

# BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM

## **Business & Finance Committee**

Thursday, August 22, 2024  
8:00 a.m. – 9:30 a.m.

Room 1820, Van Hise Hall  
1220 Linden Drive  
Madison, Wisconsin  
& via Zoom Videoconference

- A. Calling of the Roll
- B. Declaration of Conflicts
- C. Approval of the Minutes of the June 6, 2024 Meeting of the Business & Finance Committee
- D. UW System Status Report on Large or High-Risk Information Technology Projects
- E. UW-Parkside Contractual Agreement with CDW Government LLC
- F. UW-Milwaukee Graduate Application Fee
- G. UW-Milwaukee Contractual Agreement with Collegiate Licensing Company, LLC
- H. UW System Collective Bargaining Agreement with the Building and Construction Trades Council of South Central Wisconsin
- I. UW-Madison Collective Bargaining Agreement with the Building and Construction Trades Council of South Central Wisconsin
- J. 2023-24 Budget-to-Actuals Performance Report
- K. Approval of 2025-27 Biennial Operating Budget and Financial Aid Request
- L. Semi-Annual Report on Gifts, Grants, and Contracts
- M. Cost-Benefit Analysis of Foundations and Associated Affiliated Organizations for Fiscal Year 2022-23

August 22, 2024

## **UW SYSTEM STATUS REPORT ON LARGE/HIGH-RISK INFORMATION TECHNOLOGY PROJECTS**

### **REQUESTED ACTION**

Approval of Resolution D., approving submission of the required reports to the legislative Joint Committee on Information Policy and Technology.

**Resolution D.** That, upon the recommendation the President of the UW System, the UW System Board of Regents approves: (1) the UW System Status Report on Large/High-Risk Information Technology Projects dated August 22, 2024; and (2) UW System Administration's submittal of the report on the Board's behalf to the legislative Joint Committee on Information Policy and Technology, as required by [s. 36.59\(7\), Wis. Stats.](#)

### **SUMMARY**

The Status Report on the Large/High-Risk Information Technology Projects seeks to provide the Board of Regents with the information it needs to execute appropriate oversight over the large and high-risk IT projects across the UW System.

### **Presenter**

- Steven Hopper, Associate Vice President for the Office of Learning and Information Technology and Chief Information Officer

### **BACKGROUND**

[Section 36.59, Wis. Stats.](#), requires that by no later than March 1 and September 1 of each year, the Board of Regents submit to the Joint Committee on Information Policy and Technology a report that documents each information technology project within the system with an actual or projected cost greater than \$1,000,000 or that the board has identified as a large, high-risk information technology project.

[Regent Policy Document 25-4](#) implements the requirements of [s. 36.59, Wis. Stats.](#), which coordinates information technology strategic planning across the UW System, and specifies management and reporting requirements related to large or high-risk information technology projects.

Attachments A and B provide a dashboard along with individual progress reports on the UW System’s major IT projects. There are nine (9) major projects to report.

	<b>Institution</b>	<b>Project Name</b>	<b>Milestone since Feb. 2024 BOR Meeting</b>
1	UW-Madison	Active Directory Migrations	Finalized Scope and Budget
2	UW-Madison	Campus Access Controls Replacement Phase 2	Scope Transferred
3	UW-Madison	Point of Sale System	Completed
4	UW-La Crosse	Wireless Network Refresh	Completed
5	UW-Parkside	Network Equipment Refresh	Request for Approval
6	UW System	Administrative Transformation Program (ATP)	None to Report
7	UW System	Enterprise Analytics Platform (EAP)	Phase Completed
8	UW System	Enterprise Identity Platform (EIP)	Multiple Go-Live Events
9	UW System	Hybrid Cloud Adoption for UWL, UWP, and UWSA	Ready for Migrations

The overall portfolio totals \$246.5 million, which is a 5.2% decrease from the \$260.1 million reported at the February 2024 Board of Regents (BOR) meeting. This decrease can be attributed to the closing of one (1) project at the February 2024 meeting, the transfer of scope for one (1) project (detailed below), and the requested addition of the following project:

- UW-Parkside’s Network Equipment Refresh project will replace the aging core wired and wireless campus network to improve capacity, modernize the architecture, and improve the overall security posture. This project is being executed in partnership with the IT as a Service (ITaaS) program for the Universities of Wisconsin and will provide a foundation for expansion to other universities in the future.

The project budget is \$3.4 million with a \$500,000 (15%) contingency totaling \$3.9 million. The project will have incremental deliverables starting in early 2025 but is expected to be fully completed by June 2026. For reference, the project will be managed in tandem with the Telecom Cable Replacement Capital project that is governed by the Capital Planning and Budget Committee for all construction-related aspects.

Since the February 2024 BOR meeting, the following projects have successfully completed:

- UW-Madison’s Point of Sale System project completed, which replaced the legacy point of sale hardware while also adding mobile ordering capabilities for all

university dining and retail operations. The project completed within the revised scope, budget, and timelines reported during the February 2024 meeting.

- UW-La Crosse's Wireless Network Refresh project completed, which replaced aging end-of-life equipment while also increasing the capacity and reliability of the campus network. The project team was able to complete the remaining installation of wireless access points seven (7) months earlier than the revised schedule reported at the February 2024 meeting, but seven (7) months beyond the original timeline, which was disrupted due to the COVID-related supply chain issues and staff turnover. The project completed within the original budget.

The following six (6) projects have noteworthy updates since the February 2024 BOR meeting:

- UW-Madison's Active Directory Migrations project finalized its contract negotiations with its third-party vendors, thus finalizing the scope and budget. The final budget is \$4.3 million, which is below the estimated \$5-6 million, and the established completion date is July 2026.
- UW-Madison's Campus Access Controls Replacement Phase 2 project transferred the scope and budget associated with the expansion of door locks for new buildings to a separate UW-managed construction project. Once the detailed planning was completed, university leadership realized that adding new locks was more of a construction project than an IT project, which resulted in the scope and budget transfer. Therefore, the budget for the IT project was reduced to \$8.8 million (from \$18.8 million) and the schedule shortened to March 2025 (from December 2027).
- UW System's Administrative Transformation Program (ATP) project is continuing to make substantial progress and is on track for a July 2025 go-live. The second end-to-end testing phase will be completed in September 2024, which is when project leadership will have confirmation on the critical functionality required for a successful go-live. The testing activity is on track and the results are promising. A detailed deployment plan to manage the cutover between PeopleSoft and Workday has been completed and is being confirmed with campus stakeholders, thus enabling them to finalize local activities during the transition period, which will begin in spring of 2025.

The highly anticipated in-person User Experience Testing (UXT) sessions will be held with key campus stakeholders over the next two (2) months. These sessions represent the first-time significant volumes of campus users will experience Workday and will mark the beginning of the hands-on aspects of change management, which will culminate with in-person training for all employees starting in April 2025.

The project team is continuing to monitor and mitigate risks around data and reporting strategies along with the campus technical work of retrofitting the 800+ ancillary systems that will need to consume data from Workday. Detailed scorecards will be rolled out this fall allowing system and campus leadership to track key indicators of go-live readiness.

Project leadership is leaving the schedule status as yellow until successful completion of the second end-to-end testing, and confirmation of key details around reporting and ancillary systems. The project remains under budget and leadership meets weekly to review budget changes and forecasts to make every effort to remain within budget.

- UW System's Enterprise Analytics Platform (EAP) project completed the phase of the project implementing the HelioCampus student lifecycle and Learner data products, which provide deeper insight into student-related data for the pilot universities (UW-Green Bay, UW-Oshkosh, UW-Stevens Point, and UW-Stout). The project team has now archived the HR and Finance data from PeopleSoft and the legacy data warehouses.

The scope for the new HR and Finance data views from Workday have been finalized and the schedule has been aligned to the revised ATP timeline. Project leadership is actively monitoring the delivery dates to ensure progress is proceeding at a pace that will allow sufficient time for downstream consumers to adopt the new data structures before the July 2025 go-live of ATP/Workday. The ongoing issues of turnover and adopting skillsets for the new technology environment remain concerns for which the project leadership is monitoring and adapting.

- UW System's Enterprise Identity Platform (EIP) project experienced six (6) successful go-live events (UW-Green Bay, UW Oshkosh, UW-Platteville, UW-Stevens Point, UW-Stout, and UW-Superior) since the February 2024 Board of Regents meeting. UW-Milwaukee is evaluating its overall identity management environment in context of the ATP implementation and will be finalizing plans over the next six (6) months.
- UW System's Hybrid Cloud Adoption for UWL, UWP, and UWSA project resolved the technical issues reported during the February 2024 meeting. Unfortunately, the extended resolution period forced a schedule extension to May 2025. While the majority of the primary production servers for UWSA, UWL, and UWP will be completed in waves during the Fall 2024 semester, several migrations require tight coordination around the academic calendar (e.g., semester transitions, spring break,

etc.), which is driving the timeline extension. The project remains within budget and is not impacted by the schedule extension.

The attached project dashboard and individual progress reports provide additional information and details on the status of each of these major projects.

### **Related Policies**

- [Section 36.59, Wis. Stats.](#), “Information technology”
- [Regent Policy Document 25-4](#), “Strategic Planning and Large or High-Risk Projects”

### **ATTACHMENTS**

- A) Dashboard for the Large/High-Risk Information Technology Projects
- B) Progress Reports for the Large/High-Risk Information Technology Projects

LARGE/HIGH-RISK INFORMATION TECHNOLOGY PROJECTS

ROW	Milestone Since Last BOR Meeting	Institution	Project Name	Start Date	Scoped End Date	Revised Scoped End Date	Original Scoped Project Budget	Revised Scoped Project Budget	Schedule Status	Scope Status	Budget Status	Other Issues	Notes
1	Finalized Scope and Budget	UW-Madison	Active Directory Migrations	March 2024	July 2026		\$ 4,327,000						After Board approval in February 2024, the final contracts were negotiated with 3rd party vendor, the scope and budget were finalized, and the required project documentation was completed. Original budget estimates were \$5-6M with the final budget settling at \$4.3M.
2	Scope Transferred	UW-Madison	Campus Access Controls Replacement Phase 2	July 2023	December 2027	March 2024	\$ 18,790,000	\$ 8,818,705					After the detailed project planning was complete, university leadership determined that the expansion of door locks to new buildings contained a significant construction element and therefore transferred this scope and funding to a UW-managed construction project. The yellow scope status highlights the scope transfer along with a corresponding budget reduction to \$8.8M and a revised end date of March 2025.
3	Completed	UW-Madison	Point of Sale System	January 2023	December 2023	January 2024	\$ 3,300,000	\$ 823,615					The project was successfully completed within the revised scope, budget, and timelines reported during the February 2024 meeting.
4	Completed	UW-La Crosse	Wireless Network Refresh	May 2022	June 2023	January 2024	\$ 2,400,000						The project team was able to successfully complete the remaining installation of the wireless access points seven (7) months earlier than the revised schedule of August 2024, but seven (7) months beyond the original timeline, which was disrupted due to supply chain issues and staff turnover. The project completed within the original budget.
5	Request for Approval	UW-Parkside	Network Equipment Refresh	September 2024	June 2026		\$ 3,900,000						Upgrade the core wired and wireless campus network by replacing aging hardware, improve capacity, modernizing the architecture, and improving overall security posture. Executed in partnership to the Telecom Cable Replacement capital project, which will handle the construction-related costs to place new wireless access points to improve density and bandwidth.  The network access for academic classrooms, residence halls, administrative offices, and community spaces will be upgraded in partnership with UW System's IT as a Service (ITaaS) for a more sustainable support model that can be expanded to other universities in the future. The expected cost of the project is \$3.4M with a \$500k (15%) contingency. A separate Board resolution has been submitted to create a payment plan contract to distribute the cost over the next five (5) fiscal years.
6	None to Report	UW System	Administrative Transformation Program (ATP)	January 2021	July 2026	December 2025	\$ 212,000,000	\$ 211,866,117					The second end-to-end testing phase will be completed in September 2024, which is when we will have confirmation that we can successfully deliver critical functionality next summer. The testing activity is on track and the results are promising. The highly anticipated in-person User Experience Testing (UXT) sessions will be held with key campus stakeholders over the next two months.  The project team is continuing to monitor and mitigate risks around data and reporting strategies along with the campus technical work of retrofitting the 800+ ancillary systems that will need to consume data from Workday. Detailed scorecards will be rolled out this Fall allowing system and campus leadership to track key indicators of go-live readiness. The project is still <u>on track for a July 2025 go-live</u> , but project leadership is leaving the schedule status as yellow until successful completion of the end-to-end testing, and confirmation of key details around reporting and ancillary systems.  The project remains under budget and leadership meets weekly to review budget changes and forecasts to make every effort to remain within budget.

## DASHBOARD

### LARGE/HIGH-RISK INFORMATION TECHNOLOGY PROJECTS

ROW	Milestone Since Last BOR Meeting	Institution	Project Name	Start Date	Scoped End Date	Revised Scoped End Date	Original Scoped Project Budget	Revised Scoped Project Budget	Schedule Status	Scope Status	Budget Status	Other Issues	Notes
7	Phase Completed	UW System	Enterprise Analytics Platform (EAP)	October 2022	June 2025	December 2025	\$ 3,800,000	\$ 6,900,000					<p>The project team has completed the phase of the project related to the Helio Campus Student Lifecycle and Learner data along with archiving of the HR and Finance data from PeopleSoft and the legacy data warehouses.</p> <p>The scope for the new HR and Finance data views from Workday have been finalized and the schedule has been aligned to the revised ATP timeline. Project leadership is actively monitoring the delivery dates to ensure progress is proceeding at a pace that will allow sufficient time for downstream consumers to adopt the new data structures before the July 2025 go-live of ATP/Workday.</p> <p>The ongoing issues of turnover and adopting skillsets for the new technology environment remain concerns for which the project leadership is monitoring and adapting.</p>
8	Multiple Go-Live Events	UW System	Enterprise Identity Platform (EIP)	January 2023	June 2025		\$ 5,500,000						<p>There have been six (6) successful go-live events (Green Bay, Oshkosh, Platteville, Stevens Point, Stout, and Superior) since the February 2024 Board of Regents meeting. UW-Milwaukee is evaluating its overall identity management environment in context of the ATP implementation and will be finalizing plans over the next six (6) months.</p> <p>With all comprehensive universities now live, the project team is transitioning to the "Okta Hub," which is a critical component on the long-term integration strategy between Workday and local campus IT environments. The project remains on time and within budget.</p>
9	Ready for Migrations	UW System	Hybrid Cloud Adoption for UWL, UWP, and UWSA	February 2022	December 2023	May 2024	\$ 2,000,000						<p>The technical issues discovered during the final testing phase that were reported during the February 2024 meeting have been resolved but unfortunately have forced a schedule extension to May 2025.</p> <p>While the majority of the primary production servers for UWSA, UWL, and UWP will be migrated in waves during the Fall semester, the overall timeline is extended to the end of the Spring semester since several migrations must be tightly coordinated around activities in the academic calendar (eg – semester transitions, spring break, etc).</p> <p>The project remains within budget and is not impacted by the schedule extension.</p>

**Total Scoped Budget \$ 246,535,437**



## PROJECT PROGRESS REPORTS FOR THE LARGE/HIGH-RISK INFORMATION TECHNOLOGY PROJECTS

### Active Directory Migrations



**Milestone**

Finalized  
Scope and  
Budget

**Description:** The Active Directory Migrations Project is a multi-year initiative to centralize the university’s distributed directory environments into one Campus Active Directory (CAD) environment.

**Impact:** The campus has multiple instances of Active Directory (AD) which create challenges in advancing campus-wide cybersecurity controls. Reducing the number of domains on campus by migrating them into Campus Active Directory (CAD) is the most effective and sustainable strategy for reducing attack surface area, applying consistent domain policy and practices, consolidating infrastructure to enable the implementation of modern cybersecurity tooling, and reducing complexity of campuswide services leveraging S/C/D Active Directories. Further, this project will provide a better end-user experience by eliminating multiple credentials used in many environments.

**Notes:** After Board approval in February 2024, the final contracts were negotiated with 3rd party vendor, the scope and budget were finalized, and the required project documentation was completed. Original budget estimates were \$5-6 million with the final budget settling at \$4.3 milion.

**Timeline**

March 2024 – July 2026

**Budget**

\$4,327,000

**Source of Funds**

Internally Available  
to UW-Madison

**Current Status:**

Schedule
Scope
Budget
Other

## Campus Access Controls Replacement – Phase 2



**Milestone**  
Scope  
Transferred

**Description:** The second phase of the project to replace the 15-year-old system that controls the electronic door locks across the UW-Madison campus.

**Impact:** Completion of replacing existing door locks on the legacy software.

**Notes:** After the detailed project planning was complete, university leadership determined that the expansion of door locks to new buildings contained a significant construction element and therefore transferred this scope and funding to a UW-managed construction project. The yellow scope status highlights the scope transfer along with a corresponding budget reduction to \$8.8 million and a revised end date of March 2025.

### **Timeline**

July 2023 – Mar. 2025  
(shortened from Dec. 2027)

### **Budget**

\$8,818,705  
(reduced from \$18,790,000)

### **Source of Funds**

Internally Available  
to UW-Madison

### **Current Status:**

Schedule
Scope
Budget
Other

## Point of Sale System



**Milestone**  
Completed

**Description:** Expand upon the current point of sale (POS) and related systems contract to replace existing point of sale hardware and add additional mobile capabilities. Integrated solutions support all UW-Madison dining and retail operations.

**Impact:** Provide the capability for enhanced PCI secure cashier and self-service POS hardware and software, expand current mobile ordering solutions, mobile credit solution and user account management.

**Notes:** The project was successfully completed within the revised scope, budget, and timelines reported during the February 2024 meeting.

### **Timeline**

Jan. 2023 – Jan. 2024  
(extended from Dec. 2023)

### **Budget**

\$823,615  
(decreased from \$3,300,000)

### **Source of Funds**

Internally Available  
to UW-Madison

### **Final Status:**

Schedule
Scope
Budget
Other

## Wireless Network Refresh (UWL)



**Milestone**  
Completed

**Description:** Increase wireless capacity and improve reliability by replacing aging and end-of-life equipment to support the growing demand of wireless across the campus. This project will focus on the switches that support the wireless services.

**Impact:** Maintain the growing use of wireless access to support students in the classroom, help maintain a secured environment, and support any emergency notifications when needed. Providing adequate and consistent service is critical, especially with the number of students living on campus.

**Notes:** The project team was able to successfully complete the remaining installation of the wireless access points seven (7) months earlier than the revised schedule of August 2024, but seven (7) months beyond the original timeline, which was disrupted due to supply chain issues and staff turnover. The project completed within the original budget.

### **Timeline**

May 2022 – Jan. 2024  
(shortened from Aug. 2024)  
(extended from June 2023)

### **Budget**

\$2,400,000

### **Source of Funds**

Federal Higher Education  
Emergency Relief Fund  
(HEERF)

<b><u>Final Status:</u></b>
Schedule
Scope
Budget
Other

## Network Equipment Refresh



### Milestone Request for Approval

**Description:** Upgrade the core wired and wireless campus network by replacing aging hardware, improve capacity, modernizing the architecture, and improving overall security posture. Executed in partnership to the Telecom Cable Replacement capital project, which will handle the construction-related costs to place new wireless access points to improve density and bandwidth.

**Impact:** Network access for academic classrooms, residence halls, administrative offices, and community spaces will be upgraded in partnership with UW System's IT as a Service (ITaaS) for a more sustainable support model that can be expanded to other universities in the future.

