degree completion. This initiative will move our core curriculum to focus on our students.

The components for this revision are in the Revising the Undergraduate Experience report:

- Revise the Core Curriculum by reforming the General Education program
- Implement an Experiential Learning requirement for all programs
- Revise the campus budget allocation model (see #8 below).

Implementation

- Lead: Academic Affairs
- Partners on Initiative: Faculty Governance, Deans, Departments
- Resources
    - This initiative will take a significant and sustained commitment of time to discuss and develop an acceptable proposal.
    - Once implemented, changes should be able to be incorporated into normal curriculum development.
- Timeline: Anticipate need for a semester of discussion, followed by a 6-12 months to implement. It will require progress on budget revision and possibly realignment initiatives.

3. Increasing Inclusion and Diversity

In order to serve society and the Milwaukee community, UWM must make a commitment to equity and to becoming more inclusive and diverse. This is critical to the institution's future and to the success of its graduates. While advances have been made, this effort needs to penetrate our culture and inform actions across the entire campus.

The key elements are contained in the Radically Welcoming Institution report (Belonging, Hiring and Training for Staff and Faculty section), although other reports also identify this as a critical need. The main elements are:

- Equity Awareness
- Hiring, Recruitment and Retention (also see the Research report recommendation #4 on faculty hiring)
- Maintaining a Campus Culture of Relational Success
- Belonging

The primary unit supporting this effort is the Office of Diversity, Equity and Inclusion, but this initiative must engage and impact all parts of the university.

Implementation

- Lead: Office of Diversity, Equity and Inclusion
- Partners on Initiative: Admissions, Academic Affairs, Student Affairs, CETL, HR

- Resources: This initiative will take a significant commitment of time from a variety of stakeholders across campus.

- Timeline
    - We have the components but need to integrate them and operationalize these initiatives into our work.
    - Program development: 6 months; full array of training and process work: 1-2 years

4. Aligning UWM's Academic Workforce

UWM's academic workforce includes a broad array of individuals: students, staff and faculty. Their contributions vary across units and during a career, but most reward structures do not reflect these variations. In order to assemble and retain a high-quality workforce to advance instruction, research and other academic initiatives and systems, UWM must make cultural and policy changes to support these diverse contributions.

The major elements of this initiative are included in the Research and Realignment reports:

- Improve rewards and recognition system to reflect the full range of work being done
- Create flexibility in assigning faculty effort to reflect different contributions ("workload policy")
- Revise Promotion and Tenure guidelines to recognized different forms of scholarship
- Adopt Research and Teaching Professor titles
- Provide better support for graduate students
- Expand opportunities for undergraduates to participate in research

These changes are largely related to culture and policies, but they will require substantial investment of time to make appropriate policy changes.

Implementation

- Lead: Academic Affairs
- Partners on Initiative: Human Resources, Faculty and Academic Staff Governance, Deans
- Resources
    - Changes to policies and guidelines will take investment of time
    - Increasing support for graduate stipends and faculty salaries is a long-term issue
- Timeline
    - Policies and Guidelines: anticipate 1 year

5. Re-Assessing Unit Alignment

UWM has a relatively large number of schools and colleges compared to peers, as noted in the Realignment Group report. This leads to some inefficiencies but supports the unique identity of some units. That team outlined the potential benefits and shortcomings of various approaches to realigning units. The major recommendations are to

- Reduce the number and composition of college-level units (for which several options are suggested); and
- Modify existing Policies and Procedures to accommodate positioning schools within colleges.

The Realignment team's report provides information and suggestions for the next steps in the realignment process. It should be noted that any realignment will intersect with General Education reform and alterations to the budget model.

Implementation

- Lead: Academic Affairs
- Partners on Initiative: Faculty Governance, Deans
- Resources
    - This initiative will take a significant and sustained commitment of time to discuss and develop an acceptable proposal.
    - This initiative will require modification to Policies & Procedures
- Timeline: Anticipate need for a semester of discussion, followed by a 6-12 months to implement. Will probably require progress on budget revision.

6. Refocusing Research Infrastructure

UWM's research environment is shifting toward increased use of team-based research, community collaborations and commercial partnerships. This requires changes to the research infrastructure to support the shifting needs of investigators across the institution.

The Research group's report presents some critical needs:

- Establish support units at the level of colleges/schools (or combinations of them) to provide vision and consistent research services that fit the needs of the academic unit(s).
- Centralize some research infrastructure (core facilities for major research equipment, grant matches, collaborative research spaces)
- Restructure internal funding programs to address two basic needs: seed funding and research career development.
- Develop opportunities for informal faculty interactions about their research
- Invest in a position for research compliance (reflecting commercialization activity).
- Increase support for Entrepreneurship by developing courses devoted to entrepreneurial skills and by broadening the UWM-Research Foundation I-Corps to engage a wider range of researchers.

These recommendations are a mixture of changes to current programs and those requiring a cooperative effort across several divisions.

Implementation

- Lead: Vice Provost for Research
- Partners on Initiative: Academic Affairs, UWM Research Foundation, Deans, Financial & Administrative Affairs, Development Office, Strategic Partnerships
- Resources
    - This initiative will require the time of a number of people spread across various units.
    - Additional staff (2) will be needed for compliance work and developing collaborative research.
    - Longer-term needs for developing research investment funds
- Timeline: varies 6 months – 2 years; move to core facilities, shared support units

7. Updating the Budget Model

Almost all groups indicated that the current budget model requires adjustment to meet UWM's needs. Most notably, the model heavily weighs SCH in determining unit allocations. This discourages instructional collaborations and encourages the establishment of barriers that retain student credit hours within units. In addition, financial systems do not handle collaborative instruction or research in a transparent manner which makes it hard to document collaborative efforts. The challenge will be to develop adjustments that preserve unit incentives, but which also accommodate institutional change.

It is beyond the scope of this report to recommend specific changes, but we must emphasize that revisions are essential to implementing General Education reform, unit realignment, and collaborative research. Thus, this is a priority item that must be addressed to remove a primary obstacle to implementing some of the institutional changes recommended in this report.

Implementation

- Lead: Vice Chancellor for Financial and Administrative Affairs
- Partners on Initiative: Academic Affairs
- Resources: This initiative will require the time and commitment of a number of people.
- Timeline: 6 months for development although implementation may take another year.

8. Growing the UWM Foundation Endowment

Following the lead of the Think Tank 2030+ Recommendations issued in May 2019, growth of the UWM Foundation endowment to $500M by 2030 is critical to enable all the priorities described above.

Implementation

- Lead: Vice Chancellor for Development and Alumni Relations
- Partners on Initiative: Academic Affairs, Chancellor, Deans, Strategic Partnerships, University Relations and Communications, UWM Foundation and others.
- Resources: This initiative will require the time and commitment of a number of people.
- Timeline: This goal will be folded into the planning of the next comprehensive campaign which is a multiple-year effort.

III. Outline of Group Recommendations

1. Radically Welcoming Institution

Section 1: Institutional Culture and Climate

- A Need for Coordination and Action
- A Need for Centralization
- A Need for Leadership
- A Need for Accountability
- A Need for Equitable Hiring Practices

Section 2: Belonging, Hiring, and Training for Staff and Faculty

- Initiative 1: Equity Awareness
- Initiative 2: Hiring – Recruitment, Onboarding, and Retention
- Initiative 3: Maintain a Campus Culture of Relational Success
- Initiative 4: Belonging

Section 3: Pathways to Success

- Initiative 1: Collaborate to create a cohesive pathway to UWM
- Initiative 2: Automatic Admission to UWM for Milwaukee High School Graduates
- Initiative 3: Expanding programs/outreach for K-12 students
- Initiative 4: Attract and Retain high achieving students from surrounding region, particularly focusing on access to MPS, first generation and diverse populations
- Initiative 5: Map student's pathway to graduation

Section 4: College Affordability

- Initiative 1: Robust Need-Based Fundraising Efforts
- Initiative 2: Create Campus-wide Need-based Scholarship
- Initiative 3: Award All Wisconsin Tuition Grant Funds
- Initiative 4: Coordinated Comprehensive Efforts to Promote FAFSA Completion and Financial Wellness
- Initiative 5: Update the Scholarship Portal to be More User-Friendly and Automated
- Initiative 6: Institutionalize Retention Grants
- Initiative 7: Optimize All Campus Student Emergency Funds

Also:

- Increase the use of open-sourced texts
- Prioritize affordable food options on campus
- Reimagine the campus dining meal plan model
- Enhance the UWM Food Center and Pantry
- Expand laptop loan program to continue beyond pandemic
- Expand the WIFI hotspot program to continue beyond pandemic
- Designate a coordinated care location within the UWM Student Union

2. Revising the Undergraduate Experience

Core Curriculum

- Structure General Education program around clear learning goals
- Limited course array
- Universal requirements across Schools/Colleges/Programs
- Outcome-Specific Course Caps
- Reform budget and administrative practices that incentivize units to compete for the student credit hours generated by General Education courses

Student-Centric Experience

- Coordinated Advising and Support Structure
    - Undergraduate Advising
    - Coordinated Care Network
    - Campus Operations Transparent and Consistent
- Training and Technology for Student Services
    - Use Navigate to coordinate and collaborate on student support
    - Develop infrastructure to use complete data set to drive changes
    - Consistent training and development for advisors, etc.
    - Strengthen faculty engagement in supporting students
    - Train frontline staff to be informed and accountable to a unified vision of student success
- Unique Student-Centric UWM Experience
    - First-Year Experience course and New Transfer Experience course for first semester at UWM
    - New Student Welcome Week
    - Experiential Major Maps for student's co-curricular activities
    - Create a unique UWM Campus Life experience

Experiential Learning

- Implement graduation plan for Freshman class of 2022
- Rigorous marketing campaign targeting internal and external stakeholders
- Create options for students and value different forms of Experiential Learning
- Use data-driven decision making to ensure quality and effectiveness of Experiential Learning

3. School, College and Program Realignment

General

- Incentivize better collaboration and cooperation among colleges, specifically at the academic program level.
    - Implement some form of Euro-fication of SCH
    - Revise Budget model to be more flexible
- Policy changes to allow schools within colleges
- Other
    - Change tenure/guidelines
    - Joint positions become the norm

    - Cluster hiring

Five Models

- Minor Tweaks
- Reorganize Professional Schools
- Meta-Majors (6 units)
- Hybrid of Meta-Majors and Reorganize Professional Schools (~ 8 units)
- Extreme Consolidation (3-5 units)

4. Research Excellence

Research Workforce

- Invest in the Development of Research Careers
- Flexible assignment of work/effort
- Improve Faculty Rewards and Recognition
- Increase diversity, equity and inclusiveness of our research workforce
- Implement academic staff Teaching Professor and Research Professor titles
- Increase support and professional development for graduate students
- Advance and better leverage undergraduate research programs

Research Infrastructure

- BRIDGE
- Revise financial system and budget models to support research
- Research Compliance

Collaborative and Team-Based Research

- FRIEND
- Align research positions with research initiatives

Innovation and Entrepreneurship

- Broaden I-Corps
- Support for after I-Corps
- Alumni mentor program
- Improve the visibility to researchers of the UWM-RF tech transfer and commercialization services

IV. Team Members

Lead Co-Chairs

Kathleeen Dolan, Co-Chair
Mark Harris, Ch-Chair

Revising the Undergraduate Experience

Kathleen Dolan, Co-Chair, Distinguished Professor, Political Science, College of Letters & Science; Chair of Univ. Comm.
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Radically Welcoming Institution

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APPENDIX A: 2030+ IMPLEMENTATION TEAM
RADICALLY WELCOMING INSTITUTION SUBGROUP

INTRODUCTION

The 2030 Think Tank charged UWM to make cultural and structural changes to become a radically welcoming institution. They stated,

> "UWM must be the anchor institution for Milwaukee and region, including southeast Wisconsin, and will serve the needs of the citizens of the region, and reflect the populations served, within UWM and by UWM. As such, UWM must more intentionally engage with the city and surrounding areas and be viewed as a welcoming and accessible institution. This will require changes in UWM's institutional culture, structure, and affordability to residents of the city of Milwaukee.
>
> UWM seeks to achieve the aspirational reality of being perceived by students of all backgrounds as a place to engage meaningfully with a world-class faculty and staff who are invested in a student's academic and personal development, growth and academic experience. This includes the encouragement of UWM to embed principles of liberation, equality, and diversity into the learning experiences for students so that students from all backgrounds understand their value as equal members of the learning community. Equally important for achieving this aspiration is that UWM is received by the people and communities it serves as an authentic academic partner that is committed to principles of diversity, equity, and inclusion and creates opportunities for social mobility and racial equality and justice through research and community engagement."

The 2030 Implementation Team steadfastly put together a blueprint on how to advance the recommendations in the Think Tank Final Report.

It must be noted that much of the 2030 Think Tank's work took place prior to many major events of 2020 (e.g., ongoing pandemic, the most recent demands for racial justice, civil unrest, and increasing polarization) that have significantly reshaped higher education, our communities, and our world. These major events have required us to act quickly. As such, the implementation team has found that several recommendations are already underway, are even more urgent, or must be even bolder to meet the moment. Thus, the implementation team includes added insights and recommendations to further advance the 2030 Think Tank's charge.

The Radically Welcoming Institution (RWI) subgroup talked to dozens of campus groups, departments, and offices. Our work is comprised in the following four sections:

SECTION 1: INSTITUTIONAL CULTURE AND CLIMATE

SECTION 2: BELONGING, HIRING, AND TRAINING FOR STAFF AND FACULTY

SECTION 3: PATHWAYS TO SUCCESS

SECTION 4: COLLEGE AFFORDABILITY

SECTION 1: INSTITUTIONAL CULTURE AND CLIMATE

The Implementation Team heard common themes threaded throughout our conversations with campus colleagues about existing efforts and ideas for future initiatives. In response to the charge given by the Chancellor, particularly as it relates to culture and climate, it feels important to directly address the reoccurring themes we heard from committee members and staff. In this section, we highlight the themes that have the greatest impact on UWM's culture and climate. In the wake of a global pandemic which has cost many lives, wrought economic devastation to many communities and laid bare the rifts in American society, the following is less a set of concrete initiatives ready for implementation and more a call for healing and reconciliation. Still, it is important that these challenges are understood to precede and not be attributable to the unprecedented challenges of the past year.

We preface this section by stating that we have discussed whether to include this information in our report. We truly believe that UWM administrators work to act with the best intentions and we have compassion for leaders who have the tremendously difficult task of guiding us during these tumultuous times. We've collectively lost loved ones, fallen ill, and have faced unprecedented challenges both at work and at home. Under this backdrop, this feedback is even more challenging. However, we would be remiss to exclude critical observations that we believe will help us truly become a radically welcoming institution. Thus, we ask that you read these with the understanding that we have the best of intentions.

We humbly submit the following feedback and recommendations for the Chancellor's Cabinet to guide our culture and climate at UWM:

A Need for Coordination and Action

Staff[1]from across the campus repeatedly shared frustrations about our decentralized structure and work happening in silos. This has contributed to duplicated efforts and inefficient use of time when two or more groups try to address the same issue in different ways. For example, one group might make a recommendation to operate within an existing system whereas another group might recommend revamping the entire system. When staff are aware of other groups, they spend valuable time coordinating efforts, figuring out what work has already been done, figuring out how to coexist, and so on. This slows down progress in an era where we must be nimbler. Furthermore, in some cases, groups make recommendations to implement programs that already exist.

Examples of this issue repeatedly emerged as we explored the 2030 initiatives. Similar issues are being tackled in various workgroups including Moonshot for Equity, Momentum Pathways, Chancellor's Enrollment Management Action Team (CEMAT), Pathways and Interventions, M-cubed, Academic Taskforce on General Education, Enhancing Advising, Diversity, Equity, and Inclusion (DEI) Work Group, 2030 Implementation Team, and so on. Though staff are working hard on these efforts and are invested in the success of the initiatives, they are not consistently working together to tackle similar or overlapping issues efficiently. We were surprised to find this scenario over and over, and in some cases, groups were not even aware of one another.

Further, teams are often unsure about who is empowered to carry forward an initiative or if the initiative will be supported by administrators for broad implementation. Often teams put in significant effort into making strong recommendations, but the tough decisions needed by administrators are not

[1] In this report, "staff" or "employees" collectively refer to faculty, staff, and administrators for clarity and brevity.

executed. For example, within the 2030 Implementation team, we have discussed the work from CCOET and CSOWG several times. We believe that all the recommendations in this document have been shared at some point over the past several years. UWM does not suffer from a lack of ideas or people willing to do the work. Rather, implementation of ideas has fallen short of expectations.

We strongly recommend that the Chancellor's cabinet refrain from future committees and instead charge administrators with developing and implementing plans. Administrators are a better fit because they can be held accountable to achieve outcomes and they have the authority to direct the work of others. Administrators can then choose to put together committees as they consider necessary for collaboration and feedback so long as they lead the implementation.

A Need for Centralization

Similarly, throughout this process, we learned about several wonderful high impact practices that are implemented on a small scale. For example, several schools and colleges have implemented a first-year seminar. However, because such efforts are not scaled across campus, UWM does not fully realize the benefits of these initiatives. Not only do students have inconsistent experiences with high impact practices at UWM, staff within schools and colleges also duplicate efforts. Further, staff who lead these initiatives are often stretched thin as they lead several other retention initiatives for their school or college. We believe that centralized efforts would allow UWM to have greater outcomes without, in many cases, the need for more staff. More so, we believe centralized efforts will give space for staff to specialize and advance their expertise. When efforts are duplicated, there is no single person who has the time and resources to implement initiatives well.

Specifically, we recommend one administrator to oversee all initiatives within a specific area so that we can provide more coordinated and effective services. For example, in our recommendations below, we endorse bold ideas to merge academic support units under the leadership of a vice provost level administrator who would be charged with coordinating seamless student academic experiences. We acknowledge that while we were drafting this report, organizational changes to the academic support units and enrollment management units were announced. Though we believe the grouping of these units are a step in the right direction, they are not enough. We call for bolder, more comprehensive changes to be a radically welcoming institution. For example, we recommend structures that allow for greater integration of branch campus operations. Additionally, we recommend that campus leaders are given the expressed authority to oversee campus-wide functions (e.g., advising, first year seminars, etc.) in addition to units they lead.

A Need for Leadership

Across UWM, staff and students are calling for visibly collaborative and visionary leaders. The financial difficulties we face reinforce our need to be the urban campus that successfully engages students to support them in achieving their goals. Substantive lasting change comes from cultural reinforcement where we are all willing to give up some things to achieve a larger goal. We believe this work must start within the Cabinet and spread outward.

The first way administrators might tackle this issue head on is by ensuring that leaders of all departments and divisions are aware of the dire consequences of not making changes to our structures, programs, and services. We recognize that some of this work is underway, however, we recommend undaunted engagement. A common observation during our meetings with colleagues is that the Chancellor's Cabinet and other campus administrators seem to prematurely abandon initiatives under

the presumption that faculty will reject them. Several staff have expressed hearing phrases such as "it will never get through governance" or "faculty will not support this" from cabinet members and other campus administrators before initiatives are brought to governance groups. Hence, challenges with shared governance appears to be overstated. The 2030 Implementation Team believes that governance groups will be on board with many initiatives if they understand the issues and financial challenges.

There is shared belief throughout campus, that the Chancellor's cabinet must drive bold change. For several years, discussions about the need for a one stop shop and challenges with advising, GERs, course scheduling, and the number of schools and colleges have taken place; however, little progress has been made. Campus partners have stated that we do not need more committees; rather, campus administrators and those responsible for the areas where change is needed should lead implementation.

The campus community does not see members of the cabinet working together on shared efforts to advance a common vision for UWM. Further, staff within divisions are often unaware of the efforts and goals of other divisions. This separation, regardless of whether perceived or real, impacts the work. *The campus community strongly recommends that senior administrators intentionally and visibly work together to model this for the campus community.*

A Need for Accountability

We further recommend that senior administrators work on and explicitly define our campus identity and priorities, in a way that is measured by increases in retention, diversity, and equitable student outcomes. Colleagues across campus have requested for members of the Chancellor's Cabinet to set ambitious, specific, and measurable goals to propel cross-divisional efforts, reduce silos, lead to bolder actions, and drive a greater sense of urgency.

Furthermore, because we do not regularly share comparisons with our peer institutions, many members of the campus community do not understand the extent of our challenges. For example, it is common knowledge that UWM strives to increase retention, but it is not well-known among employees by how much we must increase retention to be on par with (and exceed) our peer institutions. We call for ambitious goals that are motivating and draw all our efforts toward the common goal. To start, we recommend the Cabinet set two-year and five-year goals for retention and graduation respectively for Pell eligible students and students from historically underrepresented groups to be equal to the average retention rates of our peer institutions. Additionally, we also seek ambitious goals for credits taken per semester, fundraising, and diversity among administrators, faculty, staff, and students to name a few. The 2030 Implementation team recommends that these goals be displayed on dashboards to show our progress.

Similarly, many members of our campus community expect campus leaders to hold others to account. Lack of accountability has also fostered a culture where plans and actions are unpredictable, and employees feel undervalued. Employees have expressed feeling that their work is unnoticed or set aside unused. Staff are treated similarly if they work very little or work very hard because UWM lacks consistent systems for accountability and redirection or reconciliation, meaningful recognition, professional development, and fair opportunities for advancement. This brings us to our final and most significant piece of feedback.

A Need for Equitable Hiring Practices

To become the radically welcoming institution that we aspire to be, UWM must invest time in honest assessment of its own institutional identity, its complex past, and its precarious future. We must consider our place in local, regional, and global culture. We must accept the challenges of the rapidly shifting society we find ourselves responsible for co-creating. This must begin with the Chancellor's Cabinet.

Specifically, the practice of making direct appointments is in direct conflict with our diversity, equity, and inclusion framework. Whether it be a national search, UW System search, or a search limited to UWM, we must conduct search and screening processes as a foundational effort toward attaining equity and ending systemic racism within UWM. The 2030 Implementation Team cannot put forward meaningful recommendations for increasing equity and diversity at UWM when these processes are overlooked.

For example, several colleagues offered the very recent example of the appointment of the Vice Provost of Student Success and Associate Vice Chancellor of Enrollment Management. Additionally, the Director of Equity and Diversity Services was made by direct appointment without a search and screen. Several other similar appointments were noted as well. We recognize that in some cases of interim appointments (e.g., dean positions), failed searches have occurred prior to direct appointments. We understand such exceptions and respectfully call for searches to always being pursued first. These appointments without recruitment reduce new ideas, diversity, and opportunities flowing through the Cabinet and undermine staff morale. Staff who seek to advance, struggle to navigate how to do so when searches are not conducted. Our primary recommendation here is discussed below in Section 2. Additionally, we encourage the cabinet to direct Human Resources across all areas of campus to institute its policies and the new DEI hiring process.

Institutional culture changes slowly only with consistent modelling and accountability from those who are in the highest positions. We look to the Chancellor, the Provost, and the other members of the Cabinet to "create an institutional culture of relationship building and equity with a goal of achieving educational equity and justice at UWM." Instituting cultural, structural, and hierarchical changes, laid out in the radically welcoming section of the 2030 implementation plan will be a step in the correct direction.

SECTION 2: BELONGING, HIRING, AND TRAINING FOR STAFF AND FACULTY

Introduction

The 2030 Final Report, written in May of 2020, issues the following call to action:

> Achieving overarching goal #1 will require an intentionality across all employees, programs, and levels of UWM to create an institutional culture of relationship building and equity with a goal of achieving educational equity and justice at UWM. Everyone working at UWM needs intensive and ongoing development to improve strategies supporting student engagement and competency to engage in the principles of diversity, equity, and inclusion (DEI). A faculty or staff member who is knowledgeable about and capable of implementing best practices to support students of diverse backgrounds is fundamental for attracting, retaining, and graduating all students. If all faculty and staff are focused on building a campus climate to promote educational equity and establishing relational networks that support student success, then UWM will become a first-choice

destination for all students. Because having a goal of educational equity must be authentic, the committee recommends centering the principle that being welcoming is everyone's job at UWM.

In the wake of current events, the following is less a set of concrete initiatives ready for implementation and more a call for healing and reconciliation.

We must more authentically engage with colleagues and students about deep harm felt by current events of exclusion, bias, and hate. UWM has not yet found a means of communicating strong commitment to the issues of our time. Messages are often safe but not strong enough to unite the campus. Students and staff want to know UWM is a place where administrators are willing to explicitly state and act in ways that protect them from hate and discrimination they are experiencing on and off campus. Anything short of this cannot be believed to be radically welcoming.

The Radically Welcoming subgroup, in particular the set of individuals tasked with considering intentionally elevating belonging and community well-being, has concluded that UWM has considerable work to do to become welcoming. UWM is not well prepared to attract and retain a diverse group of employees and students who will freely accept one another and strive toward a future built upon relational success. An important belief shared by many cultures is, "to love others, one first must love oneself." This same can be said for acceptance and support. We must take the long path of building trust, kindness, equity and genuine care into our shared workplace culture and systems to become a campus that is truly welcoming to all.

The set of recommendations below supports existing internal systems intended to foster equity and inclusion and highlight ways in which we must construct new ways to ensure we can demonstrate ways we work well together, seek justice together and reconcile the inevitable grievances that arise. If we do this, we will then be able to radiate a sense of confidence, conscience, and community that is welcoming to all.

Initiative 1: Equity Awareness
Initiative 2: Hiring – Recruitment, Onboarding, and Retention
Initiative 3: Maintain a Campus Culture of Relational Success
Initiative 4: Belonging

Initiative 1: Equity Awareness

SECTION I: OVERVIEW

Equity awareness includes holistic acceptance of other individuals' beliefs, practices, and roles in a shared social system. At UWM this must be developed and maintained across the workforce of staff and cohorts of students served by our institution.

Recommendation: All members of the UWM campus community should receive anti-racist, anti-bias training to help people reflect on their own and others' intersectional position in society.

- The training should include accurate historical and cultural information regarding race and identity to establish shared definitions and practices of respect.
- The training should be tailored to the position the person is in.
- Annual or bi-annual renewal of "certification" should take place and require a conversation with a supervisor.

Purpose: To shift culture and practices to foster a campus environment that affirms and celebrates marginalized and minoritized communities. This liberatory structural change invites people to show up fully and unapologetically as all of themselves, while being part of the UWM family.

Linkages to other Initiatives /Current work: This work is already underway within a DEI workgroup and should be supported as it moves forward.

- Center for Excellence in Teaching and Learning (CETL) has created a Teaching for Multicultural Inclusion and Equity Workshop and Certificate Program.
- Global Inclusion and Engagement (GIE) has developed an antiracist, antibias training for all employees. Chancellor's Cabinet completed the training last December. The program will be launched at the beginning of Spring semester. GIE and the Office of Assessment and Institutional Research (OAIR) implemented the *Toward an Antiracist Campus* mini-grant program that funded ten groups to carry out actions and activities aimed improve campus climate.
- Admissions has included topics of diversity in New Student Orientation.
- School of Education has launched an Equity Action Plan and numerous departments and units have created diversity committees.

Initiative champions: This work should be a part of every office on campus and continue to be developed by GIE, CETL, and Human Resources and maintained through the institutional channels of onboarding for students and staff.

Resources needed: The resources required to implement and maintain equity awareness are built into existing training.

Risks and concerns: The risks related to this initiative include individuals or entire units falsely believing that equity has already been achieved. However, equity is more of a journey rather than a destination. Thus, training is needed that focuses on how equity will be practiced. It must be continuously offered and advanced to foster increased awareness behavioral change among all campus community members.

Outcome: Effectiveness will be measured by the reduction in staff and student grievances and via a regularly distributed climate assessment.

SECTION II: ACTION STEPS

This initiative is already underway and requires the full support of the administration. The DEI workgroup recommended the following specific action steps:

Immediate Steps:
Customized Learning Opportunities. Implement a "Racial Justice and Equity Program" for all employees and students, beginning with those in leadership positions (department chairs, directors, associate deans, deans, associate vice chancellors, vice chancellors, cabinet members, and chancellor).

a. Develop a targeted curriculum, including history of race, implicit bias, white privilege and allyship fundamentals that would be available for employees to complete virtually, either as self-paced training or in a facilitated cohort.
    i. Seek volunteers from Spring 2020 USC Race and Equity Center cohort and DEI Training Work Group to serve as "racial equity facilitators". Ensure that facilitators represent the

different employee categories. By including local/UWM facilitators UWM will foster a sense of ownership among our campus community.

ii. GIE staff and volunteers would create the curriculum by curating publicly available resources (some of which are available in Appendix B), which would then be structured into "tiers" so individuals could choose the path that works best for them (i.e., a "beginner" course on history of race and structural racism, then something more advanced for individuals who already have a foundation in the history). A facilitation guide will be developed. Ultimately, UWM employees would be expected to participate in some of the curriculum in support of the campus diversity goals.

iii. Create an accountability system with actionable follow-up to training. Supervisors would be held accountable for employee completion. Employees would receive a certificate upon completion. Diversity goals should be outlined in the annual performance evaluation process. Division heads/leaders would report their DEI status annually.

b. Offer opportunities for extended learning and growth to all leadership, faculty, academic and university staff who are interested and wish to enhance their learning and ability to foster a more equitable—and racially just—campus.

i. Host a film series with post-screening discussions, including but not limited to:

1. 13th (2016), Ava DuVernay: explores racial inequality in the USs and disproportionate imprisonment of African Americans.
2. Race: The Power of an Illusion (2003), A three-part documentary produced by California Newsreel: explores concept and origin of race.
3. Just Mercy (2019), Destin Daniel Cretton: addresses systemic racism.

ii. Organize book discussions, including but not limited to:

1. Stamped from the Beginning by Ibram Kendi.
2. White Fragility: Why It's So Hard for White People to Talk about Race by Robin DiAngelo.
3. White Rage: The Unspoken Truth about our Racial Divide by Carol Anderson.
4. Blindspot: Hidden Biases of Good People by Mahzarin R. Banaji.
5. Intersectionality and Higher Education: Identity and Inequality on College Campuses by Byrd et al.

iii. Collaborate with CETL to ensure existing modules (e.g., LGBTQ+ Inclusivity and Teaching for Multicultural Inclusion and Equity) are included in the menu of options from which faculty and staff can choose.

Long-term Steps:

- A comprehensive climate study focusing on diversity, equity and inclusion to serve as a baseline for where UWM stands today. This survey should be conducted on a three-year cycle in order to determine if we are improving or need to adjust, adapt or expand efforts. Data should be at the foundation of this initiative not only from a survey but based on analysis of data on recruitment and retention of our faculty, staff, or students. Furthermore, this data should be transparent and made available. The UW System Climate Study may work as a tool.
- UWM should identify a vision for equity and adopt a uniform statement that would be threaded through all essential learning, in job postings, in student recruitment efforts, and in policies. This would be a guiding principle that the campus community would know and uphold in all its efforts.
- Essential development opportunities for those in leadership positions should include tools for reflection on past decisions within one's operational area in order to realize the potential impacts of those units on diversity.

- Review campus policies and procedures to ensure standards are clear, equitable and do not result in the marginalization of any individual group.
- Develop a standard implicit bias training for all search and screen committees.
- Develop a training series for supervisors on leading diverse teams which would include the above identified leadership trainings.
- Develop training modules for faculty, staff and students that enable cultural change.

The 2030 Implementation Team supports all of these recommendations. We further recommend that the Vice Chancellor for Global Inclusion and Engagement work with the Cabinet to immediately begin item a, "develop a targeted curriculum, including history of race, implicit bias, white privilege and allyship fundamentals that would be available for employees to complete virtually, either as self-paced training or in a facilitated cohort." We recommend that the Chancellor's Cabinet prioritize funding this initiative with the following:

- Call for interest in anti-racist, anti-bias curriculum development. To identify campus experts who many already have experience in this area, we recommend an application process.
- Funding. We recommend an employee(s) buy-out to ensure the staff have adequate time to do this well.
- Once the curriculum is developed, seek volunteers to train the trainers. Curriculum shall require the use of facilitators regardless of whether it is offered in person or virtually (no self-paced online modules).
- Charge human resources with tracking employee completion for current employees.
- Charge human resources with including this training in on-boarding for new employees.
- The Chancellor and Provost meet with the governance executive committees to propose the creation of a policy requiring that all employees take the training.

Initiative 2: Hiring - Recruitment and Retention

SECTION I: OVERVIEW

A radically welcoming campus is one where employees reflect the diversity of our greater community. Several campus groups have noted that UWM staff currently does not reflect this diversity. We can measure this with via data from our recruitments (e.g., if we post positions or make direct appointments, where we post recruitment announcements, demographics of applicants, demographics of new hires) as well as retention or employees (i.e., overall demographics within different employee classifications, length of time employees of different demographic groups remain within the UWM community).

Intentional efforts regarding equity must be prioritized in both recruitment and retention. Efficient and deliberate external searches allow for UWM to advance both its equity goals and foster a greater sense of belonging among staff. Hiring processes that lack transparency and consistency creates space for inequity, whether intentional or not and whether real or perceived, and harms our culture and climate. Additionally, employee retention preserves institutional knowledge and allows units to develop inter-generational systems of evolution in teaching, research, and service to our students. Furthermore, who is retained is critical. Losing employees from marginalized identities more than others reflects an unwelcoming culture and climate (which we address in other sections) where some employees maybe be afforded more advantages than others. Intentional and standardized practices will foster a culture where all employees, especially employees of identities historically underrepresented in higher

education leadership, faculty, and staff positions, feel equity is valued. We begin with the following recommendations:

- Hiring procedures should be clear, transparent, and consistent throughout campus. See Appendix I for specific hiring and employee development recommendations.
- All open positions should be posted. UWM should use direct appointments sparingly and strategically as they do not promote equitable opportunities for current employees or provide opportunities to bring in fresh ideas from external hires.
- "Interim" positions should be allowed only in emergency situations for short times (i.e., 3 months). Many individuals cited ongoing extended interim positions as a problem. Extended interim positions are not the norm within higher education in the US as they create instability in units and burnout among staff. Yet, UWM has grown so accustomed to interim positions being held for several months or years that campus administrators seem to commonly engage in this practice as a part of their hiring strategy. This must be stopped.

Linkages to Other Initiatives/Current Work: Several groups have already begun this work.

- As part of the Chancellor's DEI Compact, the Faculty Action Team (FACT) has begun work on the initiative and has representation from every school and college.
    - Ensure there is an equivalent process for the recruitment and retention of Research Staff, Instructional Staff, and Non-Instructional Staff.
    - Work towards pay equity on campus and in relationship to comparative roles within higher education.
    - Introduce restorative practices to divisional employees as an approach to build community, dialogue and address conflict.

Initiative champions: This work must be implemented and maintained by Human Resources with oversight the Cabinet. Equity and Diversity Services regularly compiles information related to UWM's affirmative action goals. The Cabinet and HR must review and share with the campus community these goals and metrics to drive strategic and targeted efforts to improve equity via recruitment and retention.

Resources needed: No additional resources are needed but the existing system for receiving input from employees should be strengthened.

Risks and concerns: The only risk related to this initiative is not doing it which risks loss of investment in personnel and exposure to litigation when hiring practices are not handled properly.

Outcome: Effectiveness will be measured by diversity of employees at all levels and within all divisions and schools and colleges.

SECTION II: ACTION STEPS

Many positive changes have been implemented over recent years, but there is a sense that there is a need for more consistency so that all employees perceive equity in opportunities for advancement and various units maintain the same standards in hiring.

The actions for advancing this initiative have already begun within the campus-wide DEI Council which is guided by a three-phase action plan. This group was charged to "prioritize diverse faculty and staff

recruitment, retention and development strategies (understand climate drivers and ensure that they promote a welcoming and supportive environment)" as one of their actions. This 2030 Implementation Team recommends that the recommendations of their efforts are fully supported and implemented.

Initiative 3: Maintain a Campus Culture of Relational Success

SECTION I: OVERVIEW

Purpose: Across UWM there is a need for more integration of strategic goals structures that reinforce messaging about shared success (i.e. we all benefit when we work together). In every school and college, individuals cited unit-level competition as a barrier to overall success. We recommend the following:

- Formulate budget models that incentivize collaboration.
- Support structural changes that ensure equal access to resources including opportunities for development.
- Carefully monitor marketing and messaging from the Provost and Chancellor's office to ensure the full breadth of institutional talents are featured.
- Create opportunities for staff and faculty to understand roles outside of their unit.
- Create and amplify existing relationships within the greater Milwaukee community.
- Greater centralization to incentivize collaboration, reduce silos, and reduce duplication of efforts (e.g., first year seminars, need-based fundraising, policies and processes for students).
- Emphasize a specific and focused goal for UWM. The 2030 Think Tank strongly advocated for "a Milwaukee and student-centric vision for the future of UWM." The 2030 Implementation Team reinforces this recommendation. It would help guide our efforts in how we work together to directly tackle the challenges and invest in the future of Milwaukee.

Linkages to other Initiatives / Current work: Colleagues in other 2030 subgroups are working on specific related initiatives. In this section, we reemphasize the significance of shared goals.

Initiative champions: We do not presume to have all the answers for how best to achieve this but strongly recommend that the Chancellor's cabinet work together on shared initiatives to reinforce our shared goals and interdependence.

Resources needed: Some areas may need dedicated time to strategize how best to achieve this and many people asked that this perspective be included in future updates and town hall meetings.

Risks and concerns: As with several of our other initiatives there is greater risk in NOT acting. However, we have heard mentions that this is not how higher education and research is currently organized to operate. There may be a perceived risk of reduced revenue by not fostering competition. However, we must remember that our main goal is student success, not revenue. High student success can be equated to greater retention and graduation (thus revenue) for us to increasingly do our jobs better. Thus, the subgroup believes we must change this paradigm at UWM as our decentralization is often noted among faculty, staff, and administrators to be far greater than what they have experienced at their previous institutions. Furthermore, students have shared that our structures have hindered their progress. Thus, we must work more collectively, prioritizing students and Milwaukee, in our shared efforts.

Outcome: Cooperation and collaboration leads to efficiencies, better ideas, and opportunities for depth. For example, if students are able to more effectively plan their courses for four years and engage in GERs that count for most (if not all) majors, students would take fewer classes. Thus, one could reason that if we maintain student numbers we would be able to reduce class sizes or the number of classes offered with the same revenue. Thus, an efficiency is created. Additionally, it is likely that the number of grants received annually could increase.

SECTION II: ACTION STEPS

This initiative is one that will need to be owned and implemented at the highest levels and will likely take at least one year to form actionable steps (such as new budget models or incentive plans for cooperation) and several years before it becomes a norm. This section reinforces the recommendations in Section 1.

Initiative 4: Belonging

Initiative: To create a sustained sense of belonging for all members of the campus community. We acknowledge that some people, departments, and services are already working on fostering a sense of belonging for students. This section is a call for all members of the UWM community to engage in intentional efforts to foster a sense of belonging for both students and staff. In the following paragraphs, we offer a reasoned analysis of why belonging and fostering an asset approach toward our work is critical to our shared success.

Institutions of higher education in America, especially land-grant institutions, were constructed as a part of nation-building and originally available only to those considered full and equal citizens. For many decades students were primarily upper-middle class American men. Generations of policies, intentional efforts, and litigation have led to institutions of higher education being more accessible to students from many backgrounds. Yet, though students of historically underrepresented identities have greater access to higher education, they have not experienced more success or belonging. For decades, university administrators and staff have tried to address inequity by developing programs and services designed to increase students' success. However, gains have been minimal as many strategies for increasing success were constructed from theories based on research with mostly White, middle and upper middle-class, traditional-aged college students. Strategies largely ignored systemic injustice, cultural differences and challenges students face with campus climate, limited finances and time, and outside commitments.

To foster a sense of belonging at UWM, we must reexamine our behaviors, systems, and structures to create an environment that supports the success of all UWM students. Historically, strategies in higher education have focused on programs and services to address students' deficiencies (e.g., remediation, identity-based subcultures, teaching students about college culture) while leaving the campus structure intact. Though some programs that have focused on students' deficits have produced marginal results, they have not led to equitable outcomes. Further, the onus is on students to engage in these efforts that often require more time and money from students. For example, rather than changing the course sizes or curriculum for STEM courses, universities have added supplemental instruction.

