University of Wisconsin-Milwaukee
Chancellor’s Retreat
Thursday, January 23, 2020, 9:00 a.m. – 2:00 p.m.
Golda Meir Libraries, fourth floor conference room

Summary of Strategic Direction Discussions
Note: Diversity, Equity and Inclusion was woven into each of the following sections.

SUSTAINABLE FUTURE DIRECTION

Easel Notes:

- Non-traditional students have different needs; provide infrastructure to support this
- Employee development—upscale
- Diversity: Be the ‘school of choice’ BUT: ‘Give them a 1st-choice experience’
- ‘Just Do It”: Make decisions and proceed; less committee work and less “discussion fatigue”
- Toolbox for professional development for new employees
- Strengthen performance evaluation + professional development
- Better structures
- Hard budget choices—"just do it”
- Financial Aid for Students
  - $500 need to return (HELP)
  - Financial literacy
- Pro rata fee: Student
- IT infrastructure in support of online teaching
- Space utilization: Rethink how we use space (e.g., summer)
- Bring more students to campus over the summer
- Space aligned with realistic and future enrollments
- ‘Quality Brand’: attract students with better scholarships; most other states’ 2nd most prominent universities make strategic financial aid package offers to high-achieving students that result in cost lower than student’s flagship university cost
- ‘Certification’ becomes more important: employers demand, or still just a degree?
- Quality—are we really caring to students?

Written Comments:

- Most valuable elements:
  o Roads leading to enrollment (e.g. capital planning, financial aid, re-branding)
  o Branding to help build the profile of UWM for potential students
  o Removing obstacles to retention and enrollment
  o Accessing and improving scholarship management
  o Increased aid to address student retention for financial reasons
  o Comprehensive aid
  o UWM as first choice institution
First goal in marketing section
- Facilities plan
- Centralization in a thoughtful way
- Plan seems realistic and without arbitrary goals
- Maintaining a safe environment
- Metrics thoroughly outlined
- Helpful to have all these plans in one document

Additional elements:
- Sustainability of culture and environment to identify more closely with region and world – glocalization
- Communication plan for the goals that have maximum impact across campus
- Partner with a program that teaches students how to plan financially for college, complete a FAFSA and navigate the educational system
- Increase student/faculty contact with Zoom – low cost way of providing touchpoints
- Add strategic allocation as an essential element around institutional aid
- OK to be 2nd choice, but give 1st choice experience
- Create a culture of customer service – perhaps HR to help with training and tie goal to offering enhanced professional development
- Expand “1st choice” thinking around non-traditional learning such as distance learning, credentialing, badging
- Building Pride for sustainable future

Problem areas:
- Don’t refer to “campus” but rather extended university
- Many goals – prioritization seems necessary
- How to fund increased cost of student aid in a sustainable way
- Expand definition of students and what that means, reflecting realities of demographics
- Massive plan – suggest phasing
- Where are funds needed?
- Projects/initiatives are a collection of unrelated efforts. Organizing efforts requires thoughtfulness in the “responsible party” structure and connections between units.

DEI inclusion:
- Make cultural sustainability more visible – e.g. creating a multicultural environment recognizing the various groups that compose the heritage of the area and attention to historic landscapes (potentially with help from the Buildings-Landscapes-Cultures program)
- Implement #20 (Increase the Enrollment, Retention, Quality and Diversity of Students at UWM with Marketing Messages that Celebrate UWM as First-Choice Institution Rather than Fallback School)
- Many components difficult to tie DEI concepts to.
Metrics on URM populations for student financial assistance would be helpful.

**Suggestions By Topic Area:**

See table below on next page.

In addition, the following items were suggested but may be better suited for other goal areas:

- Provide infrastructure for non-traditional students (OLE)
- Diversity – be the school of choice but give them 1st choice experience (OLE)
- Just Do It – less discussion/decision-making fatigue (all)
- Pro rata seg fees for students (OLE)
- Certification (OLE)
- Quality (OLE)
- Adding faculty/student touchpoints such as ZOOM (OLE)
# Sustainable Future Goal – Feedback and Responses

<table>
<thead>
<tr>
<th>Issue Area</th>
<th>Suggestions</th>
<th>Response/Action Step</th>
<th>Responsible Units</th>
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</table>
| Financial Impact of Outstanding Learning Environment Plans | • Provide funding to return from stepping out  
• Financial literacy  
• More and strategic scholarship funding  
• Improved scholarship management  
• Strategic aid allocation  
• Provide stats on URM populations | • Add goal relating to creation of Student Financial Services office  
• Campus workgroup to make recommendations around scholarship processes  
• Implement retention/graduation grant  
• Examine disaggregated data regarding impact of institutional aid | EM/AA/FAA |
| New Budget Model implementation and Financial Reporting & Analysis | • Hard budget choices – just do it | • Thanks for the encouragement – this concept is incorporated into NBM framework | FAA/AA |
| Integrated Capital Planning and Space Management    | • Rethinking utilization, such as in summer  
• Space aligned with realistic enrollments  
• Work with Buildings/ Landscapes/ Cultures program to create multicultural landscapes/planning | • Will incorporate suggestions into existing goals | FAA/AA |
<p>| Data Management Solutions and Digital Transformation | • Better infrastructure for online education | • Related to OLE, UWM is working to: (1) secure a partnership/identifying resources to enable the expansion of the online program array and increase online enrollment of current online programs; (2) launch | AA/FAA |</p>
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<tbody>
<tr>
<td>UW System Administrative Transformation Project</td>
<td>• More communication about initiatives</td>
<td>• Add goal relating to P2P (Procure to Pay) umbrella project</td>
<td>FAA</td>
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| Human Resources Management and Employee Learning & Development | • Upscale employee development  
• Toolbox for new employees’ professional development  
• Strengthen performance evaluations & professional development  
• Provide PD in customer service | • One of the goals is pursuit of an e-performance management tool (through UWS, connected to HRS) which is also intended to help us better connect to performance to professional development  
• All new supervisors are required to complete HR leadership training modules  
• We will discuss with CELDAC adding a PD module around customer service (especially student facing) | FAA               |
| Marketing, Branding and Advocacy                    | • “First-choice experience” as concept  
• Build pride                                                                  | • In March, UWM will debut the new marketing/branding campaign. The theme is “UWM First Choice,” featuring real UWM | URC               |
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<td>Students for whom UWM was their first choice.</td>
<td>• The new marketing campaign will showcase highly ranked, unique academic programs that give UWM a competitive advantage. The second phase of the campaign will tell stories of alumni who have had career success because of their UWM education.</td>
<td>students for whom UWM was their first choice.</td>
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<td>Maintaining a Safe Environment</td>
<td>• Safe environment is important</td>
<td>• Add additional goals for:</td>
<td>FAA</td>
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<td></td>
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<td>• Outside classroom safety/behavior</td>
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<td>• Active Shooter Preparedness</td>
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<td>(These are initiatives underway already.)</td>
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<tr>
<td>Improve Sustainability and Energy Management</td>
<td>• More communication about initiatives</td>
<td>• Add goal describing project to add more renewable energy</td>
<td>FAA</td>
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<td>Other/New Within Sustainable Future</td>
<td>• Don’t refer to “campus”</td>
<td>• Will examine references to “campus”</td>
<td>All</td>
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<td>• Prioritize or phase massive plan</td>
<td>• Many different groups are involved in the plan but, yes, staffing to carry these out remains a challenge</td>
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