**Notes:** Expected cost of the project is \$3.4M with a \$500,000 (15%) contingency. A separate Board resolution has been submitted to create a payment plan contract to distribute the cost over the next five (5) fiscal years.

### Timeline

Sept. 2024 – June 2026

### Budget

\$3,900,000

### Source of Funds

Internally Available  
to UW-Parkside and UW  
System

<u>Current Status:</u>
Schedule
Scope
Budget
Other

## Administrative Transformation Program (ATP)



**Milestone**  
None

**Description:** A multi-year program that will work across the UW System to address the current complexity and build an administrative infrastructure for the future.

**Impact:** The program will streamline policies, standardize processes, organize roles, and modernize technology with cloud-based enterprise resource planning (ERP) software. The project scope includes implementing both Workday and the Huron Research Suite solutions.

**Notes:** The end-to-end testing phase will be completed in September 2024, which is when we will have confirmation that we can successfully deliver critical functionality next summer. The testing activity is on track and the results are promising.

The highly anticipated in-person User Experience Testing (UXT) sessions will be held with key campus stakeholders over the next two months. These sessions represent the first-time significant volumes of campus users will experience Workday and will mark the beginning of the hands-on aspects of change management, which will culminate with in-person training for all employees starting in April 2025.

The project team has created a detailed deployment plan to manage the cutover between PeopleSoft and Workday and will be finalizing with campus stakeholders in September 2024. This plan will enable campuses to finalize its HR, financial, and IT activities for transition period during the Spring and Summer of 2025.

The project team is continuing to monitor and mitigate risks around data and reporting strategies along with the campus technical work of retrofitting the 800+ ancillary systems that will need to consume data from Workday. Detailed scorecards will be rolled out this fall allowing system and campus leadership to track key indicators of go-live readiness.

The project is still on track for a July 2025 go-live, but project leadership is leaving the schedule status as yellow until successful completion of the end-to-end testing, and confirmation of key details around reporting and ancillary systems. The project remains under budget and leadership meets weekly to review budget changes and forecasts to make every effort to remain within budget.

### **Timeline**

Jan. 2021 – Dec. 2025  
(revised from Dec 2024)  
(revised from Dec 2026)

### **Budget**

\$211,866,17  
(decreased from \$212M)

### **Source of Funds**

Internally Available  
to UW-Madison and  
the UW System  
+  
DOA's Master  
Lease Program

### **Current Status:**

Schedule
Scope
Budget
Other

## Enterprise Analytics Platform (EAP)



### **Milestone**

Phase Completed

**Description:** Establish a data analytics infrastructure that can be leveraged for the longitudinal data warehousing needs of the Administrative Transformation Program (ATP) in a manner that will be expandable to campuses for other student-centric uses.

**Impact:** Provide the capability for participating campuses to integrate their HR data, financial data, student data, learner data, and other local datasets to improve data-informed decision-making.

**Notes:** The project team has completed the phase of the project related to the Helio Campus Student Lifecycle and Learner data along with archiving of the HR and Finance data from PeopleSoft and the legacy data warehouses.

The scope for the new HR and Finance data views from Workday have been finalized and the schedule has been aligned to the revised ATP timeline. Project leadership is actively monitoring the delivery dates to ensure progress is proceeding at a pace that will allow sufficient time for downstream consumers to adopt the new data structures before the July 2025 go-live of ATP/Workday.

The ongoing issues of turnover and adopting skillsets for the new technology environment remain concerns for which the project leadership is monitoring and adapting.

### **Timeline**

Oct. 2022 – Dec. 2025  
(extended from June 2025)

### **Budget**

\$6,900,000  
(increased from \$3,800,000)

### **Source of Funds**

Internally Available to the UW System

### **Current Status:**

Schedule
Scope
Budget
Other

## Enterprise Identity Platform (EIP)



### Milestone

Multiple  
Go-Live  
Events

**Description:** Establish Okta as a system-wide identity and access management platform to simplify the of sharing digital identities/ accounts to reduce technical debt, minimize barriers to collaboration, and better adapt to modern cloud architectures.

**Impact:** Simplifies access for campus users for system-level applications, streamlines the flow of identity information between UW System and the UW institutions, improves campus-level identity management practices, and enables durable relationships with students, faculty, and staff through social identities.

**Notes:** There have been six (6) successful go-live events (Green Bay, Oshkosh, Platteville, Stevens Point, Stout, and Superior) since the February 2024 Board of Regents meeting. UW-Milwaukee is evaluating its overall identity management environment in context of the ATP implementation and will be finalizing plans over the next six (6) months.

With all comprehensive universities now live, the project team is transitioning to the “Okta Hub,” which is a critical component on the long-term integration strategy between Workday and local campus IT environments. The project remains on time and within budget.

### Timeline

Jan. 2023 – June 2025

### Budget

\$5,500,000

### Source of Funds

Internally Available  
to the UW System

### Current Status:

Schedule
Scope
Budget
Other

## Hybrid Cloud Adoption for UW-La Crosse, UW-Parkside and UWSA



### **Milestone**

Ready for Migrations

**Description:** A project to consolidate UW-La Crosse (UWL), UW-Parkside (UWP) and UW System Administration (UWSA) servers and storage into a unified service leveraging UW-Madison’s Hybrid Cloud infrastructure.

**Impact:** This project will establish a scalable IT infrastructure service available to all comprehensive UW institutions that will shrink the information security attack surface, lower the cost of IT infrastructure, improve disaster recovery, and increase resilience to staff turnover. The project will also be a forcing-function to clean up technical debt and ensure systems are properly monitored, supported, and patched henceforth.

**Notes:** The technical issues discovered during the final testing phase that were reported during the February 2024 meeting have been resolved but unfortunately have forced a schedule extension to May 2025.

While the majority of the primary production servers for UWSA, UWL, and UWP will be migrated in waves during the Fall semester, the overall timeline is extended to the end of the Spring semester since several migrations must be tightly coordinated around activities in the academic calendar (e.g., semester transitions, spring break, etc.).

The project remains within budget and is not impacted by the schedule extension.

### **Timeline**

Feb. 2022 – May 2025  
(extended from Jun. 2024)  
(extended from Dec. 2023)

### **Budget**

\$2,000,000

### **Source of Funds**

Internally Available to the UW System

### **Current Status:**

Schedule
Scope
Budget
Other



**UW-PARKSIDE CONTRACTUAL AGREEMENT WITH  
CDW GOVERNMENT LLC**

**REQUESTED ACTION**

Adoption of Resolution E., approving the contractual agreement between the Board of Regents and CDW Government LLC.

**Resolution E.** That, upon the recommendation of the Chancellor of the University of Wisconsin-Parkside and the President of the UW System, the Board of Regents approves the contractual agreement between the Board of Regents of the University of Wisconsin System and CDW Government LLC.

**SUMMARY**

UW-Parkside (UWP) is seeking approval to replace both its wired and wireless network to improve capacity, modernize the architecture, and improve overall security posture. The electronic equipment for the wireless network at UWP is nearing the end of its planned life and is due for a complete replacement. Having a secure and robust network is essential for the success of the university since internet connectivity is a requirement in classrooms, residence halls, administrative offices, and community spaces.

The proposed contract with CDW Government LLC divides the total payment of \$3,396,447.87 into equal installments of \$679,289.57 for five (5) fiscal years, thus making the large investment manageable for UWP.

**Presenters**

- Steven Hopper, Associate Vice President and Chief Information Officer, UW Administration
- Brent Tilton, Director of Procurement. UW Administration

## **BACKGROUND**

[Regent Policy Document 13-1](#) requires that any contract for a large or high-risk information technology (IT) project be approved by the Board of Regents prior to execution.

[Regent Policy Document 25-4](#) defines a large or high-risk IT project as one that exceeds \$1 million or is deemed vital to functions of the UW System or a UW institution, and requires that any such project be approved by the Board prior to implementation.

### **Related Policies**

- [Section 36.59, Wis. Stats.](#), “Information Technology”
- [Regent Policy Document 13-1](#), “General Contract Signature Authority, Approval, and Reporting”
- [Regent Policy Document 25-4](#), “Strategic Planning and Large or High-Risk Projects”

## **UW-MILWAUKEE GRADUATE APPLICATION FEE**

### **REQUESTED ACTION**

Adoption of Resolution F., approving the graduate application fee at UW-Milwaukee.

**Resolution F.** That, upon the recommendation of the Chancellor of the University of Wisconsin-Milwaukee and the President of the University of Wisconsin System, the Board of Regents approves UW-Milwaukee's request to assess a graduate application fee of \$75.

### **SUMMARY**

Effective July 1, 2018, UW-Milwaukee (UWM) implemented an increase in its graduate application fee from \$56 to \$75 for applications to the 2019-2020 academic year.

The 2015-17 state biennial budget repealed prior requirements for statutorily-defined application fee levels and created new language requiring that each institution charge a uniform application fee to each group of applicants (e.g., undergraduate, graduate, law, and medical). In August 2020, Regent Policy Document (RPD) 32-8 was adopted, addressing the Board's authority to set application fees under s. 36.11(3)(d), Wis. Stats.

After a review by both UW Administration and UWM, no documentation of approval by the Board of Regents was identified for the current graduate application fee level of \$75. To ensure compliance with RPD 32-8, UWM is now requesting approval of a \$75 graduate application fee.

The fee increase supported the purchase, implementation, and maintenance of a new UWM graduate school application software system (Panthera) and is used to support the graduate school application and recruitment operations. The fee generated approximately \$587,000 in revenue in fiscal year 2024.

In July 2024, UWM completed a benchmarking assessment of all Research 1 institution application fees, which showed a range from \$0 to \$250, with an average rate of \$71-84 (some institutions have different graduate application fee rates for select programs). UW-Madison also currently assesses a \$75 graduate application fee. UW-Milwaukee completed a similar benchmarking analysis in establishing the \$75 fee in July 2018.

## **Presenter**

- Drew Knab, Associate Vice Chancellor for Business and Financial Services, UW-Milwaukee

## **Previous Action**

Res. 10705, "Approval of Increase in UW-Institutions' Undergraduate, Graduate, and Professional Application Fees" (adopted June 10, 2016)

## **Related Policies**

- [Chapter 36.11\(3\)\(d\), Wis. Stats.](#)
- [Regent Policy Document 32-8, "Application Fees and Waiver"](#)

**UW-MILWAUKEE CONTRACTUAL AGREEMENT  
WITH COLLEGIATE LICENSING COMPANY, LLC**

**REQUESTED ACTION**

Adoption of Resolution G., approval of the contractual agreement between the Board of Regents and Collegiate Licensing Company, LLC.

**Resolution G.** That, upon recommendation of the Chancellor of the University of Wisconsin-Milwaukee and the President of the University of Wisconsin System, the Board of Regents approves the contractual agreement between the Board of Regents of the University of Wisconsin System, doing business as UW-Milwaukee, and Collegiate Licensing Company, LLC.

**SUMMARY**

UW-Milwaukee (UWM) is seeking approval to extend its contractual agreement with Collegiate Licensing Company, LLC ("CLC"), which expires on September 30, 2024, for an additional 21 months.

CLC is a full-service trademark licensing agency that works with over 700 colleges, universities, conferences, and collegiate athletics properties to sell their officially-licensed products. CLC also assists colleges and universities in protecting their brands from infringements and improper uses, as well as assisting them in meeting standards for fair labor, corporate social responsibility, and sustainability.

UWM has contracted with CLC since May 2015 to generate revenue through UW-Milwaukee's Trademark Licensing Program. Since that time, program revenues have steadily increased. At the start of the partnership in FY16, the contract generated under \$29,000 in revenues to the campus. In FY24, CLC collected over \$141,000 in royalties on behalf of UWM and delivered over \$109,000 back to the UWM campus. As of July 1, 2024, the 2015 contract and its subsequent extensions have generated a total of over \$970,000 to UWM. These monies are used to fund non-salary operational expenses of the program, as well as student scholarships, including the Panther Aim Scholarship, Mi Futuro Scholarship, and UWM College Possible Scholarship.

Given this success of its trademark licensing program, UW-Milwaukee is interested in continuing to work with a third-party vendor to support its operations. In addition to CLC, there are a limited number of other companies who currently offer comprehensive trademark licensing services. UW-Milwaukee intends to conduct a competitive procurement for its next trademark licensing services partner. However, UWM's current contract with CLC will expire on September 30, 2024. As such, UWM requests to extend CLC's contract for 21 months, through June 30, 2026.

Board approval is being requested as revenues under the current contract and extension are likely to put the total value of the agreement over the \$1,000,000 approval threshold provided under Regent Policy Document 13-1. This extension will provide UWM with the necessary time to build and execute a competitive procurement, negotiate a contract with the selected vendor, and onboard should a new vendor be awarded the contract. It will also permit UWM to align the conclusion of the competitive procurement process, and awarding of a new agreement, with the fiscal year and Division I athletics schedules.

Highlights of the contract extension are as follows:

- 21-month contract term (October 1, 2024 - June 30, 2026)
- No financial cost to the university
- Projected revenue impact during this 21-month extension of \$250,000 (which will bring UW-Milwaukee's total revenues with CLC to over \$1,000,000)

### **Presenter**

- Drew Knab, Associate Vice Chancellor for Business and Financial Services, UW-Milwaukee

### **BACKGROUND**

Regent Policy Document 13-1 requires that any grant or contract with private, profit-making organizations with a value greater than \$1,000,000 for all campuses other than UW-Madison be presented to the Board of Regents for formal approval prior to execution.

### **Related Policies**

- [Regent Policy Document 13-1](#), "General Contract Approval, Signature Authority, and Reporting"
- [Regent Policy Document 27-1](#), "Collegiate Licensing"

August 22, 2024

**UW SYSTEM COLLECTIVE BARGAINING AGREEMENT WITH THE  
BUILDING AND CONSTRUCTION TRADES COUNCIL OF  
SOUTH CENTRAL WISCONSIN**

**REQUESTED ACTION**

Adoption of Resolution H., approving the collective bargaining agreement between the Board of Regents and the Building and Construction Trades Council of South Central Wisconsin (BTC).

**Resolution H.** That, upon the recommendation of the President of the University of Wisconsin System, the Board of Regents approves the collective bargaining agreement between the Board of Regents and the Building and Construction Trades Council of South-Central Wisconsin (BTC).

**SUMMARY**

UW System and the Building and Construction Trades Council of South-Central Wisconsin (BTC) negotiated for a 4.12% increase in base wages, effective June 30, 2024, which is the beginning of the first pay period of the 2025 fiscal year. The contract ends on June 30, 2025. The total annualized cost for the base wage increase is \$447,856 including salary and fringe costs. The proposed base wage increase, and timing thereof, contained in this proposed contract are consistent with those in the contracts between BTC and the Department of Administration and UW-Madison.

BTC members are not eligible for pay plan increases applicable to non-union employees. The proposed 4.12% increase is 2.12% more than the pay plan proposal that was contained in the current biennial budget for non-union employees.

**Presenter**

- Daniel Chanen, Associate Vice President and Chief Human Resource Officer, UW Administration

## BACKGROUND

Under the State Employment Labor Relations Act (SELRA), there has long been one set of approximately 20 state employee bargaining units. SELRA, as amended, specified that effective July 1, 2015, three sets of state employee bargaining units were created: one for non-UW state employees, one for UW System employees (excluding UW-Madison employees), and one for UW-Madison employees. The Board of Regents is responsible for certain employer functions with respect to the non-Madison UW System bargaining unit, including tentative approval of collective bargaining agreements.<sup>1</sup> The UW-Madison chancellor is responsible for employer functions with respect to the UW-Madison collective bargaining unit.<sup>2</sup>

Following the passage of 2011 Wisconsin Act 10, bargaining with the trades union is limited to the subject of base wages only. The maximum increase that can be bargained is based on the consumer price index each fiscal year, as determined by the Wisconsin Employment Relations Commission. CPI for the 2024-2025 bargaining year is 4.12%.

### Related Policies

- [Regent Policy Document 13-1](#), “General Contract Signature Authority, Approval, and Reporting”

## ATTACHMENT

- A) UW System Collective Bargaining Agreement with the Building and Construction Trades Council of South-Central Wisconsin
- B) Fiscal Impact Memorandum

---

<sup>1</sup> “Any tentative agreement reached between the Board of Regents of the University of Wisconsin System, acting for the state, and any labor organization representing a collective bargaining unit specified in s. 111.825 (1r) shall, after official ratification by the labor organization, be submitted by the Board of Regents of the University of Wisconsin System to the joint committee on employment relations, which shall hold a public hearing before determining its approval or disapproval.” Wis. Stat. § 111.92(2).

<sup>2</sup> “Any tentative agreement reached between the University of Wisconsin-Madison, acting for the state, and any labor organization representing a collective bargaining unit specified in s. 111.825 (1t) shall, after official ratification by the labor organization, be submitted by the University of Wisconsin-Madison to the joint committee on employment relations, which shall hold a public hearing before determining its approval or disapproval.” Wis. Stat. § 111.92(3).



**AGREEMENT**

between the

**BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM**

and the

**WISCONSIN STATE BUILDING  
TRADES NEGOTIATING COMMITTEE**

and its

**APPROPRIATE AFFILIATED BUILDING  
TRADES COUNCILS**

July 1, 2024 – June 30, 2025

## TABLE OF CONTENTS

AGREEMENT	3
PURPOSE OF AGREEMENT	4
ARTICLE I – Scope of the Agreement	5
ARTICLE II – Wages	6
SIGNATURE PAGES	7-8

## **AGREEMENT**

This Agreement made and entered into effective July 1, 2024, in Madison, Wisconsin, pursuant to the provisions of the State Employment Relations Act, ss. 111.80-111.94, Wis. Stats., by and between the Board of Regents of the University of Wisconsin System (“the Employer”) and the Wisconsin State Building Trades Negotiating Committee, AFL-CIO, and its appropriate affiliated locals, (“the Union”) (collectively “the parties”).

## **PURPOSE OF AGREEMENT**

It is the intent and purpose of the parties that this Agreement constitutes an implementation of the provisions of ss. 111.80-111.94, Wis. Stats., consistent with the legislative authority contained therein, and provides for orderly and constructive employment relations in the public interest and in the interests of employees hereby covered and the Employer.

The parties acknowledge that this Agreement represents an amicable understanding reached by the parties as the result of the unlimited right and opportunity of the parties to make any and all demands with respect to the Employer-employee relationship which exists between them relative to the subjects of bargaining.

## ARTICLE I

### Scope of the Agreement

**1/1/1** This Agreement relates only to university staff employees of the Employer in the appropriate collective bargaining units as defined by the Wisconsin Employment Relations Commission certifications Cases V and VI; Nos. 15579 and 15580; SE-40 and SE-41; Decision Nos. 10991-B and 10992-B, dated January 4, 1973.

## ARTICLE II

### Wages

#### **Section 1 General Wage Adjustment (GWA)**

**2/1/1** Effective June 30, 2024, pay rates for each Trades occupation will be increased by a General Wage Adjustment (GWA) of four point twelve percent (4.12%).

#### **Section 2 Lump Sum Wage Payment for the Delay in Negotiating and Implementing the GWA**

**2/2/1** If there is a delay in implementing the GWA identified in section 2/1/1, employees in pay status on the effective date of the GWA will receive a lump sum wage payment in an amount equal to the value of the GWA received under 2/1/1 above, multiplied by the number of the employee's hours in pay status from June 30, 2024 to the first pay period in which wage adjustments required under section 2/1/1 above are reflected in the Employees' regular paychecks. The lump sum payment will be provided as soon as is administratively feasible. Employees that retire or die after June 30, 2024 will also be eligible for the wage adjustment and lump sum payment.