We must reinforce asset approaches where historically underrepresented students' strengths (e.g., hard-working, financially savvy, multilingual, greater self-authorship) are valued. Staff must see themselves as agents who believe in and support the success of all students who attend UWM. With this

mindset, we must turn inward to look at our structures and behaviors to identify ways we can make changes to better support students' success. We must make changes to ensure that the real barriers students face do not prohibit them from achieving their goals. We recognize that students of different backgrounds and identities have great diversity of ideas and perspectives and we incorporate this into the fabric of UWM.

SECTION I: OVERVIEW

We recommend the following:

1. Strategies for fostering a sense of belonging often focus on mentoring and campus subcultures and avoids addressing more pervasive structural problems that cause people to feel as though they don't belong. To make sure we dig deeper, our first priority is to Identify patterns of systemic racism and how they influence processes and programs at UWM and make changes. We seek to require all units (both academic and programmatic) to engage in equity-focused continuous improvement plans on a 3 to 5-year cycle staggered cycle.
    a. See Division of Student Affairs Inclusive Environment Inventory Process (Strategic plan Item 7) for a model on how to begin to engage individual units in collective campus wide process of self-examination and action steps.
    b. In additional to unit specific efforts, UWM should build upon the efforts on the DEI Council to focus on campus-wide systemic efforts that should be changed. One example of a significant accomplishment this past year is the elimination of ACT scores in admissions. There are several other curricular, cocurricular, and service structures that can be reimagined to advance structural equity. The 2030 Implementation Team offers a few examples of how these efforts can be continued:
        i. Improved education and support related to paying for college (See section).
        ii. Requiring every course to intentionally foster opportunities for peer-to-peer engagement.
        iii. Generating alumni support and dedicating campus funds toward traditions that speak to students of diverse backgrounds. Consult students in developing traditions and strongly encourage all faculty, staff, and administrators to attend events.
        iv. Ensure campus communications to students are welcoming, convey interdependence, speak to shared experiences, and use the power of storytelling to build connections.
2. Because systemic inequities are so pervasive, gaps in equity can go unnoticed without proactive and intentional efforts to examine data for differences based on demographics. We recommend the creations of a group to coordinate efforts to examine campus-wide and unit data regarding engagement and success outcomes. A small group lead by a OAIR with membership across campus should be tasked with reviewing various programs and services to identify gaps in populations served and student outcomes broken down by demographics. This team will develop a plan to gather metrics on a regular and rotating basis so that units have time to gather data and make continuous improvements.
3. Engage authentically with students about current events. For example, many students and staff believe campus emails recognizing Black Lives Matter, January 6th sedition, etc., are appeasement measures rather than authentic expressions. To accomplish this, the campus community must see members of the Cabinet engaging directly in equity initiatives and programs throughout the year. Members of the cabinet must be proactive and vulnerable. One way to do this is by participating in campus events and initiatives where students of historically

marginalized may likely engage in healing, action, and/or celebration. Cabinet members can listen, engage, and learn and should not feel pressure to have answers as this can trivialize the history and significance of harm. With the discomfort, administrators can commit to do better, act to do, better and ask to be called to account.

4. Seek resolution, restorative justice, and reconciliation by ensuring the operations and decisions on campus are evaluated for bias and are inclusive to all members of the UWM community. In addition to the recommendations above, this also requires intentional efforts to identify and include more members of the campus community in consultative and decision-making roles. People who have been historically marginalized may feel the weight of speaking out about issues at risk of tokenization or marginalization. Further, they may feel like a fish out of water in a culture that is different than what they are used to. Their voices are lost without intentional efforts to remedy this. Administrators can reduce employees' feelings of vulnerability and elevate their voices by encouraging leaders in all areas to prioritize diversity and inclusion as challenges are addressed in departments designated by Deans, Chairs, and Administrators to lead initiatives.
5. Clarify the most important parts of our collective identity and ensure everyone on campus is working to reinforce that identity across all layers of the institution. As previously acknowledged, the 2030 Think Tank strongly advocated for "a Milwaukee and student-centric vision for the future of UWM." The 2030 Implementation Team reinforces this recommendation.

Linkages to other Initiatives / Current Work:

- Global Inclusion and Engagement and the Office of Institutional Research and Assessment Action Grants: "Towards an Anti-Racist Campus." This program supports ideas, activities, and programs that directly strive to dismantle racism at UWM. Examples of current projects include:
    - Antiracist Teaching Practices for Writing Across Disciplines at UWM.
    - Healing, Restoration, and Self-Care for Students of Color at UWM.
    - Taking Action: Policing and Campus Safety at the Intersection of Race and Disability.
- Care, Respect, and Expression Workgroup.
- Student Affairs Strategic Plan. This plan prioritizes equity, student connection, and belonging.
- Ongoing work within the Centers for Advocacy and Student Engagement in Student Affairs and the cultural centers within Global Inclusion and Engagement.
- Programs including orientation, common read, Living Learning Communities.

Initiative champions: Administrators within Academic Affairs, Student Affairs, and Global Inclusion and Engagement should work together to lead this initiative. These units are engaged with students and equity efforts. Furthermore, this initiative requires the engagement of the entire campus community.

Resources needed: We do not need significant additional resources to do this. This initiative requires our campus to reprioritize engagement, data collection, and continuous improvement efforts. For this to be successful, leaders across campus must model behaviors that foster a sense of belonging and care and calls on everyone to examine and drive structural changes that can further foster equity.

We recommend that only two to three specific areas are focused on campus wide to ensure that the messages are not muted by competing messages and all members of the campus community clearly understand the priorities.

Risks and concerns: The risk is in not making a campus wide effort to shift the campus culture towards equity, care, and belonging. Significant culture change takes many years, but significant and clear

changes to organizational structure, access to services, and coordinating efforts to improve our climate would signal significant change is possible to both students and staff at UWM.

Outcome: If successfully implemented this initiative will increase student and staff retention, investment from the greater Milwaukee community, and number of alumni who remain connected to the institution.

SECTION 3: PATHWAYS TO SUCCESS

This section includes work on pre-college and post acceptance pathways for undergraduate students to UWM. There are significantly large amounts of work being done in both of these areas across campus. The clearest challenge hindering this work is the lack of coordination and oversight. The five initiatives considered to create coherent pathways into UWM include:

Initiative 1: Collaborate to create a cohesive pathway to UWM
Initiative 2: Automatic Admission to UWM for Milwaukee High School Graduates
Initiative 3: Expanding programs/outreach for K-12 students
Initiative 4: Attract and Retain high achieving students from surrounding region, particularly focusing on access to MPS, first generation and diverse populations (Page 12, item 2e)
Initiative 5: Map student's pathway to graduation

Initiative 1: Collaborate to Create a Cohesive Pathway to UWM

SECTION I: OVERVIEW

Purpose: **Create pathways for success from high schools and two-year institutions to UWM, ensuring that students and potential students receive support, resources, and services to succeed and to graduate in four years from UWM.** Offering a coherent, unified entry point/process to UWM will increase graduation rates, equity, and sense of community.

Pathways between high schools and two-year institutions will create and build relationships with students prior to attending the University of Wisconsin Milwaukee. Building relationships and developing trust with prospective students via the cultural centers, schools/colleges, academic/career advising, dual enrollment, campus events, and UWM champions at feeder institutions could help in recruiting students. Further these pathways could enable UWM to fulfill its mission as an access institution serving the State of Wisconsin.

The proposed initiative, which is recommended to be coordinated by a senior leader at the level of Vice Provost, would require investments to support additional staff FTEs and programming expenses. Performance outcomes could include: 1) a significant increase in the undergraduate enrollments, especially from MPS and local 2-year colleges, 2) Improve retention (particularly for first year students) 3) a significant increase in enrollment of students of historically underrepresented races and ethnicities, and 4) a significant reduction in achievement gaps between White students and students of historically underrepresented races and ethnicities (African American/Black, Hispanic/Latinx, Indigenous/Native American, and Asian students who identify as Hmong, Laotian, Cambodian, and Vietnamese). Data should be disaggregated by socio-economic status (proxies include Pell eligibility, pre-admission zip code, and/or self-reported data) to better understand the relationships between success, sense of

belonging, and financial resources. Researchers have found that when demographic data is disaggregated by income or socioeconomic status, BIPOC students experience greater success than White students of similar means. Similar data analysis efforts will help UWM will have a more nuanced understanding of equity, student success, areas of challenge, and bright spots.

The intent of this initiative is to ensure every student is prepared and connected to the resources they need before or during their first semesters on campus to succeed in achieving their goals at UWM. We suggest this initiative consider:

1. Create and build relationships with students prior to them attending the University of Wisconsin-Milwaukee. If students have a relationship and develop trust with UWM via the cultural centers, schools/colleges, academic/career advising, dual enrollment, campus events, and UWM champions at feeder institutions, then students will be more likely to attend UWM. With time, these efforts should reduce strain or augment the work of admissions staff. These relationships should be built earlier (preferably at the middle or even elementary school level) and not at the end after orientation.
2. UWM fulfill its access mission serving the State of Wisconsin. Leaning into this mission more could lead to greater partnerships and resources for students with synergistic efforts from schools, businesses, and community agencies. The success of students at UWM is correlated to the success of Milwaukee since many students do not move far away. Furthermore, relationships could assist UWM in providing personalized attention to students for them to thrive and be successful.
3. With knowledge that all students benefit from information, resources, and connections to the campus and people to be successful and outcomes are greatest for students of historically underrepresented identities, efforts should be broad and comprehensive. Some students may need more support, or different types of support, than others and thus a tailored approach within the available resource structure is encouraged. Further, structures should seem invisible to students so that they do interfere with students' goals, yet supportive so that students feel welcome when navigating UWM.
4. Utilize and incorporate existing resources, programs, and funds to be successful. This likely will warrant reorganization of units to better foster student success. Opportunities for greater collaboration include bridge programs, first semester experiences, advising to students without majors and GERS.
5. Require creativity and the development (or continuation) of multiple pathways for students (e.g., first-generation, adult, transfers, commuter, MPS graduates, international, etc.). These pathways should be continually evaluated on a rolling basis.

To create clear unified pathways for students, silos must be broken down and efforts must be centralized and streamlined. Everyone must play a role and contribute to a culture that encourages student success.

Current work: There are inordinate amounts of work happening to move these initiatives forward across campus, but to date there is not a singular entity encouraging them to work together to avoid overlapping services (which would save resources) or hold the groups accountable to shared goals. We believe that a cohesive overarching solution will lead to much better outcomes.

The proposed initiative has many sub-initiatives, many of them are in the planning stages.

The following initiatives are for students prior to acceptance at UWM:

1. Leveraging campus wide initiatives such as M-cubed and Moonshot for Equity so they are not causing multiple pathways of work – but working in conjunction with each other to engage students early, help them apply and be accepted and then successfully reach graduation.
2. Expanding the number of articulation agreements with 2-year colleges in Wisconsin and Northern Illinois, and doing joint career/academic advising.
3. Building a community of UWM champions consisting of career counsellors, teachers, and principals at feeder institutions (both high schools and 2-year colleges) through engagement such as by organizing professional development activities for champions, by providing opportunities for champions to serve on advisory committees, and attend UWM events.
4. Doing career/academic advising at high schools**.**
5. Expanding the number of course offerings for dual enrollment including offering online courses to high school students.
6. Holding events to bring high school and 2-year institution students to UWM campuses.
7. Expanding summer programs for high school/middle school students.
8. Expanding service-learning opportunities for UWM students at middle schools and high schools.
9. Facilitating engagement between UWM student organizations and feeder institutions by providing financial incentives to student organizations and/or by recruiting student ambassadors from these organizations.
10. Expanding scholarship offerings to MPS students, including ensuring state, federal and scholarship dollars are spent in full every year.

The following initiatives are for students after they have been accepted to UWM:

1. Post-Acceptance Bridge programs are embedded in MKE Scholars and TRIO Student Support Services.
    a. Additional support and bridge programs of this type should be expanded, especially if UWM expands admissions to all MPS graduates. See an example of bridge programming from IUPUI.
    b. Bridge programs should be an option for all students to reduce stigmatization.
    c. Furthermore, they should be expanded over longer time periods via cohort structures (e.g., similar students in bridge classes, NSO/TSO and Panther Academic Welcome (PAW)) to enhance relationship building.
2. Plans for a coherent pathway to degrees at UWM:
    a. Ensure clear paths of entry to UWM through MPS, branch campuses, and other two-year institutions are clearly defined and communicated to partners.
    b. Prioritize coherent structure for all students to learn how to navigate UWM.
        i. This will likely include multiple tracks (some that already exist and others that may not) depending on the student and their needs or other affiliations (pre-college experiences, honors college, transfers, etc.).
    c. Develop a sense of belonging through student cohorts and intentional faculty relationship building opportunities.
    d. Ensure all students have funds and access to critical items for success including housing, food, textbooks, and transportation.
    e. Foster connections to services, co-curricular experiences, UWM community and Milwaukee.
3. The following initiatives, units, and positions are most closely related to this initiative:
    a. Key Committee: Pathways & Interventions Team
    b. Pathways Advising

c. Student Success Center
d. New Student Orientation Programs
e. Associate Vice Chancellor Enrollment Management and Vice Provost of Student Success
f. Degree mapping
g. Office of Undergraduate Admissions staff
h. Center for International Education (undergraduate recruitment and admissions)
i. Dual Enrollment Program and Early Credit Programs
j. M-Cube Initiative
k. MKE Scholars Program
l. Living Learning Communities (LLCs) (University Housing and collaborating academic programs/offices)

Linkages to other Initiatives:

- Moonshot for Equity
- M-cubed
- Extensive campus initiatives in Academic Affairs, Student Affairs, Enrollment Management, and Global Inclusion and Engagement.

Other Partners and related/overlapping programming or services:

- Global Inclusion and Engagement/Cultural Student Centers: American Indian Student Center, Black Student Cultural Center, Southeast Asian American Student Center, Career Planning & Resource Center
- New Student Programs is working on increasing identity-specific breakouts to provide connections and support during New Student Orientation (NSO)/Transfer and Adult Student Orientation (TASO)
- Lawton Scholars Program (Inclusive Excellence Center)
- Centers for Advocacy and Student Engagement (CASE): Women's Resource Center, LGBTRC, MAVRC, Inclusive Excellence Center
- Student Involvement, including Student Organizations and programming
- Student Support Services (TRiO)
- University College Initiative in Academic Affairs
- Housing: LLCs piloted virtual LLCs this year with a goal of launching them before students move on campus to foster connections earlier
- Smart Panther year-long academic initiative – not cohort based but has ongoing content that could be used to help in planning
- Community-Based Learning, Leadership, and Research

Barriers to the implementation of this initiative: Historically, the organizational structure at UWM has inhibited the implementation of this initiative in a coordinated and holistic manner. Having a more centralized management that is driven by the Provost office would help. The Deans of Letters and Science and General Studies have designed a program to centralize support the first-year experience at UWM where several initiatives could be managed.

Regardless of the specific structure chosen, there is a dire need for centralization, leadership, coordination, and data driven decisions including tracking relevant performance metrics related to larger goals. Additional financial and possibly human resources would be needed to launch this initiative well. However, even minimally funded shifts to our structure would be additive to our current efforts.

Initiative champions: A vice provost level person who has sufficient authority over campus initiatives and units and who can guide stakeholders--including the Vice Chancellors and Chief Officers—with collaborative efforts, joint communications, accountability metrics, and shared responsibility to ensure the success of the implemented initiatives. This central person would share a focused vision and details about how programs services will be coordinated and/or centralized to foster a cohesive student experience. The implementation will be guided by practices that encourage diversity, equity of practice, and curriculums to prepare all students for success at UWM and beyond.

Academic Affairs, Enrollment Management, and Student Affairs all have a significant role in the successful implementation.

Staff time will be needed to move this initiative through to fruition: This is difficult to estimate, as multiple staff members cutting across multiple academic and administrative units would be involved. With layers of staff in place, a merger and connection point could ultimately lead to a scaled delivery – expanding from currently served groups to larger groups over a few years to allow for financial planning, implementation, and fundraising for expansion.

Key stakeholders: Provost Office: Schools/Colleges; Enrollment Management; Student Affairs; Academic Affairs

Finance and Administration, Office of Equity/Diversity Services (EDS), UWM Alumni Association, UWM Office for Development and Alumni Relations should also be included to support these efforts.

Resources needed:

What materials, tools, software, equipment, trainings, etc., be needed?

CRM system.

How much will this initiative cost when it is operational?

Difficult to estimate. Depends on what sub-initiatives are implemented and to what extent. At the very least, we need to have 3 FTE for advising/outreach support.

Can implementation start small and be scaled up, or does it require full implementation?

By starting with a few sub-initiatives or connecting and expanding existing programs the concept could be piloted.

What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?

Some of the organizational structural changes could be done without the need for any new resources. Additional revenues generated from increased enrollment could fund this initiative.

Risks and concerns:

- Risk of being underfunded due to external environment.
- Risk of non-cooperation by Schools/Colleges and other stakeholders.
- Transition risks – creating buy-in is hard on both a student and staffing level. Like any large cultural change, this will require a significant philosophical switch for both students and staff, and if not done will, this will get increasingly harder to implement. Additionally, it must be rolled out in a way that can actually support a diverse group of students (we cannot recruit before being able to support or else we are being more destructive to the student experience).
- **The most significant risk is inaction**: not working together with diminished resources and allowing so many overlapping initiatives to continue to work in silos.

Potential challenges:

- Underfunding for this initiative; misalignment of the organization structure with this initiative; buy-in from school and colleges; buy-in from feeder institutions; engagement from student clubs.
- Breaking silos and working together is meaningful change that needs to be modelled by leaders who hold others accountable to the expectations that working separately is not allowable. This will potentially include requiring change in 'ownership' of tasks, which is difficult for staff and position descriptions.

Steps that should be taken to mitigate or plan for these challenges:

Engage all the stakeholders early on during the planning stage.

Outcome: When we see:

1. a significant increase in the undergraduate enrollments, especially from MPS and local 2-year colleges,
2. Improve retention (particularly for first year students)
3. A significant increase in student diversity
4. A significant reduction in the achievement gap between the majority student and under-represented minority population.

The performance of this Initiative could be measured using quantifiable metrics that UWM already tracks. Secondary evaluation of programs and services should be created by individual units and then monitored by central director of this project.

SECTION II: ACTION STEPS

Initial steps that should be taken within the first month of launching this initiative

Action Step	Leader(s)	Time to complete	Notes
Reorganize the allocation of duties to assign this initiative to a Vice Provost/Leader	Provost	Month 1	
Organize a series of townhalls to socialize this initiative with all the stakeholders and seek feedback.	Provost	Month 1	
Gather team of EM, AA, SA leaders committed to continuing, funding and offering bridge program(s) to all MPS students; Develop goals and specific activities	Provost appointed Lead	Month 1	

timeline and collect data regarding successful models.			

Steps that can be accomplished within the first 6 months.

Action Step	Leader(s)	Time to complete	Notes
Assign a leader for each of the sub-initiatives along with budget, performance metrics and timeline.	Vice Provost /Lead	Month 2	
Sub-initiative leaders such as the proposed pre-college coordinator, Admissions Director, work with relevant stakeholders to develop detailed plans for their respective sub-initiatives.	Sub-initiative leaders	Month 3	
Leads of sub-initiatives meet regular to create a proposal and implementation plan	Lead and Sub-initiative leads	Month 1-4	
Finalize plan for coherent structure, goals and timeline to move forward	Provost and Lead	Months 4-6	
Assign budget, performance metrics and timeline for the initiative.	Provost	Month 6	

Steps that can be accomplished within 1 year.

Action Step	Leader(s)	Time to complete	Notes
Review of strategic initiatives for 2030 Implementing the sub-initiatives	All leaders Sub-initiative Leaders such as the proposed pre-college coordinator All leaders	One year	Is this creating a radically welcoming culture? Are we creating systems of equity through a cohesive delivery of services and programs?

Analysis of collected data and learning			

Steps beyond 1 year that are needed to move this initiative through to full implementation.

Action Step	Leader(s)	Time to complete	Notes
Performance metrics evaluation and adjustments to sub-initiatives, budgets, and timeline.	Provost, Vice Provost	One month	

Initiative 2: Automatic Admission to UWM for MPS Students

SECTION I: OVERVIEW

Automatic Admission to UWM for Milwaukee High School Graduates will help create a welcoming environment and strengthen relationships between Milwaukee students, the Milwaukee community, and University of Wisconsin Milwaukee (UWM). This initiative will help ameliorate some of the systemic inequities that exist within the K through 12 educational system that impede some Milwaukee students access to higher education. It will send a strong message that UWM is committed to local students and that UWM is prepared to meet our students where they are academically and support them with the resources necessary for their success. It will also strengthen the local student pipeline ensuring that we have a diverse student body and adequate number of enrolled students to preserve and expand programs. Both students and the university will benefit because it will increase recruitment and retention. Overall, the initiative will provide incentives for Milwaukee graduates to attend UWM and demonstrate UWM's commitment to the local community. There are however some risks and opportunities as well.

1. The opportunity to generate community goodwill, increase the number of applications from local students and strengthen UWM's brand as an agent for positive change.
2. The risk of not having adequate capacity in terms of programming, should the initiative be fully implemented.
3. The risk of not meeting student expectations as well as not realizing gains in student success, which could undermine support for this initiative.

Logistically, there are no significant barriers to automatically admitting all Milwaukee High school graduates who apply. The issue is providing sufficient remediation resources and supports for the increased number of Milwaukee High School graduates who are likely to score low in English and Math assessments/placements. The College of General Studies could play a key role in implementing this initiative.

Purpose: This initiative, which furthers the access mission of UWM, will create and build relationships with students and the Milwaukee community prior to attending the University of Wisconsin Milwaukee. If students and the community have a relationship and trust with the institution through pathway and co-curricular programs offered by Multicultural Centers, Schools and Colleges, it will be a smoother transition for students. Both students and the university will benefit because it will increase recruitment

and retention. The initiative will provide incentives for MPS graduates to attend UWM and will demonstrate UWM's commitment to the local community.

Current work: Initial conversations have started in the Office of Undergraduate Admissions (OUA) and among senior administrators, but no implementation plan has been developed thus far. Currently efforts are supported by OUA Administrators, Student Success Center (CGS Bridge Coordination) and Milwaukee Public Schools.

Potential barriers to the implementation of this initiative: The potential volume of students is very high, and we do not have specific experience with implementing an initiative at this scale. Thus, challenges include:

- Coordination of stakeholders.
- Budgetary commitments (Staffing, marketing, recruitment initiatives/events, etc.)
- Criteria development- baseline for admission and how to work with outliers (i.e., students with cognitive impairment, ESL learners, etc.).
- Access to student records/transcripts.
- Competitors/Collaborators- MATC Promise.

Initiative champions:

- Office of Undergraduate Admissions
  - Director of OUA taking on the work of marketing on communicating auto-admit process and procedures.
  - Recruitment team disseminating criteria and procedures to MPS schools and students.
  - Visit Programs- designing events and training student staff to assist in recruiting through auto-admit.
  - Operations- adjusting processing, evaluation, and admission rubric to accommodate auto-admit.
- College of General Studies
  - Expand 1-year Bridge program to accommodate MPS students who may be provisionally admitted. This entails increasing capacity of faculty and advising staff.
- Milwaukee Public Schools
  - Communicating to HS officials, students, and families about the auto-admit option.
  - Coordinating with OUA for the delivery of info sessions, recruitment support, and referrals for information.

- How much staff time will be needed to move this initiative through to fruition? TBD! It is hard to gauge this at this stage.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
  - Marketing/Communication- Email and print information to students, update CRM communications
  - Recruitment- training and understanding of criteria and admission policy; developing recruitment and outreach plan to all MPS schools.
  - Operations- adjusting processing procedures and admission rubric to accommodate auto-admit policy.

    - Visit Programs- tailored events for auto-admit students (for example: hosting an app completion event virtually or on-campus); special swag for these students.
    - University Relations- website updates and additional marketing like video, radio and digital.
    - Student Success Center- scale up Bridge program coordination.
    - College of General Studies- scale up Bridge faculty and advising staff.
    - Financial Aid- high volume of admits could lead to a need for additional FA advisors.
    - Foundation- secure additional funding for this program and assist in securing legislative funding.
    - MPS/DPI- Access to student academic records.
    - MATC- partner for remedial coursework.

- In addition to the unit(s) above, which unit(s)/people should be included in planning? (consider funding, IT, marketing, legal, policy changes, units/people who are connected to external stakeholders, etc.)
    - Finance
        - Additional funding for merit awards/CEMAT awards might be needed to accommodate higher volume of admits.
        - Additional funding for staff needs (for expanding Bridge and/or Pathways).
    - M-Cubed representatives for UWM. To advocate for agreements necessary to implement this initiative.

- Who else connected to or involved in this initiative should be included in planning and implementation?
    - College and Career Centers at MPS.
    - MPS School Counseling Staff.
    - School of Ed- student teacher preparation and training.

- Which other stakeholders should be consulted with during the planning or implementation? (e.g., students, UW System, MATC, etc.)
    - MATC- work seamlessly to take in students in need of remedial work CGS cannot accommodate. Will need a process and agreement.

- At what point(s) during the planning or implementation of this initiative should key stakeholders be consulted with?
    - All UWM stakeholders should come together from initiation to implementation.
    - MPS Central/Administration also included from planning to implementation. (Coordinate messaging with MPS on rollout).
    - Prior to initiating auto-admit implementation, MATC to be consulted on the creation of a referral process for students needing remediation.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., be needed?
    - Print and mail pieces.
    - Digital marketing.
    - CRM & PAWS adjustment for volume if needed.
    - Department-wide training in OUA, CGS, student affairs.
    - Host information sessions/meetings with MPS & MATC.

    - Administrative assistance for budgeting and timeline of implementation.
- What physical space will be needed, if any?
    - Existing physical space should be sufficient. However, we may need to reorganize existing spaces.
- Once this initiative is operational, what staff time, additional resources, etc. will be needed? Describe.
    - Hard to determine currently, but it will require some new staff, a significant amount of staff time & additional resources.
- How much will this initiative cost when it is operational?
    - TBD. This can be estimated by taking existing programs that serve this population and determining what would be needed to scale up those programs given total number of current MPS applicants.
- Can implementation start small and be scaled up, or does it require full implementation? Describe.
    - It can start small and be scaled up. However, we cannot legitimately claim initiative is in effect until initiative is in full implementation.
- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - Repurposing and restructuring CGS, Office of Central Advising, MKE scholars and M3 to meet the needs of this initiative.
    - Prepare grant proposals asking Foundations for monetary assistance.
    - Lobbying legislators to provide funding through the legislative process

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
    - We may admit students who may need remediation services that we cannot currently provide. We may have applicants graduating from MPS who may have cognitive disabilities that may impair their ability to complete college level work.
    - Students may be confused about the communication of the auto-admit, we may need to plan for consistent follow-up and messaging.
    - Brand integrity and community good will. If students admitted under this admission initiative are not successful by important metrics and are burdened with excessive debt. It will be harder to convince the local community to send us their children and youth.
- What challenges or issues might come up as you implement this initiative?
    - We may have many students that are MPS graduates that are not academically prepared for college level work.
    - Students going from an auto-admit message to being placed in Bridge due their academic needs may be confused or disappointed.
    - Need to be sensitive how we communicate MATC placement if we end up using their remediation coursework. This will require further work.
- What steps should be included in the implementation plan to mitigate or plan for these?
    - Provide counseling services to connect these students to the appropriate educational partners or social service partners that can assist the student meet their educational goals.
    - Consistent meetings with stakeholders to establish timelines for advising, communication of auto-admit and follow-up procedures.

- Create an agreement or MOU with MATC about referral to remedial coursework for students who do not meet auto-admit criteria.
- Annual release of auto-admit communication with plans to have recruitment and other campus partners at the ready to follow up with schools and students as they go.

Outcome:

- How will we know that this initiative is successful?
  - When the number of applications received from MPS graduates significantly increases along with corresponding increases in enrollment.
  - When we are able to retain and graduate a high percentage of these students in reasonable time frames.
  - When most students admitted through this initiative report a high level of satisfaction with the service that UWM and its partners have provided.
  - When it is widely viewed that UWM has their students' best interests in mind. That UWM does not view their student as a commodity, but as an individual who needs support while learning and earning their degree.
  - Significant investment from Foundation, donors and UWM to provide scholarship support and other needs.
- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
  - I think an assessment tool (perhaps a student impact survey) or a third-party assessment (like MKE Scholars does) will be critical.
  - Use real-time assessment tools such as CRM dashboard/reporting.

<u>SECTION II: ACTION STEPS</u>

Initial Steps.

Action Step	Leader(s)	Time to complete	Notes
Decide criteria that would allow the maximum number of students to be auto admitted that will ensure student success with the programs we have available.	Undergraduate Admissions Administrators & CGS	2-3 weeks	
Determine if Bridge program is the best place to expand to accommodate higher number of MPS admits.	EM Administrators & CGS	2-3 weeks	

Steps can be accomplished within the first 6 months.

Action Step	Leader(s)	Time to complete	Notes

Establish auto-admit criteria and procedures	OUA Administrators	1-2 months depending on data analysis needed	
Determine staffing and program capacity needs for Bridge and create proposal to expand and make room for these needs	CGS staff, SSC, MKE Scholars	1-2 months	
Connect with MPS to communicate needs in order to be able to make auto-admit work (for example: access to student records?)	MPS Administration, possibly DPI officials	3-6 months	

Steps that can be accomplished within 1 year.

Action Step	Leader(s)	Time to complete	Notes
Develop messaging and communication pieces for auto-admit	OUA Administrators & Marketing	3-6 months	
Establish step-by-step process for and auto-admit student from initial letter to enrollment with details on what available pathways students have (regular admit, Bridge, 2 year)	OUA Administrators	6-9 months	
Establish a referral partnership with MATC for students who do not meet auto-admit criteria and need to complete remediation courses first	Subgroup members	6-9 months	
Expand staffing of advisors and faculty at CGS to accommodate volume of MPS students	EM Administrators & CGS	9-12 months	

Propose possible additional funding needed to support CEMAT scholarships and Chancellor's Merit Award for the higher number of admitted MPS students	EM Administrators to Finance Administrators	12 months	

Steps beyond 1 year that are needed to move this initiative through to full implementation.

Action Step	Leader(s)	Time to complete	Notes
Increase in enrollment and retention of MPS students over time Establish scholarship/funding opportunities for students and staff Coordination across OUA, CGS, MPS, & MATC	OUA. Student Success Center, Advisors, MKE Scholars OUA Administrators, Financial aid (Maria Solis) OUA Administrators. Perhaps appoint a dedicated individual at the Vice Provost level to head coordination.	1-2 years	

Initiative 3: Expand Programs and Outreach for K-12 Students

SECTION I: OVERVIEW

Expanding programs/outreach for K-12 students will create, build, and nurture first-hand college experiences for students prior to attending the University of Wisconsin-Milwaukee (UWM) to earn their postsecondary degree. The strong bond between the K-12 pre-college students with the UWM campus community will be vital in ensuring K-12 student success and the longevity of our institution. The effectiveness of this initiative can directly relate to UWM's increased student recruitment and retention.

Various pre-college programming/outreach experiences are in support of this initiative such as the American Indian Student Center Pre-College Program, College for Kids & Teens, Dual Enrollment, EnQuest, Girls Who Code, M-Cubed, MKE Scholars, Summer STEM University, and TRiO programs.

These pre-college efforts should be continues as we develop additional programs within UWM's School and Colleges to engage and attract our community's K-12 population to UWM. The development of summer programming and/or academic year programming should be pursued in architecture & urban planning, arts, business, education, engineering & applied sciences, freshwater sciences, health sciences,

information studies, humanities, natural science, social science, nursing, public health, and social welfare.

The proposed initiative is recommended to be coordinated by the Pre-College Coordinator (a new position) reporting to the Vice Provost for Student Success. Performance outcomes include:

1. A significant increase in K-12 student engagement in the UWM community.
2. A significant increase in K-12 student interest in UWM's degree granting programs.
3. Greater connection to the Milwaukee County community through the expansion of pre-college programming which will in turn ensure the longevity of UWM's educational legacy through increased enrollment and graduation rates.

Purpose: This will create and build relationships with students prior to attending the University of Wisconsin Milwaukee. If students build relationships and trust with UWM via pre-college programming and outreach, they will experience smoother transitions. Both students and UWM will benefit through increases in enrollment and retention.

Current work: Various pre-college programming/outreach experiences that are currently active in support of this initiative.

- The following units are involved in current/ongoing work:
    - American Indian Student Center Pre-College Program.
    - College for Kids & Teens
    - Dual Enrollment
    - EnQuest
    - Girls Who Code Club
    - Learn-Earn-Grow MKE
    - M-Cubed
    - MKE Scholars
    - Summer STEM University
    - TRiO Precollege Programs
    - TRiO Student Support Services
    - Institute for World Affairs
- What have been barriers to the implementation of this initiative?
    - Limited funding, human resources, and the lack of support.

Initiative champions:

- Who should lead this initiative?
    - We propose the creation of a Pre-College Coordinator position who would coordinate and oversee all UWM's pre-college efforts and align goals, create, and establish synergy between existing programming while eliminating duplicative efforts. This position would also partner with schools and colleges to develop and enhance pre-college experiences for K-12 students.
- How much staff time will be needed to move this initiative through to fruition?
    - This is to be determined.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?

    - Pre-College Coordinator (new position) in partnership with UWM's schools and colleges for offering community outreach programs, as well as the current pre-college programming.
- In addition to the unit(s) above, which unit(s)/people should be included in planning?
    - UW System, UWM Admin Team, UWM Schools and Colleges, Multi-cultural Centers, M-Cubed, MKE Scholars, Dual Enrollment, TRIO & Pre-College Programs, College for Kids & Teens, Department of Public Instruction, EnQuest, and Girls Who Code Club.
- Who else connected to or involved in this initiative should be included in planning and implementation?
    - UWM Schools and Colleges, Multi-cultural Centers, M-Cubed, MKE Scholars, Dual Enrollment, TRIO & Pre-College Programs, College for Kids & Teens, K-12 staff, Department of Public Instruction, EnQuest, and Girls Who Code Club.
- Which other stakeholders should be consulted with during the planning or implementation?
    - Milwaukee Public Schools and other Local School Districts, K-12 Student Community, UW System, Local Businesses.
- At what point(s) during the planning or implementation of this initiative should key stakeholders be consulted with?
    - Stakeholders are to be consulted throughout the entire planning and implementation process.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., be needed?
    - Advertising and Marketing.
    - Database System.
    - Pre-College Program Website.
    - Training
        - Youth Development Training
        - Understanding of MPS and other Local School District Ed Systems
        - Community Awareness
- What physical space will be needed, if any?
    - Evaluate physical pre-college campus spaces currently in use.
- How much will this initiative cost when it is operational?
    - To be determined.
- Can implementation start small and be scaled up, or does it require full implementation? Describe.
    - Start small and scale up through assessment.
- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - Current pre-college programming and outreach experiences to continue in more of a collaborative and partnership fashion. Expanding opportunities to new K-12 audiences and enhance programming.

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
    - Time effort and continuous stream of resources.
- What challenges or issues might come up as you implement this initiative?

    - The merging of programming, limited resources, time effort, cross campus collaboration.
- What steps should be included in the implementation plan to mitigate or plan for these?
    - Initially, bring in all of the key stakeholders as pioneers to assist in implementing this new initiative. It is imperative that they fully understand the goals, objectives, and guiding principles behind the plan- partnership, collaboration, innovation, engagement, and inclusion.

Outcome:

- How will we know that this initiative is successful?
    - When we see: 1) a significant increase in the undergraduate enrollments, especially from MPS and local 2-year colleges, 2) a significant increase in student diversity, and 3) a significant reduction in achievement gap between the majority student and under-represented minority population.
- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
    - Yes, conduct various assessments and need-based evaluation of current programming. Ways to enhance, innovate, merge, and partner. Surveys, focus groups, interviews, etc.

SECTION II: ACTION STEPS

Immediate Actions

Action Step	Leader(s)	Time to complete	Notes
Assess and Evaluate all of the current pre-college/outreach work within the campus community.	Pre-College Coordinator	One Month	Gather data through, meetings, interviews, research, etc.

Steps that can be accomplished within the first 6 months.

Action Step	Leader(s)	Time to complete	Notes
Create synergies, establish collaborations and merges.	Pre-College Coordinator	Six Months	Work with pre-college program teams to determine.

Steps that can be accomplished within 1 year.

Action Step	Leader(s)	Time to complete	Notes
Develop plans in the creation of additional programming within schools and colleges,	Pre-College Coordinator	One Year	This plan will be foundational in the development of additional pre-college

etc. where gaps are present.			and outreach programming.

Steps beyond 1 year that are needed to move this initiative through to full implementation.

Action Step	Leader(s)	Time to complete	Notes
Continuous Evaluation of current pre-college programming and implementation of new programming in result of the changing education environment.	Pre-College Coordinator	Ongoing	

Initiative 4: Attract and Retain high achieving students from surrounding region, particularly focusing on access to MPS, first generation and diverse populations. (Page 12, item 2e)

SECTION I: OVERVIEW

Purpose: We believe that UWM would benefit from a focus on recruiting and retaining high achieving students with diverse identities with focus on programs that have historically attracted high achieving students and/or are targeted for strategic growth. This initiative will enable a more organized and cohesive enrollment strategy for larger institutional goals. By focusing recruitment and retention efforts on historically underrepresented high achieving students, UWM advances our goal to be a radically welcoming environment.

Linkages to current initiatives:

- Merit Scholarship from Departments (Academic Departments)
    - Committee on ensuring department merit dollars are being distributed.
- Chancellor's Merit Awards which are four-year scholarships for incoming new first-year students focused on those with high school GPAs of 3.4 or higher. There are 3 levels so those with the highest GPAs receive the largest awards. These awards can then be stacked with other scholarships coming from schools/colleges. (Enrollment Management/Academic Affairs)
- Housing: LLCs have been noted by students as a reason for choosing UWM over other universities. Students have stated that having an LLC (specifically for Health Professions and Honors) have made it so they were more comfortable attending UWM as they were excited to automatically be a part of a sub-community.
- GIE/OAIR: Toward an Antiracist Campus Programs
- Expanded recruitment areas in including Illinois and more recently, Minnesota. While these aren't specifically high-achieving strategies, there is some alignment. Students from either state also qualify for our Milwaukee Advantage Program (MAP) funds that offer a $1000 annual scholarship. (Admissions)
- Admissions collaborates with the Honors College on a variety of recruitment activities aimed at high-achieving students.

- Admissions partners to recruit students in local schools in SE Wisconsin that typically send high-achieving students to UWM. An experienced admissions advisor manages this area and does joint HS visits, workshops, and college fairs with the Honors College Enrollment Coordinator.
- Admissions also partners with the Honors College, Office of Undergraduate Research, and other areas on campus to host events specifically for prospective and admitted high-achieving students.
- Scholarships for International Students
- Lawton Scholars program (includes mentoring)

Initiative champions:

- Who should lead this initiative?
    - Admissions with collaboration from Academic Departments and Honors College.

How much staff time will be needed to move this initiative through to fruition?

- Current staff levels should be fine to expand or continue this work; some type of centralized oversight and data collection might be beneficial.

Key stakeholders:

- In addition to the unit(s) above, which unit(s)/people should be included in planning?
    - Financial Aid, Registrar's Office, Branch Campuses, Office of Undergraduate Research

- Which other stakeholders should be consulted with during the planning or implementation?
    - Opportunity to recruit high achieving students from MATC and other 2-year institutions who are high achievers.