**2/2/2** Except as provided for in Section 2/2/1, employees terminated prior to the implementation of the GWA are not entitled to receive lump sum payments.

**2/2/3** Employees who went on a leave of absence from a position in the bargaining unit on or before June 30, 2024, and have not returned to pay status will receive no payment until they return to pay status in the bargaining unit during the term of this Agreement.

**2/2/4** Bargaining unit employees who transfer from one permanent university staff position to another permanent university staff position, and who keep the same title, are entitled to the lump sum wage payment based on their hours worked in both positions. Employees who transfer from project or temporary positions into permanent university staff bargaining unit positions, however, are entitled to lump sum payments based only on the number of hours in pay status in their permanent positions.

**2/2/5** For the purposes of calculating employee benefits, the lump sum wage payment will be considered as salary or wages earned during the period commencing June 30, 2024, to the first pay period in which wage adjustments are reflected in the Employees' regular paycheck.

-Signature Pages Follow-

By signing below, the parties indicate their acceptance to the terms contained in this Agreement.

**On behalf of the Board of Regents  
of the University of Wisconsin System**

---

Signature

---

Print Name

---

Date

**On behalf of the Wisconsin  
State Building Trades  
Negotiating Committee**

---

Signature

---

Print Name

---

Date





# UNIVERSITIES OF WISCONSIN

University of Wisconsin System FY25 Cost of Craftworkers Bargained Increase at 4.12% All Funds (Based on October 2022 Payroll) Effective July 1, 2024				
		<u>Salary</u>	<u>Fringe*</u>	<u>Total</u>
	<u>FTE</u>	<u>All Funds</u>	<u>All Funds</u>	<u>Salary &amp; Fringe</u>
				<u>All Funds</u>
Milwaukee	23.65	99,722	15,308	115,030
Eau Claire	7.00	25,930	3,980	29,910
Green Bay	2.00	7,280	1,117	8,397
LaCrosse	9.00	34,391	5,279	39,670
Oshkosh	13.00	46,447	7,130	53,577
Parkside	3.00	11,813	1,813	13,626
Platteville	3.00	11,584	1,779	13,363
River Falls	7.00	25,970	3,986	29,956
Stevens Point	10.99	38,051	5,841	43,891
Stout	7.97	30,310	4,653	34,963
Superior	4.00	15,087	2,316	17,403
Whitewater	<u>10.00</u>	<u>41,675</u>	<u>6,397</u>	<u>48,071</u>
<b>Total</b>	<b>100.61</b>	<b>388,259</b>	<b>59,598</b>	<b>447,857</b>

\*The fringe amounts are calculated at the Department of Administration approved variable fringe rate for the 2023-25 biennium at 15.35%.

Note: Each biennium the University of Wisconsin System bases its annual GPR pay plan increase funding requests on the October payroll of the preceding even year. For example, the payroll base for the 2023-25 biennium is based on the October 2022 payroll. Also note that Systemwide have no craftworkers in the October 2022 payroll base. The FY23 4.70% pay plan increase effective January 1, 2023 and FY24 4.0% pay plan increase effective July 2, 2023 has been applied to the October 2022 payroll base to calculate these FY25 costs.

August 22, 2024

**UW-MADISON COLLECTIVE BARGAINING AGREEMENT WITH THE  
BUILDING AND CONSTRUCTION TRADES COUNCIL OF  
SOUTH-CENTRAL WISCONSIN**

**REQUESTED ACTION**

Adoption of Resolution I., approving the collective bargaining agreement between UW-Madison and the Building and Construction Trades Council of South Central Wisconsin (BTC).

**Resolution I.** That, upon the recommendation of the Chancellor of the University of Wisconsin-Madison and the President of the UW System, the Board of Regents approves the collective bargaining agreement between UW-Madison and the Building and Construction Trades Council of South Central Wisconsin (BTC).

**SUMMARY**

UW-Madison and the Building and Construction Trades Council of South-Central Wisconsin (BTC) negotiated for a 4.12% increase in base wages, effective June 30, 2024, which is the first pay date of the 2025 fiscal year. The contract date is July 1, 2024, through June 30, 2025. The total annualized cost for the base wage increase is \$1,079,713 including salary and fringe costs. The proposed base wage increase, and timing thereof contained in this proposed contract, are consistent with those in the contracts between BTC and the Department of Administration and UW System.

BTC members are not eligible for pay plan increases applicable to non-union employees. The proposed 4.12% increase is 2.12% higher than the 2.0% pay plan received by non-union employees provided for in the current biennial budget.

**Presenter**

- Patrick Sheehan, Chief Human Resource Officer, UW-Madison

## BACKGROUND

Under the State Employment Labor Relations Act (SELRA), there has long been one set of approximately 20 state employee bargaining units. SELRA, as amended, specified that effective July 1, 2015, three sets of state employee bargaining units were created: one for non-UW state employees, one for UW System employees (excluding UW-Madison employees), and one for UW-Madison employees. The Board of Regents is responsible for certain employer functions with respect to the non-Madison UW System bargaining unit, including tentative approval of collective bargaining agreements.<sup>1</sup> The UW-Madison chancellor is responsible for employer functions with respect to the UW-Madison collective bargaining unit.<sup>2</sup>

Following the passage of 2011 Wisconsin Act 10, bargaining with the trades union is limited to the subject of base wages only. The maximum increase that can be bargained is based on the consumer price index each fiscal year, as determined by the Wisconsin Employment Relations Commission. CPI for the 2024-2025 bargaining year is 4.12%.

### Related Policies

- [Regent Policy Document 13-1](#), “General Contract Signature Authority, Approval, and Reporting”

## ATTACHMENT

- A) UW-Madison Collective Bargaining Agreement with the Building and Construction Trades Council of South Central Wisconsin
- B) Fiscal Impact Memorandum

---

<sup>1</sup> “Any tentative agreement reached between the Board of Regents of the University of Wisconsin System, acting for the state, and any labor organization representing a collective bargaining unit specified in s. 111.825 (1r) shall, after official ratification by the labor organization, be submitted by the Board of Regents of the University of Wisconsin System to the joint committee on employment relations, which shall hold a public hearing before determining its approval or disapproval.” Wis. Stat. § 111.92(2).

<sup>2</sup> “Any tentative agreement reached between the University of Wisconsin-Madison, acting for the state, and any labor organization representing a collective bargaining unit specified in s. 111.825 (1t) shall, after official ratification by the labor organization, be submitted by the University of Wisconsin-Madison to the joint committee on employment relations, which shall hold a public hearing before determining its approval or disapproval.” Wis. Stat. § 111.92(3).

**AGREEMENT**

**between the**

**UNIVERSITY OF WISCONSIN–MADISON**

**and the**

**WISCONSIN STATE BUILDING TRADES NEGOTIATING COMMITTEE**

**AND ITS**

**APPROPRIATE AFFILIATED BUILDING**

**TRADES COUNCILS**

**July 1, 2024 – June 30, 2025**



**WISCONSIN**  
UNIVERSITY OF WISCONSIN-MADISON

## **AGREEMENT NOTE**

This Agreement made and entered into effective July 1, 2024, at Madison, Wisconsin, pursuant to the provisions of ss. 111.81-111.94, Wis. Stats., by and between the University of Wisconsin–Madison (“the Employer”) represented by the Office of Human Resources, and the Wisconsin State Building Trades Negotiating Committee, AFL-CIO, and its appropriate affiliated locals, (“the Union”) (collectively “the parties”).

## **PURPOSE OF AGREEMENT**

It is the intent and purpose of the parties that this Agreement constitutes an implementation of the provisions of ss. 111.81-111.94, Wis. Stats., consistent with the legislative authority contained therein, and provides for orderly and constructive employment relations in the public interest and in the interests of employees hereby covered and the Employer.

The parties acknowledge that this Agreement represents an amicable understanding reached by the parties as the result of the unlimited right and opportunity of the parties to make any and all demands with respect to the Employer-employee relationship which exists between them relative to the subjects of bargaining.

## **ARTICLE I**

### **Scope of Agreement**

1/1/1 This Agreement relates only to university staff employees of the University of Wisconsin–Madison in the appropriate collective bargaining units as defined by the Wisconsin Employment Relations Commission certifications Cases V and VI; Nos. 15579 and 15580; SE-40 and SE-41; Decision Nos. 10991- B and 10992-B, dated January 4, 1973.

## **ARTICLE II**

### **Wages**

#### **Section 1     General Wage Adjustment (GWA)**

2/1/1 Effective June 30, 2024, the first date of the July A payroll, the first payroll of FY25, pay rates for each Trades occupation will be increased by a General Wage Adjustment (GWA) of 4.12%.

#### **Section 2     Lump Sum Wage Payment**

2/2/1 If implementation of the Agreement is delayed until after June 30, 2024, employees in pay status on the date of implementation will receive the increase with a lump sum payment for the increase for all hours in pay status in the bargaining unit back to June 30, 2024. Employees that retire or die after June 30, 2024, will also be eligible for the wage adjustment and lump sum payment. Employees in the bargaining unit that return from an unpaid leave of absence will also receive the wage adjustment and lump sum payment for hours in pay status back to June 30, 2024.



**Fiscal Impact of FY25 Tentative Collective Bargaining Agreement  
UW–Madison and Wisconsin State Building Trades Union**

This memorandum outlines the estimated fiscal impact of the tentative agreement (TA) that UW–Madison and the Wisconsin State Building Trades Union have reached on the 2024-25 collective bargaining agreement (CBA). The CBA covers the time period from July 1, 2024, through June 30, 2025, and the TA proposes a 4.12% increase in wages effective June 30, 2024, the first pay date of the 2025 fiscal year.

The following chart outlines the anticipated cost increases across all funding sources. Please note the estimated increase factors in the 4.12% pay plan effective June 30, 2024:

<b>Fiscal Impact of TA on All Funding Sources (235.04 FTE)</b>			
	Increase in Wages	Increase in Fringe Costs <sup>1</sup>	Total Increase
Annualized	\$934,816	\$144,897	\$1,079,713

Approximately 54.1% of the amounts listed above would come from general purpose revenue (GPR).

Pursuant to relevant provisions of the Wisconsin Statutes,<sup>2</sup> UW–Madison is submitting the TA to the Joint Committee on Employment Relations (JCOER). Approval of the TA and, consequently, any fiscal impact outlined in this memorandum are dependent on JCOER’s approval.

<sup>1</sup> The variable fringe rate is 15.5%.

<sup>2</sup> See Wis. Stat. § 111.92(1)(a)3 (“Any tentative agreement reached between the University of Wisconsin-Madison, acting for the state, and any labor organization representing a collective bargaining unit specified in s. 111.825 (1t) shall, after official ratification by the labor organization, be submitted by the University of Wisconsin-Madison to the joint committee on employment relations, which shall hold a public hearing before determining its approval or disapproval.”); Wis. Stat. § 111.825(1t)(c) (“Except as provided in sub. (2), collective bargaining units for employees employed by the University of Wisconsin System and assigned to the University of Wisconsin-Madison are structured with one collective bargaining unit for each of the following occupational groups: . . . Building trades crafts.”).

**2023-24 BUDGET-TO-ACTUALS PERFORMANCE REPORT**

**REQUESTED ACTION**

No action is required; this item is for information only.

**SUMMARY**

Attached is the final fiscal year (FY) Budget-to-Actuals Report, which reflects the status of the Universities of Wisconsin budget by major area of activity in comparison to actual financial experience for the period of July 1, 2023, through June 30, 2024.

Final FY 2023-24 revenues for the Universities of Wisconsin as a whole exceeded the budget for that year by \$513.4 million, or 6.9%. This is primarily due to additional revenue of \$250.8 million received from gift, grant, and contract activity, which includes charitable giving and research grants. This revenue is generally difficult to budget given the uncertainty of when donations will be received and which grant proposals will be approved. In addition, General Operations revenue exceeded its budget by \$115.5 million, largely due to higher than expected interest earnings.

FY 2023-24 UW expenses exceeded the budget by \$311.4 million, or 4.1%. The largest variance of \$326.4 million is in Salaries and Fringe Benefits. UW-Madison's Salaries and Fringe Benefits expenses exceeded its budget by \$313.2 million. Supplies and Expenses were \$77.4 million under the FY 2023-24 budget, primarily due to UW-Madison being under budget by \$107.9 million.

For FY 2023-24, total revenues exceeded total expenses by nearly \$202.0 million, or 2.5% of expenses.

**Presenter:**

- Sean Nelson, Vice President for Finance and Administration

## **BACKGROUND**

The report provides budget-to-actual revenue and expense information along with variances of that activity from the initial Board of Regents' approved budget. The report is intended to provide a high-level summary to help aid the Committee in meeting its fiduciary responsibilities with respect to Universities of Wisconsin budget management and oversight.

The budget-to-actuals report presented here details revenues for the following unrestricted and restricted funding source categories:

- State General Purpose Revenue (GPR)
- Tuition & Fees
- Auxiliary Enterprises
- General Operations
- Gifts
- Nonfederal Grants, and Contracts
- Federal Grants and Contracts
- Other Restricted Program Revenue
- Other Unrestricted Program Revenue
- Federal Indirect Cost Reimbursement
- Trust Funds
- Other Appropriated Funds
- GPR: Debt Service

On the expense side, the following categories are highlighted:

- Salaries and Fringe Benefits
- Supplies and Expenses
- Capital
- Financial Aid
- Other (Debt Service/Transfer Out to DOA)

This cash basis report is not intended to replace the UW System's Annual Financial Report and related accrual-based, audited Financial Statements. The UW System Annual Financial Report presents a comprehensive look at the University's financial activities for a given fiscal year.