Opportunities to focus our efforts:

- Financial modeling for scholarships as many high achieving students receive attractive financial aid and scholarship offers from a variety of institutions.
- The UWM first choice campaigns from University Relations which counters the notion that UWM is a second-choice school.
- Expand promotion of accelerated master's degrees as many high-achieving students are already thinking about graduate school options.
- The university does not currently establish goals for the academic makeup of an incoming class. Establishing enrollment goals based on academic achievement, geographic location, diversity, etc. will allow us to allocate resources and prioritize recruitment based on enrollment goals.

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
    - Recruiting students and not living up to the promises made to them will create additional dissatisfaction with student's UWM experience.

- What challenges or issues might come up as you implement this initiative?
    - Perception of this being a primary focus compared to other areas of concern

- What steps should be included in the implementation plan to mitigate or plan for these?
    - Ensure the inclusive culture issues have been addressed before focusing on expanding outreach to high-achieving, diverse student populations.

Outcome:

- How will we know that this initiative is successful?
    - Increased enrollment for diverse, high-achieving student populations.

SECTION II: ACTION STEPS

Initial steps that should be taken within the first month of launching this initiative.

Action Step	Leader(s)	Time to complete	Notes
Work collectively in above initiatives to ensure: • Enhance partnerships (M-cubed) to attract students • Consistent distribution of scholarship funding dollars • Distribution of funding dollars should work to attract high performing MPS and local students			

Steps that can be accomplished within the first 6 months.

Action Step	Leader(s)	Time to complete	Notes
Annual Enrollment Review – have given funds for a year been distributed? How many students were they distributed to? Did we attract new types of students? Identify student groups missing from the data; how can we identify and fund them; Are students with these funds leaving? If yes, why? Do they have the support they need? Are the programs offering them what they want?			

Steps that can be accomplished within 1 year.

Action Step	Leader(s)	Time to complete	Notes
Improved Retention of students receiving merit funding;			

more diversity in types of students receiving funds (MPS, access institution) More of these students participating in undergraduate research			

Initiative 5: Map a Clear Course to Students' Graduation

SECTION I: OVERVIEW

Purpose: Create a clear pathway for students to graduate from their program of choice in four years. This includes pathways and course scheduling (academic maps, online courses, and course scheduling) (p. 11, Item 2c, first bullet). Overlaps with "Leveraging Technology" (page 10) for the Undergraduate Experience sub-team.

The intention of academic maps is to be able to show students a clear pathway from first semester to graduation in their field of study. It encourages equity because it will be clear to all students how to get to a successful completion. It also helps hold departments accountable to offering the classes that students need in a timely way to graduate in 4 years.

Linkages to other Initiatives: This initiative is a part of Vision 2030. UWM has several other workgroups and initiatives in progress. List out any other workgroups who may be working toward the implementation of this initiative:

- Moonshot for Equity is also looking into this.
- M3
- Other workgroup 2030+ Revise Undergraduate Experience
- Academic Maps work with Momentum Pathways, Moonshot, and CEMAT Pathways and Innovation – Schedule Builders, ASALC, CETL).
- Also related to Hiring –if you trust and build relationships with your academic advisor you are more likely to seek them out for support and help

Current work:

- Maps for some departments are complete/nearing completion. There is a template and standard format agreed upon. Here is an example of a map.
- Foundations for international students with English for Academic Purposes placement and curriculum.

  The following units and people are leading current/ongoing work:
  - Vice Provost for Academic Success has been working on academic maps for over a year now. The goal is to have the 25 largest programs to have completed maps by the end of the academic year. The remaining will be completed in the following academic year.
  - International Student Academic Success is led by CIE faculty.
  - Pathway Advising and Academic Advisors

- Barriers to the implementation of this initiative are:
  - The process departments go through to complete the maps requires they not only document the requirements but ensure that it is possible for a student to successful

attain their degree in 4 years. In that process, departments are sometime finding barriers and working to remove them. This takes more time than originally thought – though the outcome will be better as it also addresses these greater harms.
    - Our immediate budget challenges and competing priorities. This initiative takes considerable time with difficult to quantify outcomes for students.
    - Technology challenges – e.g., having these maps work alongside the Navigate platform to ensure a seamless experience for students.
    - Ensuring maps stay up to date. These efforts must include accountability markers to force units to update maps prior to approval for curricular and course offering changes.

Initiative champions:
Who should lead this initiative? Academic Affairs (already leading)

- Staff time needed to move this initiative through to fruition:
    - For each department, a person or committee is assigned to create the academic map. Work is dependent on the size and scope of the department. Once the form is completed, a student employee converts the documents into templates.

Key stakeholders:
- Which units(s)/people will likely carry out day to day functions once it is operational?
    - Advisors
    - Faculty and admissions will ensure maps reflect current curricular offerings.
    - English Language Academy and the Center for International Education.

Resources needed:
- Once this initiative is operational, what staff time, additional resources, etc. will be needed? Describe.
    - ELA liaisons to schools and colleges with high international student enrollment.
    - International Student Success Coach/Activities Coordinator.
    - Advisors will need to use the technology regularly to help students stay on track.
    - Students will need to be able to see in Navigate to know how to keep themselves on track.

- How much will this initiative cost when it is operational?
    - Oversight of Navigate and technology contracts/upgrades will be needed.
    - Annual or other review process for updating and improving maps.

Risks and concerns:
- There are no risks for students and this will allow for better understanding of programs.
- Some departments may consider the creation of 4-year maps not be a good use of time, to be risky if their program many complexities making the task more challenging. This will require the provost and departments to hold themselves accountable to the process for true success.
- Unit that has an uncertain future (declining enrollment or industry shifts).
  Students can potentially see the map as “the only path” to being successful in this area. It will be important to have messaging and adapted pathways/maps for students who need to stop out or take developmental courses. These plans will also be useful for non-traditional students and students who transfer to UWM.

- To address challenges with the creation of maps, UWM must have buy-in from administrators who can drive changes and lead people to carrying out difficult decisions.
- To address equity issues in mapping, after the first maps are completed, steps must be taken to help advisors work with students to create personalized maps to ensure there are pathways for students who need additional courses, stop out, have transfer credits, or need less-traditional course scheduling.

Outcomes:

- How will we know that this initiative is successful?
    - Increase in 4-year graduation rates
    - Average credits at graduation decreases
    - Less time to degree completion
    - Fewer curricular exceptions and course substitutions to address inadequate course offerings.

SECTION II: ACTION STEPS

Initial steps that should be taken within the first month of launching this initiative.

Action Step	Leader(s)	Time to complete	Notes
Hold AA accountable to completing this work entirely by end of FY22. Ensure that it is implemented and used across the campus, particularly with advisors and through Navigate. Set up metrics for tracking changes to graduation rates, less unnecessary courses (which means less loans for students)	Provost Provost w/ Advising teams AA	FY22	

Steps that can be accomplished within the first 6 months.

Action Step	Leader(s)	Time to complete	Notes
Review and continue to train advisors; require consistent use of tool Teach students to use it?	Provost; EM; Pathways ASALC		

Steps that can be accomplished within 1 year.

Action Step	Leader(s)	Time to complete	Notes
Review initial data and feedback of tools; each department may need to make unique changes to programs			

SECTION 4: COLLEGE AFFORDABILITY

Introduction

The Radically Welcoming Institution college affordability subgroup focuses on 2030 Think Tank recommendations related to making college affordable for students with financial need with the goal of increasing UWM retention and overall student success. This implementation plan addresses the following recommendations from the Think Tank 2030 Final Report:

- Exploration of a promise program (Page 12, item 2D, second bullet)
- Robust emergency grant program (Page 11, item 2c, third bullet)
- Focus on initiatives that reduce financial strain on students such as the broad implementation of open-sourced textbooks (Page 11, item 2c, second bullet)

UWM had explored the implementation of a promise program (a scholarship program that fully funds a student's tuition for 4 years) a year ago and determined that UWM did not yet have the available funding to broadly implement such a program (A program like the Bucky Tuition Promise will cost UWM $2 million per year per cohort if we use a similar December 1st date. If the deadline is removed, the program would require $8 million per year per cohort). The team considered the possibility of starting a small-scale promise program to fully fund a few students with the goal of expanding the program as more funds are raised; however, only a small subset of students would benefit. Further, the subgroup understands that UWM already faces challenges to fund programs such as MKE Scholars and the Life Impact Program. Thus, UWM must have a comprehensive plan to award a wide-range of students need-based funds that will require additional fundraising. Currently UWM has committed $700,000 in need-based aid. In comparison, the University of Illinois-Chicago commits $34 million. This is one example of several institutions that are aggressively dedicating funds to need-based aid. Thus, the subgroup makes several recommendations to increase our competitiveness. This plan offers a path forward that maximizes the impact of funds, can be implemented quickly without significant additional staffing, and can be scalable or transformed into a promise program as funding permits.

Hence, the subgroup recommends UWM take immediate and longer-term actions to ensure student success. The following recommendations consist of "quick wins" and coordinated and comprehensive action steps:

1. The creation of a need-based funding team that will coordinate efforts for a robust funding campaign.
2. The creation of a campus-wide, scalable need-based scholarship program.
3. Coordinated comprehensive efforts to promote to promote FAFSA completion and financial wellness.
4. Robust efforts to ensure all funds from the Wisconsin Tuition Grant are awarded annually.
5. Enhancing the effectiveness of the scholarship portal.
6. Institutionalize the retention grant to support the continuous enrollment of students who do not reenroll due to outstanding balances at UWM.

7. Optimize Emergency Grant fund operations.

Furthermore, the committee recommends additional efforts to enhance current initiatives and introduce new ideas to make the college experience more affordable and help students connect to available resources. Though the subgroup did not have time to explore these initiatives in-depth, the subgroup believes that these initiatives are critical to students' experiences at UWM and should be prioritized and led by the individuals identified:

- **Increase the use of open-sourced texts**.
    - Lead: Teaching and Learning Team Lead, UWM Library
    - Recommendation: Expand use of open-sourced materials prioritizing courses that currently use expensive texts, have large enrollments, or have high D, F, and W grades.
- **Prioritize affordable food options on campus**
    - Lead: Executive Director of Student Life and Services
    - Recommendation: provide healthy options of staple groceries that are available and comparable to grocery store prices at campus Restores.
- **Reimagine the campus dining meal plan model.**
    - Lead: Executive Director of Student Life and Services
    - Recommendation: explore a "meals per week" allowances instead of an a la carte declining balance model. See Colorado State University for an example of a large public institution with an in-house dining operation with a meals per week model. Under the current model at UWM, many students run out of meal plan funs before the end of the semester or spend funds off campus.
- **Enhance the UWM Food Center and Pantry**.
    - Lead: Dean of Students Office and Student Need-Based Team.
    - Recommendation: expand operations to support the addition of refrigerated and fresh foods, toiletries, and baby supplies.
- **Expand laptop loan program to continue beyond pandemic**.
    - Lead: Dean of Students Office and UITS
    - Recommendation: scale up laptop program to 500 laptops by repurposing end-of-life departmental laptops. Efforts are underway with UITS.
- **Expand the WIFI hotspot program to continue beyond pandemic**.
    - Lead: Dean of Students Office and Library.
    - Recommendation: scale funding for 200 hotspots for 9 months with an annual budget of $75,000.
- **Designate a coordinated care location within the UWM Student Union**.
    - Lead: Chief Student Affairs Officer.
    - Recommendation: Create a non-stigmatized space that will serve as a central location for campus resources (e.g., food pantry, refrigerators for commuters, Fostering Success closet, etc.). This space will also have a spot for community case managers to help connect students to public benefits. See Division of Student Affairs Coordinated Care proposal.

Initiative 1: Robust Need-Based Fundraising Efforts

The team recommends a "need-based funding team" to support Development's efforts to strategically raise funds. This team will be action oriented with each member charged with responsibilities that fall within their functional unit.

SECTION I: OVERVIEW

Purpose: Currently, Development receives ad-hoc information from campus partners to support fundraising. A coordinated team would significantly enhance UWM's ability to strategically raise funds. Furthermore, several need-based initiatives operate in silos and do not have the staffing or technical expertise to fully assess their program's outcomes. The coordination would support campus units in developing shared knowledge, reduce duplication of efforts, and prevent units from vying for the same funds.

Linkages to other Initiatives:

- M3
- Scholarship Committee
- Institutional Need-based and Merit Scholarships.
- Other need-based programs that rely on fundraising (IEC, Fostering Success, Life Impact, MKE Scholars, RHC Emergency Grant, DOS Emergency Grant, Food Center and Pantry, etc.)

Current work:

- What work has already been started to move this initiative forward? What components/aspects are already in place?
    - Chancellor's Student Success fund (Development & Dean of Students)
    - Campus allocation of funds for need-based scholarships

- Who is involved in the current/ongoing work?
    - Financial Aid
    - Development
    - Dean of Students Office

- What have been barriers to the implementation of this initiative?
    - Lack of data expertise and/or coordinated data collection efforts
    - Siloed operations
    - Lack of strategic plan and campus-wide coordinated efforts
    - Need for campus prioritization of this initiative so that units dedicate staff time to move this initiative forward.
    - An identified leader to move this initiative forward.

Initiative champions:

- Who should lead this initiative?
    - The team will have a direct reporting path to the Vice Chancellor for Development or the Associate Vice Chancellor of Enrollment Management who will offer direction, guidance, and help coordinate communication with Chancellor's cabinet.
    - Representatives from the following offices should include:
        - Financial Aid
        - Development
        - Dean of Students Office
        - Member of the Multicultural Network
        - University Relations

        - Office of Assessment and Institutional Research
        - UITS
        - Admissions (including International Admissions)

- How much staff time will be needed to move this initiative through to fruition?
    - This initiative is anticipated to take 25% time of a staff member to lead and coordinate the efforts. It is expected to take between 5 and 10% of time of other team members.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
    - With this being an ongoing committee, the committee members will continue to carry out day to day functions.

- Which other stakeholders should be consulted with during the planning or implementation?
    - Individuals with oversight over need-based initiatives. This includes but is not limited to: Children's Learning Center, Fostering Youth, MKE Scholars, M3, IEC, Roberto Hernandez Center, Food Center and Pantry, Life Impact.
    - Scholarship coordinators and Development staff.
    - Student Association, Governance Groups, Deans, Chancellor's Cabinet.

- At what point(s) during the planning or implementation of this initiative should key stakeholders be consulted with?
    - After the team is formed, individuals with oversight over need-based initiatives should be contacted as they will be closely involved in coordinated efforts. Supervisors of these units should also be kept abreast of the creation of this new oversight team.
    - Shortly after this, this new team should be introduced to various Senior Administrators and governance groups on campus as a part of an official roll out of our intentional efforts to address students' financial needs.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., be needed?
    - Some data collection training and capabilities will be needed.

- Once this initiative is operational, what staff time, additional resources, etc. will be needed? Describe.
    - This could take 5 hours per week for committee members to coordinate the initial efforts. Once up and running, it may take 2 hours per week per committee member.

- How much will this initiative cost when it is operational?
    - Costs for this initiative should initially be absorbed. However, as funds are raised, consideration should be given to create a dedicated position that advances these efforts further.

- Can implementation start small and be scaled up, or does it require full implementation? Describe.

    - This initiative will launch at full scale. However, each item that the team is tasked to coordinate will take time. Though many efforts can begin immediately, it will take up to 2 years to implement all efforts and to optimally refine them.

- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - Ideally a position is dedicated to lead this effort. However, the plan is written to use existing resources.

Risks and concerns:

- The biggest risk is that team members and connected units do not prioritize these efforts or that they do not have time for these efforts. This often happens when there is an initiative or task that either lacks leadership or is tangential to one's job.
- To mitigate this, we recommend a reporting requirement for units to report up to the Vice Chancellor of Development or the Associate Vice Chancellor of Enrollment Management Additionally, we believe these efforts should be prioritized by the Chancellor. We request the Chancellor to task his cabinet with holding staff to account for participating in efforts, prioritizing efforts, and meeting deadlines. This may warrant changes to staff position descriptions.

Outcome:

- How will we know that this initiative is successful?
    - Need-based fundraising will increase.

- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
    - We will need these tools to inform committee members about whether their efforts are successful. The committee may revise efforts as needed with the goal of raising more need-based funds for students.
    - Additionally, on an annual basis the Chancellor, Vice Chancellor of Development, Associate Vice Chancellor of Enrollment Management, and Director of Financial Aid should consult to determine whether the committee structure is effective and relevant.

<u>SECTION II: ACTION STEPS</u>

The following steps should be followed to launch this initiative:

Action Step	Leader(s)	Time to complete	Notes
Appointment of Team members. Chancellor, VC of Development, and Associate Vice Chancellor of Enrollment Management identify team members and set the first meeting. They may consult with identified units as needed.	Chancellor and VCs	Early spring 2021	

The team will set the terms of a campus-wide need-based scholarship (see recommendation 2) and will lead the following infrastructure efforts: • **A University webpage that focuses on students' needs for external audiences**. Site will include data about our students' financial needs, descriptions of our efforts and programs, outcome data from our programs, testimonials and photos from students, and information about giving. All need-based programs and initiatives will be described so that potential donors can select the one that appeals to them most. This model replicates the model used by Donor's Choose by channeling potential donors who want to give to students in need to a centralized location. Donors can choose which fund they want to support. This platform reduces barriers to giving. We know that sometimes donors do not give because they do not know where to give, they cannot decide which fund to support, and they want some control over how their funds are used. This plan addresses all three of those barriers. It will include a link to the need-based "give" page in the next bullet.	UITS and DOS	May 2021	Dean of Students Office and UITS will lead this initiative as they started building a site for a different purpose. It will be retooled.
• **Dedicated "give" page for need-based funds on the Development website.** This webpage would display all Foundation accounts for need based initiatives and highlight two specific primary initiatives. The first highlighted initiative will be for the new scholarship program (see below) as this will be the primary focus of fundraising efforts. The second highlighted initiative will be the Chancellor's Student Success Fund. Additionally, this dedicated "give" page on the Development website would like to the webpage described in the first bullet above.	UITS & Development	May 2021	
• **Data coordination.** Coordinate data that informs the UWM campus community about UWM students' needs. Data will be compiled in one location and	FA, OAIR, DOS	May 2021	DOS staff member has expertise in this area.

updated on an annual schedule. Selected data points will be included on the student needs website. Data points should describe our student body with counts for Pell eligibility, first generation, zip code, parental status, and others figures as identified. Additionally, we will report the average unmet need. Initially, the website will include data that has already been compiled. The team will also identify reporting metrics and timelines for future reports as described in the next bullet.	FA, OAIR, DOS	Spring 2021	Determine data to be collected.
• **Coordinated assessments for need-based programs and need-based scholarships.** Under the guidance of Office of Assessment and Institutional Research, all need-based programs and scholarships will, on a regular schedule, collect common and individually tailored data that is meaningful for campus administration and potential donors. Institutional Research will create a data request process and identify a point person for units to submit data so that it can be analyzed. The ID numbers of students who have applied to the program and students who have received support from the program should be collected along with the semester of engagement. Data can be evaluated annually for demographics, GPA, retention, and graduation. Institutional Research will develop comparison groups of students with similar demographic backgrounds to use as comparison groups to help learn about and promote program outcomes.	DOS	August 2021 Fall 2021 May 2022 Summer 2022 Fall 2021	Develop infrastructure for compiling data Start collecting data in coordinated manner. (Programs that have early infrastructure will report earlier) Programs report outcomes Outcomes posted on website Immediate launch with phased in program participation, Full implementation by end of Fall 2021.
• **Regular collection and coordination of student testimonials.** The Dean of Students Office has created a Qualtrics survey to collect testimonials from students and it includes several options for students to give permission on how testimonials can be used by the campus as well as interest in being contacted for future interviews and promotions. This			

could be scaled up for all units to participate. Testimonials can be used by Development, University Relations, and on materials to help raise additional funds.	Team lead	Spring 2021	First meeting
• **Semester meeting of unit directors of all need-based programs.** The goal of this meeting is to coordinate fundraising campaign and assessment efforts**.** Programs includes food pantry, MKE Scholars, Lawton Scholars, Life Impact Program, Children's Learning Center scholarships, emergency grant programs, laptop loans, hotspot check-out, Fostering Success, Financial Aid, Development, Student Success Center, and others as identified.	Team lead	Summer 2022	First full review after all programs have submitted data.
• **Annual goal setting.** Annually data will be reviewed, and recommendations will be provided to help set fundraising goals and to evaluate the success and further investment in various programs.	Team lead	Spring 2021	Develop plan in spring 2021. Review annually.
• **Campus outreach.** Team will create a schedule to coordinate regular outreach with key campus stakeholders to educate, build collaborations, and foster campus-wide support. Outreach groups include chancellor's cabinet, deans and division heads, scholarship coordinators, admissions, governance groups, ACN, CEMAT, and others as needed.	Team Lead will coordinate with VC of Dev.	Spring 2021	Develop plan in spring 2021. Review annually.
• **Coordinated fundraising campaign.** Team will coordinate press releases, interviews for publications, data infographic, and other content as requested by Development to use in their fundraising efforts.			

Initiative 2: Create Campus-wide Need-based Scholarship.

SECTION I: OVERVIEW

Purpose: Finances are a significant barrier to students' success. UWM must have a comprehensive plan to award a wide-range of students need-based funds.

By the end of Spring 2021, the Need-Based Team will develop the terms of the campus-wide need-based scholarship. The committee will use data to support the optimal model to maximize retention. This will

serve as the long-term fundraising goal. Under the advisement of Vice Chancellor for Development, the committee will also set initial scholarship terms based immediate funds available and future fundraising efforts to scale up the scholarship.

Current work:

- What work has already been started to move this initiative forward? What components/aspects are already in place?
    - Chancellor's Student Success Fund
    - Campus Commitment of in $700,000 in need-based aid

- Who is involved in the current/ongoing work?
    - Development
    - Financial Aid
    - Dean of Students Office
    - Several other units raise need-based funds; however, they are not coordinated for campus-wide implementation.

- What have been barriers to the implementation of this initiative?
    - One barrier is our current fundraising model. Fundraising is coordinated at the school and college level. This hampers opportunities to create campus-wide funds because potential donors are tapped for a particular school or college. For example, a campus-wide program is prohibited from sending letters requesting donations from individuals who have been prior recipients/participants of the fund/program (to pay it forward) because those potential donors are already tapped for a school or college.
    - Individuals who have tried to raise campus-based funds have been limited to fundraise through foundations. This model disincentivizes campus-wide coordination and collaboration. It also disenfranchises those who seek to raise campus-wide funds because options for fundraising are so limited.

Initiative champions:

- Who should lead this initiative? Explain.
    - The Need-based funding team described in the above recommendation should lead this initiative. Representatives from the following offices should include:
        - Financial Aid
        - Development
        - Dean of Students Office
        - Member of the Multicultural Network
        - University Relations
        - Office of Assessment Institutional Research
        - UITS
        - Admissions (including International Admissions)
    - The team will have a direct reporting path to the Vice Chancellor for Development or the Associate Vice Chancellor of Enrollment Management, who will offer direction, guidance, and help coordinate communication with Chancellor's cabinet.

- How much staff time will be needed to move this initiative through to fruition?

    - This initiative is anticipated to take 25% time of a staff member to lead and coordinate the efforts to develop the scholarship. It is expected to take between 5% and 10% of time of other team members.
    - A minimum of 1 full-time Development Officer will be needed to engage in need-based fundraising efforts.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
    - Financial Aid
    - Development

- In addition to the unit(s) above, which unit(s)/people should be included in planning? (consider funding, IT, marketing, legal, policy changes, units/people who are connected to external stakeholders, etc.)
    - OAIR, EAB, and UWM faculty or staff who have data analytics background should be consulted with to help the Student Need-based Funding Team set terms.
    - Deans and division heads and scholarship coordinators will need to be consulted about changes to UWM's fundraising approach:

- Priority groups include to announce the launch include:
    - M3 and MKE Scholars administrators
    - Admissions and other staff who work closely with high schools
    - Academic advisors
    - And broadly the entire UWM community.

- Which other stakeholders should be consulted with during the planning or implementation?
    - CEMAT, Moonshot for Equity, M3, Momentum Pathways, MKE Scholars, and other recruitment/retention groups.

- At what point(s) during the planning or implementation of this initiative should key stakeholders be consulted with?
    - Data experts should be consulted with early to help optimize initial awarding.
    - Campus administrators should be consulted with early to help facilitate new model for need-based fundraising.
    - Once terms are set, marketing and information sharing efforts should be shared widely.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., be needed?
    - Marketing materials. Posters or banners strategically placed during orientation and campus visits. Materials to high schools (these might be able to be embedded in current communications and publications).
    - Data analytics tool used by campus will be utilized.
    - It might be advantageous to send the Need-based team to a conference or training on initiatives, practices, and data skills for making awarding decisions.

- Once this initiative is operational, what staff time, additional resources, etc. will be needed? Describe.

    - Significant staff time will be needed by Development to raise funds.
    - Significant staff time will be needed by financial aid to administer awarding of funds.
    - Moderate time (2-5 hours/week) will be needed from the need-based review team to implement this initiative and carry out ongoing functions.

- How much will this initiative cost when it is operational?
    - To implement a promise program with an application deadline of December 1, UWM would need to raise an estimated $8 million annually.
    - To award 100 students $4,000 each semester each year, UWM would need $800,000 during the first year, $1,600,000 during the second year, $2,400,000 during the third year and $3,200,000 thereafter. These are likely overestimates as some students will not persist. However, additional available funds should be committed for additional scholarships. $4,000 was selected as an amount as it will likely encourage students to live on campus. Thus, we anticipate that a subset of funds will return to the campus in the form of room and board.

- Can implementation start small and be scaled up, or does it require full implementation? Describe.
    - This can be scaled. We recommend that UWM use available funds in 2 distinct ways:
        - We recommend that some funds are used toward a promise grant (even if only 2-5 students) based on available funding. We recommend this step even if only a handful of students can be awarded so that we can work on the logistical elements of the program and promote that we have a promise program. It is our strong perception that donors are waiting for us to launch a promise program to start giving.
        - Meanwhile, we also recommend that UWM set aside a significant proportion of remaining funds to be spread more widely with need-based scholarships (e.g., $1,000-$2,000)

- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - We recommend data be reviewed to optimize the use of funds as described in the action steps below.

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
    - One risk is that the costs to run to administer this initiative will not outweigh the benefits. It is imperative that efforts are made to scale the program so that administrative efforts put into this program are spread to effectively support as many students as possible.
    - Other risks are that funds will not be optimally awarding (e.g., too little to be impactful).
    - Finally, another risk is that funding will dry up. Thus, annual awarding criteria should be set realistically so that UWM has the means to fund students for 4 years.

- What challenges or issues might come up as you implement this initiative?
    - Logistical challenges will be present. Staff will have to be persistent and open about refining and improving the scholarship terms, awarding, marketing, probationary components, etc.

- What steps should be included in the implementation plan to mitigate or plan for these?
    - Steps are included in the action plan below.

Outcome:

- How will we know that this initiative is successful?
    - Increased retention for students who received the award compared to UWM student body, demographically similar students from prior years.

- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
    - Assessments of GPA, retention, and graduation should be gathered with comparative control groups (e.g., students who are just above or below financial threshold for receiving an award, similar students from previous years, and/or similar students who just missed a deadline to be awarded) to evaluate impact of funds awarded.

SECTION II: ACTION STEPS

The following steps should be followed to launch this initiative:

Action Step	Leader(s)	Time to complete	Notes
The need-based funding Team will develop the terms of the campus-wide need-based scholarship while a new UWM promise program is scaled up. The committee will use data to support the optimal mode to maximize retention. This will serve as the long-term fundraising goal. Under the advisement of Vice Chancellor for Development, the committee will also set initial scholarship terms based immediate funds available and future fundraising efforts to scale up the scholarship. Optimal scholarship terms: • **Determine who qualifies and estimate how many students will qualify.** ○ Explore UWM data in detail. Who is not succeeding? Create FASFA "unmet need" brackets and evaluate success and graduation per grouping to determine the population where we should focus our attention. Financial Aid staff reported that students who are just above the Pell Grant threshold may need the most funding. Thus, we might consider students who have an "estimated	Need-based funding team.	All steps will be completed by May 2021. Awarding will begin for Fall 2021 for a small pilot program to work through logistics. A more robust roll-out will begin in Fall 2022.	

family contribution" of between $5,500 and $9,000 (who are just beyond the Pell threshold). Data should be analyzed to determine if this is the case. ○ Award criteria may include a subset of the following: Wisconsin residents, students from specific counties (Illinois has such a program), students who meet need threshold based on estimated family income, GPA, students of identities who have historically graduated at lower rates an UWM, pre-college, TRIO participants, application statement of need, year in school, etc. ○ Award criteria must not eliminate undocumented students. UWM has processes to award undocumented students and these should be incorporated into this scholarship. • **Determine the optimal award amount.** Small awards may stretch farther but they may do little to impact retention. Full funding would have significant impact on retention but could only be offered to a few students. The Team must determine a sufficient amount to award students that will have significant impact on retention. ○ Team will review use UWM data, including the above data on unmet need to propose data-informed scholarship amount to impact retention. ○ We know that they average debt for UWM students in 2019 was $37,131. If we divide this by 8 semesters, we can see that on average students acquire $4641 in debt each semester. Our lowest income students likely have greater than average debt. As such, a target program may offer semester scholarships in the amount $4000-$5000 per semester. This amount of funding may allow more students to live on campus, thus, enhancing support and further fostering			

students' sense of belonging. Further, funds are repaid to the university via housing and meal plans. • **Determine <u>optimal</u> terms of award.** ○ Ideally, we would fund students for 8 semesters of continuous enrollment if specific criteria are met Criteria may include: ▪ GPA. ▪ Committee recommends avoiding scholarship requirement for students to engage in high impact practices. Smaller scale programs where relationships are deeply fostered can work by requiring engagement, but it would likely be counterproductive in a large-scale program. This requires significant staff time, puts the onus on the student to engage rather than on the campus to be engaging, and it perpetuates a deficit mindset (It assumes students have will not engage unless required. Students with financial need want to engage in campus life; they often just do not have the time or money to do this). Instead, committee recommends interventions to be used when students do not meet criteria and are in a probationary status. ○ Renewed annually if criteria are met. ○ Probation process for students who do not meet GPA criteria. Recommend smaller scholarship ($500) to students while on scholarship probation to give them the chance to boost their grades while they engage in academic and financial success programs that will	Student Success Center will lead	Launch in Spring 2022	

be offered via the Student Success Center throughout the academic year. (See page 12 https://enrollment.gsu.edu/wp-content/blogs.dir/57/files/2013/09/GSU_College_Completion_Plan_09-06-12.pdf). ○ We recommend that this award have no application process and that students automatically receive the award if they meet the criteria. • **Determine initial scholarship terms and number of promise program awardees based immediate funds available and short-term fundraising capabilities**. Initial scholarship may be offered to fewer students and of a smaller amount than described above. Terms should be informed by the above data so that scholarships are maximally impactful, though not ideal. ○ Development will provide information on funds available. ○ Chancellor and Provost will identify any available campus funds and determine whether funds for other scholarships, foundations, etc. can be repurposed to support this scholarship Ideas include: ▪ Chancellor's Student Success Fund. ▪ Percentage of unrestricted funds for various school, college, divisional foundation accounts. ▪ Need-based scholarships within schools, colleges, and centers. Schools, colleges, and centers may have individualized need-based fundraising efforts. These should be inventoried. All need-based scholarships should be consolidated when possible and, when not possible, coordinated to help maximize effective disbursement of funds. The Provost is recommended to	the financial success program		

lead this charge as some deans, departments, and units may seek information about how their specific fundraising goals are impacted. ○ The need-based scholarship team will make recommendations to divide funds for both Promise scholarships and more general need-based scholarships. They will determine: ▪ The number of Promise Scholarships to award during the first year (with funds planned for the next 4 years for these students). ▪ The amount and criteria for need-based scholarships. • Team will coordinate logistical elements to promote the scholarship, determine eligibility, award funds by Fall 2021, and track outcomes. Team will continue to plan for a more well-organized robust rollout in Fall 2022. Units involved in the planning include: ○ Accounting: Development, UWM Foundation, Financial Aid. ○ Awarding of funds: Financial aid, Bursar. ○ Promotion of scholarships: Admissions, University Relations, schools & colleges, pre-college programs. ○ Eligibility determinations: Financial Aid (potentially Institutional Research and Assessment). ○ Tracking outcomes: Need-based funding team (as described above).			

Initiative 3: Award All Wisconsin Tuition Grant Funds

SECTION I: OVERVIEW

Purpose: The Wisconsin Tuition Grant consists of state allocated need-based funds where students can be awarded a maximum of $3,150. The subgroup learned that UWM has returned over $200,000 in

Wisconsin Tuition Grant funds to UW System last year because UWM was unable to award the funds by the census date. For perspective, this is more than UWM can raise in student Emergency funds in a year. We believe, we would see an immediate impact if we are able to award all funds. The subgroup was astonished to learn that we were losing this money. Financial Aid reported that this is due to students not completing FAFSA in time. The subgroup believes that with more efforts and resources, we can award all funds so that $0 are returned.

Current work:

- Who is involved in the current/ongoing work?
    - Financial Aid currently awards these funds.

- What have been barriers to the implementation of this initiative?
    - Students do not complete FAFSA on time to create conditions to award students who qualify for the funds.

Initiative champions:

- Who should lead this initiative? Explain.
    - Oversight: Associate Vice Chancellor of Enrollment Management.
    - Implementation lead: Director of Financial Aid.

- How much staff time will be needed to move this initiative through to fruition?
    - 10% of one FTE will be needed to launch marketing efforts to encourage FAFSA applications. This staff time will be condensed to a few months of the year (March through August 2021).

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
    - Financial Aid will carry out primary duties.

- In addition to the unit(s) above, which unit(s)/people should be included in planning?
    - Admissions recruiters, orientation, registrar, bursar, student success center, TRiO programs, advisors, etc. can assist in getting the word out about available funds and promote FAFSA completion. Additionally, ACN, and ASALC can help promote these efforts.

- At what point(s) during the planning or implementation of this initiative should key stakeholders be consulted with?
    - Throughout summer 2021, weekly reports should be shared to oversight leads to ensure adequate progress.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., be needed?
    - Funding for supplies to send mailers to a large portion of the student body. Financial Aid currently does not have a budget for print materials. We believe that funds for a printed mailer would be an effective use of campus resources as it will lead to more students completing FAFSA, receiving a more substantial award, and having a decreased financial

burden while in college. However, we also believe that data should be compared to prior years to ensure the cost of mailers was of value.

- Once this initiative is operational, what staff time, additional resources, etc. will be needed? Describe.
    - During 2021, significant staff time will be needed by one member of the Financial Aid team during a portion of the year. Once Recommendation 4: Financial Fitness Week is launched, we hope efforts can be reduced.

- How much will this initiative cost when it is operational?
    - A few thousand dollars for mailers.

- Can implementation start small and be scaled up, or does it require full implementation?
    - This requires full implementation as our goal is to spend down funds. Once funds are awarded, the initiative is complete.

- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - Reprioritizing efforts to ensure time is dedicated on this important initiative. Leveraging campus knowledge to help encourage FAFSA completion.

Risks and concerns:

None. We must ensure this initiative is prioritized with so many competing responsibilities.

- What steps should be included in the implementation plan to mitigate or plan for these?
    - Work with Financial Aid early (and periodically check in) to ensure that they have the staff time to lead the tasks laid out below. If not, identify staff who would volunteer to lead this.
    - Assistance from other units might be needed, with expressed support of Financial Aid, to coordinate marketing efforts.
    - Another option is to have co-leads. One person in FA and one outside of FA who can coordinate materials and processes to engage campus in FAFSA completion efforts.

Outcome:

- How will we know that this initiative is successful?
    - Increase in the percentage of students who complete FAFSA by specific dates.
    - Awarding of all Wisconsin Tuition Grant Funds.

- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
    - After the initiative is over, focus groups should be gathered to collect feedback on how efforts could be improved. These could inform plans in Recommendation 4: Coordinated comprehensive efforts to promote FAFSA completion and financial wellness.

<u>SECTION II: ACTION STEPS</u>

The following steps should be followed to launch this initiative:

Action Step	Leader(s)	Time to complete	Notes
Implement "Recommendation 4," which is a long-term plan designed to address FAFSA completion. Additionally, a focused campaign should be launched in March 2021 (dates can be modified based on other efforts).			
• **Inform key campus personnel about this issue.** Personnel should include admissions reps, registrar, advisors so they can assist in getting the word out about available funds and promote FAFSA completion during advising appointments and via communications. The team recommends visits to staff meetings of the above units, ACN, and ASALC.	Financial Aid (FA) Director, & VC Enrollment Mgmt	March 2021	
• **Create handouts for staff.** Give tips, priority dates, deadlines, and talking points to faculty, staff, and administrators so they can help encourage FAFSA completion. This should be shared via email and during the meetings described above. These also should be posted on the One Stop website.	FA staff and marketing team	March 2021	
• **Create targeted emails for students**. This is right after priority course registration. Emails and text messages should encourage course registration and FAFSA completion. Communications should be reviewed for clarity, brevity, and inviting tone for students.	FA staff and marketing team	April 2021	
• **Send mailers**. After the semester has completed, send mailers to students who have not yet completed FAFSA. This will reach students who do not read their emails. Mailers will include information about the importance of applying early and how they can seek help (students from a design or marketing course create the flyer). The mailer would be reviewed for readability and accessibility to reduce the likelihood students will ignore it, shut down, or feel overwhelmed by it.	FA staff and marketing team	May 2021	
• **Share data**. Data should be pulled for each school and college each week (like the process for enrollment reports), to solicit assistance from academic units on FAFSA completion. We should include focused data on students who have historically been eligible for the award to encourage their enrollment and FAFSA Completion.	FA and/or VC Enrollment Mgmt.	May 2021	
• **Outreach campaign.** FAFSA Completion can be rolled into current campaigns by academic advisors and other staff to encourage students to reenroll. We would advise FA to create a Teams Group with Academic advisors to	FA and/or VC Enrollment Mgmt, & ASALC.	May 2021	

allow for the quick sharing of information and to have a spot for tips/training materials. • **Weekly reports from Financial Aid.** Reports should include how much funds have been awarded and how much is left of the Wisconsin Tuition Grant. This will help us be flexible and nimble in case we must boost or modify any efforts.	Financial aid	May 2021	

Initiative 4: Coordinated Comprehensive Efforts to Promote FAFSA Completion and Financial Wellness.

SECTION I: OVERVIEW

Purpose: Coordinated campus-wide efforts will promote FAFSA completion, promote scholarship portal engagement, and offer students finance skills. Students miss funding opportunities because students do not complete FAFSA during optimal times. Further, students are apprehensive to apply for FAFSA due to misinformation and myths about the process. Efforts must be made to reach students who are in non-traditional situations, have tension with parents, have no parents, feel overwhelmed, etc. We recommend that comprehensive materials be created and adapted for current students, high school and admitted students, and parents. Additionally, we recommend a robust campus-wide program, "Financial Fitness Week," to highlight key funding deadlines and promote financial fitness in engaging ways.

Current work:

- What work has already been started to move this initiative forward?
    - No coordinated campus wide efforts have been launched. Financial Aid currently encourages FAFSA completion via email and posters.

- What have been barriers to the implementation of this initiative?
    - Campus prioritization of this initiative has been a barrier.

Initiative champions:

- Who should lead this initiative? Explain.
    - Lead: Director of Financial Aid, Director of Student Involvement, and member of the University Committee with support from University Relations or Union Marketing.

- How much staff time will be needed to move this initiative through to fruition?
    - 25% FTE will be needed to coordinate programs and launch marketing efforts to encourage FAFSA applications. This staff time will be consolidated to a few months of the year.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
    - Financial Aid will give guidance and training to UWM staff so the entire campus community understands the significance and can respond to basic questions from students about FAFSA.
    - Student Involvement will lead programmatic efforts.