## **ATTACHMENT**

- A) FY 2023-24 Budget-to-Actuals Report



**UW System**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 1,088,626,960	\$ 18,645,041	\$ 1,107,272,001	\$ 1,107,272,000	\$ 18,645,040	(1)	100.0%	
Tuition and Fees	1,710,296,877	4,306,264	1,714,603,142	1,789,110,370	78,813,492	74,507,228	104.3%	
GPR/Tuition and Fees	\$ 2,798,923,837	\$ 22,951,305	\$ 2,821,875,143	\$ 2,896,382,370	\$ 97,458,532	74,507,227	102.6%	
GPR: Miscellaneous	28,203,449	3,155,425	31,358,874	27,774,497	(428,952)	(3,584,377)	88.6%	
Auxiliary Enterprises	1,004,791,000	45,263	1,004,836,262	999,400,610	(5,390,389)	(5,435,652)	99.5%	
General Operations	556,334,613	1,284,060	557,618,673	673,098,766	116,764,153	115,480,093	120.7%	
Other Unrestricted Program Revenue	130,885,176	82,334	130,967,510	143,546,667	12,661,491	12,579,157	109.6%	
Federal Indirect Cost Reimbursement	233,933,062	314,097	234,247,159	258,388,382	24,455,320	24,141,223	110.3%	
<b>Total Unrestricted</b>	<b>4,753,071,138</b>	<b>27,832,484</b>	<b>4,780,903,622</b>	<b>4,998,591,292</b>	<b>245,520,155</b>	<b>217,687,670</b>	<b>104.6%</b>	
Gifts	636,168,978	513,445	636,682,424	850,191,732	214,022,754	213,509,308	133.5%	
Nonfederal Grants and Contracts	156,325,086	(174,708)	156,150,378	193,485,012	37,159,926	37,334,634	123.9%	
Gifts and Nonfederal Grants and Contracts	792,494,064	338,737	792,832,801	1,043,676,744	251,182,680	250,843,943	131.6%	
Federal Grants and Contracts	839,292,205	5,159,516	844,451,722	894,460,971	55,168,765	50,009,249	105.9%	
Other Restricted Program Revenue	762,639,155	(56,709)	762,582,446	736,200,287	(26,438,868)	(26,382,159)	96.5%	
Trust Funds	33,753,475	-	33,753,475	49,128,097	15,374,622	15,374,622	145.5%	
Other Appropriated Funds	2,948,300	124,494	3,072,794	9,280,862	6,332,562	6,208,068	302.0%	
GPR: Debt Service	198,072,400	-	198,072,400	197,729,170	(343,230)	(343,230)	99.8%	
<b>Total Restricted</b>	<b>2,629,199,599</b>	<b>5,566,039</b>	<b>2,634,765,638</b>	<b>2,930,476,131</b>	<b>301,276,531</b>	<b>295,710,492</b>	<b>111.2%</b>	
<b>Total Revenue</b>	<b>\$ 7,382,270,737</b>	<b>\$ 33,398,523</b>	<b>\$ 7,415,669,260</b>	<b>\$ 7,929,067,423</b>	<b>\$ 546,796,686</b>	<b>\$ 513,398,163</b>	<b>106.9%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 2,980,568,982	\$ 1,504,987	\$ 2,982,073,969	\$ 3,242,423,760	\$ 261,854,778	\$ 260,349,791	108.7%	
Fringe Benefits	1,020,529,227	19,109,150	1,039,638,377	1,105,731,511	85,202,284	66,093,135	106.4%	
<b>Total Salaries and Fringe Benefits</b>	<b>4,001,098,209</b>	<b>20,614,137</b>	<b>4,021,712,346</b>	<b>4,348,155,272</b>	<b>347,057,063</b>	<b>326,442,926</b>	<b>108.1%</b>	
Supplies and Expenses	1,601,888,155	62,257,447	1,664,145,602	1,586,704,639	(15,183,516)	(77,440,963)	95.3%	
Capital	280,750,713	(1,757,404)	278,993,310	313,941,122	33,190,408	34,947,812	112.5%	
Financial Aid	1,104,664,997	5,646,840	1,110,311,837	1,128,432,915	23,767,918	18,121,078	101.6%	
Other (Debt Service/Transfer Out to DOA)	544,045,509	(452,196)	543,593,313	552,950,146	8,904,637	9,356,833	101.7%	
<b>Total Expenses</b>	<b>\$ 7,532,447,584</b>	<b>\$ 86,308,824</b>	<b>\$ 7,618,756,408</b>	<b>\$ 7,930,184,094</b>	<b>\$ 397,736,510</b>	<b>\$ 311,427,686</b>	<b>104.1%</b>	
<b>Revenue less Expense **</b>	<b>\$ (150,176,847)</b>	<b>\$ (52,910,301)</b>	<b>\$ (203,087,148)</b>	<b>\$ (1,116,671)</b>	<b>\$ 149,060,176</b>	<b>\$ 201,970,477</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Madison**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 478,793,341	\$ 36,961,801	\$ 515,755,142	\$ 515,755,141	\$ 36,961,800	(1)	100.0%	
Tuition and Fees	914,822,805	-	914,822,805	964,067,706	49,244,900	49,244,900	105.4%	
GPR/Tuition and Fees	\$ 1,393,616,146	\$ 36,961,801	\$ 1,430,577,948	\$ 1,479,822,847	\$ 86,206,701	49,244,900	103.4%	
GPR: Miscellaneous	24,100,164	(433,857)	23,666,307	23,001,343	(1,098,821)	(664,964)	97.2%	
Auxiliary Enterprises	519,716,559	-	519,716,559	501,489,199	(18,227,360)	(18,227,360)	96.5%	
General Operations	413,959,711	-	413,959,711	482,223,026	68,263,314	68,263,314	116.5%	
Other Unrestricted Program Revenue	110,044,808	-	110,044,808	123,639,964	13,595,156	13,595,156	112.4%	
Federal Indirect Cost Reimbursement	217,554,062	9,619	217,563,681	238,185,632	20,631,570	20,621,951	109.5%	
<b>Total Unrestricted</b>	<b>2,678,991,451</b>	<b>36,537,563</b>	<b>2,715,529,014</b>	<b>2,848,362,011</b>	<b>169,370,560</b>	<b>132,832,997</b>	<b>104.9%</b>	
Gifts	593,613,702	-	593,613,702	773,811,992	180,198,290	180,198,290	130.4%	
Nonfederal Grants and Contracts	136,275,913	-	136,275,913	163,873,103	27,597,190	27,597,190	120.3%	
Gifts and Nonfederal Grants and Contracts	729,889,615	-	729,889,615	937,685,095	207,795,480	207,795,480	128.5%	
Federal Grants and Contracts	757,042,491	-	757,042,491	776,772,827	19,730,336	19,730,336	102.6%	
Other Restricted Program Revenue	225,250,407	-	225,250,407	234,001,250	8,750,843	8,750,843	103.9%	
Trust Funds	31,890,294	-	31,890,294	44,776,675	12,886,381	12,886,381	140.4%	
Other Appropriated Funds	1,590,000	-	1,590,000	6,009,492	4,419,492	4,419,492	378.0%	
GPR: Debt Service	83,483,600	-	83,483,600	75,879,282	(7,604,318)	(7,604,318)	90.9%	
<b>Total Restricted</b>	<b>1,829,146,407</b>	<b>-</b>	<b>1,829,146,407</b>	<b>2,075,124,621</b>	<b>245,978,214</b>	<b>245,978,214</b>	<b>113.4%</b>	
<b>Total Revenue</b>	<b>\$ 4,508,137,858</b>	<b>\$ 36,537,563</b>	<b>\$ 4,544,675,421</b>	<b>\$ 4,923,486,632</b>	<b>\$ 415,348,774</b>	<b>\$ 378,811,211</b>	<b>108.3%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 1,900,115,765	\$ 1,355,883	\$ 1,901,471,648	\$ 2,147,843,154	\$ 247,227,389	\$ 246,371,506	113.0%	
Fringe Benefits	589,969,285	18,040,987	608,010,272	674,838,051	84,868,766	66,827,779	111.0%	
<b>Total Salaries and Fringe Benefits</b>	<b>2,490,085,050</b>	<b>19,396,870</b>	<b>2,509,481,920</b>	<b>2,822,681,205</b>	<b>332,596,155</b>	<b>313,199,285</b>	<b>112.5%</b>	
Supplies and Expenses	1,043,062,950	71,937,712	1,115,000,662	1,007,062,026	(36,000,924)	(107,938,636)	90.3%	
Capital	238,348,229	-	238,348,229	276,532,680	38,184,451	38,184,451	116.0%	
Financial Aid	457,066,424	1,852,916	458,919,340	483,250,183	26,183,759	24,330,843	105.3%	
Other (Debt Service/Transfer Out to DOA)	317,028,413	-	317,028,413	345,783,830	28,755,417	28,755,417	109.1%	
<b>Total Expenses</b>	<b>\$ 4,545,591,066</b>	<b>\$ 93,187,498</b>	<b>\$ 4,638,778,564</b>	<b>\$ 4,935,309,925</b>	<b>\$ 389,718,858</b>	<b>\$ 296,531,361</b>	<b>106.4%</b>	
<b>Revenue less Expense **</b>	<b>\$ (37,453,208)</b>	<b>\$ (56,649,935)</b>	<b>\$ (94,103,143)</b>	<b>\$ (11,823,293)</b>	<b>\$ 25,629,915</b>	<b>\$ 82,279,850</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Milwaukee**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 145,618,548	\$ 4,300,366	\$ 149,918,914	\$ 149,918,914	\$ 4,300,366	(0)	100.0%	
Tuition and Fees	193,585,251	-	193,585,251	199,150,991	5,565,740	5,565,740	102.9%	
GPR/Tuition and Fees	\$ 339,203,799	\$ 4,300,366	\$ 343,504,165	\$ 349,069,905	\$ 9,866,106	5,565,740	101.6%	
GPR: Miscellaneous	765,950	1,064,276	1,830,226	1,357,878	591,928	(472,348)	74.2%	
Auxiliary Enterprises	94,393,095	-	94,393,095	97,240,907	2,847,812	2,847,812	103.0%	
General Operations	15,731,171	-	15,731,171	24,854,187	9,123,016	9,123,016	158.0%	
Other Unrestricted Program Revenue	4,178,411	-	4,178,411	4,700,210	521,799	521,799	112.5%	
Federal Indirect Cost Reimbursement	7,701,988	-	7,701,988	8,808,127	1,106,139	1,106,139	114.4%	
<b>Total Unrestricted</b>	<b>461,974,414</b>	<b>5,364,642</b>	<b>467,339,056</b>	<b>486,031,213</b>	<b>24,056,799</b>	<b>18,692,157</b>	<b>104.0%</b>	
Gifts	18,416,759	-	18,416,759	28,409,087	9,992,328	9,992,328	154.3%	
Nonfederal Grants and Contracts	6,918,732	-	6,918,732	7,440,953	522,221	522,221	107.5%	
Gifts and Nonfederal Grants and Contracts	25,335,491	-	25,335,491	35,850,040	10,514,549	10,514,549	141.5%	
Federal Grants and Contracts	39,163,398	-	39,163,398	44,101,938	4,938,540	4,938,540	112.6%	
Other Restricted Program Revenue	128,815,000	-	128,815,000	122,611,370	(6,203,630)	(6,203,630)	95.2%	
Trust Funds	666,962	-	666,962	1,469,625	802,663	802,663	220.3%	
Other Appropriated Funds	-	-	-	498,599	498,599	498,599	-	
GPR: Debt Service	24,153,400	-	24,153,400	26,939,016	2,785,616	2,785,616	111.5%	
<b>Total Restricted</b>	<b>218,134,251</b>	<b>-</b>	<b>218,134,251</b>	<b>231,470,588</b>	<b>13,336,337</b>	<b>13,336,337</b>	<b>106.1%</b>	
<b>Total Revenue</b>	<b>\$ 680,108,665</b>	<b>\$ 5,364,642</b>	<b>\$ 685,473,307</b>	<b>\$ 717,501,801</b>	<b>\$ 37,393,136</b>	<b>\$ 32,028,494</b>	<b>104.7%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 280,995,570	\$ 1,471,902	\$ 282,467,472	\$ 290,287,387	\$ 9,291,817	\$ 7,819,915	102.8%	
Fringe Benefits	104,508,498	1,321,526	105,830,024	108,076,235	3,567,737	2,246,211	102.1%	
<b>Total Salaries and Fringe Benefits</b>	<b>385,504,068</b>	<b>2,793,428</b>	<b>388,297,496</b>	<b>398,363,622</b>	<b>12,859,554</b>	<b>10,066,126</b>	<b>102.6%</b>	
Supplies and Expenses	115,748,807	2,139,203	117,888,010	124,109,964	8,361,157	6,221,954	105.3%	
Capital	10,384,582	112,804	10,497,386	9,407,720	(976,862)	(1,089,666)	89.6%	
Financial Aid	157,290,074	319,207	157,609,281	158,375,976	1,085,902	766,695	100.5%	
Other (Debt Service/Transfer Out to DOA)	35,690,230	-	35,690,230	40,758,538	5,068,308	5,068,308	114.2%	
<b>Total Expenses</b>	<b>\$ 704,617,761</b>	<b>\$ 5,364,642</b>	<b>\$ 709,982,403</b>	<b>\$ 731,015,820</b>	<b>\$ 26,398,059</b>	<b>\$ 21,033,417</b>	<b>103.0%</b>	
<b>Revenue less Expense **</b>	<b>\$ (24,509,096)</b>	<b>\$ -</b>	<b>\$ (24,509,096)</b>	<b>\$ (13,514,019)</b>	<b>\$ 10,995,077</b>	<b>\$ 10,995,077</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Eau Claire**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 42,931,291	\$ 1,753,273	\$ 44,684,564	\$ 44,684,564	\$ 1,753,273	-	100.0%	
Tuition and Fees	77,942,047	4,295,624	82,237,671	79,838,736	1,896,689	(2,398,935)	97.1%	
GPR/Tuition and Fees	\$ 120,873,338	\$ 6,048,897	\$ 126,922,235	\$ 124,523,300	\$ 3,649,962	(2,398,935)	98.1%	
GPR: Miscellaneous	56,834	256,498	313,332	187,204	130,370	(126,129)	59.7%	
Auxiliary Enterprises	52,129,144	(8,000)	52,121,144	48,830,723	(3,298,421)	(3,290,421)	93.7%	
General Operations	8,463,252	8,000	8,471,252	10,534,545	2,071,293	2,063,293	124.4%	
Other Unrestricted Program Revenue	551,200	-	551,200	540,537	(10,663)	(10,663)	98.1%	
Federal Indirect Cost Reimbursement	315,712	-	315,712	560,686	244,974	244,974	177.6%	
<b>Total Unrestricted</b>	<b>182,389,480</b>	<b>6,305,395</b>	<b>188,694,875</b>	<b>185,176,995</b>	<b>2,787,515</b>	<b>(3,517,880)</b>	<b>98.1%</b>	
Gifts	2,455,232	-	2,455,232	4,592,391	2,137,159	2,137,159	187.0%	
Nonfederal Grants and Contracts	2,104,247	-	2,104,247	3,248,313	1,144,066	1,144,066	154.4%	
Gifts and Nonfederal Grants and Contracts	4,559,479	-	4,559,479	7,840,704	3,281,225	3,281,225	172.0%	
Federal Grants and Contracts	2,549,705	-	2,549,705	7,791,474	5,241,769	5,241,769	305.6%	
Other Restricted Program Revenue	46,365,909	-	46,365,909	39,037,483	(7,328,426)	(7,328,426)	84.2%	
Trust Funds	1,500	-	1,500	45,830	44,330	44,330	3055.3%	
Other Appropriated Funds	-	-	-	5,500	5,500	5,500	-	
GPR: Debt Service	8,386,800	-	8,386,800	7,063,931	(1,322,869)	(1,322,869)	84.2%	
<b>Total Restricted</b>	<b>61,863,393</b>	<b>-</b>	<b>61,863,393</b>	<b>61,784,922</b>	<b>(78,471)</b>	<b>(78,471)</b>	<b>99.9%</b>	
<b>Total Revenue</b>	<b>\$ 244,252,873</b>	<b>\$ 6,305,395</b>	<b>\$ 250,558,268</b>	<b>\$ 246,961,917</b>	<b>\$ 2,709,044</b>	<b>\$ (3,596,352)</b>	<b>98.6%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 93,804,076	\$ 1,269,017	\$ 95,073,093	\$ 96,683,002	\$ 2,878,926	\$ 1,609,910	101.7%	
Fringe Benefits	38,727,361	610,310	39,337,671	40,215,079	1,487,718	877,408	102.2%	
<b>Total Salaries and Fringe Benefits</b>	<b>132,531,437</b>	<b>1,879,327</b>	<b>134,410,764</b>	<b>136,898,081</b>	<b>4,366,644</b>	<b>2,487,317</b>	<b>101.9%</b>	
Supplies and Expenses	43,658,339	1,236,292	44,894,631	47,679,272	4,020,933	2,784,640	106.2%	
Capital	8,584,060	-	8,584,060	4,672,341	(3,911,719)	(3,911,719)	54.4%	
Financial Aid	52,073,477	108,008	52,181,485	47,754,235	(4,319,242)	(4,427,250)	91.5%	
Other (Debt Service/Transfer Out to DOA)	19,357,659	-	19,357,659	6,251,553	(13,106,106)	(13,106,106)	32.3%	
<b>Total Expenses</b>	<b>\$ 256,204,972</b>	<b>\$ 3,223,627</b>	<b>\$ 259,428,599</b>	<b>\$ 243,255,481</b>	<b>\$ (12,949,491)</b>	<b>\$ (16,173,118)</b>	<b>93.8%</b>	
<b>Revenue less Expense **</b>	<b>\$ (11,952,099)</b>	<b>\$ 3,081,768</b>	<b>\$ (8,870,331)</b>	<b>\$ 3,706,436</b>	<b>\$ 15,658,535</b>	<b>\$ 12,576,767</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Green Bay**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 31,841,775	\$ 1,478,134	\$ 33,319,909	\$ 33,319,909	\$ 1,478,134	-	100.0%	
Tuition and Fees	46,656,805	-	46,656,805	49,856,079	3,199,274	3,199,274	106.9%	
GPR/Tuition and Fees	\$ 78,498,580	\$ 1,478,134	\$ 79,976,714	\$ 83,175,988	\$ 4,677,407	3,199,274	104.0%	
GPR: Miscellaneous	91,447	593,677	685,124	515,801	424,354	(169,323)	75.3%	
Auxiliary Enterprises	22,716,845	-	22,716,845	25,364,419	2,647,574	2,647,574	111.7%	
General Operations	5,308,114	-	5,308,114	5,717,435	409,321	409,321	107.7%	
Other Unrestricted Program Revenue	3,111,072	-	3,111,072	3,109,275	(1,797)	(1,797)	99.9%	
Federal Indirect Cost Reimbursement	526,327	-	526,327	743,184	216,857	216,857	141.2%	
<b>Total Unrestricted</b>	<b>110,252,385</b>	<b>2,071,811</b>	<b>112,324,196</b>	<b>118,626,100</b>	<b>8,373,715</b>	<b>6,301,905</b>	<b>105.6%</b>	
Gifts	4,984,197	-	4,984,197	8,929,055	3,944,858	3,944,858	179.1%	
Nonfederal Grants and Contracts	533,790	-	533,790	1,357,403	823,613	823,613	254.3%	
Gifts and Nonfederal Grants and Contracts	5,517,987	-	5,517,987	10,286,457	4,768,470	4,768,470	186.4%	
Federal Grants and Contracts	3,662,180	-	3,662,180	5,444,972	1,782,792	1,782,792	148.7%	
Other Restricted Program Revenue	36,702,542	-	36,702,542	35,083,255	(1,619,287)	(1,619,287)	95.6%	
Trust Funds	16,000	-	16,000	29,051	13,051	13,051	181.6%	
Other Appropriated Funds	-	25,761	25,761	32,123	32,123	6,362	124.7%	
GPR: Debt Service	4,797,000	-	4,797,000	3,994,655	(802,345)	(802,345)	83.3%	
<b>Total Restricted</b>	<b>50,695,709</b>	<b>25,761</b>	<b>50,721,470</b>	<b>54,870,512</b>	<b>4,174,803</b>	<b>4,149,042</b>	<b>108.2%</b>	
<b>Total Revenue</b>	<b>\$ 160,948,094</b>	<b>\$ 2,097,572</b>	<b>\$ 163,045,666</b>	<b>\$ 173,496,612</b>	<b>\$ 12,548,518</b>	<b>\$ 10,450,947</b>	<b>106.4%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 61,451,579	\$ 1,338,720	\$ 62,790,299	\$ 63,897,730	\$ 2,446,151	\$ 1,107,431	101.8%	
Fringe Benefits	25,906,897	609,711	26,516,608	26,186,692	279,795	(329,916)	98.8%	
<b>Total Salaries and Fringe Benefits</b>	<b>87,358,476</b>	<b>1,948,431</b>	<b>89,306,907</b>	<b>90,084,422</b>	<b>2,725,946</b>	<b>777,515</b>	<b>100.9%</b>	
Supplies and Expenses	26,022,337	3,878,636	29,900,973	28,706,780	2,684,443	(1,194,193)	96.0%	
Capital	1,617,948	-	1,617,948	1,742,111	124,163	124,163	107.7%	
Financial Aid	43,796,823	(802,503)	42,994,320	44,252,898	456,075	1,258,578	102.9%	
Other (Debt Service/Transfer Out to DOA)	10,297,721	-	10,297,721	7,470,404	(2,827,317)	(2,827,317)	72.5%	
<b>Total Expenses</b>	<b>\$ 169,093,305</b>	<b>\$ 5,024,564</b>	<b>\$ 174,117,869</b>	<b>\$ 172,256,616</b>	<b>\$ 3,163,310</b>	<b>\$ (1,861,254)</b>	<b>98.9%</b>	
<b>Revenue less Expense **</b>	<b>\$ (8,145,211)</b>	<b>\$ (2,926,992)</b>	<b>\$ (11,072,204)</b>	<b>\$ 1,239,997</b>	<b>\$ 9,385,208</b>	<b>\$ 12,312,200</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-La Crosse**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 33,941,437	\$ 1,246,455	\$ 35,187,892	\$ 35,187,893	\$ 1,246,456	0	100.0%	
Tuition and Fees	85,405,468	-	85,405,468	87,253,801	1,848,333	1,848,333	102.2%	
GPR/Tuition and Fees	\$ 119,346,905	\$ 1,246,455	\$ 120,593,360	\$ 122,441,694	\$ 3,094,789	1,848,333	101.5%	
GPR: Miscellaneous	129,252	150,976	280,228	253,434	124,182	(26,794)	90.4%	
Auxiliary Enterprises	48,332,887	-	48,332,887	46,273,765	(2,059,122)	(2,059,122)	95.7%	
General Operations	2,668,573	-	2,668,573	11,821,678	9,153,105	9,153,105	443.0%	
Other Unrestricted Program Revenue	1,168,735	-	1,168,735	1,140,631	(28,104)	(28,104)	97.6%	
Federal Indirect Cost Reimbursement	373,367	-	373,367	273,735	(99,632)	(99,632)	73.3%	
<b>Total Unrestricted</b>	<b>172,019,719</b>	<b>1,397,431</b>	<b>173,417,150</b>	<b>182,204,936</b>	<b>10,185,217</b>	<b>8,787,786</b>	<b>105.1%</b>	
Gifts	1,532,500	-	1,532,500	4,255,877	2,723,377	2,723,377	277.7%	
Nonfederal Grants and Contracts	1,572,604	-	1,572,604	742,377	(830,227)	(830,227)	47.2%	
Gifts and Nonfederal Grants and Contracts	3,105,104	-	3,105,104	4,998,254	1,893,150	1,893,150	161.0%	
Federal Grants and Contracts	4,352,761	-	4,352,761	2,722,695	(1,630,066)	(1,630,066)	62.6%	
Other Restricted Program Revenue	49,259,914	-	49,259,914	43,386,369	(5,873,545)	(5,873,545)	88.1%	
Trust Funds	-	-	-	(513,086)	(513,086)	(513,086)	-	
Other Appropriated Funds	-	-	-	25,000	25,000	25,000	-	
GPR: Debt Service	10,548,300	-	10,548,300	11,954,867	1,406,567	1,406,567	113.3%	
<b>Total Restricted</b>	<b>67,266,079</b>	<b>-</b>	<b>67,266,079</b>	<b>62,574,100</b>	<b>(4,691,979)</b>	<b>(4,691,979)</b>	<b>93.0%</b>	
<b>Total Revenue</b>	<b>\$ 239,285,798</b>	<b>\$ 1,397,431</b>	<b>\$ 240,683,229</b>	<b>\$ 244,779,036</b>	<b>\$ 5,493,238</b>	<b>\$ 4,095,807</b>	<b>101.7%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 85,338,637	\$ (141,076)	\$ 85,197,561	\$ 83,235,602	\$ (2,103,035)	\$ (1,961,959)	97.7%	
Fringe Benefits	35,645,360	(670,684)	34,974,676	33,969,365	(1,675,995)	(1,005,310)	97.1%	
<b>Total Salaries and Fringe Benefits</b>	<b>120,983,997</b>	<b>(811,760)</b>	<b>120,172,237</b>	<b>117,204,967</b>	<b>(3,779,030)</b>	<b>(2,967,269)</b>	<b>97.5%</b>	
Supplies and Expenses	43,537,081	1,599,647	45,136,728	43,207,273	(329,808)	(1,929,455)	95.7%	
Capital	2,073,499	31,259	2,104,758	3,029,178	955,679	924,420	143.9%	
Financial Aid	54,775,405	578,286	55,353,691	53,122,975	(1,652,430)	(2,230,716)	96.0%	
Other (Debt Service/Transfer Out to DOA)	20,788,618	-	20,788,618	21,356,336	567,718	567,718	102.7%	
<b>Total Expenses</b>	<b>\$ 242,158,600</b>	<b>\$ 1,397,431</b>	<b>\$ 243,556,031</b>	<b>\$ 237,920,730</b>	<b>\$ (4,237,871)</b>	<b>\$ (5,635,302)</b>	<b>97.7%</b>	
<b>Revenue less Expense **</b>	<b>\$ (2,872,802)</b>	<b>\$ -</b>	<b>\$ (2,872,802)</b>	<b>\$ 6,858,307</b>	<b>\$ 9,731,109</b>	<b>\$ 9,731,109</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Oshkosh**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget	Board Approved to Actual			Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 47,009,783	\$ 908,544	\$ 47,918,327	\$ 47,918,327	\$ 908,544	-	100.0%	
Tuition and Fees	69,988,622	-	69,988,622	61,236,543	(8,752,079)	(8,752,079)	87.5%	
GPR/Tuition and Fees	\$ 116,998,405	\$ 908,544	\$ 117,906,949	\$ 109,154,870	\$ (7,843,535)	(8,752,079)	92.6%	
GPR: Miscellaneous	135,542	581,150	716,692	439,113	303,571	(277,578)	61.3%	
Auxiliary Enterprises	46,098,194	-	46,098,194	44,564,912	(1,533,282)	(1,533,282)	96.7%	
General Operations	10,401,142	-	10,401,142	16,165,530	5,764,388	5,764,388	155.4%	
Other Unrestricted Program Revenue	353,780	-	353,780	113,115	(240,665)	(240,665)	32.0%	
Federal Indirect Cost Reimbursement	617,655	100,000	717,655	956,224	338,569	238,569	133.2%	
<b>Total Unrestricted</b>	<b>174,604,718</b>	<b>1,589,694</b>	<b>176,194,412</b>	<b>171,393,764</b>	<b>(3,210,954)</b>	<b>(4,800,647)</b>	<b>97.3%</b>	
Gifts	319,929	-	319,929	1,596,732	1,276,803	1,276,803	499.1%	
Nonfederal Grants and Contracts	2,107,507	-	2,107,507	2,125,790	18,283	18,283	100.9%	
Gifts and Nonfederal Grants and Contracts	2,427,436	-	2,427,436	3,722,521	1,295,085	1,295,085	153.4%	
Federal Grants and Contracts	9,075,323	-	9,075,323	12,837,287	3,761,964	3,761,964	141.5%	
Other Restricted Program Revenue	53,941,274	-	53,941,274	41,476,128	(12,465,146)	(12,465,146)	76.9%	
Trust Funds	-	-	-	206,314	206,314	206,314	-	
Other Appropriated Funds	-	18,723	18,723	284,797	284,797	266,074	1521.1%	
GPR: Debt Service	9,187,100	-	9,187,100	10,462,644	1,275,544	1,275,544	113.9%	
<b>Total Restricted</b>	<b>74,631,133</b>	<b>18,723</b>	<b>74,649,856</b>	<b>68,989,692</b>	<b>(5,641,441)</b>	<b>(5,660,164)</b>	<b>92.4%</b>	
<b>Total Revenue</b>	<b>\$ 249,235,851</b>	<b>\$ 1,608,417</b>	<b>\$ 250,844,268</b>	<b>\$ 240,383,456</b>	<b>\$ (8,852,395)</b>	<b>\$ (10,460,811)</b>	<b>95.8%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 93,215,570	\$ 473,502	\$ 93,689,072	\$ 91,883,798	\$ (1,331,772)	\$ (1,805,274)	98.1%	
Fringe Benefits	39,064,871	(1,469,779)	37,595,092	38,409,457	(655,414)	814,365	102.2%	
<b>Total Salaries and Fringe Benefits</b>	<b>132,280,441</b>	<b>(996,277)</b>	<b>131,284,164</b>	<b>130,293,255</b>	<b>(1,987,186)</b>	<b>(990,909)</b>	<b>99.2%</b>	
Supplies and Expenses	43,489,113	1,998,697	45,487,810	43,400,958	(88,155)	(2,086,852)	95.4%	
Capital	1,252,557	-	1,252,557	2,151,871	899,314	899,314	171.8%	
Financial Aid	57,502,914	605,997	58,108,911	49,360,179	(8,142,735)	(8,748,732)	84.9%	
Other (Debt Service/Transfer Out to DOA)	19,755,251	-	19,755,251	20,853,123	1,097,872	1,097,872	105.6%	
<b>Total Expenses</b>	<b>\$ 254,280,276</b>	<b>\$ 1,608,417</b>	<b>\$ 255,888,693</b>	<b>\$ 246,059,385</b>	<b>\$ (8,220,891)</b>	<b>\$ (9,829,308)</b>	<b>96.2%</b>	
<b>Revenue less Expense **</b>	<b>\$ (5,044,425)</b>	<b>\$ -</b>	<b>\$ (5,044,425)</b>	<b>\$ (5,675,929)</b>	<b>\$ (631,504)</b>	<b>\$ (631,504)</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.