    - A University Committee Representative will lead efforts for faculty to promote FAFSA completion in their courses during Financial Fitness Week.
    - University relations or Union Marketing will create materials for passive campaign.
    - Students in Marketing or Design courses could be asked to create a campaign (award for the best campaign will be used during the next campaign cycle).
    - Navigate and Canvas Coordinators will be asked to create announcements to their students on the respective platforms.
    - Admissions staff will be needed to time out materials to be shared with potential and incoming students.

- In addition to the unit(s) above, which unit(s)/people should be included in planning?
    - Admissions recruiters, Orientation, Registrar, Bursar, Student Success Center, TRiO programs, advisors, ACN, MCN, M3, ASALC, governance groups, department chairs, and others can assist in getting the word out about FAFSA completion and applying for scholarships.

- Which other stakeholders should be consulted with during the planning or implementation?
    - Community agencies that promote financial planning.
    - Alumni
    - Private organizations such as the UWM Credit Union who may want to lead workshops
    - Area high schools

- At what point(s) during the planning or implementation of this initiative should key stakeholders be consulted with?
    - Throughout summer 2021, weekly reports should be shared to oversight leads to ensure adequate progress.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., be needed?
    - Funding for supplies for marketing materials (posters, banners, etc.).

- Once this initiative is operational, what staff time, additional resources, etc. will be needed?
    - During 2021, significant staff time will be needed by one member of the Financial Aid team during a portion of the year. Once Financial Fitness Week is launched, we hope efforts can be reduced.
    - Annually, significant efforts by Student Involvement will be needed that are comparable to other programming such as Geek Week.

- How much will this initiative cost when it is operational?
    - $1,000 for marketing materials.

- Can implementation start small and be scaled up, or does it require full implementation?
    - To foster student engagement, we recommend a fully scaled program. Efforts can be evaluated and modified each year to meet students' needs.

- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?

- Reprioritizing efforts to ensure time is dedicated on this important initiative. Leveraging campus engagement to help encourage FAFSA completion.
- Marketing for scholarship completion, FAFSA completion, and Financial Fitness Week may have some overlap. As such, a comprehensive campaign is recommended. Templates with basic information should be created that can then be modified for different events, audiences, etc.

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
  - No significant risks.

- What challenges or issues might come up as you implement this initiative?
  - Ensuring this initiative is prioritized with so many competing responsibilities.
  - Campus-wide participation is much welcomed.

- What steps should be included in the implementation plan to mitigate or plan for these?
  - A strong presentation should be presented to various campus groups to highlight the importance of FAFSA completion, scholarship application completion, and overall financial fitness to foster support and engagement from all members of the UWM community. Presentation should speculate the impact an increase in FAFSA and Scholarships could have on our student retention and success.

Outcome:

- How will we know that this initiative is successful?
  - Increase in the percentage of students who complete FAFSA by specific dates.
  - Increase in percentage of students who complete scholarship applications.
  - Indirectly increase in GPA, retention, and graduation.

- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
  - Feedback gathered from campus partners about roll out to improve efforts for future years.
  - Participation rates and workshop evaluations for programs.
  - Focus groups or student surveys to better understand students' knowledge about FAFSA and myths to inform future campaigns.

<u>SECTION II: ACTION STEPS</u>

The following steps should be followed to launch this initiative:

Action Step	Leader(s)	Time to complete	Notes
The Director of Financial Aid will work with Student Involvement to designate a week in January or early February for Financial Fitness Week.	See Action Steps	Spring 2021	

University Relations and Union Marketing will create a robust marketing campaign. Marketing should be placed in all classroom buildings and in places where students commonly are (University Housing, Library, Union, etc.) and social media. Additionally, campaign materials (infographics, informational materials, etc.) will be modified and adapted for ongoing use throughout the year and for future students during the recruitment and enrollment process.
• Marketing should be designed to:
  ○ Promote events during financial fitness week.
  ○ Dispel myths related to financial aid (e.g., no other university can see which other institutions you sent your FAFSA information). Financial Aid advisors should be consulted with to identify common myths that they see.
  ○ Inform students about Scholarship portal and how easy it is to apply to scholarships each year (essays roll over and they can choose to modify them).
  ○ Increase student's financial vocabulary (define: work study, grants, loans, tuition, financial aid, etc.).
  ○ Inform students of priority dates and their importance.
  ○ Inform students of how they can seek assistance.
		Summer & Fall 2021	

• CETL will create a CANVAS Announcement for all open courses.		Arrange in Fall 2021	

• Examples of programs that might be considered for this week:
  ○ **"Ask-me-tent" type spaces** for students to get their questions answered about Financial Aid. Locations near bus stops, parking lots, University Housing, and Union during peak course times.
  ▪ Campus volunteers participate in a one-day training about basic FAFSA info. Volunteers staff the tents. Invite alumni volunteers and community organizations who promote FAFSA completion to participate as well.
  ▪ Volunteers will have a system to elevate a student to a FA rep for more tough questions or for specific assistance.
		Reserve equipment and solicit volunteers in Fall 2021 and launch training during winter break.	

○ **Promote FAFSA in all courses**. University Committee Rep will ask all instructors to promote FAFSA completion during Financial Fitness week in all courses for the week.		October 2021	
○ **Competitions**. The academic program/student org./sports team with the highest completion		Meet with campus	

rate receive something (e.g., a trophy (that is passed around yearly), a chance to have lunch with the chancellor, photo on the home page, etc.). In years after, also have recognition for unit with biggest increase. ○ **Videos and social media** that explain why completing FAFSA early is important and dispelling common myths. Interviews of students should be considered. ○ **FAFSA & Scholarship Application workspace events**. Places where students can go to complete FAFSA. Staff will be placed nearby in case students have questions. Free cookies, fruit, and coffee will be available to encourage students to participate (Work with Alumni Relations to find donors to fund the refreshments). ○ **Financial Fitness programming.** Emergency grant reviewers have reported that students seek financial information, advice, and tips about daily living (e.g., living on a shoestring budget, buying a vehicle, paying off debt, negotiating for better rates, couponing, health insurance, investing, saving to buy a house, internet and cell-phone contracts, signing a contract, banking, finding private scholarships, etc.). Workshops and programs will be available to address these topics and to promote students' financial wellness, which in turn may increase their success at UWM. Further, program topics will be broad (not only low-income focused) to reduce stigmatization and encourage broad participation. ▪ Call for presenters. Presenters can propose a topic or request to present on a pre-identified topic. Target Lubar School of Business, Helan Badar School of Social Welfare, Faculty Senate, Department Chairs, Alumni Relations, ACN, UWCU, Student Affairs, Development, Continuing Education, Enrollment Management, community agencies, and so on for potential presenters. ▪ Student Involvement will coordinate event spaces and other logistics to encourage volunteer presenters to participate.		groups in Fall 2021 Meet with UR or UM in Summer 2021. Reserve spaces in Summer 2021 and plan in Fall 2021 Call for presenters in Fall 2021. Fall 2021	

• **Creation of FAFSA help lines**. Use Panther Chat and ensure basic information about FAFSA is available via the chat. Coordinate efforts to ensure FA advisors assist with advanced questions.
• **Family Information.**
  ○ Create of information for families to help them understand FAFSA, timelines, dispel myths, etc.
  ○ Family information should be available in the Visitor's Center, Mellencamp Hall, Residence Hall, in event locations during Family Weekend, on the Family page of the UWM website, and in any other communications to parents and families. Though the Panther Families listserv should be included, it should not be the sole source of engagement since that group is not representative.
  ○ UWM host evening events to help families, incoming, and current students to complete their portion of FAFSA/taxes. Host simultaneous virtual and on campus events to accommodate families with different resources and time commitments. Recruit volunteers accountants and tax professionals to assist with this effort.
• **Parallel Precollege Financial Fitness Campaign**.
  ○ Include intentional Financial Aid education, FAFSA, cost off attendance, scholarship portal, and priority deadline (and rolling application) information in all recruitment publications, visit programs, and campus visits. Materials for current students can be adapted so they are specifically directed towards prospective students and their families early in the enrollment process. Materials should be graphically pleasing and easy to follow with checklists and smooth integration to campus processes.
		Launch anytime
		
		FA meets with UR or UM during summer 2021 to create marketing campaign.
		
		Planning begins in Fall 2021.
		
		Planning begins in Spring 2021 for Fall 2021 roll out.	

Initiative 5: Update the Scholarship Portal to be More User-Friendly and Automated.

SECTION I: OVERVIEW

Purpose: The Scholarship portal is under-utilized by UWM students. Further, some scholarships go unawarded. The following recommendations will help increase the percentage of students who are awarded scholarships.

Current work:

- What work has already been started to move this initiative forward? What components/aspects are already in place?

    - Financial Aid is working with scholarship coordinators to transition all scholarships to the portal.

- What have been barriers to the implementation of this initiative?
    - Some areas of campus have been slow to transition to the portal.
    - Financial aid has shared that they do not have the staffing to fully move this initiative forward.

Initiative champions:

- Who should lead this initiative?
    - Financial Aid Director in coordination with Student Financial-Need Team, scholarship coordinators, and student focus groups.

- How much staff time will be needed to move this initiative through to fruition?
    - 10% FTE will be needed to update portal and transition scholarships to the portal.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
    - Financial Aid will oversee portal functions and transitioning scholarships to the portal.
    - UITS will assist in modifying the portal to improve the user experience.
    - University relations or Union Marketing will create marketing materials to encourage portal use. Additionally, students in marketing or design courses could be asked to create a campaign as part of a class project.

- In addition to the unit(s) above, which unit(s)/people should be included in planning?
    - Admissions recruiters, Orientation, Registrar, Bursar, Student Success Center, TRiO programs, advisors, ACN, ASALC, MCN, governance groups, department chairs, and others can assist in getting the word out about the scholarship portal and priority dates for students to apply for scholarships.
    - Bursars, Foundation, and Accounts Payable should be involved in identifying workflow solutions to ensure all scholarships to students are first reviewed by Financial Aid.

- Which other stakeholders should be consulted with during the planning or implementation?
    - Community agencies that promote financial planning.
    - Alumni
    - Private organizations such as the UWM Credit Union who may want to lead workshops.
    - Area high schools.

- At what point(s) during the planning or implementation of this initiative should key stakeholders be consulted with?
    - Admissions and multicultural network should be consulted with early during marketing campaign.
    - Marketing should be vetted by diverse student focus groups prior to finalization to ensure they are effective at drawing students in.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., are needed?

    - Funding for supplies for marketing materials (posters, banners, etc.).

- Once this initiative is operational, what staff time, additional resources, etc. will be needed? Describe.
    - Marketing materials, websites, etc. will need semi-regular updates. However, this should not require significant staff time.

- How much will this initiative cost when it is operational?
    - $1,000 for marketing materials.

- Can implementation start small and be scaled up, or does it require full implementation?
    - To foster student engagement, we recommend a fully scaled campaign with all scholarships operating within the portal. Efforts can be evaluated and modified each year to meet students' needs.

- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - Reprioritizing efforts to ensure time is dedicated on this important initiative. Leveraging campus engagement to help encourage scholarship completion.
    - Marketing for scholarship completion, FAFSA completion, and Financial Fitness Week may have some overlap. As such, a comprehensive campaign is recommended. Templates with basic information should be created that can then be modified for different events, audiences, etc.

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
    - None

- What challenges or issues might come up as you implement this initiative?
    - Ensuring this initiative is prioritized with so many competing responsibilities.
    - Campus-wide participation is much welcomed.

- What steps should be included in the implementation plan to mitigate or plan for these?
    - A strong presentation should be presented to various campus groups to highlight the importance of FAFSA completion, scholarship application completion, and overall financial fitness to foster support and engagement from all members of the UWM community. Presentation should speculate the impact an increase in FAFSA and Scholarships could have on our student retention and success.

Outcomes:

- How will we know that this initiative is successful?
    - Increase in the percentage of students who complete scholarships by specific dates.
    - Increase in percentage of students who are awarded scholarships.
    - Indirectly increase in GPA, retention, and graduation.

- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?

- Feedback gathered from campus partners about roll out to improve efforts for future years.
- Student focus groups to continuously improve students' experiences navigating the portal.

SECTION II: ACTION STEPS

The following steps should be followed to launch this initiative:

Action Step	Leader(s)	Time to complete	Notes
• **Campus-wide marketing of the portal.** The subgroup recommends University Relations or Union Marketing develops a professional marketing material for the portal. The Student Financial Need Team is charged with identifying placement of marketing materials increase student use of portal.	Marketing team, Student Financial Need Team	May 2021	
• **Conduct a UWM website sweep.** UITS will be tasked with searching all UWM websites to ensure the elimination of outdated content or scholarship information that does not include the portal. Furthermore, UITS will work to ensure that the scholarship portal is well-promoted on each school/college page, admissions, financial aid, etc. Furthermore, they will ensure the portal is optimized for the UWM search and Google.	UITS	Initial sweep complete by May 2021	
• **Create priority deadline for completion of the general application**. This will promote students applying at optimal times of the academic year for scholarship consideration. Yet, clearly state that students can apply any time. Time promotional materials to encourage students to apply by the priority deadline. Coordinate promotions to be placed in key units on campus, on the UWM website, in CANVAS reminders, and on social media. A date that aligns with the FAFSA priority date and Financial Fitness week should be considered.	Financial Aid	February 2021	
• **Improve the student user experience of portal.** o Bi-annually, the Student Financial Need Team will conduct student focus groups to improve user experience. The UITS member of the Student Financial Need Team will oversee website improvements. o The subgroup tested the website. Though all the content is present, due to the layout, information can easily be overlooked. The team recommends improvements to the portal design, if possible, and organization so that students	Student Financial Needs team	Initial focus group in June 2021 Summer 2021	

engage with the webpage content in the following order: ▪ A page with application instructions (convert FAQs to this) and priority deadline. ▪ The general application. ▪ Listing of additional scholarships for which students are not automatically considered. ▪ Tags and filter features to help students more easily find scholarships for which they are eligible.			
○ Conduct an audit to try to reduce the number of essay questions on the general application to promote student engagement. We recommend no more than 3 essay type questions. Scholarship coordinators and student focus groups may be consulted to narrow down or combine questions so desired information is obtained via a simpler application.	FA with assistance from Student Financial Needs team	Summer 2021	
○ Annually strategically review scholarship questions that are not on the general application. When possible, work with scholarship coordinators and donors to modify questions to further promote the use of the general application and auto-matching to increase students' consideration for more funding opportunities.	Financial Aid.	Completion by December 2021	
• **Require portal use for all UWM scholarships.**	FA and Scholarship Coordinators	May 2021	
○ Financial Aid will identify all scholarships that they are aware of that are not currently in the portal. This process is underway. We recommend enforcing a deadline of May 2021 for scholarship coordinators to move their application to the portal. If there are several scholarships operating outside of the portal, implementation can be staggered with prioritization of awards that have the broadest impact on students.	Financial Aid, UITS, Bursar, Accounts Payable, UWM Foundation.	Summer 2021	
○ Periodically, Financial Aid learns about new scholarships that they were previously unaware of. These should be run through the Scholarship Portal. A workflow tool using BP Logix or other system to force all scholarship awards to be run by Financial Aid. This workflow would also help ensure compliance with Federal Financial Aid policies. In this process, the Bursar, the UWM foundation, and Accounts Payable will only			

	disburse funds to students if the scholarship disbursement request was submitted through a common workflow process. We recommend that UITS assist with the development to ensure they can be embedded into current processes within the units. We recommend that these efforts are prioritized for immediate implementation. Here is an overview of a possible workflow: ▪ Scholarship administrators enter an award amount, semester, year, student name, student id, fund name, school/college/unit, funding disbursement source (Accounts Payable, UWM Foundation, Bursars), and any other information required for disbursement into the workflow. ▪ This would be routed to Financial Aid first for recording and review for federal compliance. ▪ After the Financial Aid review, data is forwarded to Bursar, UWM Foundation, and/or Accounts Payable for fund disbursement.			

Initiative 6: Institutionalize Retention Grants

SECTION I: OVERVIEW

Purpose: At various times over the past several years UWM has offered retention grants to boost enrollments. In 2019, 119 students were awarded retention grants amounting to $78,365. 114 students (96%) attended in the spring term or graduated that term. The subgroup recommends dedicating an annual retention grant program of $250,000 dollars in annual dedicated funding. A standardized program will allow campus members to prepare for a well-organized calling campaign for students who:

- have not signed up for courses,
- signed up for courses but dropped courses before the start of the term,
- previously attended UWM and are close to graduating but did not finish
- have attended UWM within the past 5 years, have not returned, and have outstanding balances.

Linkages to other Initiatives: CEMAT, Momentum Pathways, and Moonshot for Equity may overlap with this initiative.

Current work:

- What work has already been started to move this initiative forward? What components/aspects are already in place?

    - Retention grants have been offered in the past. Thus, some infrastructure exists to support this initiative.

- Who is involved in the current/ongoing work?
    - Financial Aid, Enrollment Management, Advisors

- What have been barriers to the implementation of this initiative?
    - Dedicated institutional funds and standardization of this initiative so that units can prepare early and improve upon systems to ensure it runs efficiently.

Initiative champions:

- Who should lead this initiative?
    - Lead: Enrollment Management, Director of Financial Aid, and ASALC.

- How much staff time will be needed to move this initiative through to fruition?
    - This initiative is fairly easy to launch and would take .1 FTE of a staff member's time to organize.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
    - Financial Aid and Enrollment Management will pull reports to identify students who have not yet enrolled and who have a financial balance.
    - Financial Aid and the larger Enrollment Management team will craft instructions for advisors and volunteers and identify resources/referral paths for students who need additional assistance (e.g., retroactive withdrawal, tuition appeal)
    - ASALC will assist in distributing lists to advising staff and trained volunteers to make calls and will set goals for calls/week.

Resources needed:

- Once this initiative is operational, what staff time, additional resources, etc. will be needed?
    - Though not much staff time is needed to develop this initiative, significant staff time will be needed to operationalize it. Estimates are that it amounts to .5 FTE per school/college/unit during the summer months and 1 FTE in Financial Aid.
    - Financial resources of $250,000 are needed in retention grants.

- How much will this initiative cost when it is operational?
    - $250,000. Though, it can be scaled down to operate with fewer resources.

- Can implementation start small and be scaled up, or does it require full implementation?
    - Yes. However, the return on investment is significant. Thus, a robust full-scale implementation will have a greater payoff for our student body.

- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - Reprioritizing efforts to ensure time is dedicated on this important initiative. Leveraging campus engagement to help encourage FAFSA completion.
    - Combine these efforts with the FAFSA completion calling campaign.

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
    - Funds will be spent but students will not be more successful. EAB data supports that this risk is low and that generally this is very impactful initiative.

- What challenges or issues might come up as you implement this initiative?
    - Ensuring this initiative is prioritized.
    - Campus-wide participation is much welcomed. Consideration could be given to put a call out for volunteers to engage in the calling campaign.

Outcome:

- How will we know that this initiative is successful?
    - Increase in the percentage of students who reenroll.
    - Indirectly increase in retention, and graduation.

- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
    - Enrollment of all awardees should be tracked on a semester basis (GPA, Enrollment, and Graduation and broken down by race/ethnicity, gender, international status, veteran status, in-state/out-of-state, and unmet need to identify any trends and or biases in these methods).

<u>SECTION II: ACTION STEPS</u>

The following steps should be followed to launch this initiative:

Action Step	Leader(s)	Time to complete	Notes
The retention grant planning should begin in Spring 2021. Logistical pieces should be organized to run this program optimally. Program should maximize use of all tools including exploring cost of living adjustments; federal, state, and external grants; and the UWM Retention Grant. Staff who will call students will need to be identified. They will need to coordinate with Financial Aid, Admissions, and Academic Advisors to ensure successful enrollment.	VC Enrollment Mgmt.		
• Trained campus volunteers could be used to call students to determine why the withdrew and offer an award if appropriate. Logistical pieces could be coordinated similarly to the Dean of Students Office Emergency Grant operations, which uses trained volunteer reviewers.		Spring 2021	
○ Put a call out for volunteers in March 2021 ○ Train volunteers in April 2021		Spring 2021	

• Calls to students could be made as early as Spring 2021 for students who did not enroll in spring 2021 to encourage them to enroll in summer or fall of 2021. • Optimal times should be determined to call students who were enrolled in Spring 2021 to encourage Fall 2021 enrollment. • Coordination will be needed to make timely calls to students who enroll for fall 2021 and later drop courses. Calls should be made within 2-3 days of courses being dropped. One option is to have reports run each evening of students who have dropped all their courses for the upcoming term (and early during the current term). o Develop workflow during spring 2021		Summer 2021	

Initiative 7: Optimize All Campus Student Emergency Funds.

SECTION I: OVERVIEW

Purpose: UWM recognizes that students face emergencies while in college. For students who have few financial means, a car breakdown or medical procedure can lead to students missing courses or even withdrawing from school altogether. The committee offers several recommendations to improve and maintain funding for student emergency funds:

Current work:

- What work has already been started to move this initiative forward?
  - Robust efforts have been launched by Development and the Dean of Students Office.

- Who is involved in the current/ongoing work?
  - Dean of Students Office, Development, UWM Foundation, Accounts Payable, Financial Aid, and trained volunteer reviewers from across campus.

- What have been barriers to the implementation of this initiative?
  - Dedicated staff to administer grants quickly.

Initiative champions:

- Who should lead this initiative?
  - Dean of Students Office
- How much staff time will be needed to move this initiative through to fruition? (e.g., 25% for one year)
  - .5 FTE is needed to quickly and effectively process applications and award grants.

Key stakeholders:

- Which units(s)/people will likely carry out day to day functions once it is operational?
  - This initiative is currently operational. However, resources are needed to run this initiative optimally.

- In addition to the unit(s) above, which unit(s)/people should be included in planning?

    - Dean of Students Office, Life Impact Program, MKE Scholars, School/College emergency funds, and other units with emergency funds.

- Who else connected to or involved in this initiative should be included in planning and implementation?
    - Accounts Payable, Financial Aid, and the UWM Foundation to help operationalize common procedures.

- Which other stakeholders should be consulted with during the planning or implementation?
    - Students, Development, Bursar, and advisors should be informed early to gather insights.
    - Entire campus community should be informed of roll out.
    - UITS should be consulted with to help identify old website links and redirect them to the new application.

Resources needed:

- What materials, tools, software, equipment, trainings, etc., be needed?
    - This initiative does not warrant additional funds for materials.

- Once this initiative is operational, what staff time, additional resources, etc. will be needed? Describe.
    - Additional staff time will be needed within the Dean of Students Office for administrative processing of grants.

- How much will this initiative cost when it is operational?
    - Only costs are for additional staffing which is estimated at $30,000.

- Can implementation start small and be scaled up, or does it require full implementation?
    - Yes, though this is not ideal, programs can join the common emergency grant application independently.

- What are ideas/strategies for executing this initiative with existing resources or self-sustaining funds?
    - This goal could be accomplished without additional resources; however, it would cut efforts to support students who are in crisis, struggle with mental health, etc. as the staff member who currently administers the emergency grant program also oversees the Student Support Team.
    - Instead of a 0.5 FTE appointment, a 50% Graduate Assistant could be hired to assist in these efforts. This is not preferred since grants are time sensitive and require daily processing; however, any additional staffing support is much appreciated.

Risks and concerns:

- What risks, if any, are associated with the implementation of this initiative?
    - Consolidation of services could slow down processes if not implemented well.

- What challenges or issues might come up as you implement this initiative?
    - Ensuring this initiative is prioritized with so many competing responsibilities.

    - Creating a system that is easier for both students and staff.
    - Requiring all units to participate in coordinated efforts

- What steps should be included in the implementation plan to mitigate or plan for these?
    - Strong collaboration and development of sound procedures.
    - Ask students to provide feedback on the process to tweak and improve functionality.
    - This effort must be supported by the Chancellor's Cabinet and deans to ensure seamless coordination of efforts.

Outcome:

- How will we know that this initiative is successful?
    - Decrease in award processing timeline.
    - Increase in students knowing how to apply for an emergency grant.
    - Reduction in students who are over-awarded or who shop around to find the right award.
    - Indirectly increase in GPA, retention, and graduation.

- Will we need to create assessments, focus groups, etc. to help us know whether this initiative is successful?
    - Focus groups or student surveys to better understand students' knowledge about emergency grants and their experiences navigating the application.

SECTION II: ACTION STEPS

The following steps should be followed to launch this initiative:

Action Step	Leader(s)	Time to complete	Notes
• **One centralized application for emergency funds.** Currently UWM has several emergency funding sources (e.g., Dean of Students Office, Life Impact Program, MKE Scholars, School/College emergency funds, and others). Though it would be optimal to have one fund, several grants may prohibit the full implementation of a centralized fund. However, units should use one common application to increase student awareness so staff can quickly address financial emergencies and reduce stress students may face by trying to find sources of funding. The subgroup recommends the use of the Maxient Database (currently used by DOS) or the Scholarship Portal to facilitate a smooth process for students and campus personnel. Students who select MKE, Life Impact, etc. on application will automatically be reviewed for the program's designated funds and considered for general funds if program funds are unavailable. Coordinators of each program can review	Dean of Students Office.	Transition during Summer 2021	

applications if they are interested or centralize the review.
• **Funding for one 50% appointment staff member within the Dean of Students Office.** Best practices are for emergency grants to be reviewed within 2 busines days of completed application to maximize impact. The staff member will support the smooth implementation by conducting initial eligibility checks, ensuring grants are within financial aid parameters, assigning reviewers to meet with applicants, processing awards, and gathering data on a semester basis.
• **Annual fundraising goal or $100,000-$300,000.** The following data points were considered to arrive at this annual fundraising goal.
  ○ Dean of Students Office awarded $345,000 in annual funding when UWM participated in the Ascendium Dash Grant. Awards were limited to $1,000.
  ○ UWM's emergency grant fund is available to more students than the Ascendium funds were. International, graduate, and undocumented students are eligible for UWM Emergency grants.
  ○ As UWM builds capacity to award need-based scholarships at the start of the academic year, emergency fund requests may decline.
  ○ The expansion of other initiatives to reduce college costs (see recommendation 8) may also reduce the need for emergency funds.
	Development and the Student need-based Team	Ideally fall 2021
		
		Efforts have started and should be ongoing	

Appendix I.

Hiring and Employee Development Best Practices

Credit to the USC Race and Equity Center 2020 session
REC 717: "Reducing implicit bias in the search and hiring process"

Recommendation: Minimize the conditions or situations that make implicit bias more likely in hiring.

Situations that "encourage" implicit bias include:

- Time constraints
- Ambiguity
- Cognitive overload/stress
- Lack of focus on task
- Lack of acknowledgement of potential areas of personal bias

Conditions that help diminish implicit bias include:

- Education
    - Understand bias research
    - Increase conscious awareness of how subtle bias operates
    - Have awareness of prevailing societal stereotypes
- Actions Related to Education
    - Workshops for staff at all levels
    - Follow-up sessions with case studies
    - Ongoing review of organizational practices
    - Create cues to stimulate recall of earlier learning
- Environment/Culture
    - Engage in open and direct discussion of the potential for implicit bias and stereotyping at the beginning of decision-making processes and at critical points along the way
    - Restructure systems to include more explicit selection criteria. In other words, increase objectivity and decrease ambiguity
- Actions Related to Environment/Culture
    - Consider "blind applications"
    - Focus on competence and skills, reduce inappropriate reliance on pedigree
    - Reinforce and reward individual and teams for efforts to reduce implicit bias
    - Conduct formal "organizational scan"
- Personal
    - Insight into areas of potential personal bias through, for example, taking the IAT
    - Increase opportunities for significant engagement with individuals and communities that differ from your own
    - Seek opportunities to motivate colleagues and direct reports to reflect on their potential for personal bias and to modify deeply ingrained stereotypes
- Actions Related to Personal
    - Initiate a two-week journal of "assumptions and associations"
    - Practice self-reflection and awareness of personal likes, dislikes, inclinations, tendencies, etc.

Additional Recommendations

- Put minimum and preferred qualifications together in as broad a manner as possible. When qualifications are created to try to replace the person vacating the position, this can limit opportunities for candidates.
- Provide guidance for what can and cannot be discussed in closed sessions of meetings when hiring committee decisions are made in order to minimize bias that can seep into closed meetings.
- Ensure every search and screen committee completes annual implicit bias training specific to recruitment and hiring practices priori to initiating committee work.

APPENDIX B: REVISING THE UNDERGRADUATE EXPERIENCE

The Revising the Undergraduate Experience group was given the following charge.

> Make a full-scale revision of the undergraduate student experience as well as developing forward-facing core competencies that will make a UWM education distinctive. This will also include optimizing the student experience of UWM services and leveraging technology to maximize flexibility for students' preferred learning pathways.

To accomplish its work, the group divided into three subgroups with different focus areas – Core Curriculum, Student-Centric Experience, and Experiential Learning.

The work of the Core Curriculum group centered on reform of the General Education program. Recommendations are provided as to how to move forward with this reform, both at the administrative level and the governance level. This group also considered the need to develop a common first-year experience and universal graduation requirements. While supportive of the need for work in these areas, group members believed that both issues have ties to the General Education program and that this reform should proceed before any substantive work in the first-year experience or graduation requirements can be performed.

The work of the Student-Centric Experience group makes a series of wide-ranging recommendations on enhancing the student experience enhanced advising, on-going improvements to the campus life experienced by the students, and the creation of meaningful student engagement opportunities. They also recommend how to implement improvement in the advising process by creating academic maps for the students.

The Experiential Learning group outlines how to shepherd a plan for universal experiential learning through governance and how to capitalize on this new UWM focus through marketing the advantages to prospective students. The plan calls for flexibility in the types of experiential learning opportunities available to the students and includes a plan for monitoring the quality of the experience.

V. Report of the Core Curriculum Subgroup

One of the major recommendations of the 2030 Task Force report is the development of a unified "UWM Core Curriculum" that will provide students with a distinct undergraduate education and differentiate UWM from other higher education institutions in the state and region. A significant part of this UWM Core Curriculum is a revised General Education program. As the 2030 Task Force report states:

> UWM needs to immediately modernize its general education curriculum to create a more accessible and welcoming campus for students and explore a more optimal program array and alignment (page 4 of the 2030 report).

In discussing the current UWM General Education program, the 2030 report recognized the need for a dramatically reformed system that acknowledges the limitations of the current system and capitalizes on its existing strengths. In recommending reform, the report states:

> **General Education Requirements.** One of the highest-priority changes the committee identified is to revamp GERs by updating and modernizing the core competencies and creating a more streamlined and cohesive list of eligible GER courses. In addition to the core competencies of a traditional liberal arts education, the committee recommends that local and global community literacy, technological literacy, team skills, leadership & initiative, and entrepreneurship be included in some fashion. UWM is well positioned to infuse these competencies into its core curriculum which will distinguish the UWM brand from our regional competitors.

General education provides students with the foundation for successful academic study, for lifelong learning, and for carrying out the duties of local, national, and global citizenship. Students develop communication and analytic competencies, gain exposure to a range of disciplinary perspectives, and learn to make thoughtful choices that lead to creative and productive lives and to responsible participation in society.

In recent years, colleges and universities in the U.S. have re-envisioned their General Education programs to ensure that students are well-prepared for success in a rapidly changing national and international environment. Many of these institutions have shifted from a program of distribution requirements across disciplines to programs that are motivated by explicit learning outcomes tied to particular competencies and that can make clear to students the value in what they are learning.

UWM, in contrast, has not examined its General Education program in many years. This presents an opportunity for our campus to reflect on how we can build a program focused on key learning outcomes that provides students with tangible academic and personal skills and allows them to evolve as learners as they move through the University. Beyond these fundamental goals, a new General Education program can contribute to greater student success and retention and provide students with a better feeling of connectedness. **After significant research and consideration, the Core Curriculum subgroup recommends that campus undertake a robust effort to reform the General Education program.**

General Education at UWM

Currently, the UWM General Education program consists of

- Competency requirements in quantitative literacy (QL), oral and written communication (OWC), and foreign language.
- Distribution requirements in humanities, natural sciences, social sciences, and arts.
- A cultural diversity requirement that can be satisfied through completing a designated course within the distribution requirement.

Beyond the General Education requirements, individual schools and colleges have specific distribution requirements. Some schools and colleges also designate completion of particular General Education courses for their major/minor. These unique school/college requirements can place a burden on students who change majors and/or move between schools and colleges, making it more difficult for some students to complete their General Education courses in a timely and efficient manner.

A. Problem Statement

Despite the need for reform of the current General Education program, there are many strengths on which to build. Many faculty and instructional staff have, over time, demonstrated great commitment to creating strong and valuable courses that serve the General Education program. We have broad participation from a significant number of departments and programs across campus. And, with an average General Education course enrollment of 50 students, we have a healthy mix of small enrollment courses (primarily the competency courses) and larger courses, which has led to a reasonably efficient General Education program from a cost perspective.

At the same time, it is clear that there are significant challenges associated with the current structure of General Education courses, several of which were identified in the 2030 Task Force report:

B. Challenges for Student Centeredness

- **"Implement a learning-outcome-based GER model" (from the 2030 report) -** UWM's general education program isn't a coherent and thematic program so much as it is a set of distribution requirements. Students take competency courses in math, English, and foreign languages and a series of courses distributed across a range of disciplines. Most contemporary General Education models at other universities are explicitly organized around key learning outcomes, such as those put forward by the UW System. https://www.wisconsin.edu/international-education-engagement/download/UW-System-Shared-Learning-Goals.pdf

- **Reduce student frustration -** Student surveys and interactions with academic advisors have made it clear that far too many UWM students experience General Education as a checklist to be satisfied rather than a meaningful part of the curriculum. In the main, students complete

the General Education requirements through loosely related courses that do not comprise a cohesive whole that would add value to their experience and prepare them for integration of knowledge and methods of inquiry across disciplines. We know anecdotally that many students simply take the courses that best fit their schedules or that their roommates felt were easy.

- **Eliminate roadblocks to student progress** – Several aspects of the current General Education program can create hurdles for students and slow progress to degree. Some degree programs specify that students take a particular General Education course as part of their major. Here, a student with an L&S major might take a particular course to satisfy a General Education requirement, change their major to a program in a different school or college and be told that the course they took for requirement X isn't the course prescribed for the new major. A General Education program would ideally be universal in that all students would have the same requirements, have the freedom to choose their courses regardless of major, and not encounter new requirements when they change major.

- **Reduce transfer difficulties –** The current General Education array was not intentionally designed, but instead is product of years of accumulation. As a result, it is not in sync with other UW System campuses or with many other institutions. This makes transferring into UWM challenging for some students who don't get full transfer credit for General Education courses taken at other institutions. This could work to make UWM less attractive to transfer students.

C. Challenges with Finances and Management

- **"[Allow] no more than 150 total GER approved courses across campus" (from the 2030 report) –**There are too many courses approved for General Education designation on campus, in part because of a financial model that has encouraged departments and programs to seek General Education designation for as many courses as possible as a means of generating enrollments. Currently there are approximately 850 courses on the Kenwood campus and another 350 or so are on the Waukesha and Washington County campuses that are designated as GER courses. Not only does this demonstrate that the current General Education program is not a focused program centered around clear learning goals, but it suggests that students are faced with an overwhelming number of courses without a clear road map that allows them to put together a coherent path through their General Education requirements.

- **"Explore an alternative revenue model where GER revenue is pooled in order to change the financial incentives" (from the 2030 report) –** Because of the financial incentive for departments and programs to seek General Education designation for their courses, some units have become reliant on General Education revenue. The present system also creates competition among departments and programs for a finite number of General Education credits. To undertake a successful reform of the program, we must ensure that any changes continue to encourage the creation of high-quality General Education courses while creating a new financial structure that can spread the revenues from these courses across units.

- **Control of the array –** Approval and oversight of the General Education program is left to an overworked campus-level APCC, which has historically had little choice but to approve general education applications and has no authority to withdraw General Education designation from courses.

- **Assessment struggle –** Because of the very large number of General Education courses, timely assessment of the quality of courses is nearly impossible. The APCC struggles to get instructors and departments to provide assessment materials (or even syllabi). Our recent HLC accreditation was notable for the accreditors' dissatisfaction with our General Education assessment.

D. Core Principles for Reform

The implementation of General Education reform must engage a wide range of campus stakeholders (faculty, academic staff, administration) as well as governance processes. In addition, we identify a number of core principles that those tasked with this reform should keep at the forefront of their work.

- **Create a student-centered General Education program** – Any new General Education program should focus on creating a coherent program that creates meaning for students. It should provide students with a conceptually clear explanation of the value of general education and a structure that reinforces and demonstrates that value. This new program should remove roadblocks to graduation and be portable across schools and colleges, easing student movement internally and making transferring to UWM easier.

- **Derive courses and requirements from learning outcomes.** Our student-focused educational goals should be central to how we plan the array. The UW System shared learning goals provide an ideal platform from which to create a General Education program. At the same time, these learning goals allow for an approach that is unique to UWM and its missions. A coherent approach also creates value for other stakeholders – our community, employers, and society at large – as we create thoughtful, skilled, engaged citizens.

- **Leverage the existing strengths of our instructors and curriculum –** While a reformed General Education program will require careful thought and planning, we begin this work with the advantage of having excellent faculty and instructional staff with significant experience with these issues. The goal should be to create a new program, but to do so while making the best possible use of our current personnel and resources.

- **Create shared revenue model that preserves key activities –** Creation of a new General Education program is not a question of achieving budgetary savings, as there is no significant cost savings or new revenue to be derived from this program. But any new program must

ensure that schools and colleges that are currently dependent on General Education funding are not significantly harmed by a change. This could be accomplished with revenue sharing.

- **Create a dedicated centralized administration of General Education balanced with a commitment to faculty governance -** A centralized approach to general education management can ensure the ongoing quality of the program, control program growth, and manage program assessment. At the same time, we should balance our need for additional assessment, oversight, and coordination with structures that facilitate faculty governance of our General Education approach.

VI. Recommendations

After significant research and consideration, the Core Curriculum subgroup recommends that campus undertake a robust effort to reform the General Education program in accordance with the core principles outlined above. Specifically, we encourage the adoption of a program that contains the following elements:

A. Learning Goals

We propose a General Education program that is based on clear learning goals, such as those outlined in the UW System Shared Learning Goals document (https://www.wisconsin.edu/uw-policies/download/Shared-Learning-Goals.pdf). These goals focus on five categories, which could be modified or expanded as needed to reflect the unique character of the UWM program,

- Knowledge of Human Cultures and the Natural World including breadth of knowledge and the ability to think beyond one's discipline, major, or area of concentration. This knowledge can be gained through the study of the arts, humanities, languages, sciences, and social sciences.
- Critical and Creative Thinking Skills including inquiry, problem solving, and higher-order qualitative and quantitative reasoning.
- Effective Communication Skills including listening, speaking, reading, writing, and information literacy.
- Intercultural Knowledge and Competence including the ability to interact and work with people from diverse backgrounds and cultures; to lead or contribute support to those who lead; and to empathize with and understand those who are different than they are.
- Individual, Social, and Environmental Responsibility including civic knowledge and engagement (both local and global), ethical reasoning, and action.

B. Limited Course Array

From these learning goals, we envision the creation/identification of a limited number of courses that would be designated as meeting particular learning goal(s). We envision two potential approaches to identifying courses. One would be to create a series of courses for each learning

outcome with broad thematic titles that could be taught from any number of disciplinary perspectives. An example of this might be the Honors 200 – Shaping of the Modern Mind – course that is taught with a set of outcomes and goals, but with varied content depending on the discipline(s) of the instructors teaching the courses. Another approach would be to identify existing or new campus courses that could be designated as meeting specific learning outcome goals. Regardless of approach, we strongly recommend that the total number of courses carrying General Education designation be limited to what is required to meet the learning goals of our student population. An array of between 50-100 courses would align us well with the offerings of peer institutions.

C. Universal Requirements

We recommend that any new General Education requirements apply to all students regardless of major/program and that schools/colleges/departments be strongly discouraged from adding additional requirements to this structure. We also recommend that majors/programs no longer designate a particular path through General Education courses for their students, allowing students more flexibility to move across campus programs as they change majors. If a major/program wants its students to take a particular course that might also carry General Education designation, they could make that class a required part of their major/program, but should not dictate to students which specific General Education courses they must take. In the event UWM develops and incorporates a universal FYE requirement, students that have completed an FYE course in one school/college will not need to take the equivalent course in the school/college they transfer into.