**UW-Parkside**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 25,485,417	\$ 1,072,834	\$ 26,558,251	\$ 26,558,251	\$ 1,072,834	-	100.0%	
Tuition and Fees	23,825,502	-	23,825,502	28,797,779	4,972,277	4,972,277	120.9%	
GPR/Tuition and Fees	\$ 49,310,919	\$ 1,072,834	\$ 50,383,753	\$ 55,356,030	\$ 6,045,111	4,972,277	109.9%	
GPR: Miscellaneous	76,728	45,243	121,971	93,974	17,246	(27,997)	77.0%	
Auxiliary Enterprises	11,708,655	-	11,708,655	11,777,780	69,125	69,125	100.6%	
General Operations	1,446,672	-	1,446,672	1,718,787	272,115	272,115	118.8%	
Other Unrestricted Program Revenue	376,700	-	376,700	344,155	(32,545)	(32,545)	91.4%	
Federal Indirect Cost Reimbursement	95,000	-	95,000	118,911	23,911	23,911	125.2%	
<b>Total Unrestricted</b>	<b>63,014,674</b>	<b>1,118,077</b>	<b>64,132,751</b>	<b>69,409,637</b>	<b>6,394,963</b>	<b>5,276,886</b>	<b>108.2%</b>	
Gifts	156,000	-	156,000	2,510,702	2,354,702	2,354,702	1609.4%	
Nonfederal Grants and Contracts	38,419	-	38,419	232,842	194,423	194,423	606.1%	
Gifts and Nonfederal Grants and Contracts	194,419	-	194,419	2,743,544	2,549,125	2,549,125	1411.2%	
Federal Grants and Contracts	2,253,057	-	2,253,057	1,179,186	(1,073,871)	(1,073,871)	52.3%	
Other Restricted Program Revenue	26,153,040	-	26,153,040	21,255,808	(4,897,232)	(4,897,232)	81.3%	
Trust Funds	-	-	-	83,767	83,767	83,767	-	
Other Appropriated Funds	-	18,401	18,401	17,850	17,850	(551)	97.0%	
GPR: Debt Service	7,017,800	-	7,017,800	8,413,439	1,395,639	1,395,639	119.9%	
<b>Total Restricted</b>	<b>35,618,316</b>	<b>18,401</b>	<b>35,636,717</b>	<b>33,693,595</b>	<b>(1,924,721)</b>	<b>(1,943,122)</b>	<b>94.5%</b>	
<b>Total Revenue</b>	<b>\$ 98,632,990</b>	<b>\$ 1,136,478</b>	<b>\$ 99,769,468</b>	<b>\$ 103,103,232</b>	<b>\$ 4,470,242</b>	<b>\$ 3,333,764</b>	<b>103.3%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 36,628,300	\$ 335,877	\$ 36,964,177	\$ 33,696,854	\$ (2,931,446)	\$ (3,267,323)	91.2%	
Fringe Benefits	14,662,661	(724,580)	13,938,081	13,332,595	(1,330,066)	(605,486)	95.7%	
<b>Total Salaries and Fringe Benefits</b>	<b>51,290,961</b>	<b>(388,703)</b>	<b>50,902,258</b>	<b>47,029,449</b>	<b>(4,261,512)</b>	<b>(3,872,809)</b>	<b>92.4%</b>	
Supplies and Expenses	14,625,449	1,279,875	15,905,324	18,014,839	3,389,390	2,109,515	113.3%	
Capital	1,070,592	-	1,070,592	972,823	(97,769)	(97,769)	90.9%	
Financial Aid	28,165,599	245,306	28,410,905	25,668,322	(2,497,277)	(2,742,583)	90.3%	
Other (Debt Service/Transfer Out to DOA)	12,582,123	-	12,582,123	13,554,919	972,796	972,796	107.7%	
<b>Total Expenses</b>	<b>\$ 107,734,724</b>	<b>\$ 1,136,478</b>	<b>\$ 108,871,202</b>	<b>\$ 105,240,352</b>	<b>\$ (2,494,372)</b>	<b>\$ (3,630,850)</b>	<b>96.7%</b>	
<b>Revenue less Expense **</b>	<b>\$ (9,101,734)</b>	<b>\$ -</b>	<b>\$ (9,101,734)</b>	<b>\$ (2,137,120)</b>	<b>\$ 6,964,614</b>	<b>\$ 6,964,614</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.



**UW-Platteville**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 35,272,334	\$ 161,711	\$ 35,434,045	\$ 35,434,045	\$ 161,711	-	100.0%	
Tuition and Fees	43,793,707	-	43,793,707	53,958,600	10,164,893	10,164,893	123.2%	
GPR/Tuition and Fees	\$ 79,066,041	\$ 161,711	\$ 79,227,752	\$ 89,392,645	\$ 10,326,604	10,164,893	112.8%	
GPR: Miscellaneous	87,501	48,705	136,206	127,314	39,813	(8,893)	93.5%	
Auxiliary Enterprises	33,073,100	-	33,073,100	36,725,691	3,652,591	3,652,591	111.0%	
General Operations	9,858,675	-	9,858,675	10,236,347	377,672	377,672	103.8%	
Other Unrestricted Program Revenue	126,810	-	126,810	91,846	(34,964)	(34,964)	72.4%	
Federal Indirect Cost Reimbursement	147,000	-	147,000	150,206	3,206	3,206	102.2%	
<b>Total Unrestricted</b>	<b>122,359,127</b>	<b>210,416</b>	<b>122,569,543</b>	<b>136,724,049</b>	<b>14,364,922</b>	<b>14,154,506</b>	<b>111.5%</b>	
Gifts	171,857	-	171,857	5,559,788	5,387,931	5,387,931	3235.1%	
Nonfederal Grants and Contracts	126,455	-	126,455	926,580	800,125	800,125	732.7%	
Gifts and Nonfederal Grants and Contracts	298,312	-	298,312	6,486,368	6,188,056	6,188,056	2174.4%	
Federal Grants and Contracts	905,648	-	905,648	3,241,037	2,335,389	2,335,389	357.9%	
Other Restricted Program Revenue	26,911,791	-	26,911,791	27,051,387	139,596	139,596	100.5%	
Trust Funds	-	-	-	232,116	232,116	232,116	-	
Other Appropriated Funds	-	-	-	170,468	170,468	170,468	-	
GPR: Debt Service	8,228,400	-	8,228,400	8,741,137	512,737	512,737	106.2%	
<b>Total Restricted</b>	<b>36,344,151</b>	<b>-</b>	<b>36,344,151</b>	<b>45,922,514</b>	<b>9,578,363</b>	<b>9,578,363</b>	<b>126.4%</b>	
<b>Total Revenue</b>	<b>\$ 158,703,278</b>	<b>\$ 210,416</b>	<b>\$ 158,913,694</b>	<b>\$ 182,646,562</b>	<b>\$ 23,943,284</b>	<b>\$ 23,732,868</b>	<b>114.9%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 57,050,648	\$ (410,852)	\$ 56,639,796	\$ 60,526,452	\$ 3,475,804	\$ 3,886,656	106.9%	
Fringe Benefits	24,825,751	(1,761,111)	23,064,640	23,483,240	(1,342,511)	418,600	101.8%	
<b>Total Salaries and Fringe Benefits</b>	<b>81,876,399</b>	<b>(2,171,962)</b>	<b>79,704,437</b>	<b>84,009,692</b>	<b>2,133,293</b>	<b>4,305,256</b>	<b>105.4%</b>	
Supplies and Expenses	25,889,635	1,708,909	27,598,544	29,187,314	3,297,679	1,588,770	105.8%	
Capital	4,397,138	(165,905)	4,231,233	4,754,486	357,348	523,252	112.4%	
Financial Aid	34,991,831	56,695	35,048,526	41,684,157	6,692,326	6,635,631	118.9%	
Other (Debt Service/Transfer Out to DOA)	20,205,054	-	20,205,054	18,498,750	(1,706,304)	(1,706,304)	91.6%	
<b>Total Expenses</b>	<b>\$ 167,360,057</b>	<b>\$ (572,263)</b>	<b>\$ 166,787,794</b>	<b>\$ 178,134,400</b>	<b>\$ 10,774,343</b>	<b>\$ 11,346,606</b>	<b>106.8%</b>	
<b>Revenue less Expense **</b>	<b>\$ (8,656,779)</b>	<b>\$ 782,679</b>	<b>\$ (7,874,100)</b>	<b>\$ 4,512,163</b>	<b>\$ 13,168,941</b>	<b>\$ 12,386,262</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-River Falls**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 25,135,796	\$ 1,569,576	\$ 26,705,372	\$ 26,705,372	\$ 1,569,576	-	100.0%	
Tuition and Fees	38,428,508	-	38,428,508	38,014,889	(413,619)	(413,619)	98.9%	
GPR/Tuition and Fees	\$ 63,564,304	\$ 1,569,576	\$ 65,133,880	\$ 64,720,261	\$ 1,155,957	(413,619)	99.4%	
GPR: Miscellaneous	62,630	236,097	298,727	182,424	119,794	(116,303)	61.1%	
Auxiliary Enterprises	29,892,873	-	29,892,873	31,199,928	1,307,055	1,307,055	104.4%	
General Operations	2,593,698	-	2,593,698	2,821,107	227,409	227,409	108.8%	
Other Unrestricted Program Revenue	24,729	-	24,729	84,047	59,318	59,318	339.9%	
Federal Indirect Cost Reimbursement	239,000	13,459	252,459	230,721	(8,279)	(21,738)	91.4%	
<b>Total Unrestricted</b>	<b>96,377,234</b>	<b>1,819,132</b>	<b>98,196,366</b>	<b>99,238,488</b>	<b>2,861,254</b>	<b>1,042,122</b>	<b>101.1%</b>	
Gifts	388,147	-	388,147	3,164,880	2,776,733	2,776,733	815.4%	
Nonfederal Grants and Contracts	535,000	-	535,000	539,058	4,058	4,058	100.8%	
Gifts and Nonfederal Grants and Contracts	923,147	-	923,147	3,703,938	2,780,791	2,780,791	401.2%	
Federal Grants and Contracts	2,563,600	-	2,563,600	2,165,303	(398,297)	(398,297)	84.5%	
Other Restricted Program Revenue	26,549,347	-	26,549,347	22,115,930	(4,433,417)	(4,433,417)	83.3%	
Trust Funds	-	-	-	5,658	5,658	5,658	-	
Other Appropriated Funds	-	4,296	4,296	244,494	244,494	240,198	5691.2%	
GPR: Debt Service	8,283,100	-	8,283,100	9,597,203	1,314,103	1,314,103	115.9%	
<b>Total Restricted</b>	<b>38,319,194</b>	<b>4,296</b>	<b>38,323,490</b>	<b>37,832,527</b>	<b>(486,667)</b>	<b>(490,963)</b>	<b>98.7%</b>	
<b>Total Revenue</b>	<b>\$ 134,696,428</b>	<b>\$ 1,823,428</b>	<b>\$ 136,519,856</b>	<b>\$ 137,071,015</b>	<b>\$ 2,374,587</b>	<b>\$ 551,159</b>	<b>100.4%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 46,251,056	\$ 153,216	\$ 46,404,272	\$ 50,089,435	\$ 3,838,379	\$ 3,685,162	107.9%	
Fringe Benefits	19,995,187	349,949	20,345,136	19,903,149	(92,038)	(441,987)	97.8%	
<b>Total Salaries and Fringe Benefits</b>	<b>66,246,243</b>	<b>503,166</b>	<b>66,749,409</b>	<b>69,992,584</b>	<b>3,746,341</b>	<b>3,243,175</b>	<b>104.9%</b>	
Supplies and Expenses	24,543,674	1,239,766	25,783,440	26,669,881	2,126,207	886,441	103.4%	
Capital	955,102	5,000	960,102	1,190,095	234,993	229,993	124.0%	
Financial Aid	28,783,562	75,496	28,859,058	26,000,158	(2,783,404)	(2,858,900)	90.1%	
Other (Debt Service/Transfer Out to DOA)	13,468,016	-	13,468,016	17,926,367	4,458,351	4,458,351	133.1%	
<b>Total Expenses</b>	<b>\$ 133,996,597</b>	<b>\$ 1,823,428</b>	<b>\$ 135,820,025</b>	<b>\$ 141,779,085</b>	<b>\$ 7,782,488</b>	<b>\$ 5,959,061</b>	<b>104.4%</b>	
<b>Revenue less Expense **</b>	<b>\$ 699,831</b>	<b>\$ -</b>	<b>\$ 699,831</b>	<b>\$ (4,708,071)</b>	<b>\$ (5,407,902)</b>	<b>\$ (5,407,902)</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Stevens Point**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 40,531,066	\$ 2,961,344	\$ 43,492,410	\$ 43,492,410	\$ 2,961,344	-	100.0%	
Tuition and Fees	57,544,179	-	57,544,179	60,162,410	2,618,231	2,618,231	104.5%	
GPR/Tuition and Fees	\$ 98,075,245	\$ 2,961,344	\$ 101,036,589	\$ 103,654,820	\$ 5,579,575	2,618,231	102.6%	
GPR: Miscellaneous	135,716	521,257	656,973	282,343	146,627	(374,630)	43.0%	
Auxiliary Enterprises	45,759,048	-	45,759,048	49,310,465	3,551,417	3,551,417	107.8%	
General Operations	13,506,593	-	13,506,593	15,334,004	1,827,411	1,827,411	113.5%	
Other Unrestricted Program Revenue	3,199,511	-	3,199,511	3,732,663	533,152	533,152	116.7%	
Federal Indirect Cost Reimbursement	118,467	90,381	208,848	673,504	555,037	464,656	322.5%	
<b>Total Unrestricted</b>	<b>160,794,580</b>	<b>3,572,982</b>	<b>164,367,562</b>	<b>172,987,800</b>	<b>12,193,220</b>	<b>8,620,238</b>	<b>105.2%</b>	
Gifts	3,953,873	-	3,953,873	5,787,590	1,833,717	1,833,717	146.4%	
Nonfederal Grants and Contracts	2,755,205	-	2,755,205	5,549,818	2,794,613	2,794,613	201.4%	
Gifts and Nonfederal Grants and Contracts	6,709,078	-	6,709,078	11,337,408	4,628,330	4,628,330	169.0%	
Federal Grants and Contracts	3,389,227	-	3,389,227	8,414,634	5,025,407	5,025,407	248.3%	
Other Restricted Program Revenue	39,813,230	-	39,813,230	43,562,399	3,749,169	3,749,169	109.4%	
Trust Funds	-	-	-	65,714	65,714	65,714	-	
Other Appropriated Funds	203,500	-	203,500	775,680	572,180	572,180	381.2%	
GPR: Debt Service	10,429,800	-	10,429,800	11,469,894	1,040,094	1,040,094	110.0%	
<b>Total Restricted</b>	<b>60,544,835</b>	<b>-</b>	<b>60,544,835</b>	<b>75,625,730</b>	<b>15,080,895</b>	<b>15,080,895</b>	<b>124.9%</b>	
<b>Total Revenue</b>	<b>\$ 221,339,415</b>	<b>\$ 3,572,982</b>	<b>\$ 224,912,397</b>	<b>\$ 248,613,530</b>	<b>\$ 27,274,115</b>	<b>\$ 23,701,132</b>	<b>110.5%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 74,630,704	\$ 1,082,490	\$ 75,713,194	\$ 80,550,869	\$ 5,920,165	\$ 4,837,675	106.4%	
Fringe Benefits	31,989,189	1,203,272	33,192,461	33,301,646	1,312,457	109,185	100.3%	
<b>Total Salaries and Fringe Benefits</b>	<b>106,619,893</b>	<b>2,285,762</b>	<b>108,905,655</b>	<b>113,852,514</b>	<b>7,232,621</b>	<b>4,946,859</b>	<b>104.5%</b>	
Supplies and Expenses	37,844,390	635,749	38,480,139	40,262,205	2,417,814	1,782,065	104.6%	
Capital	2,780,530	15,607	2,796,137	2,371,151	(409,379)	(424,985)	84.8%	
Financial Aid	54,300,560	635,865	54,936,425	58,422,607	4,122,047	3,486,183	106.3%	
Other (Debt Service/Transfer Out to DOA)	25,468,658	-	25,468,658	32,236,460	6,767,802	6,767,802	126.6%	
<b>Total Expenses</b>	<b>\$ 227,014,031</b>	<b>\$ 3,572,982</b>	<b>\$ 230,587,014</b>	<b>\$ 247,144,937</b>	<b>\$ 20,130,906</b>	<b>\$ 16,557,924</b>	<b>107.2%</b>	
<b>Revenue less Expense **</b>	<b>\$ (5,674,616)</b>	<b>\$ -</b>	<b>\$ (5,674,616)</b>	<b>\$ 1,468,593</b>	<b>\$ 7,143,209</b>	<b>\$ 7,143,209</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Stout**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 30,816,780	\$ 1,379,098	\$ 32,195,878	\$ 32,195,878	\$ 1,379,098	-	100.0%	
Tuition and Fees	53,694,016	10,640	53,704,656	58,925,453	5,231,437	5,220,797	109.7%	
GPR/Tuition and Fees	\$ 84,510,796	\$ 1,389,738	\$ 85,900,534	\$ 91,121,331	\$ 6,610,535	5,220,797	106.1%	
GPR: Miscellaneous	95,967	298,201	394,168	324,189	228,222	(69,980)	82.2%	
Auxiliary Enterprises	41,133,357	53,263	41,186,620	45,164,867	4,031,510	3,978,248	109.7%	
General Operations	14,773,181	1,276,060	16,049,241	17,499,139	2,725,958	1,449,898	109.0%	
Other Unrestricted Program Revenue	162,450	82,334	244,784	275,249	112,799	30,465	112.4%	
Federal Indirect Cost Reimbursement	288,336	100,638	388,974	426,518	138,182	37,544	109.7%	
<b>Total Unrestricted</b>	<b>140,964,087</b>	<b>3,200,234</b>	<b>144,164,321</b>	<b>154,811,293</b>	<b>13,847,206</b>	<b>10,646,972</b>	<b>107.4%</b>	
Gifts	4,123,892	513,445	4,637,337	4,839,923	716,031	202,586	104.4%	
Nonfederal Grants and Contracts	695,423	443,312	1,138,735	416,436	(278,987)	(722,299)	36.6%	
Gifts and Nonfederal Grants and Contracts	4,819,315	956,757	5,776,072	5,256,359	437,044	(519,713)	91.0%	
Federal Grants and Contracts	3,991,000	2,252,343	6,243,343	3,452,879	(538,121)	(2,790,463)	55.3%	
Other Restricted Program Revenue	32,925,012	(56,709)	32,868,303	31,813,867	(1,111,145)	(1,054,436)	96.8%	
Trust Funds	-	-	-	61,775	61,775	61,775	-	
Other Appropriated Funds	-	15,115	15,115	12,392	12,392	(2,723)	82.0%	
GPR: Debt Service	9,040,300	-	9,040,300	9,565,264	524,964	524,964	105.8%	
<b>Total Restricted</b>	<b>50,775,627</b>	<b>3,167,506</b>	<b>53,943,133</b>	<b>50,162,537</b>	<b>(613,090)</b>	<b>(3,780,596)</b>	<b>93.0%</b>	
<b>Total Revenue</b>	<b>\$ 191,739,714</b>	<b>\$ 6,367,740</b>	<b>\$ 198,107,454</b>	<b>\$ 204,973,830</b>	<b>\$ 13,234,116</b>	<b>\$ 6,866,376</b>	<b>103.5%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 69,726,311	\$ 2,494,114	\$ 72,220,425	\$ 70,683,472	\$ 957,161	\$ (1,536,953)	97.9%	
Fringe Benefits	29,789,169	676,025	30,465,194	30,081,942	292,773	(383,252)	98.7%	
<b>Total Salaries and Fringe Benefits</b>	<b>99,515,480</b>	<b>3,170,139</b>	<b>102,685,619</b>	<b>100,765,414</b>	<b>1,249,934</b>	<b>(1,920,205)</b>	<b>98.1%</b>	
Supplies and Expenses	31,074,938	3,363,851	34,438,789	35,501,089	4,426,151	1,062,300	103.1%	
Capital	6,907,512	(1,722,926)	5,184,586	4,250,923	(2,656,589)	(933,664)	82.0%	
Financial Aid	42,369,697	(50,818)	42,318,879	41,145,172	(1,224,525)	(1,173,707)	97.2%	
Other (Debt Service/Transfer Out to DOA)	19,193,847	(452,196)	18,741,651	19,851,879	658,032	1,110,228	105.9%	
<b>Total Expenses</b>	<b>\$ 199,061,474</b>	<b>\$ 4,308,050</b>	<b>\$ 203,369,524</b>	<b>\$ 201,514,476</b>	<b>\$ 2,453,002</b>	<b>\$ (1,855,048)</b>	<b>99.1%</b>	
<b>Revenue less Expense **</b>	<b>\$ (7,321,760)</b>	<b>\$ 2,059,691</b>	<b>\$ (5,262,069)</b>	<b>\$ 3,459,354</b>	<b>\$ 10,781,114</b>	<b>\$ 8,721,424</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Superior**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 21,689,534	\$ 835,726	\$ 22,525,260	\$ 22,525,260	\$ 835,726	-	100.0%	
Tuition and Fees	16,101,468	-	16,101,468	22,995,427	6,893,959	6,893,959	142.8%	
GPR/Tuition and Fees	\$ 37,791,002	\$ 835,726	\$ 38,626,728	\$ 45,520,686	\$ 7,729,684	6,893,959	117.8%	
GPR: Miscellaneous	43,092	6,454	49,546	43,385	293	(6,162)	87.6%	
Auxiliary Enterprises	8,007,795	-	8,007,795	8,210,860	203,065	203,065	102.5%	
General Operations	1,267,000	-	1,267,000	1,849,355	582,355	582,355	146.0%	
Other Unrestricted Program Revenue	107,599	-	107,599	109,009	1,410	1,410	101.3%	
Federal Indirect Cost Reimbursement	600,000	-	600,000	416,761	(183,239)	(183,239)	69.5%	
<b>Total Unrestricted</b>	<b>47,816,488</b>	<b>842,180</b>	<b>48,658,668</b>	<b>56,150,056</b>	<b>8,333,568</b>	<b>7,491,388</b>	<b>115.4%</b>	
Gifts	1,585,000	-	1,585,000	2,525,707	940,707	940,707	159.4%	
Nonfederal Grants and Contracts	360,000	-	360,000	288,893	(71,107)	(71,107)	80.2%	
Gifts and Nonfederal Grants and Contracts	1,945,000	-	1,945,000	2,814,601	869,601	869,601	144.7%	
Federal Grants and Contracts	4,900,000	-	4,900,000	9,161,833	4,261,833	4,261,833	187.0%	
Other Restricted Program Revenue	14,844,385	-	14,844,385	18,284,774	3,440,389	3,440,389	123.2%	
Trust Funds	-	-	-	365,526	365,526	365,526	-	
Other Appropriated Funds	-	17,722	17,722	21,433	21,433	3,711	120.9%	
GPR: Debt Service	4,156,500	-	4,156,500	4,420,044	263,544	263,544	106.3%	
<b>Total Restricted</b>	<b>25,845,885</b>	<b>17,722</b>	<b>25,863,607</b>	<b>35,068,212</b>	<b>9,222,327</b>	<b>9,204,605</b>	<b>135.6%</b>	
<b>Total Revenue</b>	<b>\$ 73,662,373</b>	<b>\$ 859,902</b>	<b>\$ 74,522,275</b>	<b>\$ 91,218,268</b>	<b>\$ 17,555,895</b>	<b>\$ 16,695,993</b>	<b>122.4%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 26,531,608	\$ 249	\$ 26,531,857	\$ 28,130,482	\$ 1,598,874	\$ 1,598,625	106.0%	
Fringe Benefits	11,553,295	(385,650)	11,167,645	11,074,871	(478,424)	(92,774)	99.2%	
<b>Total Salaries and Fringe Benefits</b>	<b>38,084,903</b>	<b>(385,401)</b>	<b>37,699,502</b>	<b>39,205,353</b>	<b>1,120,450</b>	<b>1,505,851</b>	<b>104.0%</b>	
Supplies and Expenses	13,115,159	1,060,074	14,175,233	23,697,787	10,582,628	9,522,554	167.2%	
Capital	420,600	-	420,600	1,132,885	712,285	712,285	269.3%	
Financial Aid	16,402,811	185,229	16,588,040	20,038,475	3,635,664	3,450,435	120.8%	
Other (Debt Service/Transfer Out to DOA)	7,014,604	-	7,014,604	7,121,674	107,070	107,070	101.5%	
<b>Total Expenses</b>	<b>\$ 75,038,077</b>	<b>\$ 859,902</b>	<b>\$ 75,897,979</b>	<b>\$ 91,196,174</b>	<b>\$ 16,158,097</b>	<b>\$ 15,298,195</b>	<b>120.2%</b>	
<b>Revenue less Expense **</b>	<b>\$ (1,375,704)</b>	<b>\$ -</b>	<b>\$ (1,375,704)</b>	<b>\$ 22,094</b>	<b>\$ 1,397,798</b>	<b>\$ 1,397,798</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

**UW-Whitewater**  
**Fiscal Year 2024 - thru June 2024**

	Board Approved		Budget		Board Approved to Actual		Revised Budget to Actual	
	Budget	Adjustments *	Revised Budget	Actual	Variance	Variance	% of Revised Budget	
<b>Revenue</b>								
GPR: General Program Operations	\$ 34,986,127	\$ 2,998,854	\$ 37,984,981	\$ 37,984,980	\$ 2,998,853	(0)	100.0%	
Tuition and Fees	88,508,499	-	88,508,499	96,136,200	7,627,701	7,627,701	108.6%	
GPR/Tuition and Fees	\$ 123,494,626	\$ 2,998,854	\$ 126,493,480	\$ 134,121,180	\$ 10,626,554	7,627,700	106.0%	
GPR: Miscellaneous	212,309	93,220	305,529	282,962	70,653	(22,567)	92.6%	
Auxiliary Enterprises	51,089,148	-	51,089,148	56,302,171	5,213,023	5,213,023	110.2%	
General Operations	11,727,016	-	11,727,016	12,520,828	793,812	793,812	106.8%	
Other Unrestricted Program Revenue	71,450	-	71,450	65,169	(6,281)	(6,281)	91.2%	
Federal Indirect Cost Reimbursement	406,148	-	406,148	434,893	28,745	28,745	107.1%	
<b>Total Unrestricted</b>	<b>187,000,697</b>	<b>3,092,074</b>	<b>190,092,771</b>	<b>203,727,203</b>	<b>16,726,506</b>	<b>13,634,432</b>	<b>107.2%</b>	
Gifts	4,104,890	-	4,104,890	4,359,889	254,999	254,999	106.2%	
Nonfederal Grants and Contracts	1,661,467	(618,020)	1,043,447	1,777,911	116,444	734,464	170.4%	
Gifts and Nonfederal Grants and Contracts	5,766,357	(618,020)	5,148,337	6,137,800	371,443	989,463	119.2%	
Federal Grants and Contracts	3,343,713	1,253,326	4,597,039	10,557,177	7,213,464	5,960,138	229.7%	
Other Restricted Program Revenue	55,107,304	-	55,107,304	56,520,267	1,412,963	1,412,963	102.6%	
Trust Funds	70,000	-	70,000	195,452	125,452	125,452	279.2%	
Other Appropriated Funds	-	124,494	124,494	129,494	129,494	5,000	104.0%	
GPR: Debt Service	10,360,300	-	10,360,300	9,227,793	(1,132,507)	(1,132,507)	89.1%	
<b>Total Restricted</b>	<b>74,647,674</b>	<b>759,800</b>	<b>75,407,474</b>	<b>82,767,983</b>	<b>8,120,309</b>	<b>7,360,509</b>	<b>109.8%</b>	
<b>Total Revenue</b>	<b>\$ 261,648,371</b>	<b>\$ 3,851,874</b>	<b>\$ 265,500,245</b>	<b>\$ 286,495,186</b>	<b>\$ 24,846,815</b>	<b>\$ 20,994,941</b>	<b>107.9%</b>	
<b>Expenses</b>								
Salaries and Fringe Benefits								
Salaries	\$ 100,157,982	\$ (2,346,136)	\$ 97,811,846	\$ 96,068,825	\$ (4,089,157)	\$ (1,743,021)	98.2%	
Fringe Benefits	35,842,886	(509,499)	35,333,387	35,125,144	(717,742)	(208,243)	99.4%	
<b>Total Salaries and Fringe Benefits</b>	<b>136,000,868</b>	<b>(2,855,635)</b>	<b>133,145,233</b>	<b>131,193,969</b>	<b>(4,806,899)</b>	<b>(1,951,264)</b>	<b>98.5%</b>	
Supplies and Expenses	45,959,994	4,372,588	50,332,583	50,618,972	4,658,978	286,389	100.6%	
Capital	1,758,354	(4,000)	1,754,354	2,249,415	491,061	495,061	128.2%	
Financial Aid	68,055,481	1,597,603	69,653,084	77,377,455	9,321,974	7,724,371	111.1%	
Other (Debt Service/Transfer Out to DOA)	23,195,315	-	23,195,315	19,946,292	(3,249,023)	(3,249,023)	86.0%	
<b>Total Expenses</b>	<b>\$ 274,970,012</b>	<b>\$ 3,110,556</b>	<b>\$ 278,080,568</b>	<b>\$ 281,386,103</b>	<b>\$ 6,416,091</b>	<b>\$ 3,305,535</b>	<b>101.2%</b>	
<b>Revenue less Expense **</b>	<b>\$ (13,321,641)</b>	<b>\$ 741,317</b>	<b>\$ (12,580,324)</b>	<b>\$ 5,109,082</b>	<b>\$ 18,430,724</b>	<b>\$ 17,689,406</b>		

\* Revised budget typically reflects amounts initially held within UW Administration but transferred to UW universities throughout the year (e.g., fringe supplements).

\*\* Revenue less expense amounts include one-time expenses and therefore, do not equate to structural deficits.

Thursday, August 22, 2024

**APPROVAL OF THE 2025-27 UNIVERSITIES OF WISCONSIN BIENNIAL  
OPERATING BUDGET AND FINANCIAL AID REQUEST**

**REQUESTED ACTION**

Adoption of Resolution K. Approval of the 2025-27 Biennial Budget and Financial Aid Request

**Resolution K.** That, upon the recommendation of the President of the Universities of Wisconsin, the Board of Regents approves the submission of:

- (1) the Board's 2025-27 Biennial Operating Budget request, totaling \$457,279,000 in ongoing funds and \$855,143,000 biennially in General Purpose Revenue (GPR) for key initiatives;
- (2) the Wisconsin Veterinary Diagnostic Lab's request for additional positions and equity salary adjustments totaling approximately \$785,800 in ongoing funds and \$1,571,600 biennially;
- (3) the Wisconsin Grant-UW request to the Higher Educational Aids Board for inclusion in its 2025-27 biennial budget request totaling \$13,500,000 in ongoing funds and \$27,500,000 biennially; and
- (4) statutorily required performance measures for 2023-25.

In addition, the Board of Regents delegates authority to the UW President to approve and submit a 0% and 5% biennial budget reduction plan, as required by 2015 WI Act 201, and standard budget adjustments for items such as fringe benefits should it be determined they are necessary.

**SUMMARY**

The UW System Board of Regents is required to submit a budget request to the Department of Administration (DOA) by September 15 of each even numbered year. The UW President provides the Regents, for their consideration, a recommended submission at the August meeting in the same even numbered year.

The 2025-27 biennial budget request includes General Purpose Revenue (GPR) to get the Universities of Wisconsin up to the middle of national public funding support for its four-year universities. The latest State Higher Education Executive Officers Association (SHEEO)

analysis of public higher education financing, reflecting both state support and tuition, shows that Wisconsin currently ranks 43<sup>rd</sup> out of 50 states in public funding to support its four-year universities. It is estimated that an ongoing \$457 million is needed to move Wisconsin up to the middle.

To reduce the reliance on tuition and remain committed to affordable higher education in the State of Wisconsin, this budget request, if enacted, would allow the Universities of Wisconsin to keep resident undergraduate tuition flat throughout for the 2025-26 and 2026-27 academic years. The majority of additional positions requested in this budget are student-facing, in support of the Universities of Wisconsin's strategic plan.

The request includes funding for standard budget adjustments and initiatives that support increasing affordability, preserving accessibility, developing talent, ensuring quality, and investing in innovation. The request also includes items for the Wisconsin Veterinary Diagnostic Laboratory (WVDL) which requires Board approval as it is administratively attached to UW-Madison. Lastly, the budget includes forwarding a request to the state's Higher Educational Aids Board (HEAB) to increase Wisconsin Grant funding to recognize federal legislation that will result in more students being eligible for the grant and to allow for a maximum award to increase up to approximately 50% of the average tuition and fees at a UW comprehensive university.