D. Outcome-Specific Course Caps

A related and important issue is the appropriate enrollment in GER courses. Currently, GER requirements are met with courses that range from small (15-25) to quite large (100-500). This captures the reality that some learning outcomes are best met in small classes with more hands-on opportunities (math, English, labs) and others can be met in larger (often introductory) courses. Given that the current average size of a GER course is 47 students, we recommend that any reform of the GER program retain a mix of course size as appropriate to the specific learning outcomes adopted.

E. Budgetary Considerations

With regard to the budgetary implications of General Education courses, any reform must move away from the current system in which financial incentives to increase SCH counts encourage departments and programs to designate a large number of their courses for General Education participation. The current system has driven the dramatic increase in General Education courses, which has caused the program to become unwieldy and challenging for all involved. At the same time, we do not support a reform that limits participation in General Education to certain departments or programs. Instead, we strongly encourage the Provost and Academic Affairs to work with Business and Finance leaders to develop a pooled model of sharing revenues generated by these courses.

F. Central Administration

To better coordinate the designation, offering, and assessment of General Education courses, we propose the creation of an Office of General Education (or some other title) that is housed within Academic Affairs. This unit will be led by a director and will function as the unit that administers the GER program and maintains responsibility for establishing criteria for courses, coordinating assessment of GERs, and working with governance committees to manage the proposal/approval process. The office would need to work in conjunction with faculty governance and be supported by an advisory board or other mechanism to provide guidance to the director.

VII. Potential Models for Central Administration

Our recommendations include consideration of a new entity to manage the GER curriculum and a new mechanism for controlling the flow of revenue generated by the GER courses. These two structural changes are closely linked and suggest two general models for the new GER program. Model A is a highly centralized structure with GER courses residing wholly outside the current schools and colleges, though the schools and colleges would participate in the management of this new unit and provide content and instructors to it. In Model B, the GER courses would be managed centrally, but they would be offered in the current decentralized structure with schools and colleges providing the courses and instructors. Finally, either model would require GER courses that fit desired attributes that satisfy the objectives of the overall GER program.

A. Model A

- Managed by new business unit
- Courses: new or modified current courses that meet learning goals and do not serve majors
- Instructor compensation linked to new business unit
- Excess revenue of new business unit transferred to new budget model undergraduate pool

In this case, a new entity is formed to provide GER courses for the entire campus. It would work with existing schools and colleges to develop a suite of courses that meet the learning goals of the revised GER program. As a result, there would be good potential for the development of truly interdisciplinary GER courses. Because the courses would reside in a new unit, it would be difficult to incorporate current GER courses that also serve majors. The courses would use a program code associated with the new entity and the courses would be staffed with faculty and academic staff from the schools and colleges by shifting appropriate fractions of their salary to the new entity. By the nature of the offerings, this unit would generate surplus revenue and that would be returned to the schools and colleges via the current new budget model for undergraduate SCH.

Advantages

- GER program finely tuned to meet campus learning goals
- Highly managed and potentially very efficient GER program
- Removes financial incentives for competing for GER courses
- Management of the curricula and assessment are centralized

Disadvantages

- Likely requires development of many new courses
- Challenges matching current workforce with the teaching needs of the new GER program – the role of graduate teaching assistants in this new unit is unclear and potentially complicated
- Incentive for schools and colleges to develop courses and provide instructors is not straightforward

B. Model B

- Office within academic affairs manages courses with help of faculty advisory group
- Courses: new or modified current courses that meet learning goals
- Instructor compensation linked to unit providing course
- GER revenue stays with unit providing the course, but could be redistributed via a GER modification to the new budget model

This model is an incremental shift from the current GER structure. An office in Academic Affairs would be solely tasked with the management of the GER program with guidance from a faculty advisory group. Meeting the learning goals and optimizing the overall performance of the campus GER program would be criteria for courses being included in the GER list of courses. The GER courses would be taught by existing units and revenue would flow to those units via the current new budget model for undergraduate SCH. Given the management structure however, the surplus GER revenue to schools and colleges could be quantified and adjustments made to new budget model allotments to schools and colleges. This would serve to mitigate the competition between units to offer GER, but also disincentivize including major courses in the GER program because the revenue would go into the GER pool.

Advantages

- GER program can be tuned to meet campus learning goals
- Can readily accommodate current courses (or modified versions of them), if they meet learning goals
- Can remove financial incentives for competing for GER courses if GER financial management is incorporated into new budget model distribution formula

Disadvantages

- Financial model is complex and potentially counterintuitive – the revenue from GER and non-GER courses would effectively have different $/SCH rates
- In the absence of backside financial management, competition for GER SCH is incentivized
- Course curricula and assessment is decentralized, potentially leading to uneven quality control and maintenance of learning goals
- Management load for Academic Affairs GER office could be high if many courses and units are launching GER courses

C. Required course attributes (either model)

- Learning goal(s) that they satisfy
- Delivery scale: (1) greater that 50 students or (2) ~25 (communication intensive)

- Content theme for advising guidance (e.g., sustainability, world health) if we want to include optional thematic paths in the GER

In any structural model, courses will need a set of attributes consistent with the objectives of the GER program. Obviously, they must address one or more of the learning goals of the GER program. They must be able to be taught on large scale unless there are pedagogical reasons for small class sizes. Balancing the offerings of large- and small-size GER courses will be necessary to maintain the financial viability of the new GER program. The size attribute will be critical from a scheduling perspective to ensure that adequate, but not excessive numbers of GER seats are offered each semester. A desirable aspect of a revised GER program would be the ability to provide students thematic paths through the GER program, such as sustainability, world health, innovation, etc. Including this attribute would also focus the development of new or identification of current courses for the GER program.

Conclusion – Next Steps

After careful consideration, the Core Curriculum committee members recommend that campus leaders and governance groups undertake a fundamental reform of the General Education program. Our campus should take the opportunity to modernize and strengthen the program and, in the process, develop a student-centered and distinctive core of the UWM undergraduate education.

If this recommendation is made a priority, the Provost will have to identify a group to undertake the implementation. As it is currently charged, APCC is a governance group with the authority to approve courses for GER designation, but it is not clear that they have the power to change the fundamentals of the program or even to remove GER designation from previously designated courses. As a governance group, they would be important contacts for any new group tasked with this reform. Any proposal would need to go to the Faculty Senate for approval, so a reform group could consult with the University Committee and update the Faculty Senate as work is undertaken.

Additional Curriculum Issues

The original 2030 Task Force report raises two additional curricular reforms that fell under the scope of the Core Curriculum committee's work. These involve their recommendations that UWM develop a cohesive first-year experience and develop universal degree requirements that would apply to all students regardless of their degree program or major. In discussing each of these, we saw much value in both recommendations. Many colleges and universities in the U.S. have first-year programs and courses designed to create a sense of belonging and community among new students and help launch them into successful undergraduate careers. These first-year programs involve a range of approaches, from first-year seminars in a range of disciplines to courses that socialize students to college life to cohort groups that live together and take common first-year classes. Other than a limited First-Year Seminar program, UWM doesn't have a specific first-year program. With regard to universal degree requirements, the 2030 Task Force notes that some schools and colleges have degree requirements beyond the University's General

Education program requirements. While there may be important curricular reasons for these additional requirements, they can present challenges to students who change majors or programs and can slow a student's progress to graduation.

While the Core Curriculum group discussed each of these issues, we make no recommendations about them here. This is primarily because we see both issues as connected to the General Education program and we believe that the reform of the General Education program should come first. Once the campus has developed and approved a new General Education program, discussions of the merits and shape of a first-year program and universal degree requirements should follow.

Academic Advising, Student Engagement, and Student-Centric Experience
SUMMARY OF RECOMMENDATIONS (See a conceptual map of recommendations)

MEMBERSHIP

Academic Advising and Student Engagement (Alejandra Lopez, Ariel Milton-Kern, Mike Dixon, Clarence Kinnard)

- Advising and Support
- Strengthening Faculty engagement with students

Beyond Academic Engagement (Kelly Ball, Stan Yasaitis, Groovy Cocroft, Katie Waldoch, Sydney Pittner)

- Uniform and coherent support structure
- Messaging and systems integration

After some discussion about the importance of all divisions working together for student success, the two groups were combined into the Academic Advising and Support/Student-Centric Experience Team.

THE CHARGE

Take the general ideas put forth in the ThinkTank 2030 report, use them to develop solid goals, and create a plan for how to reach these goals over the next few years. While creating the implementation recommendations from the existing Think Tank 2030 report, this group was not tasked with budgeting.

TIMELINE/METHODOLOGY

In October, the team reviewed the ThinkTank2030 report and highlighted areas related to our subgroup (See RECOMMENDATIONS below).
In November, we explored what other initiatives were occurring simultaneously, including the recent Moon Shot for Equity agreement, while also researching best practices. We started organizing the areas highlighted in the ThinkTank 2030 report into themes, determining who were the "experts" on these topics across UWM that our group would need to gather information from in order to make informed recommendations.
In late November, early December, we met with the following groups:

- Dave Clark, Kay Eilers, Jeremy Page, Jacqueline Nguyen (Nov. 30)
- Pathways & Interventions Team (Dec. 2)
- Patrick Fay, Colin Daly, Brennan Olena, Becky Freer, Adam Jussel (Dec. 8)
- Academic Services & Advising Leadership Council (Dec. 14)
- Student Affairs Leadership Team (Dec. 15)
- Enhancing Advising Committee (Dec. 15)
- Multicultural Student Centers Staff (Dec. 16)

In late December and early January, we drafted a narrative and started putting information into a spreadsheet. On January 7, we shared a draft with those who spoke with us in order to ensure

accuracy and comprehensiveness. The timeline for comments was short as we needed to submit the report by January 8, 2021.

RECOMMENDATIONS FROM THE THINK TAKE 2030 (TT2020) FINAL REPORT

- **Theme 1: Coordinated Advising and Support Structure**
  - Create a "personalized student experience of advising and support" (Think Tank 2030 Final Report, page 8)
  - Create "A coordinated and integrated systems approach with a single accountable leader imbued with the authority and knowledge to reorganize and lead a major system change" (TT2030, page 8).
  - Create "A relational model for advising that includes many points of contact for students to engage with support services as a network of support across their UWM experience" (TT2030, p.9)
  - "Creat[e] a more unified and coherent student support structure focused on the individual student" (TT2030, page 7)
- **Theme 2: Training and Technology for Student Success**
  - "Strengthen faculty engagement with students and faculty investment in student success" (TT2030, p.9)
  - Create "clear coordination of messaging...among UWM's admissions office, University Relations, Academic Affairs, Student Affairs, and systems related to enrollment management (student success)." (TT2030, page 9)
  - Develop "a complete data picture that seeks to drive change and improvements of student experiences and outcomes" (TT2030, page 9)
- **Theme 3: Creating A Unique, Coordinated, Student-centric UWM Experience**
  - "Create a student-centric experience" (TT2030, page 8) with "coordinated messaging" (TT2030, p. 9)
  - "UWM must develop a strong first-year experience" (TT2030, page 7, 8).
  - "More meaningfully engage with our students" (TT2030, p.2) "through graduation" (TT2030, p.7)

GUIDING PRINCIPLES

- Student success should be everyone's priority at UWM, regardless of title/role.
- Students do not and should not see UWM as separate silos of Academic Affairs, Student Affairs, Enrollment Management, and Global Inclusion and Engagement; they just see UWM.
- While there is a subgroup devoted to a "radically welcoming environment," diversity and inclusion efforts should be infused throughout the work here as well.
- Campus leadership will need to resource the following recommendations appropriately and lead change management.
- Some recommendations here will be interdependent with other recommendations being developed simultaneously, such as the realignment of schools/colleges.

THEME 1: COORDINATED ADVISING AND SUPPORT STRUCTURE

- Create a "personalized student experience of advising and support" (TT2030, page 8)
- Create "A coordinated and integrated systems approach with a single accountable leader imbued with the authority and knowledge to reorganize and lead a major system change" (TT2030, page 8).
- Create "A relational model for advising that includes many points of contact for students to engage with support services as a network of support across their UWM experience" (TT2030, p.9)
- "Creat[e] a more unified and coherent student support structure focused on the individual student" (TT2030, page 7)

Undergraduate Advising

Undergraduate Academic Advising at UWM is decentralized, and each school/college (including College of General Studies) has an undergraduate academic advising office with professional advisors, which might also include faculty advisors. Every student at UWM is assigned an academic advisor who helps them navigate their degree progress through graduation, connects a student to resources, and assists with matters in or out of the classroom. Undecided and Pre-Major first time in college students are housed in Pathway Advising during their first year in college. Pathway Advising also advises students who are determined through the admission process to need additional support.

Through our EAB Navigate platform, students may have multiple advisors assigned to them who provide non-academic advising or coaching support. These professionals may have advisor, coach, or coordinator titles assigned to them, hold additional responsibilities, and are housed in a different campus division. These units or offices include Athletics, Honors College, Multicultural Student Centers, Student Success Center, and Student Support Services (affiliated with Pathway Advising). Other important student support offices such as: CPaRC, MAVC, WRC, LGBTQ+ Resource Center, and IEC provide advising and/or coaching services to students but are not necessarily assigned to students in the EAB Navigate platform.

Mandatory advising, advising caseloads, student assignments, and advisor responsibilities vary campus wide. Training, professional development, and assessment are limited, and advisor salaries are not always equitable across units. Kuh, et. al., (2006) noted, "The quality of academic advising is the single most powerful predictor of satisfaction with the campus environment for students at four-year schools." (p. 60). Folson and Scobie (2010) note that providing effective, quality academic advising requires knowledge, skill, and understanding (p.15). "A comprehensive training and professional development program for academic advisors build informational, conceptual, and relational knowledge, improving advisors' ability to affect student learning which implicit in every component of the Kuh et al. (2007) definition of student success" (Folson & Scobie, 2010, p. 15).

With the pandemic, virtual advising has been a necessity and has become more accessible for students. Ed Venit and Dr. Christina Hubbard on *EAB's Office Hours* (2020) podcast, "Why Virtual Advising is Here to Stay" compares virtual advising with telemedicine services and highlights how virtual advising has saved time for students, making some students feel more

comfortable, and how this service could be more accessible & equitable for students. However, this has created more work for advising due to simultaneously increased email demand. Since the pandemic, advising data shows how some institutions have seen a decrease in their no-show rates and an increase in students accepting appointment requests through campaigns. Accordingly, we have seen similar results with our own Navigate efforts at UWM regarding reduced no-show rates.

Changes in student demographics, access to technology platforms (EAB Navigate), alliances with regional institutions (HERA), and using predictive analytics to focus limited resources towards students most in need of support are changing the way we think and do our work in higher education. To make advising more proactive and individualized with limited resources, the Educational Advisory Board recommends institutions to rely on data to analyze the likelihood of students stopping out. When listening to Tim Renick on *EAB's Office Hours* (2020) podcast, "GSU's Playbook for Eliminating Equity Gaps" he noted that in 2008 Georgia State University began focusing on the data and using it to try interventions and then scaling them up across their student body. Within 5-6 years, they began to close and then eliminate equity gaps. Even amid a pandemic, Georgia State will now have their sixth straight year with no equity gaps based on race, ethnicity, or income level.

With the newly announced partnership of EAB's Moon Shot for Equity, we are in the best position to begin reviewing our existing advising models, previous work done on enhancing advising, and the advising infrastructure, as a means to make improvements to enhance our student-centered advising approaches.

Over the past several years, committees, workgroups, and councils have worked hard to enhance the advising experience for students and the advising community at UWM. For example:

- *2014: Launch of EAB Navigate (formally known as Student Success Collaborative)*
- *2014: EAC Advising Unconference and Report*
- *2014 – 2016: Academic Recovery Seminar for New Students on Probation Pilot*
- *2014: NACADA consultants conducted an audit in Lubar's Undergraduate Student Services*
- *2015: Undergraduate Advising Workgroup Recommendations*
- *2016: Registrar's Office takes on central responsibility for coding Academic Advisement Reports*
- *2016: Academic Advising Learning and Development Outcomes Workgroup*
- *2017: Creation of the Office of Central Advising (OCA)*
- *2019: Panther Graduation Promise (Implementing an expanded student support model)*
- *2019: EAC Survey on Advisors and Coaches Experiences Survey*
- *2019: Advising Chairs Request for Funding from Academic Advising Community*
- *2019: Student Success Workgroup Recommendations*
- *2019: ASALC Advising Student Satisfaction Surveys - conducted in some advising units.*
- *2019: ASALC Advisor to Student Ratios Review*

- *2019: NACADA consultants conducted an audit in the Letters and Sciences Advising Office*
- *2020: Office of Central Advising merges with Academic Opportunity Center and rebrands as Pathway Advising, serving undecided and undeclared students*
- *2020: Undergraduate Summer Bridge program for underprepared students moves to a year-long Associate program offered on the Milwaukee campus through CGS.*
- *2020: Vice Provost for Student Success appointed to oversee the coordination of academic advising*

For additional undergraduate advising information visit: www.uwm.edu/advising.

Best Practices

- The Global Community for Academic Advising (NACADA)
    - *"NACADA is an association of professional advisors, counselors, faculty, administrators, and students working to enhance the educational development of students. NACADA promotes and supports quality academic advising in institutions of higher education to enhance the educational development of students. NACADA provides a forum for discussion, debate, and the exchange of ideas pertaining to academic advising through numerous activities and publications."*
- Comprehensive Advisor Training and Development Resources
- CAS Standards for Academic Advising
    - *"The Council for the Advancement of Standards (CAS) provides standards that colleges and universities across the globe use as benchmarks in program assessment." It is* focused on training, technology and diversity, equity, and inclusion.
- Educational Advisory Board (EAB)
    - Develop a Student-Centered Academic Advising Model
    - The Advising Office of the Future
    - EAB's 6 Roles Faculty in Student Success

Coordinated Care Network

Over the past several years, UWM began increasing programs to help student success while they work toward graduation. For example, UWM provides:

- A robust emergency grant program that is fully funded by private donors. Since 2017, UWM has awarded over $920,000 in emergency grants.
- Laptop, Chromebook, and Wi-Fi hotspot checkout programs for students so they can stay on top of their coursework if they experience a financial emergency.
- A well-stocked food pantry that is open year-round (and remained open when the campus went fully online during COVID-19 in Spring 2020).
- A career closet to provide clothes to students when they go on job interviews.

- A foster youth program, where staff serves as a strong resource to ensure they can successfully navigate the campus, including welcoming them to UWM with care packages, connecting students to resources to ensure they have the supplies they need, and helping them navigate complex processes, such as applying for financial aid.
- Several high intervention and support programs (Lawton Scholars, MKE Scholars, & Life Impact program), where students apply to participate in wraparound programs. For these, students are awarded scholarships to assist with paying for college; however, they are certain requitments, such as meeting with staff, engaging in activities that will help them achieve their goals, and maintaining a specific GPA.
- Supplemental instruction and tutoring for students who are driven to succeed who will benefit from additional academic support and/or students seeking to earn better grades in their courses.

Though these individual programs have demonstrated great success; they can be fragmented, ad hoc, and difficult for students to find. Students will often share that they did not know that such resources to assist them existed. We know from research that low-income students have limited time and that one of their greatest challenges is navigating the campus. This is also an equity-based issue, as middle-class students are taught through prior school experiences to advocate for themselves and push for their needs to be met, while working class and students in poverty haven't necessarily been trained in those same expectations unless they attended a strong college-culture based high school (typically found in elite and extremely competitive high schools).

In 2019, the UWM Student Success Work Group (SSWG) both surveyed and conducted focus groups and interviews with students, with the goal of improving the UWM student experience. In their May 2019, report, SSWG noted "Students need help connecting with support opportunities: Students too often noted that even when they knew that a resource was available, they often did not utilize it until they were in trouble or crisis." A comprehensive wraparound support program would assist these students and lead to increased retention and completion rates.

By providing a cohesive support team for our most at-need students, we are also more capable to support ALL students. Dean of Students Office and Student Support Team have already begun this work. Mention that DOS has established teams and is expanding membership and operations of those teams to increase already existing wrap around community care services. The Dean of Students has established teams and is expanding membership and operations of those teams to increase already existing wraparound community care services.

Best Practices

EAB has identified 15 researched-based best practices to erase equity gaps, and one important practice is to create a Coordinated Care Network "across offices to easily coordinate and collaborate on appropriate next steps for student support." They note that "support offices such as financial aid, career advising, academic support, and student health and counseling centers

positively impact student success but are often underutilized." Specifically, this coordination can help students avoid what has been termed the "UWM Bounce" where students are shuffled from office to office.

EAB notes: "uncoordinated care has major consequences. Instead of studying or participating in the college experience, students have to spend time navigating complex, inefficient, and bureaucratic processes." EAB further notes: "A Coordinated Care Network allows students to receive help not just from the person they happen to meet with (usually their advisor), but from all of the people and offices suited to help them. Each frontline staff member is well-versed in the work of other departments and accountable to a unified vision of student success."

In addition to increasing coordination among existing offices, other institutions are creating holistic, wraparound support structures and are seeing decreases in inequity gaps and increases in graduation rates. According to Amarillo's Culture of Caring Handbook, their theory of change was "If Amarillo College removes poverty barriers for our students in an accelerated learning environment while providing a deep culture of caring, students will be successful and complete their educational goal."

Another EAB research-based best practice to erase equity gaps calls for expanding community-based partnerships to support the aspirations of first-generation, lower-income, and underrepresented students. City University of New York's Single Stop, which "connects people to the resources they need to attain higher education, obtain good jobs, and achieve financial self-sufficiency," served 77,256 students and families between 2009 and 2015, connecting them to more than $183 million in resources, tax refunds, and supportive services. UWM will build upon these models to create a more coordinated and centralized plan to address students' needs here in Milwaukee. In addition, according to the Student Success Work Group, "Students frequently commented on their love for the city of Milwaukee. The city is viewed as an extension of campus and is an integral part of their experience as a student."
Student success should be everyone's priority at UWM.

- **Action1.1: Develop a student-centered and *"relational"* academic advising model *"for students to engage with support services"* led by a *"single accountable leader imbued with authority and knowledge"* to enhance the undergraduate advising experience. (*Note: 2030 subgroup work on school/college reform will affect undergraduate advising and more conversations are needed as restructuring occurs*).**
    - Implementation Plan **(See conceptual map of recommendations)**
        - Activity 1.1.A: Conduct a review of advising infrastructure, re-examine the role of academic advisors, caseload ratios, and advising assignments.
            - Continuous review and improvement of academic advising reports, registration holds, mandatory advising holds, enrollment appointment assignments, university/major exit student surveys, outreach campaigns, and student academic appeals and processes.
            - Develop a coordinated care approach that allows faculty and those in advising roles to work in tandem.

- *Activity 1.1B:* Assess the resources and support needed for the current networks/councils/committees focused on enhancing advising across campus, e.g.,
    - Hire, promote within, or designate diverse, knowledgeable, and experienced advisors to assist with campus-wide advising coordination, training/development, and assessment.
    - Potentially restructure and form one advising council that has equal partnership and representation between advisors/coordinators/coaches and leadership.
    - Note: Individuals expressed frustration with creation of new work groups. If a new need is identified, it should first be explored whether the work can get embedded into an existing campus committee to help avoid duplicating efforts.
- *Activity 1.1C:* Develop a comprehensive campus-wide student-centered advising strategic plan based on best practice advising approaches, advising theories, research, previous advising recommendations, the future of virtual advising, and assessment findings.
    - Strategic plan should include campus-wide advising priorities, initiatives, and implementation plans that align with UWM's Outstanding Learning Environment metrics.
    - More intentionality and strategic direction. Develop common way of doing things; regular touchpoints; How do we know what works? How do we stop doing things that are not improving student success and retention?
- Activity 1.1D Prepare students more intentionally for the next semester
    - Have schedules done sooner by departments so students can register earlier.
    - Incorporate more student preferences for course delivery methods.
    - More coordinated efforts with outreach campaigns and communication.
    - Increase expectations for students to receive advising every semester to discuss academic progress and course selection.
- *Activity 1.1.E:* Create an Executive Director of Advising position
- Activity 1.1.F: Implement a comprehensive advising assessment plan, which includes establishing a process for utilizing assessment results to make continuous advising improvements. *(Note: also, a Moon Shot for Equity Action Item)*
    - Conduct campus-wide student advising surveys, utilize focus groups, and use Navigate for quick polling to assess student needs in advising.
    - Establish formalized baseline expectations for advisors' responsibilities, activities, and practices with an accountability structure

- **Action 1.2: Create a Coordinated Care Network for Wrap Around Services**

- Implementation Plan **(See conceptual map of recommendations)**
    - Activity 1.2.A: Create a permanent organizing body that gets the right people in the room and meets regularly and reports back.
    - Activity 1.2.B: Identify buckets of student concerns from a student perspective:
        - These buckets could include functional issues (transactions), academic wraparound support (tutoring, Library, etc.), crisis (need help NOW), basic needs (food, housing, medical), Health & Well-being, Engagement and Belonging, Special populations
    - Activity 1.2.C: Reorganize staff and services that are currently separate areas to offer more coordinated services.
    - Activity 1.2.D: Collocate similar services, i.e., food pantry and career closet near staff who can address students' long-term needs.
    - Activity 1.2.E: Create graduate internships to assist students in applying for public benefits and connect students to community resources (energy assistance, food, housing resources, etc.)
    - Activity 1.2.F: Create space for community partners to meet with students on campus
    - Activity 1.2.G: Incorporate these resources on a smaller scale in the Student Solutions Centers at our branch campuses.

- **Action 1.3: Improve campus operations to help make operations invisible and information accessible and easy to find**
    - Implementation Plan **(See conceptual map of recommendations)**
    - *Activity 1.3.A:* Centralize/consolidate information on the website with an easier to use search feature
    - *Activity 1.3.B* Highlight all resources available to students as early and as often as possible
    - Activity 1.3.C: Create consistency for students regarding technology used for class engagement and engaging with support units, e.g.,
        - Some advisors are using Collaborate Ultra, others zoom, some only phone calls,
        - There's no consistency in how students should engage in class (canvas, Teams, Collaborate Ultra, etc.) or how to engage with support units (video chat, phone calls, outreach via email or a help form or navigate).
    - Activity 1.3 D: Address curricular barriers to completion and redesigning academic policies where necessary (Note: EAB's 6 Roles Faculty in Student Success), e.g.,

        - Build bridges with faculty and departments to ensure advisors are consistently a part of the conversation for potential course changes, curriculum changes, special programming efforts, and creating better lines of communication between the two groups overall.
    - *Activity 1.3.E* Examine policies and procedures across units and assess how they impact student success and create equity gaps
    - Activity 1.3.F: Create a centralized way to gather student data/information of where students are getting stuck in procedures

Training and Technology for Student Success

- "Strengthen faculty engagement with students and faculty investment in student success" (TT2030, p.9)
- Create "clear coordination of messaging...among UWM's admissions office, University Relations, Academic Affairs, Student Affairs, and systems related to enrollment management (student success)." (TT2030, page 9)
- Develop "a complete data picture that seeks to drive change and improvements of student experiences and outcomes" (TT2030, page 9)

According to the UWM Moon Shot web page: UWM started to incorporate Navigate, EAB's student success management system, as an advising and outreach tool in 2014. The technology offers features like online scheduling with advisors and student progress reports that allow for faculty to reach out proactively if a student may be falling behind academically. Jeremy Page and Brennan Olena have been working with a Navigate Team and have developed the Navigate Manager. A new progress report was added in spring 2020 to follow up with students who may have been affected by the COVID-19 pandemic. Nearly all UWM student services offices have some level of access to Navigate, especially those offices that provide advising and academic skills support.

High advisor caseloads and lack of expertise in predictive analytics can be barriers for the usage of the Navigate platform. Creating a student-centered model, as discussed in Action 1.1, will allow for advisors to be able to work more efficiently and to develop stronger relationships with their students. For example, according to EAB's *A Student-Centered Approach to Advising Study*, "Advisors can most effectively balance their time across their caseloads if they know how attrition risk differs for each student and have the tools to proactively reach out when students show early signs of need." More training on intervention strategies for robust usage of the Navigate platform is needed. More staffing resources will be necessary to increase capacity, particularly with the upcoming Moon Shot for Equity work.

The Chancellor's Enrollment Management Action Team (CEMAT) has been examining data and coordinating efforts to increase enrollment and retention. A subcommittee of CEMAT, Pathways

and Interventions, is responsible for ensuring collaboration and alignment across all interventions that are critical components for the success of students. This cross-functional team works to clarify roles, standardize communication plans, use Navigate to its full potential, improve available student information, create student-centered offices, and create standardized processes. See Pathways & Interventions Action Plan for more detail.

Best Practices

EAB notes that "In a Coordinated Care Network, staff have technology and processes in place to share information, saving them from having to repeatedly ask students, 'Why are you here, and where have you already been?' Like the electronic health records by health care providers used, a centralized student data center enables staff to more easily understand the whole picture when they meet with a student. They do this by accessing a shared log of all interactions and shared staff notes."

Another EAB research-based best practice to erase equity gaps calls for leveraging technology for proactive advising. As part of the Moon Shot for Equity, UWM has committed to using Navigate to manage advising data, degree plan structure, student enrollment, and progress through degree plans, as well as to implement strategies to engage staff and faculty in early warning systems that signal student struggles to enable just-in-time advising interventions. UWM has also committed to using Navigate to coordinate and collaborate on student support.

- **Action 2.1: Use Navigate to coordinate and collaborate on student support (Moon Shot Action Item)**
    - Implementation Plan
        - Activity 2.1.A: Create a Navigate administrator (similar to the CRM administer) and increase staffing support and training as usage expands
        - Activity 2.1.B: Discuss the context and information that goes into Navigate
        - Activity 2.1.C: Coordinate messaging in Navigate and among coaches, advisors, instructors and those assigned as the student's success team in the platform
        - Activity 2.1.C: Enhance personalized communication and outreach efforts
            - Enhance our Navigate app usage to allow push notifications, nudges, quick polls, micro-surveys
        - Activity 2.1.E: Enhance our predictive analytics and success markers.
            - Track risk factors and behaviors to alert advisors and intervene earlier (example: students registered for wrong courses, underperforming in pre-requisite courses) (Problem: Advisors in some units are not able to keep up with alerts due to caseload & other responsibilities)
            - Work more closely with EAB to better leverage and adapt its predictive analytics for advising and early intervention

- **<u>Action 2.2:</u> Develop "a complete data picture that seeks to drive change and improvements of student experiences and outcomes" (TT2030, page 9)**
    - <u>Implementation Plan</u> **(See conceptual map of recommendations)**
        - Activity 2.2.A: Build infrastructure to share data to connect the lessons learned and create a larger picture of the UWM students and their experiences
        - Activity 2.2.B: Engage in short-term research to follow students from pre-admissions through graduation, and learn, from their perspective, where their expectations are not being met and where roadblocks are—e.g., students might expect to have coursework in their major during first-year, interacting with diverse students, getting around, etc.
        - Activity 2.2.C: Use data analytics to inform processes for intentional, proactive outreach to students who might need assistance before they reach a crisis, including students who haven't completed FAFSA, students who stopped attending classes, and students who are struggling academically.

- **<u>Action 2.3:</u> Develop consistent training and development for academic advisors, success coaches, multicultural success coordinators, faculty advisors, and those in case management roles to provide effective, quality advising and coaching practices to increase student success; and create opportunities for career growth.**
    - <u>Implementation Plan</u> (**See conceptual map of recommendations)**
        - *<u>Activity 2.3.A:</u>* Create online training modules, protocols, and research-based on student development and advising theories
        - *<u>Activity 2.3.B:</u>* Engage professionals with intercultural competence training and development to ensure student belongingness is being fostered
        - *<u>Activity 2.3.C:</u>* Create an open training lab on how to do things and how to get to the same level across campus (Note: EAC is hosting open labs in spring 2021)
        - *<u>Activity 2.3.D:</u>* Create spaces for motivated and seasoned professionals to advance in titles and responsibilities, e.g.,
            - 2019 UWM Advisors & Coaches Experience Survey noted "advisors don't feel supported in their professional progress and lack professional development for growth"
            - Structure incentives for growth and success that is focused on the overall performance for building relationships, accurately tracking students' progress, etc. (Note: EAB recommendation to attract and retain advisors)
            - Avoid piling responsibilities that do not align with role and potentially affecting the quality of advising.

- **Action 2.4:** ***"Strengthen faculty engagement with students"*** **by faculty and staff working together "as a network of support" to counsel, coach, and intervene with students, especially struggling students and how can we prepare them. (Note: Potential overlap here with Radically Welcoming Group with regards to faculty training)**
  - Implementation Plan **(See conceptual map of recommendations)**
    - Activity 2.4 A: Help faculty develop their role as mentors for students who are struggling as well as those who are high achieving.
    - Activity 2.4 B: Train faculty on their role in student success and in identifying struggling students
    - Activity 2.4 C: Require campus-wide resources and intercultural competence training for faculty
    - Activity 2.4 D: Incentivize faculty by making it part of tenure and ongoing reviews after tenure. Hire more permanent faculty. Adjuncts are less engaged and have less time to engage with students than full-time faculty.

- **Action 2.5: Train frontline staff and front-facing student employees to be well-versed in the work of other departments and accountable to a unified vision of student success**
  - Implementation Plan **(See conceptual map of recommendations)**
    - *Activity 2.5.A.* Create a simplified roadmap of student support services
    - *Activity 2.5.B.* Develop training *(UWM 101)* for everyone so that there is standard knowledge about how UWM works.
    - Activity 2.5.C: Develop a customer service training that prioritizes listening, accuracy, and respect for the diverse needs of UWM students over transactions (also in Student Affairs Strategic Plan)
    - *Activity 2.5.D:* Train faculty and staff on UWM 101
    - Activity 25.E: Train faculty and staff on the customer service model

CREATING A UNIQUE, COORDINATED, STUDENT-CENTRIC, UWM EXPERIENCE

Think Tank 2030 Recommendations:

- "Create a student-centric experience" (TT2030, page 8) with "coordinated messaging" (TT2030, p. 9)
- "UWM must develop a strong first-year experience" (TT2030, page 7, 8).
- "More meaningfully engage with our students" (TT2030, p.2) "through graduation" (TT2030, p.7)

Conceptualizing Meaningful Engagement
Student engagement can and should complement what is learned in the classroom and create deep bonds connected to a 'UWM experience.' However, David Bevenino at EAB notes that "Students often struggle to navigate and connect institutions' siloed, disparate academic and co-curricular opportunities." ACPA, College Student Educators International, explains:

> "The concepts of "learning," "personal development," and "student development" are inextricably intertwined and inseparable. Higher education traditionally has organized its activities into "academic affairs" (learning, curriculum, classrooms, cognitive development) and "student affairs" (co-curriculum, student activities, residential life, affective or personal development)… students benefit from many and varied experiences during college and that learning and personal development are cumulative, mutually shaping processes that occur over an extended period of time in many different settings. The more students are involved in a variety of activities inside and outside the classroom the more they gain."

First-Year Experience at UWM
UWM's first-year experience is currently, at best, disjointed and unequal across school/college/unit of enrollment. The first-year experience can best be represented by two kinds of student experience: First-Year Experience Courses and student transition experience programs.

First-Year Experience Courses:
What is the current landscape of First-Year Experience coursework at UWM?

- Some Schools/Colleges at UWM offer pre-professional first-year courses required for new freshmen (Health Sciences, Social Welfare, Nursing, Business, Nursing) but these courses focus mainly on career readiness, not college success, and they vary widely in delivery and content.
- UWM offers 'First-Year Seminar' courses that cap participation at 20 students to maintain a low student to faculty ratio. Courses focus on special topics that sometimes overlap with General Education Requirements. Many of these courses are canceled late in August due to low enrollment, impacting students' academic plans and other course enrollments. There is no requirement for faculty to build a syllabus that includes connections to first-year success strategies, university knowledge building, or career exploration.
- Pathway Advising asks students to take Ed Psy 110, a vocation/career exploration course. It has positive outcomes but is under-resourced and is not a requirement.
- The School of Education requires the 'SOE Jumpstart' course (Ed Psy 279 special topic) for new freshmen that focuses on how to navigate college. The course has excellent outcomes and retains students to the college. It meets for the first half of the Fall semester.
- New Student Programs has done work in developing appropriately scaffolded learning outcomes for each intervention throughout a new student's transition experience, including a first-semester experience course.

Best Practices:

- The Association for Orientation, Transition, and Retention in Higher Education (NODA)
    - NODA Core Competencies
- Educational Advisory Board (EAB)
    - The Student Success Playbook
    - EAB's 6 Roles Faculty in Student Success
- Incorporate a full first-semester course (for new freshmen with an equivalent experience for transfer students) into General Education Requirements.
- Course should be connected to and hosted by Academic College. Facilitators could be Academic Advisors, Faculty, other staff, graduate students. Sections should be co-facilitated by one professional staff/graduate student and one student leader with experience in the Academic College.
- Course sections should enroll no more than 25 students. This offers a more intimate experience for students to build community and make connections with the facilitators that will offer support and outreach throughout their first year on campus.
- Course should meet outcomes related to (1) navigating college, (2) understanding one's academic plan, (3) career exploration, and (4) contributing to an equitable and inclusive campus community. Experiences should be mirrored across Academic College, other than content related to outcomes (2) and (3).

Student Transition Experience Programs:

UWM offers a limited array of transition programs for new students, both freshmen, and transfer. Here is an overview:

- New Student Programs plans Panther Academic Welcome (PAW) and Transfer & Adult Student Welcome Day (TAWD).
- Student Involvement organizes campus events into the Fall Welcome calendar and plans signature events like Panther Fest and others.
- University Housing contributes to Fall Welcome by planning events and activities for residents.

Best Practices:

- A new student Welcome Week would allow students a more in-depth experience that will facilitate the development of a sense of belonging and the knowledge students need to successfully navigate campus.
- A Welcome Week program would also meet institutional outcomes both functional (better support Housing move-in) and adaptive (communicate community expectations and priorities).
- Feedback from work done in the Student Success Work Group: "Students during their first year are balancing a desire to become increasingly independent while looking for connection and validation that they belong at UWM."

- Maintaining groups smaller than 20 allows for more effective social connection and community development. Groups should be connected to ongoing connections students will have over their first semester (FYE course; residential community).
- Student leaders will play a critical role in facilitating the new student experience, supporting programmatic needs, and contributing to the radically welcoming culture we hope to achieve as an institution.

Meaningful Engagement Efforts at UWM:

UWM already recognizes the importance of engagement. The Chancellor's Strategic Directions note that "students who feel a sense of connection to UWM and have developed relationships with other students, faculty and staff are more likely to be retained." A few examples of how UWM's units, teams, and divisions are aiming to meaningfully engage with students:

- The Dean of Students Office increases connections with UWM students and the UWM community to better understand student needs and concerns, better advocate for their success, and help UWM be a safe, friendly, and welcoming environment for students of all backgrounds and identities.
- Student Involvement hosts programs designed to bridge learning from the classroom to campus life.
- Athletics provides opportunities for student growth and development, school pride, engagement with fellow students, and more than 4,000 hours of community service annually.
- Multicultural Student Centers support Multicultural Student Success Coordinators, whose roles are designed to coach, advise, and meaningfully engage with students occupying historically marginalized identities.
- Units like MAVRC, the LGBTQ+ Resource Center, the Women's Resource Center, and the Inclusive Excellence Center all provide identity-specific programming and support for UWM students.
- The Center for Community-Based Learning, Leadership, and Research offers experiential education opportunities that connect students to the Milwaukee community through service.
- The Student Success Center (SSC) hosts academic support programming (tutoring, Supplemental Instruction) and Peer Mentorship. The SSC is also involved with coordinating student outreach and intrusive advising via Navigate.
- The Career Planning and Resource Center offers career-related support throughout various areas of students' career processes.
- University Housing enhances students' cultural understanding, leadership skills, academic success, social connections, and social responsibility by creating safe, comfortable, and well-maintained living learning environments that inspire growth and development.