### **Presenter**

- Sean P. Nelson, Vice President for Finance and Administration

### **Related Policies**

- Chapter 16.42, Wis. Stats.
- Chapter 36, Wis. Stats.
- Chapter 230, Wis. Stats.
- Regent Policy Document 20-21, University Personnel Systems

### **ATTACHMENTS**

- A) The University of Wisconsin System, "2025-27 Universities of Wisconsin Biennial Operating Budget and Financial Aid Request, August 2024"





**2025-27**

**Biennial Operating  
Budget and Financial  
Aid Request**

Universities of Wisconsin  
August 2024

---

**2025-27 BIENNIAL OPERATING AND FINANCIAL AID BUDGET REQUEST  
TABLE OF CONTENTS**

<b>Summary and Background</b>	<b>1.</b>
<b>Increasing Affordability Requests</b>	<b>7.</b>
<b>Preserving Accessibility Requests</b>	<b>9.</b>
<b>Developing Talent Requests</b>	<b>12.</b>
<b>Ensuring Quality Requests</b>	<b>15.</b>
<b>Investing in Innovation Requests</b>	<b>16.</b>
<b>Standard Budget Adjustments</b>	<b>18.</b>
<b>Wisconsin Veterinary Diagnostic Laboratory Requests</b>	<b>18.</b>
<b>Wisconsin Grant-UW Request</b>	<b>18.</b>
<b>Performance Measures</b>	<b>19.</b>

## **SUMMARY AND BACKGROUND**

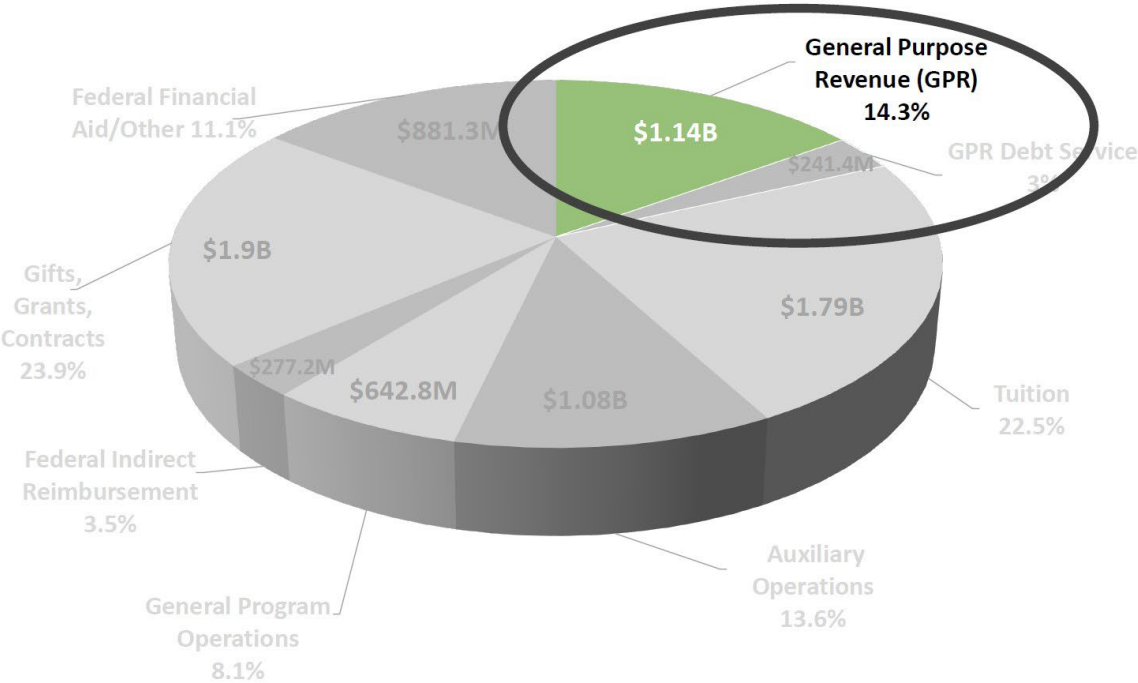
The UW Board of Regents is required to submit a budget request to the Department of Administration (DOA) by September 15 of each even numbered year. The UW President provides the Regents, for their consideration, a recommended submission at the August meeting in the same even numbered year.

The 2025-27 biennial budget request includes General Purpose Revenue (GPR) to get the Universities of Wisconsin up to the middle of national public funding support for its four-year universities. The latest State Higher Education Executive Officers Association (SHEEO) analysis of public higher education financing, reflecting both state support and tuition, shows that Wisconsin currently ranks 43<sup>rd</sup> out of 50 states in public funding to support its four-year universities. It is estimated that an ongoing \$457 million is needed to move Wisconsin up to the middle.

The request includes funding for standard budget adjustments and initiatives that support increasing affordability, preserving accessibility, developing talent, ensuring quality, and investing in innovation. The request also includes items for the Wisconsin Veterinary Diagnostic Laboratory (WVDL) which requires Board approval as it is administratively attached to UW-Madison. Lastly, the budget includes forwarding a request to the state's Higher Educational Aids Board (HEAB) to increase Wisconsin Grant funding to recognize federal legislation that will result in more students being eligible for the grant and to allow for a maximum award to increase up to approximately 50% of the average tuition and fees at a UW comprehensive university. A summary of the request is on the next page.

BIENNIAL BUDGET REQUEST SUMMARY			
Strategic Goal	FY26	FY27 Ongoing Request	Biennial Request
Increasing Affordability	\$ 56,360,000	\$ 72,610,000	\$ 128,970,000
Preserving Accessibility	\$ 113,100,000	\$ 156,870,000	\$ 269,970,000
Developing Talent	\$ 41,819,000	\$ 41,819,000	\$ 83,638,000
Ensuring Quality	\$ 84,000,000	\$ 119,280,000	\$ 203,280,000
Investing in Innovation	\$ 52,585,000	\$ 16,700,000	\$ 69,285,000
Standard Budget Adjustments	\$ 50,000,000	\$ 50,000,000	\$ 100,000,000
UW Request	\$ 397,864,000	\$ 457,279,000	\$ 855,143,000
Wisconsin Veterinary Diagnostic Laboratory	\$ 785,800	\$ 785,800	\$ 1,571,600
Wisconsin Grant Request	\$ 13,500,000	\$ 13,500,000	\$ 27,000,000
UW Request Incl. Wisconsin Grant	\$ 412,149,800	\$ 471,564,800	\$ 883,714,600

The chart below details the 2024-25 all funds annual expenditure budget of \$7.95 billion. The 2025-27 biennial budget request is focused on General Purpose Revenue (GPR) excluding debt service, which represents 14.3% of the UW's overall budget.



The chart below further distills the 2024-25 budget to reflect the net funding available for educating students in the 2024-25 annual budget.

**UNIVERSITIES OF WISCONSIN**  
2024-25 Ongoing Annual Base Budget

**Total Budget: \$7.95 Billion**

Less Federal Funds: (\$1.89 Billion)

Federal Funds include: Pell Grants, Student Loans, Federal Indirect Reimbursement

Less Gifts, Grants & Contracts: (\$1.02 Billion)

Gifts, Grants, and Contracts include: Restricted Gifts, Research Contracts, Grants to Entities

Less Auxiliaries, Other Receipts: (\$1.87 Billion)

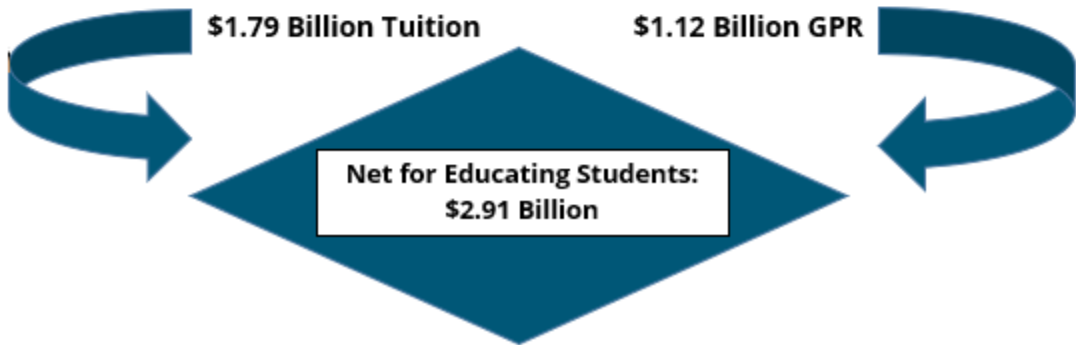
Auxiliaries and Other Receipts include: Housing, Food Service, Parking, Athletics, and Program Revenue Debt Service

**GPR/Tuition Total: \$3.17 Billion**

**Tuition: \$1.79 Billion      GPR: \$1.38 Billion**

Less Restricted GPR (\$0.26 Billion)  
\$1.12 Billion

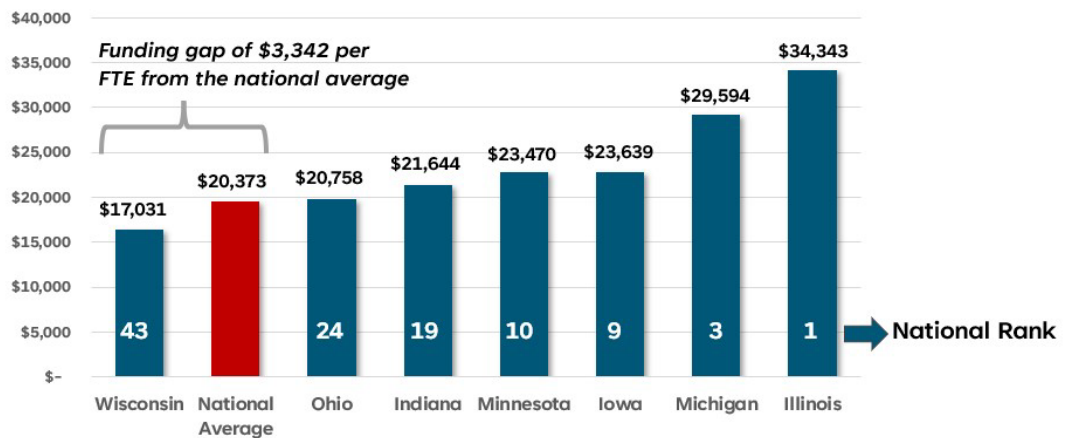
Restricted GPR such as Debt Service, State Lab of Hygiene and Vet Diagnostic Lab



Relatively low tuition and state support continues to constrain current service and strategic investments, especially given the impact of inflation over the last two years and beyond. While tuition has increased in the last two fiscal years, the cumulative effects of the tuition freeze from FY13 through FY23 have had long-term implications, including a reduction in unrestricted fund balances at the comprehensive universities.

As mentioned previously, the latest SHEEO analysis of public higher education financing, reflecting both state support and tuition, shows that Wisconsin currently ranks 43<sup>rd</sup> out of the 50 states in public funding to support 4-year universities. The UW received tuition and GPR of \$17,031 per student while the national average was \$20,373. All the Midwest states rank in the top 25, and our neighboring states rank in the top 10.

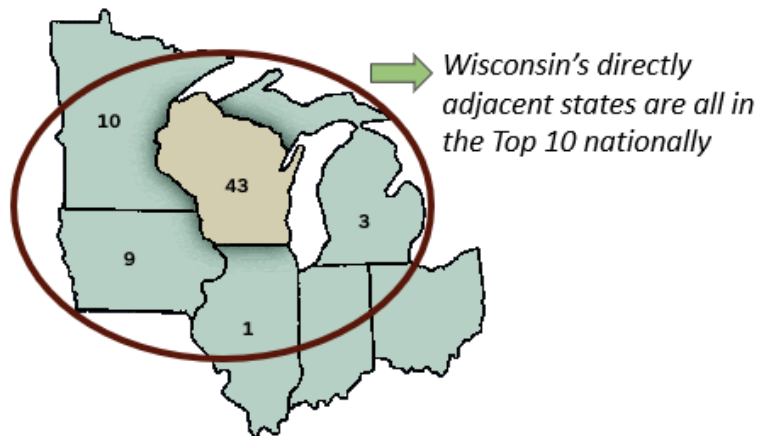
## TOTAL TUITION AND STATE SUPPORT PER FTE



Source: "Educational Revenue" metric in SHEF Report, State Higher Education Executive Officers (SHEEO)

5

## TUITION AND STATE SUPPORT IN MIDWEST



This \$457 million ongoing biennial budget request seeks to move Wisconsin to the national average of public support for four-year universities and includes initiatives in five strategic areas along with an estimate for standard budget adjustments. Each of these areas are aligned with the 2023-28 strategic plan approved by the Board of Regents in December of 2022. A summary of each of the strategic areas is set forth below with additional detail starting on page 7.

- **Increasing Affordability:** To close the opportunity gap between historically underserved students and other students, including first-generation students and those from lower socio-economic populations, these initiatives invest in affordability, which will increase enrollments, and provide critical support services to those students. Additionally, it will provide the Universities with funding to fully support the needs of our veterans, their children and spouses and the state-mandated tuition remissions.
- **Preserving Accessibility:** The Universities of Wisconsin have set a goal to graduate 41,000 students annually by 2028, a 10% increase, to meet workforce demands and develop talent. Given the changing demographics and low participation rates in Wisconsin, these initiatives are student-focused and provide resources needed to support the general operations of the universities and allow for the expansion of recruitment and enrollment while also identifying and supporting new enrollment pipelines for non-traditional students.
- **Developing Talent:** To retain students and support their learning and success, we need to invest in essential student services. These services and experiences are designed to provide holistic support, create a sense of belonging, meet students where they are, and help them achieve their personal, academic and career goals, including career readiness and the opportunity to experience High Impact Practices while working with the employer community to support their workforce needs.

- **Ensuring Quality:** A goal within the strategic plan is to recruit, develop, and retain a diverse, high-quality, faculty and staff. Pay plan increases have not kept up with the rate of inflation over the previous several biennia and faculty and staff salaries at the UWs have fallen behind relative to peers. These requests provide for an investment in compensation to ensure top-quality faculty and staff at the Universities of Wisconsin.
- **Investing in Innovation:** Our universities serve as centers for innovation in every part of the state. Artificial intelligence (AI) technologies, whether in manufacturing, health care, education, or other industries, are expected to accelerate the fourth industrial revolution. According to a recent MIT Technology Review report, talent, skills, and data are the main constraints to scaling AI technologies in the manufacturing sector. Consistent with the objectives listed in Governor Ever's Task Force on Workforce and Artificial Intelligence Advisory Action Plan, the Universities of Wisconsin propose investments in AI research, curricular development and pedagogical enhancements for improved teaching and learning, and faculty recruitment and retention in AI fields. All these efforts are intended to develop talent, educate UW faculty and staff, and engage in leading research to support Wisconsin's industries and workforce.
- **Standard Budget Adjustments:** This estimate includes items that will need to be requested to support current operating levels such as fringe benefit increases.

To reduce the reliance on tuition and remain committed to affordable higher education in the State of Wisconsin, this budget request, if enacted, would allow the Universities of Wisconsin to keep resident undergraduate tuition flat throughout for the 2025-26 and 2026-27 academic years. The majority of additional positions requested in this budget are student-facing, in support of the Universities of Wisconsin's strategic plan.

Additionally, the Board is being asked to approve funding requests for the Wisconsin Veterinary Diagnostic Laboratory and the Wisconsin Grant-UW request which will be forwarded to the Higher Educational Aids Board for inclusion in its 2025-27 biennial budget request.



# Increasing Affordability

## Strategic Plan Goals:

- We will increase access to higher education and improve rates of success for historically underserved students (S1)
- We will provide support for the universities to drive enrollment to meet the needs of the state and the knowledge economy (S8)

AFFORDABILITY			
Initiative	FY26	FY27 Ongoing Request	Biennial Request
Wisconsin Tuition Promise	\$ 11,860,000	\$ 28,110,000	\$ 39,970,000
Veterans Support	\$ 42,000,000	\$ 42,000,000	\$ 84,000,000
Fee Remission for Tribal Members	\$ 2,500,000	\$ 2,500,000	\$ 5,000,000
<b>Recommendation</b>	<b>\$ 56,360,000</b>	<b>\$ 72,610,000</b>	<b>\$ 128,970,000</b>

### Wisconsin Tuition Promise

**\$28.11M Ongoing**

The Wisconsin Tuition Promise will provide a program similar to UW-Madison’s Bucky’s Promise program to all UW universities. The program will cover tuition and segregated fees for incoming Wisconsin freshman and transfer students beginning in the fall of 2025 whose household’s adjusted gross income (AGI) is \$71,000 or less, the median AGI in Wisconsin. This is a “last dollar” program meaning the Tuition Promise dollars will be applied after all other scholarships and grants have been exhausted. Freshman will be eligible for four years and transfer student will be eligible for two years.

The total cost for a four-year cohort is estimated to be \$63 million (excluding UW-Madison), benefiting 5,000 students in the first two years.

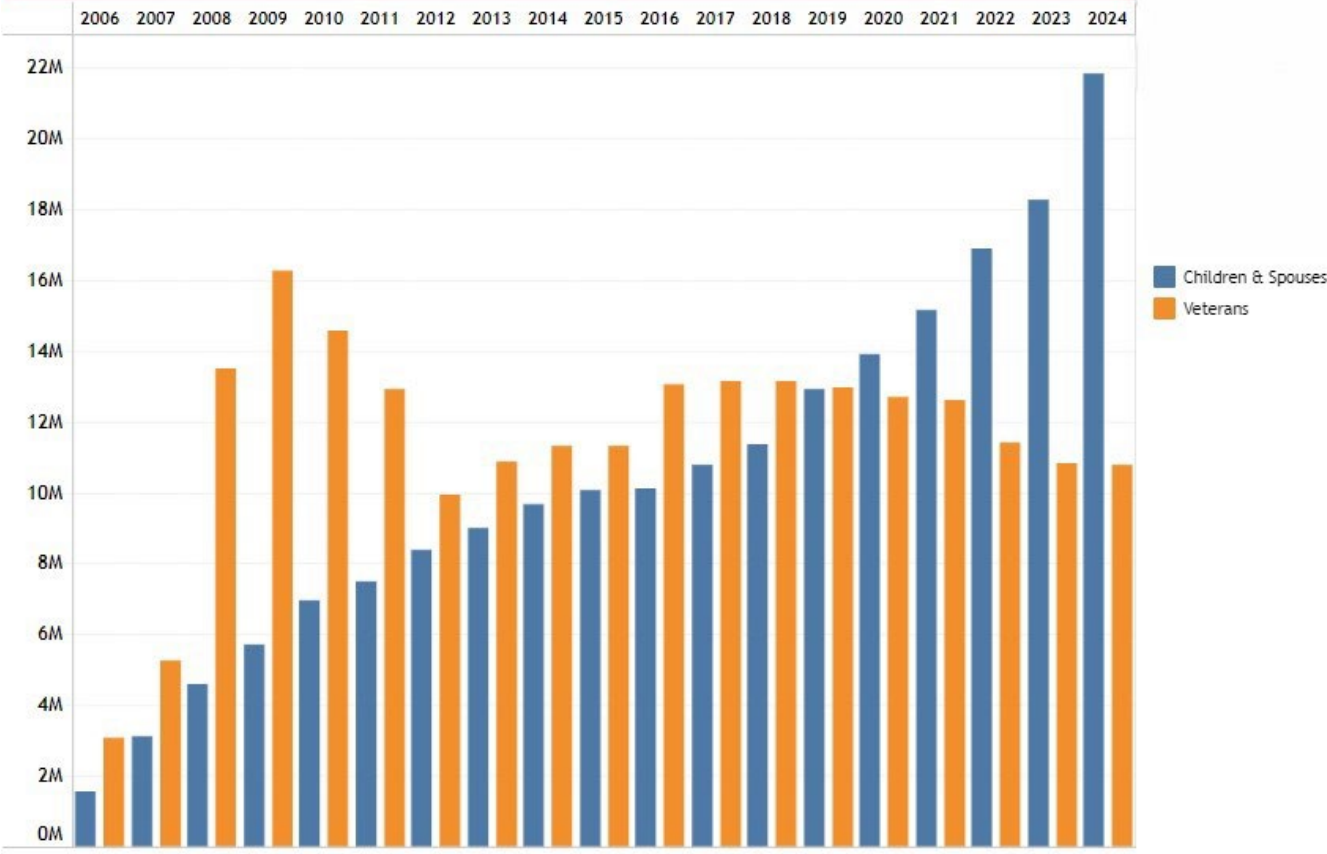
### Veterans Support

**\$42.0M Ongoing**

This request will provide funding to the universities for statutorily required tuition and fee remissions that are provided to veterans and their eligible family members and provide supporting networks for veterans facing unique challenges to achieve a degree.