- UREC offers programming which encompasses the competitive, passive, social, cultural, and instructional aspects of recreational activity.

More work can be done to build upon this foundation to ensure that there are meaningful activities and programming for all populations of students, across that year and across their academic career. For example, according to the 2017 UWM NSSE findings, there is room for growth regarding engagement: UWM seniors reported significantly lower rates of "attending campus activities and events" than their peers in the three comparison groups. Apart from "helping you manage your non-academic responsibilities," UWM freshmen experiences with supportive environment were lower than their peers in the three comparison groups.

In addition, in 2019, the UWM Student Success Work Group (SSWG) surveyed and conducted focus groups with students, intending to understand the UWM student experience. In their May 2019 report, SSWG noted that "Students want and need better human connections: An umbrella theme is that students desire and recognize a benefit from connections made with faculty, staff, older students, and peers." In addition, they noted that "students are struggling to navigate substantial personal change."

In response to these recommendations and findings, the Division of Student Affairs has developed a three-year Strategic Plan that was intentionally aligned with the Think Tank 2030 Report and the Chancellor's Strategic Directions. The inaugural positions of Director of Student Learning, Assessment, and Planning, the Executive Director of Student Life & Services, and the Director of Advocacy and Engagement positions will help guide the work of the strategic priorities: alignment, equity & justice, student learning, health and well-being, and student connection to UWM.

Best Practices that influenced the recommendations below:

- According to EAB's study, Reimaging Experiential Learning: Skill-Building Opportunities Outside the Classroom, "Students can and are developing high-demand skills through co-curricular involvement, including student organizations, Greek life, student leadership, volunteer opportunities, and campus employment, but many students don't access these opportunities and those that do often struggle to articulate the concrete or transferable value of their experiences to prospective employers." They recommend "reframing co-curricular involvement as a range of opportunities for skill development" to "reach a broader population of students and help them make more intentional choices for their involvement." The student further notes the growing movement towards "campus-wide documentation, whether in the form of a cocurricular transcript or record, or an e-portfolio." This is also described in the Division of Student Affairs Strategic Plan.

- Rather than a major map, EAB suggests creating an "experiential major map" to align course requirements with co-curricular and experiential learning opportunities. This work goes beyond an academic degree map to "help students explore majors, reflect on the career-

relevant skills they are gaining, get hands-on experience in preparation for jobs and graduate programs, and see career paths available to each major." The key elements recommended are 1. roadmap for timing of student activity, 2. key pillars of the student experience, 3. academic, cocurricular, and support services information, and 4. career outcomes information.

- The National Institute for Learning Outcomes Assessment (NILOA) suggests mapping and assessing student learning in Student Affairs. According to Jankowski and Baker (2020), "Mapping is a collaborative process of indicating which activities or experiences align with which learning outcomes throughout an institution of higher education. It is a process if making clear the relationships between different parts of the educational enterprise as well as providing clarity to students on the intended educational design." They further state: "Mapping can begin with an inventory, but an inventory is a tool that can be employed in mapping, not a map in and of itself. An inventory is a list of all activities or events. A map is a grid of connection points between different levels and layers of learning. It outlines how a particular instance of learning connects to unit or program learning outcomes and to institution-level learning outcomes" (p.6).

- Engagement and Belonging is essential to student success. In College Students' Sense of Belonging: A Key to Educational Success for All Students, Terrell Strayhorn notes, "Belonging--with peers, in the classroom, or on campus—is a critical dimension of success at college. It can affect a student's degree of academic adjustment, achievement, aspirations, or even whether a student stays in school."

  This is especially important for Minoritized Students, as noted by AnneMarrie Vaccario and Barbara Newman in the Journal of College Student Development (November 2016). They state from their study: "All students talked about how getting involved in campus extracurricular activities was connected to their sense of belonging. However, the way involvement shaped their emerging sense of belonging differed among minoritized and privileged students. Although belonging for privileged students was related to having fun and a sense of accomplishment or mattering via involvement, belonging for minoritized students revolved around whether or not they could be their authentic selves and develop authentic connections in clubs and student centers" (p. 935).

- **Action 3.1: Develop a uniform First-Year Experience course and equivalent New Transfer Experience (course or other programs) that supports students throughout their first semester at UWM (*Note: 2030 subgroup work on school/college reform will affect FYE Courses and more conversations are needed as restructuring occurs*).**
  - Implementation Plan **(See conceptual map of recommendations)**
    - *Activity 3.1A:* Develop Course syllabus and seek approval through Faculty Senate.

        - Partnership with Dr. Jacqueline Nguyen and Dr. Jeremy Page in the School of Education would be the first step—theirs is the most robustly assessed FYE course on campus.
        - In depth review of Ed Psych 110 (Planning for Careers, Major) historical assessment data would aid in identifying meaningful content. Dr. Nadya Fouad has coordinated much of this assessment and could provide insights and data.
        - Learning outcomes for the course should be aligned with the learning outcomes outlined here by New Student Programs, another willing partner in FYE course creation.
    - Activity 3.1B: Incorporate the FYE Course into the General Education Requirements for new freshmen, and an equivalent experience for Transfer Students.
        - Transfer experience could be a limited course held in Canvas that highlights resources, strategies, and meets similar outcomes to the FYE course.
        - Important to note that completion of the FYE or Transfer experience need only be done once at a student's entrance to UWM—should a student change School/College/Academic Program that student should not need to complete another FYE/Transfer experience. This must be built into the language of the GER structure.
    - Activity 3.1C: Identify how to best resource the Academic Colleges to reorganize staff responsibilities to facilitate these courses. Some key activities include:
        - Significantly lowering Academic Advisor caseloads should allow more time for them to facilitate courses. If courses are facilitated by Academic Advisors, students could be placed in a section with their Advisor, offering an opportunity for meaningful connection.
        - Identify specific facilitators among faculty, advisors, other professional staff, graduate students.
    - *Activity 3.1D*: Finalize student leader role, function, and recruitment plan.
        - Are these student leaders Peer Mentors? This would be a reorganization and redefinition of that role. Need to partner with the Student Success Center.
        - Identify funding to pay student leaders for their work supporting course facilitation.
    - *Activity 3.1E*: Develop and host training for course facilitators.

- **Action 3.2: Implement a New Student Welcome Week that builds on foundations set during Orientation, supports students in their confidence navigating campus and communicates UWM's core institutional values.**

- Implementation Plan **(See conceptual map of recommendations)**
    - *Activity 3.2A:* New Student Programs has already begun planning a Welcome Week program, but needs support from key partner units and campus leadership.
        - New Student Programs will collect feedback and input from partners in University Housing, Student Involvement, Classroom Services, Schools/College and other Fall Welcome collaborators.
        - NSP will be responsible for finalizing the proposal.
    - Activity 3.2B: Fall Welcome Leadership Team finalizes and approves the Welcome Week plan.
    - Activity 3.2C: Enrollment Management Leadership, Student Affairs Leadership, and School/College Leadership teams work with NSP and Fall Welcome Leadership team to identify a sustainable funding model for the program.
        - Expected costs include space, materials, student leader costs (recruitment, hiring, training, materials, payment), food, marketing.
        - Fall Welcome is currently funded ad-hoc by various departments under unofficial agreements that change as staff turnover and department pressures change.
    - Activity 3.2D: Develop messaging and marketing materials to begin sharing with admitted and prospective students about the program and the uniquely UWM experience.
    - Activity 3.2E: Recruitment for student leaders must begin in the spring before hosting the program for the first time in Fall—a realistic timeline would be considering Fall 2022 as the launch year.
    - Activity 3.2F: Develop and host training for student leaders, campus partners.

- **Action 3.3: Create EAB-recommended "Experiential Major Maps" resulting in a student co-curricular resume/profile**
    - Implementation Plan
        - *Activity 3.3.A*: Conclude work on first-generation academic maps
        - *Activity 3.3.B:* Map how/where student learning occurs outside the classroom
        - Activity 3.3 C: Provide alternative academic maps, e.g.,
            - Prescriptive semester-by-semester degree maps, degree maps for undeclared students, degree maps for transfer students, degree maps across related disciplines for undecided first-year students (Note: also, a Moon Shot for Equity Action item)
        - Activity 3.3 D: Build Experiential Major Maps that include 1. road maps for timing of student activity, 2. key pillars of the student experience, 3.

Academic, cocurricular and support services info, and 4. career outcomes information

- **<u>Action 3.4:</u> Create a comprehensive and unique UWM "Campus Life" experience to encourage student connections and belonging**
    - <u>Implementation Plan</u>
        - *<u>Activity 3.4.A</u>*: Map existing programming to assess participation and impact
        - *<u>Action 3.4.B:</u>* Get student feedback regarding what kinds of programming is needed/wanted (*Note: this is already part of* Student Affairs Strategic Plan, p. 7)
        - Action 3.4.C: Create communication opportunities to establish a stronger student community and campus social identity
        - *<u>Activity 3.4.D:</u>* Identify gaps in experiences, organizations, and student spaces
        - *<u>Action 3.4.E:</u>* Empower students to make UWM their home through participation in and creation of organizations
        - *<u>Action 3.4.F:</u>* Offer more directive support and out-reach to harder-to-engage students (*Note: this is part of* Student Affairs Strategic Plan, p. 17)
        - *<u>Action 3.4.G:</u>* Create new UWM traditions through annual cultural, equity, and justice programs and encourage faculty, staff, development, alum participation (*Note: this is already part of* Student Affairs Strategic Plan, p. 7)

<u>2030 Implementation Team: Experiential Learning Sub-Committee Recommendations</u>

"The undergraduate education I got would not have been the same without the experiential learning opportunities I received throughout those years. There was a focus on community-based learning by providing opportunities to work on real community issues in the classroom. Without these community-based learning opportunities I would not have discovered the career paths available in Public Administration or Urban Planning. Due to my undergraduate academic opportunities, I have found my passion for impacting community development and I am currently pursuing a master's degree in both Public Administration and Urban Planning UWM."

Rebecca Ellenbecker
Committee Member and UWM student in Public Administration and Urban Planning

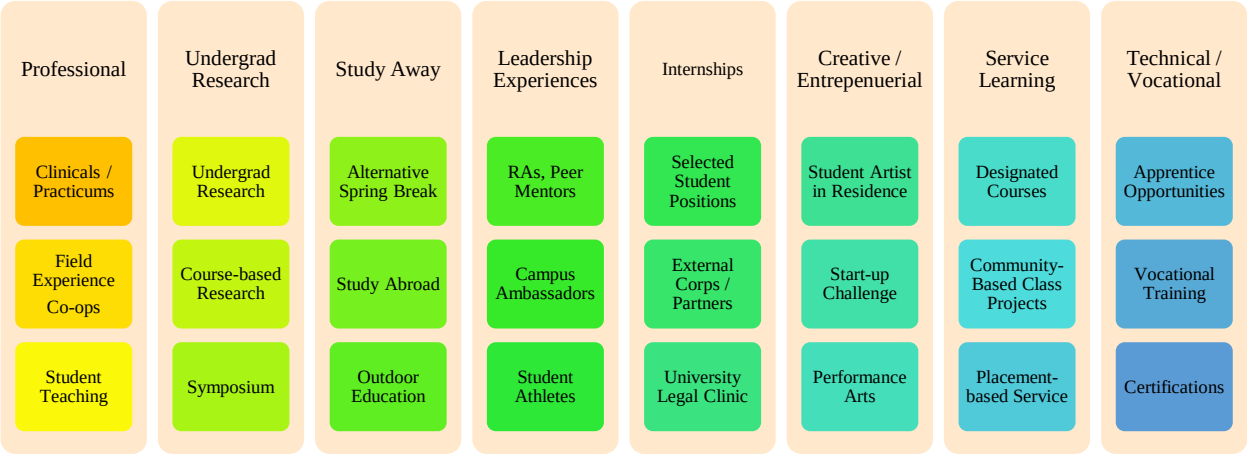
What is Experiential Learning?

Experiential learning (EL) can be defined in simple terms as "learning by doing", but a more detailed definition highlights the best practices in EL such as coupling experiences with ongoing reflection and creating opportunities for critical thinking and experimentation. According to David Kolb, "learning is the process whereby knowledge is created through the transformation of experience" (1984, p.38). One of the important cornerstones of experiential

learning is the process of "reflective observation", where a learner consciously looks back on the experience. Kolb offers a theoretical framework for the experiential learning cycle, as shown and described below.

- Step One -"Do" - The learning has a CONCRETE EXPERIENCE, where they actively experience an activity (field work, for example).
- Step Two - "Observe" – The learner consciously REFLECTS back on the experience.
- Step Three – "Think" – In stage three the learner engages in ABSTRACT CONCEPTUALIZATION, where they attempt to conceptualize a theory or model based on what has been observed.
- Step Four – "Plan" – In the last stage the learner engages in ACTIVE EXPERIMENTATION where devise a way to test a model or theory or plan for a future experience.

UW-Milwaukee currently offers many forms of EL that are well designed and support, and which can be organized into eight buckets:

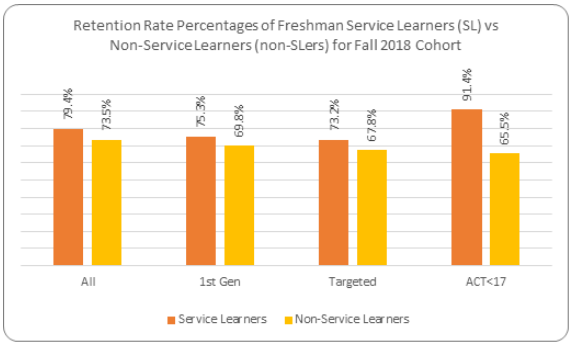


Why Focus on Experiential Learning at UWM?

In 2019 the Community Engagement and Talent Pipeline committee endorsed the idea of an experiential learning graduation requirement, and this idea was further endorsed by the 2030 Think Tank Final Report. Experiential learning is a key differentiator for university education, enhancing more traditional learning with meaningful practice in a wide range of contexts. Students who participate in experiential learning report greater satisfaction and results related to workplace engagement, and employers prefer students who have engaged in these activities. UWM is also uniquely well situated to provide a wide range of opportunities to our students, as we sit in Wisconsin's urban and economic center, surrounded by corporations, government agencies, non-profit organizations, and school systems that can serve as a "classroom-outside-of-the-classroom." We already lead the way among Southeastern Wisconsin institutions of higher education in terms of partnerships within all sectors and have the opportunity to become a destination campus for highly engaged learning.

Experiential learning can help students' close gaps between their own perceptions of their career readiness and those of employers of recent college graduates. For example, 79.4% of recent graduates believe they are proficient in oral and written communication skills, compared to employers, who report only 41.6% of recent graduates as proficient. Similarly, only 55.8% of employers consider recent graduates proficient in critical thinking and problem solving, whereas 79.9% of recent graduates rate themselves as proficient[2]. Internships, study abroad, service learning, undergraduate research, and other forms of experiential learning put students in relationships and self-reflection that allows for a deeper understanding of professional culture, an examination of one's own skillset, and an opportunity to broaden one's worldview.

In addition to career readiness, EL practices such as service-learning, undergraduate research, and study abroad have proven to be impactful student retention interventions. The chart below shows how service-learning, for example, has played a role in student retention, especially for first generation students, targeted student populations, and students with low ACT scores.



What are the aspirational outcomes of UWM implementing an EL graduation requirement?

This new initiative will become a central part of the UW-Milwaukee identity and will allow UWM to become the premier destination campus for applied learning in the Midwest; meaning parents, industry leaders, and legislators should associate experiential learning with the UWM experience and as part of the identity of our graduates. Further, all students, faculty, staff, and administrators will view EL as essential to the UWM undergraduate experience. This identity will increase the number of families who consider and enroll their college age kids at UWM.

In addition to the enrollment and retention benefits that UWM will enjoy, our students will be better prepared for their careers, and have a stronger professional network that will allow them to find meaningful employment. One of the long-term outcomes will likely be that students who benefited from UWM's identity as an EL destination

campus will eventually be offering opportunities at corporations, government departments, and non-profit agencies where they work to existing UWM students. This will lead to informal and formal mentorship and an increase in engagement with external partners.

Implementation Plan – Recommended Steps and Timeline

Implement an EL graduation plan that will take effect for the Freshman class of 2022		
Steps	Leadership / Implementation	Timeline / Completion Deadline
Secure governance approval through the Academic Program and Curriculum Committee (APCC).	Dave Clark	Spring 2021
Work to get existing courses where EL learning modes are already prominent part of the course designated in PAWS, and establish a protocol for courses to be redesigned to incorporate EL. (SEE APPENDIX A).	Kyla Esguerra and Ben Trager and Jen Steinheiser and Kristin Hildebrandt	Summer 2021 (ongoing)
Establish a Campuswide EL Stakeholder Group that meets monthly. The stakeholder group should also include external partners from the corporate, non-profit, and government sectors.	Paul Roebber and Laurie Marks	Fall 2021
Identify a central office that can be responsible for the logistics of implementing an EL graduation requirement, coordinate the marketing efforts, and establish and track assessment of EL impact.	Kelly Haag, Dave Clark, and Kay Eilers	Fall 2021

Once the EL graduation requirement is implemented a rigorous marketing campaign should be launched that targets internal and external stakeholders		
Steps	Leadership / Implementation	Timeline / Completion Deadline
UWM marketing and branding should lean heavily on the campuses commitment to experiential learning.	Michelle Johnson and Tom Luljak	Spring 2022
Establish an Innovative EL Program Fund for academic departments and / or faculty who are interested in creating new experiences that are academically rigorous, meet the EL vetting requirement, and which engage best practices in experiential education. An example of this might be the Washington Leadership Program at Indiana University (Bloomington). This program takes students on a semester-long, twelve credit, study "away" program in Washington, D.C. where students take two courses and complete a credit-bearing internship.	Central EL Office	Spring 2022
The UWM Development Office should work to secure funds for EL initiatives from external stakeholders who	Central EL Office and Development Office	Fall 2022

emerge as EL partners by way of internships, practicums, and clinical placements.		
Create a series of "uniquely UWM" experiences that will offer a comprehensive, interdisciplinary example of EL that can be showcased and highlighted as a focal point for this new UWM identity. One potential idea would be an interdisciplinary experience that involves the School of Freshwater Sciences, and which is focused on a "study away" experience where students tour the great lakes while engaging with faculty from various disciplines in the science, cultural, artistic, historical, and public policy aspects of the great lakes.	EL Stakeholder Group	Fall 2022

Create structures that value different forms of experiential learning equally, and also allows access to the different options students may be interested in or which may be meet their needs in terms of professional and personal growth.		
Steps	Leadership / Implementation	Timeline / Completion Deadline
Establish a scholarship fund that allows all students to access forms of experiential learning that have been cost prohibitive, such as unpaid internships, study abroad, teacher training, and outdoor education.	UWM Development Office and Central EL Office	Spring 2022 (Ongoing)
Provide equity in value for different forms of EL that are based on rigor and learning versus general demand of perceived value (i.e., a study abroad experience, or internship may be valued more than student teaching. Ensure there is a vetting process and equity in value).	Central EL Office	Spring 2022 (Ongoing)
Opportunities should be established that focus on career discernment as well as professional development.	Central EL Office and Office of Central Advising	Fall 2022
Create a series of "uniquely UWM" experiences that will offer a comprehensive, interdisciplinary example of EL that can be showcased and highlighted as a focal point for this new UWM identity. One potential idea would be an interdisciplinary experience that involves the School of Freshwater Sciences, and which is focused on a "study away" experience where students tour the great lakes while engaging with faculty from various disciplines in the science, cultural, artistic, historical, and public policy aspects of the great lakes.	EL Stakeholder Group	Fall 2022

Opportunities should be scaffolded in a way that encourages EL in both the freshman / sophomore years, and then a more advanced options that students can engage in during their Junior or Senior years as well.	Central EL Office and major specific advisors and faculty in the social sciences and humanities	Spring 2023
Options for distance experiential learning should be supported such as virtual internships and online experiences as appropriate. To accomplish this an investment in a robust online platform that has relationships with organizations nationwide should be considered.	Central EL Office	Fall 2022

Create a culture of data-driven decision making as EL is rolled out across the campus to ensure equity and meaningful experiences		
Steps	Leadership / Implementation	Timeline / Completion Deadline
Participate in the National Study on Internships administered by the Center on College to Workforce Transitions.	Central EL Office and Provosts Office	Fall 2021
Establish data benchmarks to track the progress and impact of the experiential learning shifts from various perspectives such as student satisfaction and experience, employer perspectives, and EL involved faculty. Also include longitudinal data that tracks the impact of EL on UWM graduates' careers.	Central EL Office	Spring 2022 (Ongoing)
Create a framework for specific descriptive statistic data points that will be of interest such as: number of EL classes designated in PAWS, number of students taking EL designated classes broken down by demographic information, retention rates of students in the various EL experiences, etc.	Office of Assessment and Institutional Research	Fall 2021

APPENDIX A -- Experiential Learning Vetting Brief

Vetting and Designating the Existing 80%

UWM students, beginning with the 2022 freshman class will be required to complete at least one course that has an EL designation. A recent audit done by Dave Clark in the summer and fall of 2019 revealed that most (approximately 80%) of students currently encounter a course with an EL component such as service learning, student teaching, clinical placements, practicums, or a creative experience (performance or other). These courses will have to be reviewed to ensure they meet the minimum criteria as outlined below, and that three basic components of a framework are met:

- EL designated courses must be a minimum of 15 hours,
- EL designated courses must have forms of formative and summative reflection and assessment,
- EL designated specific learning goals must be outlined in the course syllabus and they must be connected to soft skills and professional development.

It is generally believed that these basic requirements are already established in these courses. It is also important to note that the majority of these courses exist in the professional schools and colleges.

Vetting and Designating the Remaining 20%

Outside of the professional schools (primarily in majors within the College of Letters and Sciences) an elective pathway needs to exist for students to complete the EL requirement. These non-major specific EL course options will allow students to fulfill the UWM experiential learning (EL) requirement outside of their degree program, while still providing meaningful learning and professional skill development.

Currently, UWM offers a variety of non-credit bearing programs in which students may encounter experiential learning opportunities such as:

- undergraduate research,
- co-curricular leadership development,
- service trips,
- ongoing community-based work or volunteering,
- outdoor education,
- study abroad,
- vocational training,
- university coordinated internships,
- and student employment.

In order to ensure all students have a path to fulfilling the EL requirement with a meaningful learning experience, a one-credit elective course will be established for these experiences and others, and those that lead these programs will be able to apply for EL designation. UWM is committed to ensuring that these forms of EL provide a similar educational experience to the forms of experiential learning encountered through a student's academic major. To ensure quality, Elyer (2009) suggests the following orientations are incorporated into all experiences that are designated as experiential learning.

- The work or service must be clearly related to the goals of the experience.
- The program incorporates assessment that produces evidence of achievement of objectives.
- Learners must have an important responsibility.
- Supervisors-both internal and external to the university-should have a clear understanding of the program learning objectives.
- Structures for ongoing and continuous feedback must be in place.

Drawing upon these orientations and the National Society of Experiential Education's (1998) *Eight Principles of Good Practice for All Experiential Learning Activities*, the following criteria for quality EL at UWM has been developed:

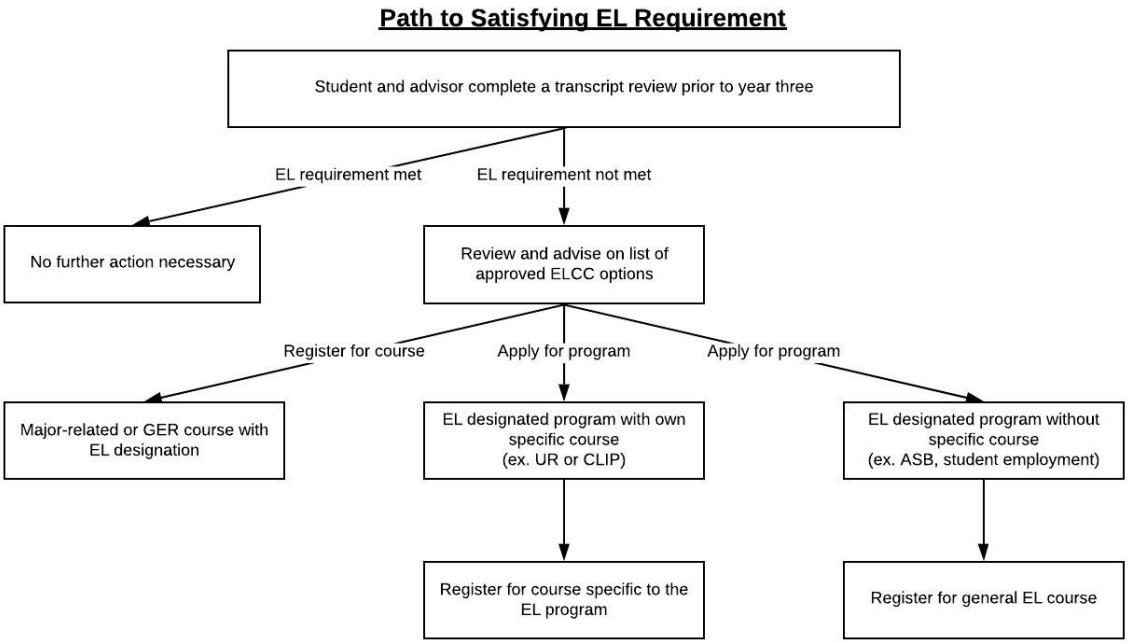
- **Intention, Preparation, & Planning** - Stakeholders should be clear on why the experience is the chosen approach to learning. All stakeholders should be thoroughly prepared for the experience. Trainings and orientations must be provided to students. The program must have an intentional design and possess clearly defined learning goals and outcomes.
- **Monitoring & Improvement** - It is important that there be a feedback loop related to learning intentions and quality objectives and that the structure of the experience be sufficiently flexible to permit change in response to what that feedback suggests. Strategies for observing progress against intentions and objectives should also be in place, including reflective exercises, and structures for providing regular feedback. Monitoring and continuous improvement represent the formative evaluation tools.
- **Learning Assessment & Program Evaluation** – Outcomes and processes should be documented regarding intentions. The quality of a student learning experience can be assessed through student projects, reports, reflections, etc. Program evaluation structures should also exist. Evaluation will provide data regarding the experiential process and its effectiveness.
- **Authenticity** – Students must have the opportunity to explore a "real world" context that is relevant for the experience's applied situation or setting. This means that the applied context of the learning process should serve as a guide for developing the learning experience.
- **Alignment** - The experience must fall under one of the campus recognized EL types of experiences or be approved by the EL champions committee.

Credentialing Non-major Related Experiential Learning

Programs must possess an experiential learning designation from the EL Champions Committee (ELCC). Designation occurs at the program level. This means that all students who seek to meet the experiential learning requirement through one of these options must participate in a program that has already been vetted and designated as EL. If a student believes that a future experience would meet the experiential learning requirement, they must work with the program coordinator to ensure that the experience is vetted and designated. The responsibility of submitting program designation materials falls on program supervisors and coordinators. Students cannot complete and submit program designation applications.

Program Designation Overview

An existing program may submit an "Experiential Learning Designation Application" to the Experiential Learning Champions Committee (ELCC) and the Registrar's office for program designation. This designation must be renewed every 3 years, or sooner, if there are significant program changes. The application will address each of the criteria listed above in detail and will be supplemented with program materials and other forms of evidence of quality. If a co-curricular experience already has a credit bearing component, students will register for the course which will have an EL designation. If students pursue an EL option that has no credit bearing component, they must register for the campus-wide EL general course, which carries 1-credit. It is recommended that we move towards a credit-bearing framework to ensure that EL is recognized as a significant portion of all UWM student's studies. Due to the nature of experiential learning activities and the need to ensure quality of experiences, retroactive EL credit is not an option. Students and advisors should continuously monitor the status of the EL requirement and begin planning the completion of an EL course no later than three semesters before a student's intended graduation date. Advisors and students are responsible for monitoring the status of a student's completion of the EL requirement.

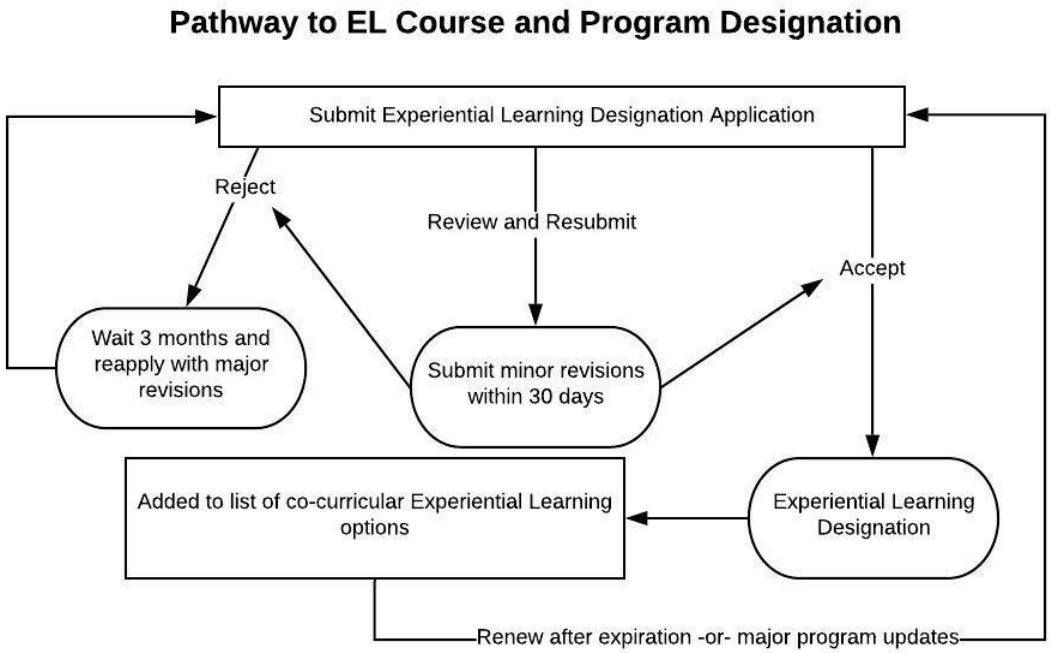


Designation Process and Quality Assurance

The ELCC will liaise with EL supervisors to ensure that student learning experiences encompass the five criteria of quality.

All Experiential Learning Designation Applications must be submitted to the ELCC for review. After review, the ELCC will inform the submitting program of its status. Status can be "accepted," "rejected," or "review and resubmit." If rejected, the program submission indicates that the program is missing key components of the UWM criteria and must wait at least 3 months to re-apply for designation. If the status is review and resubmit, the ELCC will provide specific feedback on areas of the application that need enhancement. The submitting program will have 30 days to resubmit the application. If accepted, ELCC will add the program to the co-curricular EL options. This list should be made readily available and accessible to the UWM community.

To ensure quality, all EL courses (both within a major and elective EL courses) will be required to meet minimum criteria as well as incorporate the principles listed above. As a result they will be designated by the ELCC.



To ensure enough elective experiences are available for students to participate in, the following steps should be taken.

Step 1

- Identify existing experiences that display potential to be easily EL-designated and could carry a credit bearing component or a have structures that could easily be translated into credit bearing experiences. Examples include courses offered through the Office of Undergraduate Research for students engaged in research, the Community Leaders Internship Program through the Center for Community-Based Learning, Leadership, & Research, employment that includes the student affairs Guided Reflection on Work (GROW), and the Resident Assistant role through University Housing. We recommend that a list of potential programs is compiled so that solicitation for EL designation can take place as the process moves forward. There are few logistical considerations that will need to be addressed:
    - Does the current program manager of an experience possess the credentials, willingness, ability, and time, to incorporate a one-credit course into the program for student participants who want to utilize the program to fulfill their EL requirement?
    - Where will the course be housed?
    - Since the credit-bearing component for these experiences are completely optional, how will the program manager maintain a quality experience for both types of students involved?
    - How will advisors and students be trained to ensure the EL requirements are being met by graduation?

Step 2

- Provide a process for experiences on campus not initially identified to apply to be added to the list through an application process overseen by the ELCC. The same logistical consideration list above will need to be applied to these new EL options as well.

Other general considerations:

Some of the elective EL courses above will have enough student participants to constitute their own section even though not all students engaging in the programs will need the elective. For example, a nursing major who is a RA

in University Housing will meet his / her EL requirement through his / her major, so the elective course will be optional. Despite this, there is a large enough pool of RAs that most likely a critical mass of RAs will enroll in the course and so the class can be somewhat tailored to the RA experience.
Alternatively, there will be some experiences designating as meeting the EL elective requirement, with few participants (less than 10). In these cases, a general EL reflective course should be offered and taught by a campus-wide Director of EL.
Regardless if a program has an independent section, or if students will need to enroll in a general section, the EL course design should be loosely outlined as described below. This will be a hybrid course with both online and in-person components. After completing the experience and the course, students will be able to;

1. Articulate how their EL experience transfers to future academic and professional goals.
2. Critically assess the quality of their EL experience and identify ways to build on their experience to build on their future professional and civic skills and networks.
3. Describe at least three skills they have developed through their EL experience and connect those skills to their future career.

A general course framework will be created by the ELCC that will be applicable in a wide array of experiences, containing 4 modules. These modules will be based heavily on critical reflection[2].

- **Module 1 – Preparation and Intention**
  - Needs to occur as in-person meeting at the start of semester
  - Guiding Questions: What is experiential learning? What do you think you'll be doing? What do you hope to learn? Why does it matter? How have you prepared, or will you prepare?
  - Possible Readings:
    - Excerpt from Dewey (1938) "Experience & Education"
    - Review of Kolb (1984) Experiential Learning Cycle
    - Supplement from Chapter 8 "Experiencing the Internship" in Gower and Mulvaney (2012) *Making the most of Your Internship*.
- **Module 2 – Initial Reflections and Experiences**
  - Needs to occur during the experience
  - Guiding Questions: What is going well? What has been challenging? How can you get the most of your experience?
    - Possible Activities:
      - Experience Mapping
- **Module 3 – Experimentation and Change**
  - Needs to occur within one week of the experience concluding
  - Guiding Questions: How have you changed? What have you learned? What would you do differently and why?
    - Possible Activities:
      - Journal entry synthesis
- **Module 4 – Connections to Future experiences**
  - Needs to occur by end of the semester
  - Guiding Questions: How does this experience connect to your career or professional goals? How would you incorporate this into a resume or an interview?
  - Possible Actives / Assignments
    - Resume workshop
    - Final reflective essay or presentation

Experiential Learning Designation Application

☐ Major or GER Specific Course

Department:_____
Course name and number_____
Historical / anticipated enrollment_____
Hour to be completed by students_____

☐ EL Elective Program

(Please submit learning agreement and other support documentation with form.)

- ❑ Undergraduate research
- ❑ Service learning
- ❑ Student teaching
- ❑ Clinical experiences
- ❑ Practicums
- ❑ Co-ops / Trades
- ❑ Outdoor education
- ❑ Study abroad or away
- ❑ Field placement
- ❑ Creative engagement (Public performance, visual arts, or entrepreneurship)
- ❑ Student Employment

Please provide a brief description of the experience:

Campus unit / department: _____
Historical / anticipated participant numbers:_____
Number of hours to be completed*_____
Contact person_____ Email_____
Phone_____
*Experiential hours encompass time students are involved in the entire experience—preparing, planning, activity in the field/on site, and reflecting.

Experiential Education Qualification Criteria

1. The experience is **Intention, Preparation, & Planning:**

a. List the specific learning outcome(s) for this experience. That is, what will the student be able to know and do after this experience?
b. Who are organizational partners and how are organizational partners/community collaborators prepared for the experience?
c. What training and orientation structures exist for the program?

d. Please attach documented evidence of learning outcomes, program design, orientations, and trainings
2. The experience must include **Monitoring & Continuous Improvement:** a. What strategies will be used for observing a learner's progress? b. Describe program structures that will facilitate the sharing of feedback and how this will allow for flexibility change in response to that feedback c. How are students encouraged to recall past learning (previous knowledge, pre-conceptions, assumptions) prior to the experience? d. How are students encouraged to test assumptions and hypotheses, and consider the outcomes of decisions and actions taken? e. How are students encouraged to weigh the outcomes against past learning and think about what the experience means in their lives and beyond the classroom (i.e., future implications)? f. Please attach documented evidence of strategies and structures.
a. b. c. d. e.
3. The experience must include **Assessment & Evaluation**: a. Describe how the learning facilitator communicates the methods of assessing achievement of learning objectives to students, including assessment criteria? b. Identify moments and methods for students to evaluate the experience. (i.e.: feedback to the learning facilitator or direct supervisor on the quality of materials, organization of activities, and effectiveness of learning facilitator or direct supervisor). c. Please attach documented evidence of assessment and evaluation structures.
a. b.
4. The experience requires **Authenticity:** a. How will the components of this experience be designed to help learners transfer knowledge to the real world? b. How does the context of the EL program inform the design and implementation of the experience?
a. b.
5. The experience must be **Aligned:**

a. Please explain, in detail, how the co-curricular EL is aligned with one of the campus EL types.
a.
6. Please submit **a learning agreement** (required for all co-curricular opportunities, template provided by EL committee) along with this form. This document should clearly articulate the experiential nature of the opportunity.

ExEL Qualification Approval (Experiential Learning Champions Committee)

Department/Office and College/Academic Unit Approval:

_____ (Chair/Office Supervisor Signature) _____ (Date)

_____ (Dean/Director Signature) _____ (Date)

References

Dewey, J. (1938). *Experience and education*. New York, NY: Touchstone.
Elyer, J. (2009). The power of experiential education. *Liberal Education, 95*(4), 24-31.
Kolb, D. (1984). *Experiential learning: Experience as the source of learning and development*. Upper Saddle River, NJ: Prentice Hall.
National Society for Experiential Education. (1998). Eight Principles of good practice for all experiential learning activities. Presented at the Annual Meeting, Norfolk, VA.

CRITICAL REFLECTION – an integral component to experiential learning

"Experiential learning occurs when carefully chosen experiences are supported by reflection, critical analysis and syntheses" (Association for Experiential Education)

Critical reflection is an integral component of experiential learning connecting the learning to the experience. To reflect in experiential learning means to think critically about and analyze emotional responses to experiential activities in the context of course content and the learning objectives of a particular course or curriculum.

- Reflection is intellectual work that differs from the dominant academic culture by intentionally engaging the whole person, connecting experiences with academic content, and cultivating students' awareness of themselves.

- Reflection is critical thinking that supports learning objectives by expecting students to make astute observations, to demonstrate inductive or deductive reasoning skills and to consider multiple viewpoints, theories, and types of data.

- Reflection is an activity that contributes to the creation of educational environments in which a diverse population of students thrives by acknowledging the influence of people's identities and contexts and inviting students to construct and share their own sense of meaning.

- Reflection is not a didactic retelling of the events of an experiential learning activity.

- Reflection is not simply an emotional outlet for feeling good about doing something or for feeling guilty about not doing more.

- Reflection is not an exercise that closes an experience; reflection is ongoing and provides more openings than closings. (adapted from www.servicelearning.org)

Critical reflection can take place before, during and/or after an experiential learning activity. Examples of post-reflective assessments include journals, portfolios, reports, papers, discussions, presentations, performances, photo-essays, interviews, etc. There are many ways reflection can be presented including oral reflection, written, individual, and group; reflections often make use of the arts, multi-media, games and simulations, stories, case studies, role-plays and many other activities which enhance learning.

There are several types of reflection that are useful to engage the student in order to optimize learning after an experiential learning activity. The sample questions below are Note from instructor: I use this as a guide for a critical reflection component of a course. Students are asked to respond to two questions from each section (400 – 500 words each). Following that, the groups meet with me for an oral reflection exercise where they know in advance that I will

be asking them any of the questions that are in this document. basic and broad in nature. They are meant to provide a guide as to how critical reflection may be structured.

Cognitive reflection examines the new knowledge and skills the students gain from their experiential activity. This includes the kind of learning that is addressed in the curriculum. Sample questions:

• Were the goals and objectives of the experiential activity accomplished? Describe your experiential activity relating it to its goals and objectives.

• How has your experiential activity related to the readings, discussions, and lectures in your courses? Provide specific examples of related course concepts and describe the context in which the concepts related to your experiential learning activity.

• Did your understanding of course material/concepts you have studied improve as a result of your participation in this experiential activity? Provide examples. What complexities do you now see in the concept that you were not aware of before?

• Did your understanding of the experiential activity improve as a result of the course material/concepts you have studied? Provide examples.

• In what specific ways are concepts of course material you have studied and the experience the same and/or different?

• Upon reviewing the experience, identify and describe an example of a different approach (e.g., decision or action) you could have taken. Envisage the impact of such a change.

• What additional questions need to be answered or evidence gathered in order to judge the adequacy/accuracy/appropriateness of a concept you have been taught when applied to the experience?

• How can you educate others or raise awareness about this experiential activity?

• What new skills have you learned since beginning your experiential activity?

• What are the most important learning moments you take with you from this experience?

Affective reflection looks at what students feel as a result of their experience. How has this experience changed their attitudes or opinions or sensitivities? Sample questions:
• Would you do this again? Why?

• Has this experience changed you? If yes, how?

- What values, opinions, beliefs have changed for you?

- Describe what you have learned about yourself as a result of your experiential activity.

Process reflection considers what students learn from the process itself. Examples include how to work with others and understanding the consequences of actions. Sample questions:

- What expectations did you have about your experiential activity? Do you have a different picture of your experience than you had before you began it?

- What would you like to change about your experience?

- What were the benefits from participating in this experiential learning activity?

- Did anything surprise you? If so, what?

- What did you do that seemed to be effective? What were your personal contributions to the experiential activity?

- What did you do that seemed to be ineffective?

- What were the most difficult parts of the experiential activity? Why?

- What were the most satisfying parts of the experiential activity? Why?

- What have you done in this experiential activity to make a difference? What impact do you think you have had?

- What type(s) of a role did you endeavor to fulfill during the experiential activity? Examples include leader, collaborator, challenger, creator, team-builder, innovator, etc. Were you effective within this/these roles?

- If you worked within a team, identify and describe your approach as a team member. Was it effective? Why?

- What do you think was your most valued contribution to the experiential activity?

- How do you see you role with this experiential activity? How does that compare with how others may see your role?

- What personal characteristics made this experiential activity successful?

• Identify and describe an awareness about a personal characteristic that has been enhanced by reflection on your experiential learning activity.

• How does the experiential activity relate to your long-term goals?

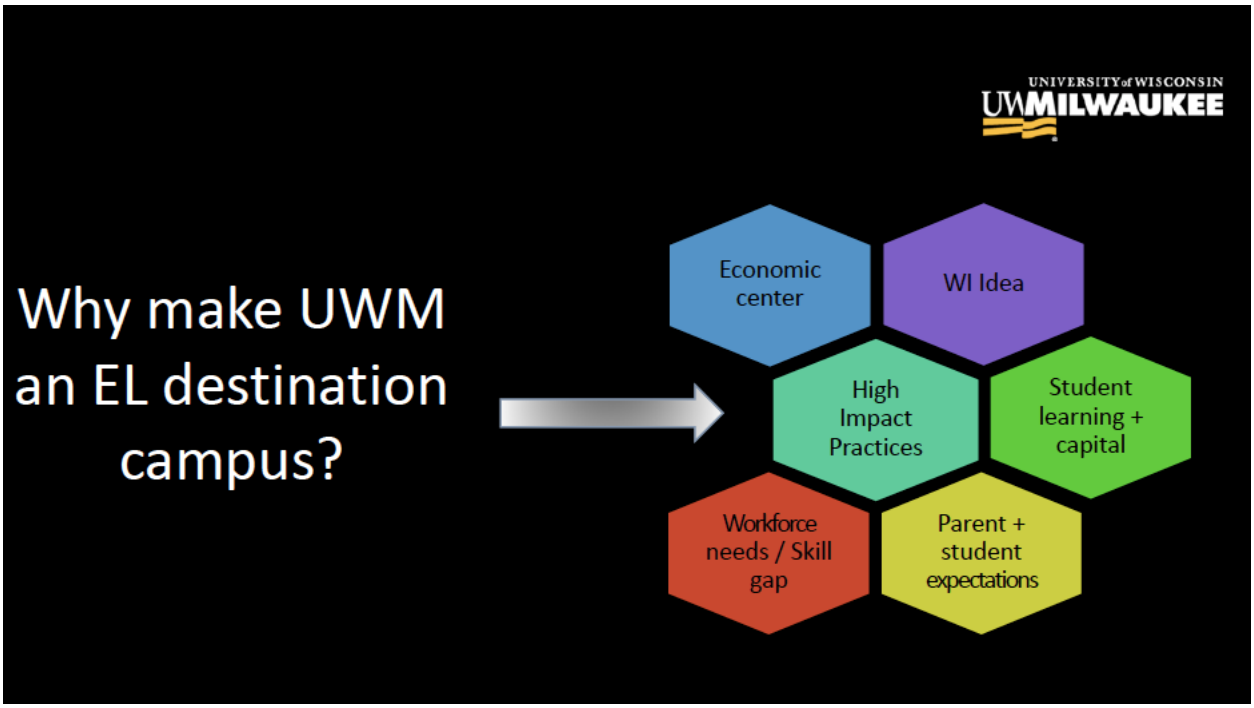
• How have you been challenged?

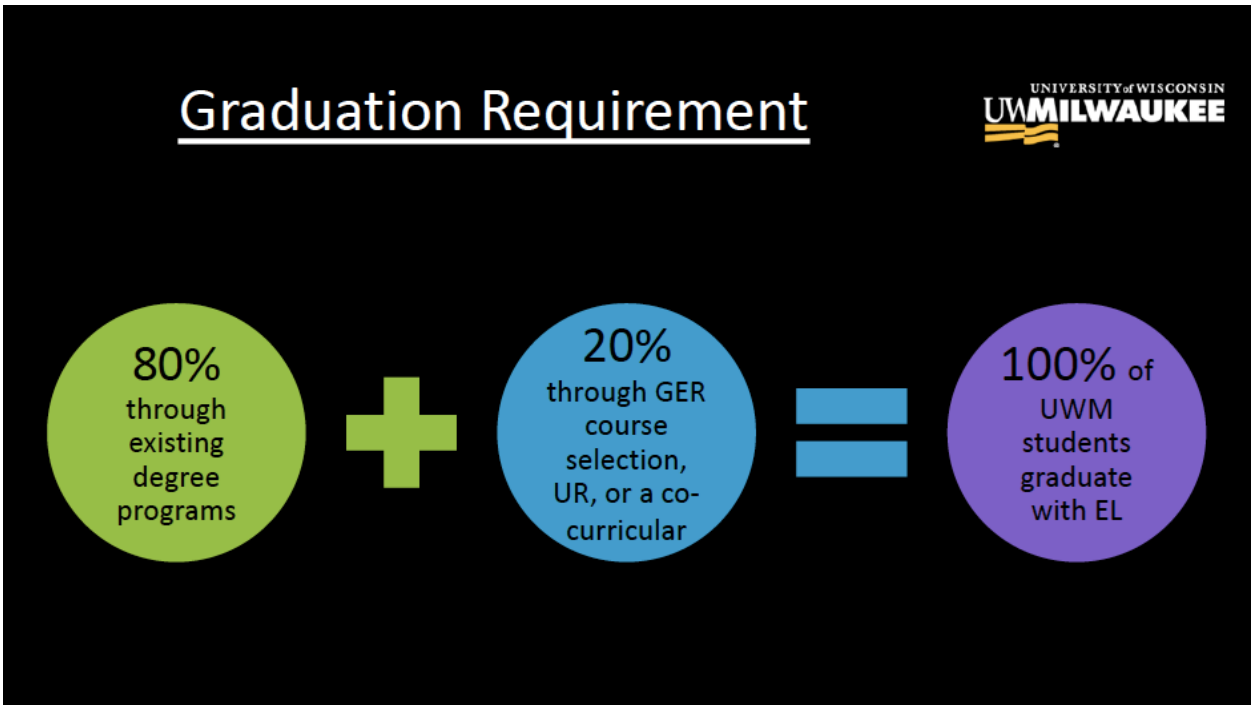
In summary, reflection is an essential process for transforming experiences - gained from the experiential activities and the course materials - into genuine learning. Reflection is crucial for integrating the experience with the course material. It enhances students' critical understanding of the course topics and their ability to assess their own values, goals, and progress.

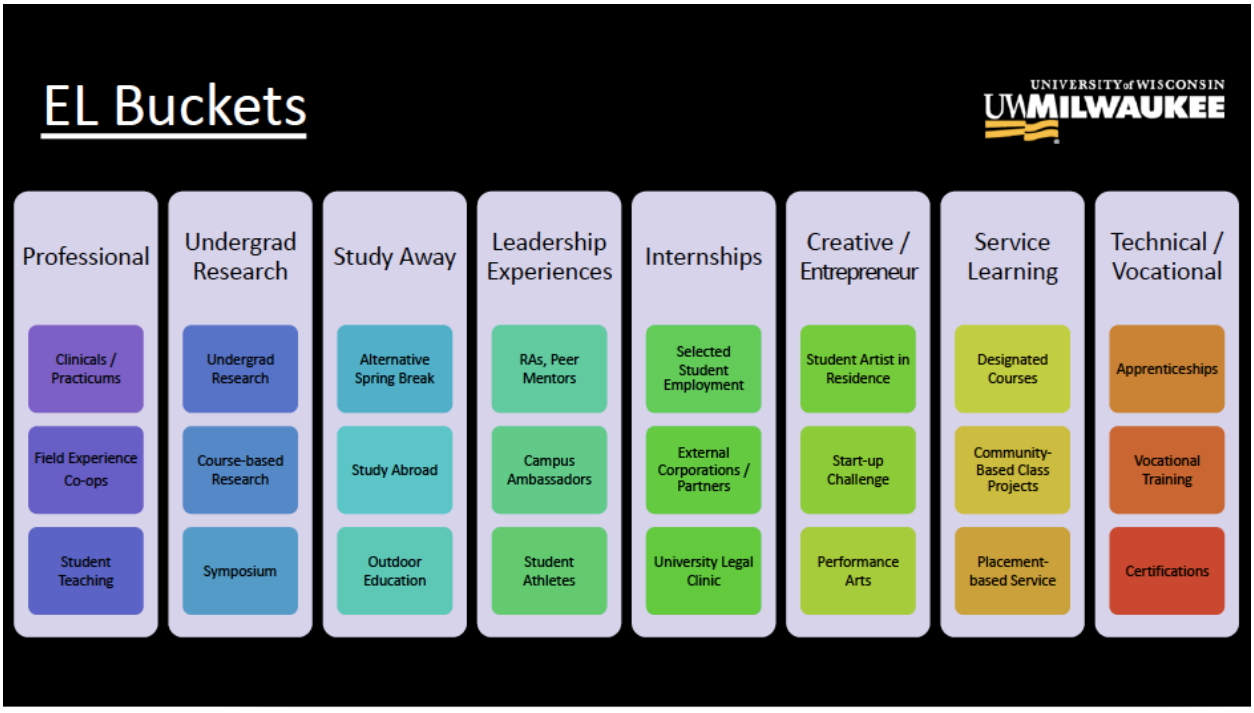
Produced by the Experiential Learning Office, Ryerson University 2009

Study abroad or away, or field placement
Undergraduate research
Service-learning
Internships
Creative- for visual and performative arts
leadership

APPENDIX B – VISUAL REPRESENTATION OF EXPERIENTIAL LEARNING AT UWM




Graduation Requirement
UNIVERSITY of WISCONSIN
UWMILWAUKEE
80% through existing degree programs
20% through GER course selection, UR, or a co-curricular
100% of UWM students graduate with EL


EL Buckets
UNIVERSITY of WISCONSIN
UWMILWAUKEE
Professional
Clinicals / Practicums
Field Experience Co-ops
Student Teaching
Undergrad Research
Undergrad Research
Course-based Research
Symposium
Study Away
Alternative Spring Break
Study Abroad
Outdoor Education
Leadership Experiences
RAs, Peer Mentors
Campus Ambassadors
Student Athletes
Internships
Selected Student Employment
External Corporations / Partners
University Legal Clinic
Creative / Entrepreneur
Student Artist in Residence
Start-up Challenge
Performance Arts
Service Learning
Designated Courses
Community-Based Class Projects
Placement-based Service
Technical / Vocational
Apprenticeships
Vocational Training
Certifications

EL Experience Design Basics

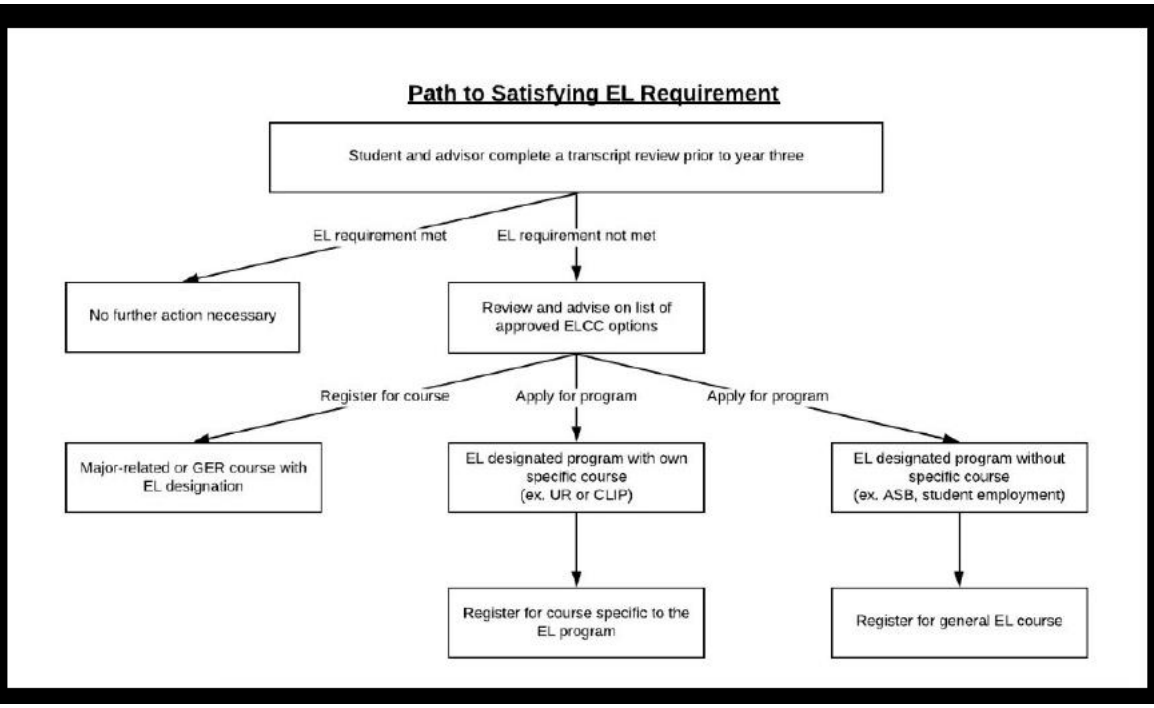
UNIVERSITY of WISCONSIN UWMILWAUKEE

What counts?

Minimum of 15 hours

EL Specific Learning Goals

Formative + Summative Course Reflection / Assessment



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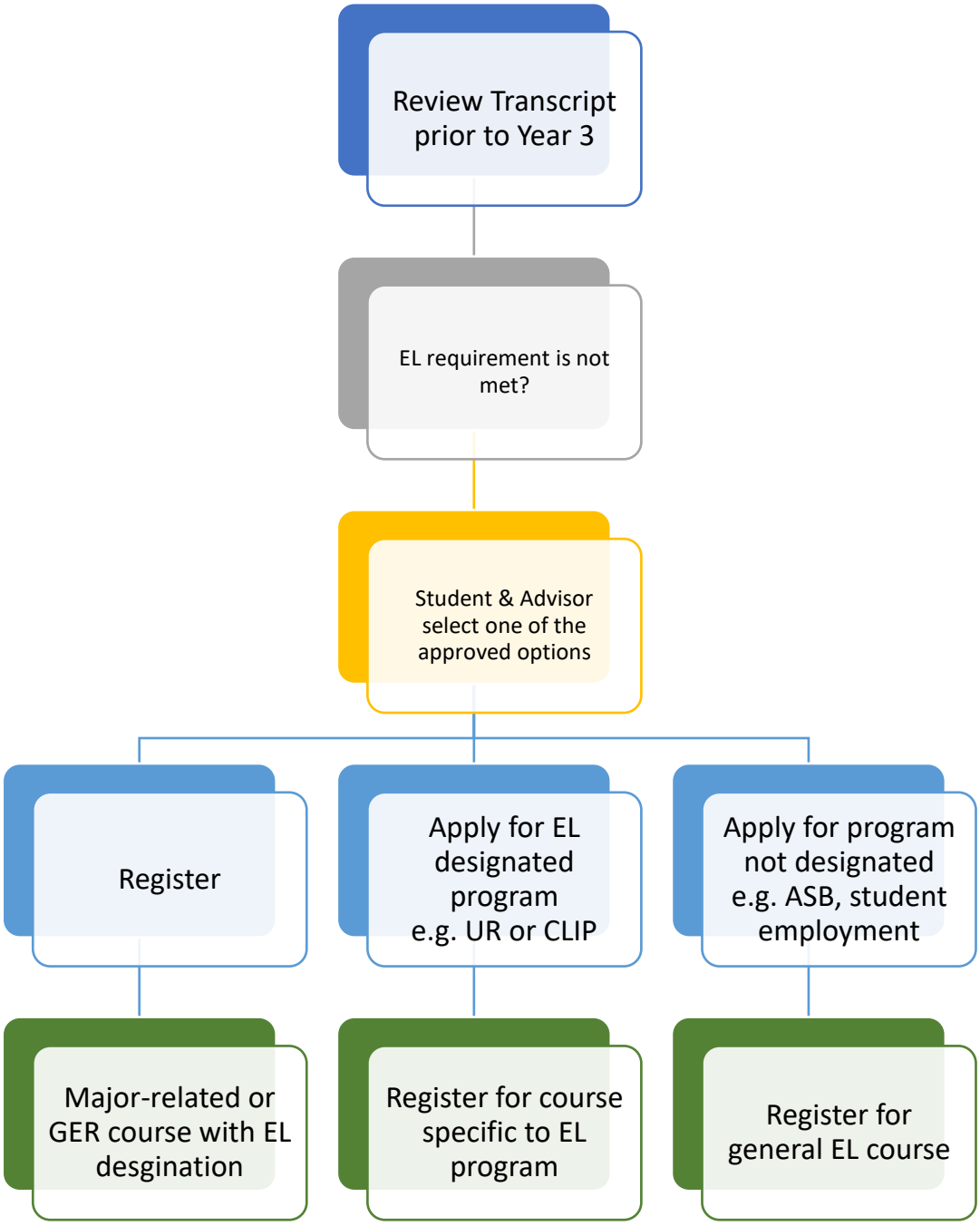

APPENDIX C: 2030 Implementation Realignment Group Final Report
January 15, 2021

Background

The Think Tank 2030+ task force that submitted its report to the Chancellor in May 2020 noted that UWM appears to have more independent schools and colleges than our peers with similar program arrays. That task force recommended that UWM consider whether there are more optimal structures that could introduce some cost efficiencies and promote broader programmatic collaborations.

Based on that 2030 recommendation, the current committee was charged with examining the university's operating structure to provide recommendations to realign units in order to more efficiently and effectively meet our educational and research missions. The committee was given a broad mandate to recommend ways to reduce the total number of stand-alone schools and colleges. There were no specific benchmarks provided to the committee to achieve, although there is an expectation that UWM can be organized such that there are fewer stand-alone schools and colleges. The end goal is to recommend potential organizational and operational structures and procedures that not only create administrative efficiencies and potential program synergies, but also provide~~s~~ a framework that can improve campus operations and position the campus to more nimbly meet future demands. There will be a major turnover in personnel of the university over the next few years, as we have a large proportion of faculty nearing retirement. This is an opportunity to more realign for the future. The current UWM organizational structure is the product of 50+ years of evolution, with each school and college developing its own culture and identity. However, this evolution has also created substantial barriers between units that inhibit opportunities for coordination and collaborations, and the number of stand-alone units is potentially less cost efficient than other potential organizational structures. However, the prospect of cost efficiencies may be minimized by the fact that UWM has been cutting administrative costs for several years in response to substantial budget reductions. The focus of the committee has been to take a fresh look at that structure to identify opportunities to improve both its efficiency and its effectiveness. While the acute reason for the formation of this committee is to address looming financial challenges, the committee took this opportunity to envision a UWM that can also better serve our long-term campus mission.

Appendix A lists the free-standing schools and colleges at nine public research universities. Some represent self-identified peers (Wayne State, Virginia Commonwealth, and Georgia State), one is a direct comparison within the same system (UW-Madison), and the others are a sampling from across the country. These institutions have roughly similar program arrays to UWM when excluding schools of Medicine, Law, Agriculture, Vet, Pharmacy, etc., with 6-10 remaining independent units, while UWM has 13. Common to all but Wayne State is the utilization of a school-within-college structure to varying degrees. At the extreme end of this approach are UW-Madison, which houses most of their smaller professional schools within their College of Letters & Sciences (e.g., School of Social Work), and Oregon State which has largely prioritized schools instead of departments (e.g., School of Language, Culture, & Society and the School of Public Policy within their College of Liberal Arts). Several of these institutions also approach the clustering of their liberal arts & sciences programs differently, where the

humanities, social sciences, and natural sciences are not necessarily grouped together (e.g., Maryland, Louisiana State, Oregon State, and Minnesota). There are likely unique internal dynamics at each institution that have driven their current organizational structure, and these alignments are likely imperfect with tradeoffs. However, these examples highlight that there are many ways to conceptualize how a research university can be organized. The challenge for the committee has been to identify organizational structures that best meet the unique demands faced by UWM going forward.

The committee has received initial input primarily from the leadership of the school/colleges and departments. These initial conversations had similar themes. There was an overall commitment to supporting UWM's mission. However, there were questions regarding the overall rationale and the criteria that will drive recommendations. While each of the units expressed a strong first preference to maintain their current independent structure, they were also willing to engage in initial discussions of other organizational structures and outlined some of their alignment preferences and absolute requirements (such as accreditation restrictions). Summaries of those discussions are provided Appendix B. Note that given the condensed timeframe to complete its work, the committee was unable to fully address all issues. For example, the committee was unable to investigate all the potential opportunities for the College of General Studies in potential new alignments. The committee was also unable to perform detailed analyses at the individual academic program level to identify optimum points of alignment.

Principles and Considerations

In developing recommendations for any campus realignments, the committee agreed to the following guiding principles:

- Prioritize Students' perspectives – any realignments should improve the student learning experience at UWM.
- Group "Like with like" or "like with complementary" - Any recommended realignments should be based on academic and research affinities and should not be based solely on cost savings. Factors that may influence these recommendations include:
    - Common academic programs – academic programs with similar missions and units (departments, schools, colleges) with similar or shared academic programs could benefit from closer alignment.
    - Common strategic vision/underlying philosophy- Any realignments must recognize similarities and differences in academic cultures.
    - Common workload models - Realigned units under the same umbrella will need to address differences in workload, which could affect cost savings arising from any realignment. Currently, the workloads across colleges vary considerably, in part due to the difference in the faculty teaching and scholarship models and expectations as well as differences in fiscal health. The College of General Studies, for example, operates with a considerably lower tuition than other colleges, which is a primary driver of its workload model.
- The committee also discussed opportunities to investigate non-traditional pairings that may be complementary, but not immediately obvious. Given time constraints, the committee was unable to fully explore this idea.

- Reduce operational cost – One key outcome of any realignments is to realize cost savings
- Better operational efficiency – Realignments must not result in greater operational overhead.
- Remove unnecessary barriers (typically driven by budget decisions) - The current campus budget model does not encourage cross-unit teaching collaborations or opportunities for students to take coursework in other schools/colleges or for instructors to teach in other units. This is primarily driven by the incentivization to retain as many student credits hours internally as possible.
- Retain and emphasize UWM's unique identity – It is important to ensure that units that are unique to UWM within the state (e.g., PSOA, SARUP and ZSPH) and across the nation (SFS) retain that recognition, particularly with the potential for spearheading statewide programming, such as the Freshwater Collaborative. SARUP envisions something similar for a UW System-wide architecture degree. Highly regarded and influential Centers and institutes should also not be negatively impacted by any future realignments.

While the above list is not in order of importance, it should be noted that removing unnecessary barriers was seen as the most critical change that the campus needs to achieve, regardless of school/college alignment. The campus should make it as easy as possible both for students to take classes across units and for instructors to teach across units, which is seen as a major impediment to student success. This will require changes in the current budget model, so that cross-unit course selection is better supported and more seamless for students. Enacting this change may also lead to increased transdisciplinary research productivity.
In addition to the principles listed above, the committee also agreed that there are several considerations in realigning schools/colleges:

- Fundraising – For many schools/colleges, the ability to attract donors is dependent on unit leaders cultivating relationships with prospective donors, which may not be as easily supported if units do not have a level of visibility and a distinct identity. It is critical for schools/colleges to have leadership (Dean/Director) with sufficient authority and visibility to be effective in developing donor relationships. It is also critical to maintain and grow unit-level development support.
- Accreditation – The location of programs and structure of the realigned schools/colleges can influence accreditation eligibility.
- Identity – Self-standing schools/colleges enjoy a level of visibility that could be affected through realignments. This could impact a school/college's ability to attract students and their standing in the larger disciplinary community. Many schools/colleges are approaching a 50 year +/- anniversaries that may have implications on fundraising.
- Autonomy – Self-standing schools/colleges have budgetary and programmatic autonomy that could be diminished through realignments. Some of UWM's freestanding schools have unique identities as the only ones of their type in the state or nation, being named schools, or other related features. It is important for UWM that it does not lose those features that make it unique.

- Nimbleness – The sizes of schools/colleges may affect their ability to rapidly address change.
- Student Experience – Aspects of the student experience (e.g., student services such as advising), could be positively or negatively affected by any realignments. Advising in some of the smaller schools appears to work effectively and consolidation into larger units might undermine this effectiveness.
- Differences in workload expectations – Realigned schools/colleges could bring together academic units with different standard workloads. The implications for continuing different workloads or for equalizing workloads would need to be considered.
- Program-level self-determination – Individual programs should have the ability to voice their preferred alignment. This has the potential to create new departmental/programmatic alliances.

General Recommendations:

- **Incentivize better collaboration and cooperation among colleges, specifically at the academic program level**. The committee identified this as a critical change for campus to implement, regardless of the organizational structure. The current siloed approach to our educational mission is unnecessary and it does not benefit our students. These barriers are driven by the incentives created by the historical approach to budgeting. While not specifically part of our charge and is more a focus of another implementation group, the committee identified this issue as more critical than the organizational structure. The committee has two specific recommendations:

    - Implement some form of **Euro-fication of SCH**. Students can "spend" their tuition dollars anywhere within the university and get credit toward their degree(s). It should be much easier for students to pursue dual majors, major/minors, major/certificates, etc. with no additional school/college degree requirements…

    - The **Budget model** should allow for greater flexibility to strategically align resources. Two examples of how this could be accomplished would be to either adjust the new model to significantly reduce the weighting on student credit hours or by increasing the percentage of GPR dollars held centrally that can be distributed strategically. If the budgeting process put less emphasis on the internal accumulation of SCH within schools and colleges programs may be psychologically less protective and insular.

  In general, the committee highly recommends that the budgeting process be re-examined to incentivize greater sharing of students and programs across units.

- **Policy Change** – In order to facilitate schools residing within colleges, UWM P&P requires modification. The committee suggests that allowing this structure provides

flexibility in realignment, but does not suggest that all units should combine into a schools within colleges model. UW-Madison provides a reasonable model for the policy language, since they work within the same UW system policies (UW P&P 3.01). Largely based on their text, the committee recommends the following language be added to UWM P&P Chapter 2:

"2.01(5). Other subunits of the university that include the term "school" in their titles are not considered schools for the purposes of this chapter as equivalent to departments for any or all purposes, and the role of Director of such a "school" will be treated as equivalent to a department chair as described in Chapter 4."

This policy change will allow for schools to reside within colleges, but since they are treated as functionally equivalent to departments, they will have a single executive committee with the Director serving as the chair of the EC. Chapter 4 allows for the delegation of most EC functions to subcommittees, which would allow for most of the current departmental functions to continue for those departmentalized schools and colleges who move to this structure and desire to retain as much departmental identity as possible. It is anticipated that the proposed language and approach will require in-depth discussions with affected units, given that it would not only eliminates fully-independent departments but also shift the leadership of the unit from an administrator to a faculty member. Note that while the Director would be an elected member of the Faculty in the same manner as a chair, their assigned administrative workload is not similarly restricted by policy. At UW-Madison, these Directors have 75% administrative workloads with portfolios that include not only the day-to-day operations but also strategic leadership and fundraising responsibilities. Also, unlike department chairs, directors generally serve for 5-year terms (although they are technically elected annually like chairs).

The committee determined that an alternative policy change that creates a new administrative structure where schools within colleges operate as "mini-colleges" with "mini-deans" is both more difficult to implement given UWM and UW System's governance structure and would achieve little in terms of cost efficiencies. Therefore, the benefits of implementing such a structure were not viewed as outweighing the costs. However, the proposed language has generated considerable discussion within the committee regarding how it would operationalize, particularly for those schools that are currently departmentalized that could become housed within a larger college. The committee anticipates that the proposed language will receive strong scrutiny and potential changes when it is introduced to governance for approval.

- The committee also identified other recommendations that are outside its primary charge.
    - **Change tenure rules/guidelines** to reflect diversity of faculty contributions. No more one size fits all. Outstanding instruction, outstanding research, outstanding outreach – all important and valued accordingly. Responsibilities and strengths can change during a career.

- **Joint positions become more the norm.** Cross college appointments should be encouraged. Although there are certainly exceptions, it is probably true that instructional gaps in individual departments are relatively small, but across the entire university gaps become collectively large, i.e. small gaps coalesce into large gaps. Departments/schools/programs should collaborate to hire faculty who can assist more than one unit, e.g., Architecture/Engineering, History/Social Work, Freshwater/Health, English/Business, etc. Cross-appointed faculty may also serve as bridges between units and could encourage cross-unit academic and research collaborations. The impact of cross-appointments on tenure and promotion decisions, in addition to annual evaluations, will need to be considered. Cross-appointed faculty may focus on the promotion and tenure expectations for their tenure home, which may be different than the assessment criteria used by the other units in which cross-appointed faculty are also members, particularly if the cross-appointments span different divisions. Service expectations that are commensurate with the percentage appointment for each unit in which a faculty colleague is a member will also need to be considered.
- **Cluster hiring.** UWM has an enormous opportunity with new hiring in the next few years, since by 2030 ~50% of the faculty will have turned over. Replacements can reflect the trans/interdisciplinary nature of the campus. Hiring new faculty should be done in clusters, i.e., hiring to maintain strength in an existing cluster or create strength.

<u>Potential Organizational Models</u>

Following are five general models that could guide future campus organization.

1. **MINOR TWEAKS**: This approach would leave the current array of schools and colleges largely intact with perhaps shifts of individual units that identify opportunities in a different alignment. This model would focus on identifying clusters of schools and colleges that can work collaboratively.

   For example, about five years ago the three health schools began an initiative called "Partners for Health". Over that time, this intentional effort to find opportunities to collaborate has resulted in the three units sharing an Associate Dean for Research, resources for marketing and development, some sharing of teaching and administrative load across units, and developing shared academic programs (e.g., Global Health Certificate, Certificate in interprofessional Public and Population Health, planned dietetics degree). This partnership has led to some efficiencies and program improvements while each maintaining their unique identity and autonomy. This has also allowed for meeting school external accreditation requirements, particularly for ZSPH. Such an approach could be employed within other clusters, such as Education, Social Welfare, and Information Sciences, where there could be some sharing of administrative resources and some efficiencies without compromising their core missions, which are overlapping but distinct from another. This model has fostered

collaboration, especially in research, where most RFPs require interdisciplinary teams. It maintains the need for each school/college to meet their own academic accreditation requirements, and to look for commonalities where sharing is possible. There is also collaboration on community engagement activities. All of these have improved efficiencies and reduced costs while maintaining independence.

Benefits:

- Allows for retention of core identity and autonomy, and fundraising relationships.
- Potential for modest cost saving.
- Limited disruptions to organizational units and associated programs.
- May encourage more teaching and research collaborations through shared resources.

Limitations:

- Does not address the central charge to the committee, which was to reduce to the total number of free-standing schools and colleges.
- Cost savings likely less than if units are combined.
- Will not necessarily address current barriers for students.

2. **REORGANIZE PROFESSIONAL SCHOOLS**: This model would focus primarily on combining professional schools and colleges into larger colleges, but it also identifies opportunities for some programs that currently reside in L&S to join with units outside L&S to create something new. This model would focus on reducing the total number of professional schools/colleges while also trying to achieve a better balance between the contrasting advantages of smaller units (nimbleness, fundraising effectiveness, and stronger student engagement) and larger units (cost efficiencies and easier internal programmatic collaborations). It would likely leave LSB and CEAS as standalone given their size, but it does not preclude the possibility of individual programs joining with those colleges if appropriate. There were several examples provided in the previous 2030 report. Summary statements regarding their viability are provided below and greater details are provided in Appendix C:

"A College of Health with several Schools (e.g, Public Health, Nursing, Rehabilitation Sciences, Health Sciences, Social Welfare).

Public health accreditation allows for ZSPH to be combined with another as long as the following criteria are met: majority of degrees programs are public health and the leadership must be consistent among all professional schools (i.e. all have Deans or none have a Dean). Remaining an accredited school is a major priority for ZSPH, donors, UWM, the state and the community. Due to these public health accreditation requirements, a single College of Health that contains

all of these units is not possible. There are plausible paths to reduce the total number of independent health schools from three to two, but the consensus view from the three units is that their current operating structure with the "Partners for Health" collaborative is the best option. This collaborative meets the three objectives of this task force in reducing costs, improving efficiencies and reducing barriers for students. Concrete examples include the sharing of one associate dean for research; collaboration in SOAR (shared office for the administration of research; sharing of UBRS and development officers; and shared academic degree and certificate programs). Note that HBSSW has indicated that it is not interested in alignment with the health schools and sees greater affinity with SOE and SOIS (see Appendix C).

"Combine the College of Engineering and Applied Science with programs that have a data science/informatics focus (e.g., Luddy School at Indiana University). This would consolidate programs with a data science focus and could lead to greater programmatic synergies."

This alignment is not supported by SOIS. First, the restructuring at Indiana was harmful to their unit identity, which was diminished by the merger. Also, while SOIS has faculty with common interests with computer and data science with a data science track in their MSIST program, they also have faculty and programs with a social science focus. Faculty also teach across the more technical and social science programs. Overall, they see greater affinity to a college clustered with HBSSW and SOE. Currently, there are efforts underway on campus to develop an interdisciplinary masters program in data science that would involve several campus units in the sciences and social sciences, where integration of all participating units under one college would be difficult (see Appendix C).

"College of Design similar to those at the University of Oregon or the University of Minnesota that bring together fields previously not housed under a singular umbrella. This college would not only combine areas of PSOA and SARUP, but could also connect to engineering and other units and could provide an academic home for entrepreneurship programming."

This alignment is not supported by SARUP and would bifurcate PSOA, potentially damaging its strong reputation in the community. There may also be a question of it continuing as a named school without the Art and Design areas. There are, however, potential affinities between PSOA and SARUP that could be further explored (see Appendix C).

"College of Environment that could include the School of Freshwater Sciences, atmospheric sciences, and faculty from various other units having environmental foci (e.g., Geosciences, Biological Sciences, Chemistry, etc.). Alternatively, SFS could become a School within CEAS or the College of Letters & Science."

There is a willingness to consider in SFS and the Atmospheric Sciences programs in such an entity, but initial discussions with other units indicated mixed interest and concerns about disrupting current operations. If an appropriate structure could be developed, this idea has potential merit. SFS does not see an obvious fit and is very hesitant to join either L&S or CEAS (see Appendix C).

In addition to the above examples provided by the 2030 task force, other potential options could include (note that this list does not exclude other possibilities):

- **Combine several professional schools under a single college umbrella**. Several schools have expressed openness to consider being part of a college focused on professional programs. SOIS, HBSSW, and SOE, in particular, have expressed interest in this as an option if they are unable to remain autonomous. In addition to reducing the number of deanships, placing these schools in a unified college may allow for efficiencies to reduce administrative burdens without losing their history of strong student support services. These three schools also currently have various program linkages between them, which could be facilitated by such a consolidation. There is potential that such a college could also include other programs, such as CHS or SARUP. Potential unifying themes/names could include "Professions", "Human Sciences, Learning, & Development", "Applied Social Sciences", or "Applied Sciences", among others.

- There is the potential for sub-school units to join with existing or newly realigned schools/colleges. There may be many such possibilities to be explored. The committee did not have time to investigate these options beyond a few such as the commonalities between SFS and Atmospheric Sciences. The mutual benefits of these department or program realignments, the level of interest by these departments/programs in different options and the feasibility of the combinations could be explored when larger unit realignments are being discussed.

Benefits:

- Addresses the central charge of the committee by reducing the number of units led by a dean, thereby realizing some potential, but unquantified, administrative efficiencies
- Facilitates further collaborations between allied units and may include some expected and non-traditional pairings that could lead to further innovation.

Limitations:

- Academic and research affinities between potential member units may not be very strong if based on high-level grouping criteria such as "professional". A more cohesive theme is better aligned with the committee's guiding principles.

- Loss of autonomy and potential loss of Identity and fundraising relationships. This was deemed a major drawback.
- Some alignments are not based on innovative ways of clustering but on historic/traditional alignments

3. **META-MAJORS**: The campus meta-majors concept (https://uwm.edu/undecided/) was developed to help undecided students identify academic paths and allied majors. There are six identified meta-majors that serve as a starting point for student exploration of different majors:
    - Arts, Design and Innovation
    - Business, Industry and Applied Technology
    - Natural Science and Engineering
    - Social and Behavioral Sciences
    - Humanities and Communication
    - Health
    - Undecided

    These could form the basis for a radically different way of organizing campus. The meta-majors were designed to reduce student barriers, and there is some evidence that they have been successful. Organizing campus around this construct may further benefit students. Due to accreditation and other needs, this exact College structure may not be possible, but a structure based on this principle would create a campus with fewer, more equally-sized administrative units, which is one of the ideal principles the committee identified. Examples of aspects of this approach are evident in some of the universities listed in Appendix A. The health schools are already looking at the health meta-major to facilitate degree entry when one degree door closes.

Benefits:

- It could result in a structure that students are better able to navigate by aligning related units and programs under the same overarching college.
- The number of resulting schools/colleges led by deans is greatly reduced from the current number.

Limitations:

- Some schools/colleges and associated programs may align with more than one meta-major.
- CGS does not have a natural fit within the meta-major structure unless "undecided" is considered the best fit.

- Accreditation requirements for some schools/colleges may not make this structure feasible.
- The existing meta-majors do not address all programs (e.g., some graduate-only programs are not listed), so the current groupings may not represent the best realignments.

4. **HYBRID**: This model would combine the meta-majors approach with reorganization of the professional schools. Examples of possible variations (many others possible):

Example A

- College of General Studies
- College of Arts, Architecture and Design
- College of Sciences & Engineering
- College of Freshwater, Earth and Environmental Sciences
- College Humanities and Communication
- College of Social and Behavioral Sciences
- College of Business, Industry and Applied Technology
- Health schools (structure TBD)

Example B

- College of General Studies
- College of Arts & Humanities
- College of Science (Social and Natural Sciences, SFS)
- College of Professions/Applied Sciences/Human Sciences (SOE,HBSSW,SOIS,SARUP)
- College of Engineering & Applied Science
- Lubar School of Business
- Two or Three Health Schools (structure TBD)

Benefits:

- A hybrid model could allow more flexible realignments that apply the best of the different approaches, as warranted.

Limitations:

- May still not address the best fits for some units that could be aligned with more than one other school/college.
- Accreditation requirements for some schools/colleges may not make this structure feasible. (See comment above specific to Zilber requirements).

5. **EXTREME CONSOLIDATION**:

Example A: Five colleges grouped by Faculty Divisions: Note that faculty in some schools/colleges currently may choose membership in one of two divisions, so there may not be a clear division membership for a school/college.

- College of General Studies
- College of Arts & Humanities
- College of Social & Behavioral Sciences
- College of Natural Sciences
- College of Professions

Example B: Three colleges

- College of General Studies
- College of Letters & Sciences
- College of Professions

Benefits:

- The number of resulting dean level-led schools/colleges is greatly reduced from the current number (from 13 to 3-5). At the same time, this could be an opportunity to create more schools within these colleges that could elevate the visibility of some programs that currently exist at the department level.
- Would reduce barriers for students wanting to work within broad areas—currently taking a second major or minor in a different school can be difficult.

Limitations:

- Accreditation requirements for some schools/colleges may not make this structure feasible.
- The culture of some divisions may make this a less desirable option.
- Fundraising, Identity, Autonomy and Nimbleness may be sacrificed
- No data that extremely large schools and colleges would be more efficient or effective. In fact, experience at UWM does not support this

Appendix A: Free-standing Schools and Colleges at nine exemplar public research universities.

Wayne State	**Virginia Commonwealth**	**Georgia State**
Liberal Arts & Sciences	Humanities & Sciences*	Arts & Sciences
Business	Business	Business
Education	Education	Education & Human Development
Engineering	Engineering	Nursing & Health Professions*
Nursing	Nursing	Public Health
Pharmacy & *Health Sciences*	Health Professions	Arts*
Fine, Performing, & Communicative Arts	Arts	Policy Studies
Social Work	Social Work	Perimeter College
Information Sciences	Government & Public Affairs	
Medicine	Dentistry	Law
Law	Medicine	
	Pharmacy	

*contains at least one school

University of Wisconsin – Madison	**University of Maryland**	**Oregon State University**
Letters & Sciences*	Arts & Humanities	Liberal Arts*
Business	Social & Behavioral Sciences	Science
Education	Computer, Mathematical, & Natural Sciences	Business
Engineering	Business	Education
Nursing	Education	Engineering
Medicine & *Public Health (not eligible for School of Public Health-level accreditation)*	Engineering	Earth, Ocean, & Atmospheric Sciences
	Architecture, Planning, & Preservation	Public Health & Human Sciences*
	Information Studies	
	Journalism	
	Public Policy	
Human Ecology	Agriculture	Forestry
Law		Pharmacy
Pharmacy		Vet
Vet		Agriculture
Agriculture		

*contains at least one school

Louisiana State University	**Illinois-Chicago**	**Minnesota**
Humanities & Social Sciences	Liberal Arts & Sciences*	Biological Sciences
Science	Business Administration	Liberal Arts

Business	Education	Science & Engineering*
Human Sciences & Education*	Engineering	Management
Engineering	Nursing	Education & Human Development*
Coast & Environment	Applied Health Sciences	Nursing
Art & Design*	Public Health	Public Health
Mass Communication	Social Work	Public Affairs
Music & Dramatic Arts*	Urban Planning & Public Affairs	Design*
	Architecture, Design, & the Arts*	
Agriculture	Pharmacy	Medicine
Vet	Medicine	Law
Law	Law	Pharmacy
Medicine	Dentistry	Agriculture
		Dentistry

*contains at least one school

Appendix B: School/College Input

In the meetings with the individual units, there were a few major questions/themes: All strongly expressed that remaining as autonomous units as their first preference. There were many questions regarding the overall rationale and the criteria by which decisions will be made.

L&S – The co-leads met separately with the Associate Deans and Chairs of the Social Sciences and Natural Sciences, and each provided similar feedback. There was a global sense that UWM should maintain an intact L&S college.

CEAS – The co-leads met with the Dean, Associate Deans, and chairs. They expressed openness to potential realignments, particularly to units joining with CEAS, such as SFS, SOIS, and others.

SOE – The co-leads met with the Associate Dean and Chairs. Two of the chairs followed up with individual written feedback from their departments. The overall feedback was an affinity to joining with HBSSW and openness to an expanded college with other professional programs. Educational Psychology had considered other campus alignments such as with Psychology in the past, although they expressed concerns about such an alignment.

HBSSW – The co-leads met with the Dean, Associate Dean and the two department chairs. The overall feedback was an openness to joining with SOE, although a larger college with several professional schools was also seen as a possibility.

LSB – The co-leads met with the Dean, Associate Dean, and the EC chair. Although not averse to becoming larger, for accreditation reasons any additions would need to have a business focus, so there was a preference expressed to remain a self-standing unit.

SFS –The co-leads did not meet with SFS, but Dean Val Klump is a member of the task force and was able to communicate the interests of his school. There is a strong reluctance to become part of L&S or CEAS. Their ideal is to remain a stand-alone, identifiable School (the only one in the US) but joining with others as part of a new entity without an established culture could be an acceptable approach. Major concerns for SFS are the loss of identity, status and the potential harm to its fundraising ability. Atmospheric Sciences is seriously considering joining with SFS in part to avoid constraints placed on them by L&S, including the L&S undergraduate requirements, which limit the flexibility of the students. The Freshwater Collaborative augurs the potential for a new mode of operation/cooperation across System and an expansion of the School. SFS has led that effort.

In the background, as this realignment is under consideration, SFS has, over the last 3 years, led the conception of a System-wide initiative, the Freshwater Collaborative of Wisconsin (FCW). In essence this is a $27M base funding request over 3 biennia to enhance and accelerate freshwater education and training programs across all 13 UWS campuses. If successful, the FCW would inject significant new funding into the SFS and CEAS. It is worth noting that the vision for the school when it was established in 2009 and the new $53M facility opened in 2014, was that it would house an interdisciplinary faculty of 30-40. Hence, what the SFS will look like in 2030 may be significantly different than it is today, and may be a very attractive home for new faculty either directly or via joint appointments. The current reluctance of external faculty to join such an entity may be moot. And that could easily include faculty from other UW System campuses.

SFS has indicated that it would be open to offering graduate faculty status for faculty at the comprehensives in order for them to advise doctoral students in SFS. The current proposed System budget for the next biennium contains the first installment of $9M for the FCW, $3M in the first year and an additional $6M in year 2. While funding is by no means assured, the FCW is an example of the flexibility and innovation that stand alone, focused units seem to be better poised to pursue.

ZSPH – The co-leads met with the entire ZSPH faculty, staff and administration. The largest concern is maintaining school accreditation. While it is possible to maintain accreditation of a standalone MPH program without school accreditation, this approach is a drastic shift from having the only SPH in the state, reducing visibility and fundraising capacity and potential for growth in the BSPH among other serious considerations. Maintaining school accreditation is considered essential by a majority of ZSPH faculty, and the loss of accreditation is seen as an existential threat. For school accreditation, The Council on Education in Public Health (CEPH) requires that the administrative structure be on par with all other professional schools on the campus including business, engineering, and social work. The most common model is a stand-alone school/college with a dean. However, there are eight examples of accredited SPHs that house other academic units. For example, UMass has the School of Public Health & Health Sciences.

SOIS – The co-leads met with the entire SOIS faculty, staff, and administration. There is a strong sense of mission in SOIS and pride in the quality of their academic programs and support of their students. Their main concerns in any restructuring are the loss of identity, nimbleness, and their strong connection to their students. They expressed an openness to a college structure with several schools, but strongly desired retaining their individual student support structures.

CHS – The co-leads met with the acting dean and the department chairs. Overall, the chairs expressed flexibility, but also some wariness to potential alignments with the other "Health" schools.

CON – The co-leads met with the Dean, Associate Dean, and EC chair. Nursing has a strong sense of mission and independence, and desired to retain its current structure while continuing to collaborate with the other health schools, through the "Partners for Health".

SARUP –The co-leads met with the entire SARUP faculty, staff, and administration. A major concern for SARUP is the loss of identity and the potential harm to its fundraising ability. SARUP's budget includes a substantial reliance on external fundraising. SARUP also has a vision to be identified as the UW System School of Architecture & Urban Planning or College of Design and want to maintain their identity to facilitate that possibility. If SARUP were to become part of another college, they expressed interest in a college with multiple other professional schools (e.g. SOE,HBSSW, and SOIS) or potentially CEAS, although either of these possibilities would require extensive discussions to determine their viability.

PSOA – One of the co-leads met with the department chairs and the Dean and, for the most part, all were willing to consider being merged with another unit. The working assumption was that SARUP was the most likely candidate, although there was

openness to working more closely with units within L&S such as Art History and Film Studies, as well as areas in the sciences (currently theater faculty work with environmental sciences). The major concern from all areas is that the four-year major be maintained. Students cannot complete the requisite training in a 2 + 2 model. There is also concern about maintaining identity and the ability to fundraise.

CGS – The co-leads did not meet with CGS but Associate Dean Greg Ahrenhoerster was able to communicate their interests on the committee. The broad scope and emphasis of CGS makes re-alignment with other units impractical. L&S might be a possibility, but the differences in workload and focus make this match unlikely. A University College structure might be another option.

Appendix C: Viability of 2030 report suggestions

1. Health School Realignment

The previous 2030 report included a suggestion of placing the three health schools into a single College of Health with multiple schools. However, this suggestion was not vetted at that time. Upon further examination, there are two primary factors that must be considered:

A. Accreditation: Most of the health programs have external accreditation requirements, although most are program-level that can be accommodated by various school/college configurations. However, the Council on Education for Public Health (CEPH) has specific requirements for accredited schools of public health:

"A4. Autonomy for Schools of Public Health (SPH only)
A school of public health operates at the highest level of organizational status and independence available within the university context. If there are other professional schools in the same university (e.g., medicine, nursing, law, etc.), the school of public health shall have the same degree of independence accorded to those professional schools. Independence and status are viewed within the context of institutional policies, procedures and practices."

It has been confirmed directly with CEPH that the language above constrains the available options. Two primary constraints exist:

- Autonomy and independence of the school is on par with all other professional schools on campus including business, engineering, and social work. These schools are not traditionally viewed by many as "professional schools": but accreditation requirements do consider these programs professional schools.
- The school/college must be composed of predominately public health degree programs

The Zilber School of Public Health cannot exist within a larger college where autonomy and independence are not retained and where public health is not the predominate focus of that unit. This precludes the possibility of one College of Health with multiple schools that includes ZSPH, but it does not preclude the possibility of a School/College of Public Health & … (e.g., School of Public Health & Health Sciences at the University of Massachusetts) as long as public health is the primary entity of that college. There are 8 accredited examples of this nationally. While a single health college is not possible, some individual programs may make sense to join with public health. Note that all accredited schools of public health in the United Stated are free-standing with deans. The School of Medicine & Public Health at UW-Madison is not eligible for CEPH school accreditation because it does meet the above criteria.

B. Potential budget/status/power imbalances: It may be possible to reorganize into two health-related colleges instead of three. There are several possible permutations of this. One possibility is for two of the current units to combine into one, with the third remaining as a standalone. Another possibility could be to group programs by common program needs, such as clinical (e.g., nursing, communication sciences & disorders, and the rehabilitation sciences) and non-clinical (e.g., public health, kinesiology, nutrition, health informatics & administration, and biomedical sciences) programs. It should be noted that the health schools are already working to collaborate on clinical and fieldwork placements of students. Overlaying these options is the possibility that individual programs may choose to align with other colleges on campus if given the opportunity, such as L&S, Business, SOIS, SARUP, etc. Any recombination of the three health schools/colleges to two introduces issues regarding potential power and budget imbalances where smaller programs will be concerned about their needs being adequately addressed, particularly with the possibility that accreditation needs of larger programs will outweigh those of smaller accredited programs or programs that do not have accreditation requirements. This is a major concern that has been expressed. There are also concerns regarding budget imbalances that if combined could compromise the current mission of some programs.

Based on accreditation needs and feedback from the three units, the best path forward for the health schools is unclear. Individual programs may be open to realignment opportunities, but the collective desire of ZSPH, CHS, and CON is to remain independent and expand upon the "Partners for Health" structure that is already in place. The desire to remain independent is shared by all 13 schools and colleges, and is therefore not a compelling argument in itself. However, the three schools do have a history of working together to identify efficiencies and programmatic improvements that could serve as a model for other clusters of schools/colleges (see model 1). Research collaboration, joint degree and certificate programs and sharing of personnel are already in place. If central administration desires further consolidation of the health schools, a single college does not appear to be a viable option. A two-college solution seems plausible, although any of the potential variations would require extensive deliberations to ensure that the needs of all programs are adequately addressed.

2. <u>Combine CEAS and SOIS</u>
   As noted above under model 2, this alignment is not supported by SOIS. Although SOIS has faculty with common interests with computer and data science, and SOIS has a data science track in their MSIST program, they also have faculty and programs with a social science focus. Faculty also teach across the more technical and social science programs.

3. <u>Combine PSOA and SARUP</u>

The 2030 report raised the possibility of integrating the Peck School of the Arts (PSOA) and the School of Architecture and Urban Planning (SARUP). There are various examples across the country of similar combinations, although combining the visual arts, performing arts, architecture, and urban planning in one college would be unique. Numerous universities house Architecture, Art and Design within a single school (UIC, LSU, Temple University and Penn State, for example), although these schools often do not include Urban Planning in their degree arrays. However, there are Architecture Schools that do include Urban planning (or Urban Design) in their program offerings. Cornell University has Art, Architecture and Planning (City and Regional Planning) within a single school. We have not found examples that combine the performing arts (Dance, Film, Music and Theater) with Art, Architecture and Urban Planning/Design in a single college, but most of the Universities referenced have large Schools of Music that operate as separately.

Pros:

- Shared commitment to community engagement and social justice
- Potential for joint projects that engage the Milwaukee community and raise the visibility of UWM in the city
- It could allow the college to more aggressively market its many classes with an Arts designation, and would provide an expanded pool of students who could enroll in classes.
- The addition of the performing arts in the same college would distinguish UWM at the national level.

Cons:

- SARUP and PSOA have expressed strong concern that this could dilute their individual identities as professional programs.
- It would dilute SARUP's and PSOA's identities as the only Schools of Architecture and the Arts in the state and undermine their autonomy.
- It might threaten the ability of both schools to fundraise. Fundraising is equivalent to one quarter of SARUP's budget, and it is also crucial in maintaining the ability of PSOA to continue to support its students and programming.
- It could threaten the integrity of both schools, first by potentially dividing Art and Design from the other arts. In addition, Urban Planning strongly prefers to maintain its current alignment with Architecture, but a combined college with the Arts would likely cause Urban Planning to seek a new alignment in a school/college such as public policy, urban affairs, social science, etc. Architecture also prioritizes its affiliation with urban planning, and therefore views aligning with PSOA as less desirable than other potential alignments, such as a college with other professional schools (e.g., HBSSW, SOE, SOIS).
- The number of different accreditations that would be needed to be maintained - NASM, NASAD, and NASD, NAAB and PAB. This could increase tensions over the allocation of financial resources to maintain accreditation.

Should it become possible for Schools to exist within colleges, there are at least two ways in which this integration could be achieved. Model 1 represents the most radical change and would break up PSOA as it currently stands. Model 2 represents the least disruptive way of integrating the schools, but might prevent affinities being fully explored.

Model 1

This model would create two schools of relatively equal size, each of which is clustered around some shared interests and affinities. Art and Design would be integrated into SARUP to form a single school with the performing arts in a second school. This model would result in two schools of relatively equal size, each of which is clustered around shared interests and affinities, and similar modes of instruction. This arrangement could be further strengthened if Art History joined the school. This approach is similar to the approach taken in academic music study, where musicologists and ethnomusicologists remain in the music department in close proximity to music majors. There are numerous universities (Case Western Reserve, University of Rochester, University of Albany, University of Virginia, and others) with Departments of Art and Art History. Should Art History move into the newly formed school, it would be maintained as a department. Similarly, Film and Media studies, currently part of the English Department, might also be willing to join with the Film Department. While this is a less common arrangement, there are programs (e.g., USC, NYU, UC Berkeley) in which film making and the study of film and media are housed in a single unit. Currently there is faculty collaboration between Film and Media Studies and Film, and, should Film and Media Studies remain within L&S, barriers that make moving between these department should be lessened.

College of the Arts and Architecture

School of Architecture and Art/Design

- Architecture
- Urban Planning
- Art and Design
- Could include Art History

School of the Performing Arts

- Dance
- Film
- Music
- Theater
- Could include Film Studies (should probably be Film and Media Studies)

Pros:

- This option would allow closer affinities between related areas within Art & Design and Architecture. It might also allow closer affinities between community-oriented programs within the Art Department, and similar interests within Urban Planning.

- If the Art History Department joins this school, it would contribute academic study of the visual and plastic arts to the school. Currently there are faculty in the Art History department whose research centers on the built environment, who may have scholarly affinities with the School.
- If Film and Media Studies moves to the school, it would make a nationally-ranked program even stronger and may attract more students to the program.

Limitations:

- Both SARUP and PSOA have expressed concerns about maintaining their individual identities and reputations, which is important for recruitment, community recognition and for fundraising. In splitting the PSOA into two parts, this option potentially damages PSOA's identity.
- SARUP has been firm in its opposition to any integration with PSOA, preferring to maintain its status as an independent school or perhaps affiliation with a College of the Professions, should that be formed.

Model 2

This model integrates the two schools, as they currently exist, under a single college structure. This model calls for less radical change, and, therefore, may elicit less opposition from both PSOA and SARUP faculty. It would still allow close affinities to develop between various areas within the college—SARUP has expressed interest in pursuing closer affinities with dance and theater, both of which have programs with community engagement—and it would allow affinities between Urban Planning and community arts programs in PSOA to develop with fewer barriers in place.

College of the Arts and Architecture

SARUP

- Architecture
- Urban Planning

PSOA

- Art and Design
- Dance
- Film
- Music
- Theater
- Could include Film Studies (should probably be Film and Media Studies)

Pros:

- Maintaining the current groupings of departments would elicit less opposition from faculty.

- Closer affinities between departments could develop more organically as faculty become more familiar with the array of programs in each school, and with the work of other faculty.
- SARUP has expressed interest in exploring affinities with Theater and Dance, and this arrangement may remove some of the current barriers to this.

Cons:

- Maintaining the current structures may also stand in the way of affinities developing.
- SARUP has expressed the concern that they would be competing with PSOA for students seeking Arts designated GER classes.

4. <u>Create an environmentally-focused school/college</u>

The previous committee recognized that there could be an opportunity to develop a more visible presence centered on the environment, given its strength in freshwater, atmospheric, and environmental sciences. There are several examples across the country with foci on the environmental and marine sciences, and UWM has the individual components to develop something similar (e.g., College of Freshwater & Environmental Sciences). UWM has BS Conservation & Environmental Sciences (CES), BS Atmospheric Sciences, and the new BS Freshwater Sciences degree programs, as well as related graduate degree programs. This would be an opportunity to strengthen UWM's environmental focus overall, which could attract new students long term. It may also allow for some efficiencies in program delivery.
This new school/college would serve as the tenure home for the SFS and likely the atmospheric sciences faculty. Based on initial discussions, it is unlikely that any other current L&S departments would move to this new unit. As currently structured, it appears unlikely that many (if any) of the current faculty who contribute to the CES degree or have environmentally-focused research agendas would want to change their tenure homes. Therefore, partial appointments may be a way to integrate the faculty from departments like Geography, Geosciences, or Biological Sciences. However, the history of such appointments at UWM is weak, but also likely antiquated. In the case of freshwater, the history of joint appointments, with the exception of Economics, predates the formation of the school and was inherently one-sided. The mechanisms to create a successful joint appointment structure need to be examined.

The next issue is whether this school/college would exist as a stand-alone entity or exist as a school within a College. A strength of a stand-alone college would be its ability to develop its own culture and identity, and the flexibility to develop its programs independent of the constraints of a large existing College (such as L&S). This has proven success. However, given the connections to natural sciences, this structure would attain maximum potential for success if there was greater student flow between colleges than

now exists. This issue is not unique to freshwater and is largely an artifact of UWM budgeting practices.

On the other hand, most of the components for such a school/college currently exist within L&S. While atmospheric sciences has already been considering a move to join SFS, initial conversations with others suggest a strong reluctance to moving outside of L&S given the current operating principles. A major factor is that environmental science is an inherently interdisciplinary academic program. Residing within L&S while allowing for more seamless student flow under its current operating principles does not open the entire breadth of the university to students, and on its face without other reforms, fails to accomplish a major goal of realignment – student access and flexibility. It is those practices themselves that are problematic for UWM as an institution and requires a new approach to budgeting. Absent such reforms, an environmentally-focused school (e.g., School of Freshwater & Environmental Sciences) simply placed solely within L&S would fall short of the potential UWM has in this arena. Major challenges to embedding SFS within L&S are the ability for SFS to maintain its unique identity and programmatic autonomy, with the ability to independently fundraise being a major concern. There is also a strong desire by the SFS faculty to be separate from L&S. Distribution requirements within L&S are a significant obstacle to fields with strong technical demands (e.g. atmospheric sciences) to create new and innovative courses of study such as one with a climate science emphasis that would likely attract new students to UWM.

The 2030 report also suggested that SFS could become a school in L&S or CEAS. While there are some research collaborations with CEAS, similar issues arise with respect to cultural and programmatic fit. The SFS academic programs likely have more in common with those in L&S, but as discussed above, there is strong hesitance for such a move. Given the current relative sizes of L&S and SFS, such a structure risks relegating SFS to a status more akin to a department and would not facilitate the obvious and needed connections between freshwater science, engineering, architecture and urban planning, public health, and other programs outside of L&S.

APPENDIX D: 2030 Research Working Group
Report of Recommendations

A research university's mission is to provide a world-class education to its students and to generate and disseminate new knowledge. As a public institution, UWM has a core mission to serve the needs of the city of Milwaukee and southeast Wisconsin by providing a strong talent pipeline, relevant research programs, and outreach to the community. UWM is distinguished by its responsibility to promote social mobility for the people in the city of Milwaukee and surrounding area by providing access to an affordable world-class university that excels at research and education.

-- Think Tank 2030 Report

The University of Wisconsin-Milwaukee is Wisconsin's Public Urban Research University. It is one of only two R1 Research Universities in the state and is located in Wisconsin's largest urban center at the heart of the state's metropolitan corridor. The recommendations of the working group flow from the University's core and primary identity as a top-tier research university. As a top-tier research university dedicated to serving the needs of the city, region, and state, UWM has a responsibility to Wisconsin's future within an evolving knowledge-based, globalized and multicultural world. We must commit to our research-oriented identity and expand collaborative research approaches, translate research into practice and learning opportunities, and infuse entrepreneurial and innovative engagement with the community. By strengthening the University's research identity, we will build a vibrant and resilient research and practice-based workforce, engage students from diverse backgrounds, and construct a foundation for the University's future contributions to its community.

The work group identified three major issues that must be addressed to sustain and grow UWM's high-quality research:

- **Our Research Workforce, Our People**: We must recognize that faculty and staff contribute to the University research mission in varied ways and that the contributions of individuals, teams, and fields change through time. More than anything else, we need to invest in the support and development of individual research careers and to diversity our research community. Beyond this, recent developments in collaborative team-based work, community-engaged scholarship, and entrepreneurship require changes in how we assemble our research workforce, ask them to contribute to our mission, and recognize their contributions. While embracing these changes, we must also renew our efforts to advance more traditional research models and provide an overall research environment through which all members of the UWM community experience vigorous support and enthusiasm for research contributions.

- **Research Infrastructure:** A viable infrastructure is requisite to developing and maintaining a "strong talent pipeline, relevant research programs, and outreach" (2030 Report). We must build a more robust, responsive, and adaptive research support structure that can address the particular needs of individual researchers, research groups, and collaborations. We must also develop better ways to incentivize, support, and reward research as we retain and expand our core identity as a research university. Our current infrastructure shows significant deficits and stress—even as we continue to produce world-class high-level research. Clearly, UWM must quickly address the need for upgrade and upkeep in areas of capacity, oversight, physical infrastructure, and data management and security.

- **Research in the 21st Century**: Researchers do not work alone. Their work reflects developments in disciplinary scholarship and creative practice, local-to-global social, political and environmental challenges, and the shared concerns and connections that develop between colleagues. Multidisciplinary teams are required in order to address difficult problems such as "grand challenges", the mechanisms and implications of global climate changes, health crises and disparities, safety and cultural disapora, and other complex community and societal issues. National and local emphasis on entrepreneurship has expanded the translational aspects of research. In addition, 21st century technologies put new demands on research infrastructure, particularly in the areas of data management, sharing and security. All of these developments have added additional dimensions to traditional research and scholarly activity.

Specific Recommendations

The working group discussed numerous ideas about improving UWM's research enterprise as it developed its recommendations. These are presented in four basic groups, but it is important to say that these are mutually supporting. For example, building research infrastructure will support development of research careers and lead to new modes of research, and the fuller development of collaborative research will require such effort to be better recognized and rewarded.

The most critical recommendations in this report focus on the development of our research workforce (A) and improvements to our research infrastructure (B.1). Other important recommendations center on improving the interactions of researchers (C.1) and the expansion of entrepreneurial training (D.1). We recognize that some of these recommendations can be implemented more quickly than others and that some may be challenging because of financial limitations, but they are critical, and we believe they should all be pursued as much as possible. (See the table at the end of the report for some general notes on priorities, timing and critically essential resources related to implementation.)

A. Research Workforce

The group's Research Workforce proposals have three key elements: (1) free-up, better value, and protect research time; (2) recognize and value the variety of contributions made by our faculty and staff; and (3) diversify the scope of research and our practitioners to better meet the needs of our community. These provide a basic framework for retaining and continuing to build our strong research profile and position UWM for future research opportunities.

Some of the specific recommendations challenge long-held assumptions, modes of operation, and institutional policies and procedures. Working through these proposals will require open-mindedness, respectful conversations, and a willingness to see that we cannot simply continue what we have done in the past just because that is what we have done in the past. It is also important to learn from groups, programs, and departments within campus who have successfully navigated challenges now which also face the entire campus. The group recommends the following:

1. Invest in the Development of Research Careers
    a. Implement a mid-career mentoring/career planning and professional development program. We must be more intentional about building our research workforce and proactive in helping mid-career scholars build their research programs.
    b. Focus the sabbatical program to promote and prioritize high-quality research.

c. Reduce service loads on faculty by critically evaluating the overall amount of time invested in governance. As our faculty becomes smaller, the service burden increases and is being disproportionally borne across the campus.

2. Develop more flexible systems to fairly distribute effort based on the reality that each individual contributes to the university mission in unique ways. We should replace existing "workload policies" (in Faculty Policies & Procedures) with more dynamic models that recognize a distribution of effort. We need systems that recognize and award the different ways that faculty can be most effective in contributing to the university.
    a. In developing flexible systems, it will be necessary to implement discipline-specific metrics that capture appropriate research/scholarly contributions. Beyond traditional measures (books, papers), these should explicitly include important research outcomes such as external funding, performances, public scholarship, grant applications, mentoring of undergraduate and graduate student research, and leadership of research consortia and organization of national and international conferences, etc.
    b. There is no single model for assigning faculty effort, but any model must recognize that (1) all faculty need to be engaged in research and that this research time must be protected and supported; (2) units must be able to offer their academic programs; and (3) specific and transparent metrics must be used to that facilitate predictable time allocations. Two models that we have discussed are:
        i. Starting from a minimum level of research, teaching and service obligations, develop an array of activities that reflect the most effective distribution of effort in light of the unit's objectives and responsibilities.
        ii. Starting from a high teaching load (3 + 3), designate time for research given an individual's research needs and obligations.
    c. The design and implementation of a system to flexibly assign effort would be done at the unit level. We recommend that these systems be subject to dean approval; deans should hold units accountable to follow their plans.
    d. These systems should be implemented within two years.

3. Improve Faculty Rewards and Recognition
    a. Revise Promotion & Tenure guidelines to reflect the importance of new forms and more diverse forms of scholarship, contributions to collaborative research teams, and the development of translational and innovation and entrepreneurial applications of research.
    b. Develop better systems of recognition and reward that reflect varied contributions. Wherever possible, use transparent metrics (disciplinarily appropriate) to demonstrate equity and research productivity and transparently assert appropriate merit adjustments to salaries. The goals are: (1) to raise faculty salaries to the average of Midwestern public R1 research universities; and (2) to have top researchers' salaries at or above the 75-80th percentile for their disciplines.
    c. Align TA assignments to provide an initial year of support for graduate students who could then be shifted to externally funded RA positions.
    d. Establish department-level or college-level programs of small awards to recognize outstanding research accomplishments. Too much of the great research being done at our University receives no institutional recognition.

4. Increase the diversity, equity and inclusiveness of our research workforce. The group is unanimous in its belief that a diverse workforce broadens research perspectives, increases the community

relevance of our work, and inspires our community (colleagues, graduate students, and undergraduates). We must not simply embrace diversity in hiring considerations, we need to work proactively to increase the diversity of our community. In order to move our research programs forward, we must:

   a. Increase the diversity of faculty by 25% within five years. Campus and disciplinary goals are needed to focus efforts on addressing specific gaps in our diversity profile.
   b. Implement hiring strategies that will increase the diversity of the faculty. Strategies that have been demonstrably successful at UWM in the past are: (1) partner hiring to increase a unit's diversity; (2) opportunity hiring when exceptional individuals are available; and (3) short-term (summer or semester long) visiting positions for doctoral students nearing completion to come to UWM to teach a course and receive career mentoring.
   c. Improve campus climate to be more inclusive and radically welcoming of faculty and staff from diverse backgrounds.

5. Implement academic staff Teaching Professor and Research Professor titles.
   a. These titles will create better career paths for academic staff colleagues, and, where appropriate, provide more time for research activity by freeing up research-focused faculty from other responsibilities.
   b. The group believes these individuals should participate in planning and decision-making related to teaching and research, as appropriate. This can be accomplished within the current P&P framework.

6. Increase support and professional development for graduate students.
   a. Graduate stipends must be raised to be nationally competitive. Appointments should be at the 50% level to attract strong students, and doctoral student support should be prioritized where possible. Finally, data on levels of support, time to degree and research outcomes should be tracked to monitor changes in stipend level and use over time.
   b. The Graduate School has developed professional development programs for graduate students. Graduate programs should leverage these to provide guidance to students about varied career opportunities within the context of their discipline. In addition, opportunities for innovation and entrepreneurship should be available to all students (see section D).

7. Advance and better leverage undergraduate research programs as part of the larger research environment of the campus. Engaging these students in research is a powerful mentoring activity and has demonstrably enhanced recruitment and retention efforts.
   a. Encourage and reward faculty who include undergraduate students in grant budgets.
   b. Increase awareness of additional campus support for grant-funded undergraduate positions such as that available through OUR programs.
   c. Encourage faculty to develop research training initiatives within their departments. This could be done with OUR resources and application for Training Grants from the NIH and NSF.

B. Research Infrastructure

We must build a more nimble and customizable array of research supports that can respond to the diverse and shifting needs of our research community. Supports must be developed at the departmental, school/college, hub, and campus levels and be organized around (1) responding to the specific needs of individual researchers and groups, (2) developing transparent processes that identify

and reward research productivity, and (3) supporting compliance in response to more intrusive federal, state and system requirements. The group is convinced that the development of this infrastructure will require a substantial investment of resources but that such an investment will be fundamental to any effort to sustain the high-quality research of our University's research.

1. BRIDGE (Building Research Infrastructure: Design/Growth/Engagement): Establish an array of research supports available to all researchers. Some elements may be best addressed at the college level or through integrated service "hubs"; others may be campus-wide supports. The services should include:
    a. Support research grant development and administration across campus. We recommend establishing support units at the level of colleges/schools (or combinations of them) to provide vision and consistent research services that fit the needs of the academic unit(s). These can include both pre-award and post-award functions which can be better coordinated with campus level (Office of Sponsored Programs, integrated shared service) staff. (NB: The Office of Research has recently reviewed grant policies and compiled a table of responsibilities that can facilitate the coordination.)
    b. Develop a campus-wide research-reporting tool for researchers to present their research programs and regularly report the outcomes of the work. This will facilitate identification of shared research interests and an inventory of expertise, projects, equipment, and skills. This will also assist in facilitating communication with the general public as well as our regional and community partners.
    c. Restructure internal funding programs to address two basic needs: seed funding and research career development. In both cases, the funding should be for specific activities with defined (and tracked) outcomes.
        i. Significantly large seed funding awards for high-quality research (DIG model).
        ii. Smaller awards of variable size based upon the needs of individual researchers or research teams. Our goal should be to advance emerging research at an early stage.
    d. Manage major research equipment and facilities as shared services.
        i. Establish a data system of equipment, facilities, and support services available for use.
        ii. Operate the equipment in shared/core facilities, with the appropriate financial models (including base funding support, user fees, etc.).
    e. Use a centralized pool to support grant matches by setting aside 20% of the indirect funds from external awards. It has been difficult for individual schools and colleges to make these investments given other demands on their funding. Our goal should be to model the importance of research and support unit leadership in doing so.
    f. Develop collaborative research spaces available for short-term or medium-term use for specific projects. These spaces will not be allocated to individuals or units but provided to research teams for collaborative work. These should include a mixture of spaces: meeting and work rooms, laboratories, etc.

2. Revise the financial system and budget models to support research.
    a. Funding for the above infrastructure improvements, research faculty and staff salaries, and graduate stipends are critical. This will undoubtedly require revisions to the current budget allocations.
    b. Implement a system to track and report participation of faculty on joint/collaborative proposals and awards. This will enhance transparency and about research activity and facilitate recognition of participation.

3. Invest in a position for research compliance. As compliance requirements steadily increase at federal, state and system levels, UWM faces increasing risks that are exacerbated as we move into research that is increasingly translational, collaborative, and/or data-rich in the 21st century.

C. Collaborative and Team-Based Research

Research in the 21st Century has become increasingly team-oriented and collaborative. This is the result of shifts in research priorities and funding toward the solution of complex problems and the translation of research into application and engaged practice. Today, more and more studies require diverse disciplinary perspectives and the involvement of community partners. For UWM to be successful in this context, we must develop strategies for building research networks at various levels (department, campus, regional, national, and international) that may include both academic and community partners. These networks may lead to new projects, but they are also important for stimulating us to approach research problems with more diverse perspectives and questions. While not everyone will work in team settings, this research mode has become increasingly expected and common, and UWM must develop and support this dimension of its research activity.

1. FRIEND (Facilitating Research, Innovation, Engagement, Novelty, and Discussion). Facilitate more collegial interactions among campus researchers
    a. Develop programs to bring faculty with common research areas of interest together. We have seen various very successful models, including in Nursing, CTSI, C21, and "research neighborhoods."
    b. Increase opportunities for informal social interactions among researchers in recognition that collegiality and friendships are critical preconditions to collaboration. Specifically, the group recommends the development of a prominent and well-stocked "research lounge" for daily informal and unplanned meetings and discussions.
    c. Reduce barriers to cross-disciplinary and cross-unit collaborations by resolving questions about sharing of funding and credits between *all* colleges and schools.
    d. Bring more national and international meetings to Milwaukee to increase the visibility of our university and its researchers. People who wish to organize such meetings should get whatever support they need in the process and not have to do everything themselves (the current model).
    e. Participate more actively in communicating with the general public the impact of our research faculty, programs and outcomes through public forums, marketing and media outlets, and social media.
2. Align research positions with research initiatives.
    a. Target recruitment of outstanding established investigators in fields critical to UWM and work with the Foundation to establish more endowed chairs.
    b. Invest in the development of research centers and institutes to enhance cross-disciplinary research as they develop from sustained collaborative endeavors. We hypothesize that the recommendations within this document will organically lead to new research centers and institutes within UWM. These centers will require substantial infrastructure, administrative, and financial support for success and sustainability.

D. Innovation and Entrepreneurship

The broad scope of UWM's research includes translation of discovery into application. This is manifest in the expansion of opportunities to develop entrepreneurship among faculty, staff, and students and in the establishment of the Lubar Entrepreneurship Center (LEC). It is clear that entrepreneurship will continue to develop as a critical element in how the University engages with the community and is vitally important for its mission. We must find ways to incentivize entrepreneurial activity across the University.

1. Broaden I-Corps to engage a more diverse range of researchers. (I-Corps is a NSF-sponsored LEC program for faculty, staff and students to explore the commercialize their research ideas. The program uses an experiential approach; over 120 teams have completed the program to date.) We recommend offering a version of the program that uses "challenges" to develop a mode of thinking and skills that is widely available to faculty, staff and students.
2. Implement additional development components for projects seeking financing following the I-Corps program to actively move projects toward commercialization.
3. Develop an alumni network to mentor students, staff, and faculty.
4. Improve the visibility to researchers of the UWM-RF tech transfer and commercialization services.

Working Group Charge and Team

Chancellor Mone's charge to the 2030 Implementation Team included the following goals for the Research working group:

- Expand collaborative and interdisciplinary scholarship and graduate programs.
- Infuse entrepreneurship, design thinking, and data science into faculty research and graduate and undergraduate education.
- Strengthen sustaining partnerships with community, industry, and other academic institutions.
- Optimize faculty workforce deployment.

The working group consulted the 2030+ Think Tank report, recent research planning reports (Office of Research), RPAC, and various invited guests while also drawing upon their varied intradisciplinary experiences. The group met 10 times between early October 2020 and mid-January 2021. The group's members were:

- Andrew Graettinger, College of Engineering
- Ana Gonzalez, Office of Research
- Prasenjit Guptasarma, Physics, College of Letters and Science
- Jennifer Gutzman, Biological Sciences, College of Letters and Science
- Mark Harris, co-chair, Office of Research *and* Geosciences, College of Letters and Science
- Kathleen Koch, Office of Research
- Robin Mello, Theater, Peck School of the Arts
- James Peoples, co-chair, Economics, College of Letters and Science
- Kimberly Lacking-Quinn, Mathematics, College of Letters and Science
- Nigel Rothfels, Office of Undergraduate Research *and* History, College of Letters and Science
- AkkeNeel Talsma, College of Nursing

Research Recommendations: Conceptual Framework

Recommendations	Action Lead	Involved
Theme 1: Research Workforce		
Action 1.1: Flexible faculty contributions (1)		Provost/VP-AA/governance/ECs
Action 1.2: Rewards and Recognition (2 + 3)		Provost/VP-AA/governance/ECs
Action 1.3: Diversity of faculty and staff (4)	Provost/VP-AA	Deans, departments, DE&I
Action 1.4: Faculty research development (5-8)	Provost/VP-AA	Governance/OR
Action1.5: Research & Teaching Professors (9)		Provost/VP-AA/HR/governance/ECs
Action 1.6: Student support and development (10 + 11)	Provost	OUR/OR/GS/Deans
Theme 2: Collaborations and Team-Based Research		
Action 2.1: Increase research interactions (a-e)	OR	Deans/departments/HR
Action 2.3: Align research positions with research initiatives (a,b)	Provost/Deans	OR/Dvelopment
Theme 3: Entrepreneurship		
Action 3.1: Broaden I-Corps	UWM-RF	
Action 3.2: Support for commercialization projects		UWM-RF/OR/Deans
Action 3.3: Alumni mentoring network	Deans	Alumni Office/UWM-RF
Theme 4: Research Infrastructure		
Action 4.1: BRIDGE	OR	Provost/Deans/departments/Space planning/F&AA/UWM-RF
Action 4.2: Financial Systems	F&AA	OR
Action 4.3: Compliance	OR	Legal Affairs