In the fall of 2023, UW universities provided remissions to 3,795 students under these programs totaling more than \$50.0 million in remissions in 2023-24. Of that, federal funding covered \$12.3 million, and the state provided approximately \$5.4 million leaving the remaining \$32.3 million to be covered by the Universities of Wisconsin as noted in the graph below. It is estimated that these programs will continue to grow at 8% in each year of the 2025-27 biennium. This request will also provide enhanced wrap-around services (e.g., advising) to these students.

**UW Paid Funds Only, Veterans Compared to Children & Spouses**



**Tuition and Fee Remissions for Tribal Members**

**\$2.5M Ongoing**

This program will expand UW-Madison’s Tribal Education Promise to all the Universities of Wisconsin to fully fund tuition and segregated fees for enrolled members of a recognized tribal nation in Wisconsin.

# Preserving Accessibility

## Strategic Plan Goals:

- We will increase access to higher education and improve rates of success for historically underserved students (S1)
- We will champion student success across the higher education life cycle (S2)
- We will provide support for the universities to drive enrollment to meet the needs of the state and the knowledge economy (S8)

ACCESSIBILITY			
Initiative	FY26	FY27 Ongoing Request	Biennial Request
Operational Budget Increase	\$ 64,000,000	\$ 92,000,000	\$ 156,000,000
Tuition Share of Pay Plan	\$ 24,000,000	\$ 39,120,000	\$ 63,120,000
Tuition Share of Merit/Market Adj.	\$ 12,000,000	\$ 12,000,000	\$ 24,000,000
<b>Accessibility</b>			
Dual Enrollment	\$ 7,250,000	\$ 7,250,000	\$ 14,500,000
Expanding Recruitment and Outreach	\$ 3,000,000	\$ 3,000,000	\$ 6,000,000
Direct Admit Wisconsin	\$ 1,500,000	\$ 1,500,000	\$ 3,000,000
Welcome Back Wisconsin	\$ 600,000	\$ 1,250,000	\$ 1,850,000
Improving Transfer Pathways	\$ 750,000	\$ 750,000	\$ 1,500,000
<b>Recommendation</b>	<b>\$ 113,100,000</b>	<b>\$ 156,870,000</b>	<b>\$ 269,970,000</b>

### Operational Budget Increase

**\$92.0M Ongoing**

This request will provide a 6.4% increase in 2025-26 and an additional 2.8% increase in 2026-27 in support of a general operating budget increase for the Universities of Wisconsin. Inflation increased by 6.3% in fiscal year 2022-23 and 3.3% in 2023-24. This increase acknowledges the inflationary costs of goods and services, backfills the financial exposure for the universities’ share of pay plan from 2018-19 to 2021-22, and provides ongoing support for the 13 universities’ general operations.

### Tuition Share of a 5% Pay Plan in 2025-26 and 3% in 2026-27

**\$39.12M Ongoing**

This request will provide the tuition share of a 5% increase in July 2025 and an additional 3% increase in July of 2026 for the faculty, academic staff, university staff, and limited appointments at the Universities of Wisconsin. The 5%/3% request helps maintain employees’ real wages, which have lagged inflationary increases to the consumer price index (CPI) by -6.12% over the past two biennium (as measured using the CPI rates published by the Wisconsin Employment Relations

Commission). The requested general wage adjustment is critical to maintaining employee's real wages.

### **Tuition Share of Merit and Market Adjustments**

**\$12.0M Ongoing**

This funding will be used to cover the tuition share of increases to retain high performing faculty and to meet market compensation demands for all employees, with a focus on supporting UW comprehensive universities and UW-Milwaukee, where average faculty and staff salaries are significantly below median peer salaries. Specifically, UW-Milwaukee's faculty salaries are 11% below the median and staff salaries are 17% behind relevant market data. For UW comprehensive universities, this disparity is even more significant, where faculty salaries are 16% below the median and staff salaries are 15% behind peer data. While this additional funding will not close the entire gap, it allows institutions to raise starting salaries to be more competitive and provides some funds for limited merit and market-based increases.

### **Dual Enrollment**

**\$7.25M Ongoing**

This funding will be provided to the universities to allow additional high school students in Wisconsin access to dual enrollment opportunities on their high school campus or at a UW campus and provide 12 support staff to develop additional capacity for the program. It is estimated this funding will expand the program to an additional 15,000 students.

### **Expanding Recruitment and Outreach**

**\$3.0M Ongoing**

To meet strategic plan goals of increasing participation rates, and ultimately the number of college graduates, this request will provide additional staff and marketing/outreach materials to the universities, which will increase the participation rate of Wisconsin students and provide recruitment support within the state and region, including travel to additional outreach locations. Additionally, five positions will be created to enhance enrollment reporting and research as well as website redesigns.

### **Direct Admit Wisconsin**

**\$1.5M Ongoing**

Wisconsin's participation rates measured by the number of high school students electing to attend college have generally declined since 2017. To help address the declining participation rates and increase access for Wisconsin high school graduates, Direct Admit Wisconsin will begin with the Class of 2025 at participating high schools and will proactively offer admission to qualifying high school students in between their junior and senior years of high school. Implementing, supporting, and expanding this program will require additional resources, including additional staff to provide ongoing support to high schools and participating universities, in addition to the cost of the technology, publications, and mailings.

### **Welcome Back Wisconsin**

**\$1.25M Ongoing**

According to the 2024 National Student Clearinghouse report on residents with some college and no degree, Wisconsin has over 760,000 residents who left college without earning a credential, over 620,000 of whom are still of working age. For adult learners, online learning is increasingly popular, but support is needed for these students to realize successful degree completion.

Welcome Back to Wisconsin funding will support evidence-based strategies to outreach and recruit this population and support their return to complete their degrees. This may also include waiving or reducing outstanding balances and provides resources to the universities to help support the returning students.

## **Improving Transfer Pathways**

**\$750K Ongoing**

According to data from the Universities of Wisconsin, over the past four years the UW campuses have seen an average of 10,000 students per year transferring into a UW university from numerous places, including international locations, out-of-state colleges, Wisconsin private colleges, Wisconsin Technical College System and other UW institutions. This request will be used to develop curricular pathways and technology to improve transfer planning and enrollment as well as supporting 15 advisors, student success professionals, recruiters, and enrollment specialists to support transfer student transition, learning, success, and outcomes.

# Developing Talent

**Strategic Plan Goals:**

- We will champion student success across the higher education life cycle (S2)
- We will champion the democratic principles of free expression, academic freedom, and civil discourse (S4)
- We will provide support for the universities to drive enrollment to meet the needs of the stat and the knowledge economy (S8)
- We will engage thoughtfully with the employer community to identify and address employer talent, support, and research needs (S9)

DEVELOPING TALENT			
Initiative	FY26	FY27 Ongoing Request	Biennial Request
<b>Student Success</b>			
Mental Health and Well-being	\$ 11,000,000	\$ 11,000,000	\$ 22,000,000
Student Retention	\$ 9,900,000	\$ 9,900,000	\$ 19,800,000
Career Readiness	\$ 5,750,000	\$ 5,750,000	\$ 11,500,000
High Impact Practices	\$ 1,700,000	\$ 1,700,000	\$ 3,400,000
Civil Dialogue Training	\$ 2,500,000	\$ 2,500,000	\$ 5,000,000
Prior Learning Assessments	\$ 719,000	\$ 719,000	\$ 1,438,000
<b>Teacher Loan Forgiveness</b>	\$ 5,250,000	\$ 5,250,000	\$ 10,500,000
<b>Continuing Education</b>	\$ 5,000,000	\$ 5,000,000	\$ 10,000,000
<b>Recommendation</b>	<b>\$ 41,819,000</b>	<b>\$ 41,819,000</b>	<b>\$ 83,638,000</b>

**Mental Health and Well-being**

**\$11.0M Ongoing**

Access to quality mental health and well-being services and resources has increasingly been recognized as critical to student success. This request will support the rising demand for mental health services including ongoing telehealth services, counseling, telepsychiatry, online well-being platform, and 24/7 peer and crisis support services, as well as increasing counseling staff to meet the recommended 1:1,000 counselor-to-student ratio which will add 57 counselors, 11 of which will provide direct support to student athletes.

**Student Retention**

**\$9.9M Ongoing**

Retention is a multi-faceted, high-touch endeavor that requires understanding student needs and providing holistic support and essential student services to meet those needs. Funding will provide additional support for gaps universities have identified in academic and career advising, student

basic needs support, supporting students with disabilities, transfer student support, and support for former foster youth.

This funding will provide 45 additional advisors to come closer to the recommended 1:250 ratio to provide holistic student advising and support services. It will also provide one position per campus to help connect students to basic needs resources both on and off campus, and an additional position per campus to support students who have aged out of the foster care system. Additionally, 15 student success professionals will be hired to support transfer students' success, and one position will be hired to assure compliance with the requirements of the Americans with Disabilities Act (ADA) new digital accessibility rules.

### **Career Readiness**

**\$5.75M Ongoing**

The 2023 Wisconsin Center for Manufacturing Partnership study cites 44% of companies seek more qualified workers, 64% see automation as important to their businesses, and 27% are planning to incorporate some form of Artificial Intelligence (AI) within the next five years. This funding will provide financial support to students who want to pursue experiential learning and career readiness opportunities that would otherwise be unpaid or not affordable. It will also support increased professional development for career services professionals and faculty and new technology to support career exploration and readiness skills development, and an additional position for each university to support students and alumni. Additionally, it will create a fund that faculty and staff can utilize to support initiatives that increase employer engagement that supports student career readiness.

### **High Impact Practices**

**\$1.7M Ongoing**

High Impact Practices (HIPs) are evidence-based teaching, learning and research practices that have been shown to have numerous educational benefits including increased student engagement, promotion of student success, development of transferrable skills such as critical thinking, creativity and problem-solving, skills application, enhanced communication skills and closing equity gaps in learning, thereby contributing to gains in retention and degree completion. UW campuses have been utilizing HIPs for decades to enhance student success.

### **Civil Dialogue Training**

**\$2.5M Ongoing**

This funding will be used to customize and continue offering the "Discussion Project" which is based on professional development for faculty. It will develop transferable skills such as critical thinking, creativity and problem solving, skills application and enhanced communication skills.

### **Prior Learning Assessments**

**\$719K Ongoing**

Findings from a systematic literature review of PLA studies ("Prior Learning Assessment in the US," Boden et al.) reveal that Prior Learning Assessment supports access and equity for college degree seekers, supports quicker and less expensive paths to graduation, and in some cases, improved outcomes. UW requests funding to review, improve, and expand PLA activities at all 13 UW campuses.

### **Teacher Loan Forgiveness**

**\$5.25M Ongoing**

This program aims to address the shortage of teachers throughout Wisconsin with a loan forgiveness program for prospective K-12 educators. The Teacher Loan Forgiveness program will require four years of teaching post-graduation to fulfill loan forgiveness for eligible tuition and fees.

**Continuing Education****\$5.0M Ongoing**

This funding will support ongoing relationships with regional employers and provide reskilling and upskilling opportunities for local employees. Continuing Education departments across all 13 UW campuses will expand training in employer-chosen, on-demand online seminars.



# Ensuring Quality

**Strategic Plan Goals:**

- We will promote excellence in teaching and prioritizing the recruitment, development, and retention of high-quality, diverse faculty and staff (S3)
- We will ensure our universities are financially and environmentally sustainable so that they are positioned to fulfill their strategic missions (S5)

ENSURING QUALITY			
Initiative	FY26	FY27 Ongoing Request	Biennial Request
GPR share of 5% and 3% Pay Plan	\$ 56,000,000	\$ 91,280,000	\$ 147,280,000
GPR Share of Merit and Market Adjustments	\$ 28,000,000	\$ 28,000,000	\$ 56,000,000
<b>Recommendation</b>	<b>\$ 84,000,000</b>	<b>\$ 119,280,000</b>	<b>\$ 203,280,000</b>

While the state provided a 4% pay plan increase in 2023-24 and a 2% increase in 2024-25, the Universities of Wisconsin salaries continue to lag their peers and the market, resulting in labor market challenges in recruiting and retaining staff.

Traditionally the State has funded 70% of the General Purpose Revenue (GPR)/Tuition pay plan costs with GPR, and tuition is expected to fund 30%. The tuition share of this request is included in the Accessibility section above.

**GPR Share of a 5% and 3% Pay Plan \$91.28M Ongoing**

This request will provide the GPR share of a 5% increase in July 2025 and an additional 3% increase in July of 2026 for the faculty, academic staff, university staff, and limited appointments at the Universities of Wisconsin. These increases are necessary for all staff to ensure wages begin to close the over 6% deficit when compared to inflationary increases over the past two biennia.

**GPR Share of Merit and Market Adjustments \$28.0M Ongoing**

This funding will be used to cover the GPR share of increases to retain high performing faculty and to meet market compensation demands for all employees, with a focus on supporting UW comprehensive universities and UW-Milwaukee, where average faculty and staff salaries are significantly below median peer salaries. Specifically, UW-Milwaukee’s faculty salaries are 11% below the median and staff salaries are 17% behind relevant market data. For UW comprehensive universities, this disparity is even more significant, where faculty salaries are 16% below the median and staff salaries are 15% behind peer data. While this additional funding will not close the entire gap, it allows institutions to raise starting salaries to be more competitive and provides some funds to provide limited merit and market-based increases.

# Investing in Innovation

## Strategic Plan Goals:

- We will promote excellence in teaching and prioritizing the recruitment, development, and retention of high-quality, diverse faculty and staff (S3)
- We will focus on being a global leader in research, scholarship, and creative activity, as well as a knowledge dissemination that benefits society (S6)
- We will foster a culture of innovation in support of advancing human knowledge and economic prosperity (S7)
- We will engage thoughtfully with the employer community to identify and address employer talent, support, and research needs (S9)

INNOVATION			
Initiative	FY26	FY27 Ongoing Request	Biennial Request
<b>Artificial Intelligence (AI)</b>			
Faculty Recruitment and Development	\$ 2,660,000	\$ 5,700,000	\$ 8,360,000
Curriculum and Classroom Applications	\$ 5,000,000	\$ 5,000,000	\$ 10,000,000
Online Collaborative Programs	\$ 1,300,000	\$ -	\$ 1,300,000
Research and Infrastructure	\$ 37,625,000	\$ -	\$ 37,625,000
<b>Freshwater Collaborative</b>	\$ 2,500,000	\$ 2,500,000	\$ 5,000,000
<b>Dairy Hub Innovation</b>	\$ 3,500,000	\$ 3,500,000	\$ 7,000,000
<b>Recommendation</b>	<b>\$ 52,585,000</b>	<b>\$ 16,700,000</b>	<b>\$ 69,285,000</b>

Artificial intelligence (AI) technologies, whether in manufacturing, health care, education, or other industries, are expected to accelerate the fourth industrial revolution. According to a recent MIT Technology Review report, talent, skills, and data are the main constraints to scaling AI technologies in the manufacturing sector.

Consistent with the objectives listed in Governor Ever’s Task Force on Workforce and Artificial Intelligence Advisory Action Plan, the Universities of Wisconsin proposes Investments in AI Research, Curricular Development and Pedagogical Enhancements for Improved Teaching and Learning, and Faculty Recruitment and Retention in AI Fields. All these efforts are intended to develop talent, educate UW faculty and staff, and engage in leading research to support Wisconsin’s industries and workforce.

### Faculty Recruitment and Development

**\$5.7M Ongoing**

This request will provide funding to hire seven artificial intelligence (AI) faculty members each year of the biennium in areas such as computer science, data sciences, mathematics and statistics,

engineering and robotics, machine learning, natural language processing, computer vision, and cognitive sciences, and provide them with startup funds.

### **Curriculum and Classroom Applications**

**\$5.0M Ongoing**

This funding will support foundational efforts to integrate AI in curricular development, teaching methods, and student learning as well as professional development. The project will include innovations in AI adaptive learning technologies that will involve convening disciplinary representatives to establish systemwide discipline specific AI learning goals.

### **Online Collaborative Programs**

**\$1.3M One-time**

This request will provide seed funding to develop online AI collaborative programs for the 13 Universities of Wisconsin to leverage both technology and faculty resources.

### **Research and Infrastructure**

**\$37.625M One-time**

As AI continues to expand into all sectors of the academy, universities will need to be positioned to embrace its possibilities. Investments in AI infrastructure and access to private resources (e.g., servers, research facilities) will be needed. This request will provide one-time research seed funding to all the universities.

### **Freshwater Collaborative**

**\$2.5M Ongoing**

The Great Lakes contain 21% of the world's surface water by volume. Protecting clean water resources through research and training is the mission of the Freshwater collaborative, which includes all 13 Universities of Wisconsin campuses and engages government agencies, businesses, nonprofits, and community members. Ongoing funding supports these efforts to benefit Wisconsin and the Great Lakes region.

### **Dairy Innovation**

**\$3.5M Ongoing**

Wisconsin's dairy community generates approximately \$46 billion in economic activity for the state and almost 160,000 jobs. UW-Madison, UW-River Falls and UW-Platteville are engaged in more than 200 funded projects, have produced hundreds of presentations and research, and engaged more than 500 student researchers. This funding will keep Wisconsin's dairy community leading in innovation and a global leader.

## Standard Budget Adjustments

Standard Budget Adjustments are changes in funding related to the current biennium which allow for continued base level services into the upcoming biennium and are determined by the Department of Administration (DOA).

### Fringe Benefits and Lease Rental Payments

**Est. \$50.0M Ongoing**

The figures for calculating the fringe benefits and lease rental payments are not currently available, therefore the UW System Board of Regents are asked to delegate the authority to approve these requests and any others that may arise to the UW System President. Any variation from the estimated \$50 million will be reallocated to the operational budget request.

## Wisconsin Veterinary Diagnostic Laboratory (WVDL)

The Wisconsin Veterinary Diagnostic Lab is governed by its own board but is administratively attached to UW-Madison, therefore their biennial budget request must be approved and submitted by the Board of Regents.

### Additional Staffing

**\$568.5K Ongoing**

This funding will support six additional microbiologist positions and a sample receiving technician which will allow the Laboratory to better serve Wisconsin agricultural industries, the DNR, and Wisconsin hunters by improving capacity and the response to chronic wasting disease and high-consequence pathogen disease outbreak surge testing.

### Salary Equity Adjustments

**\$217.3K Ongoing**

The Wisconsin Veterinary Diagnostic Laboratory veterinary specialists and subject matter experts who have joint faculty appointments with UW-Madison have fallen behind their solely UW-Madison peers and recruiting for these positions is challenging given the high demand for specialists in the private and academic sectors.

## Wisconsin Grant-UW

The Wisconsin Grant-UW program is the state's largest need-based financial aid program for students attending the Universities of Wisconsin. The program is administered by the State's Higher Educational Aids Board (HEAB). In even-numbered years, a budget request for the Wisconsin Grant-UW is approved by the Board of Regents and then forwarded to HEAB for inclusion in that agency's biennial budget submission to the Department of Administration (DOA).

### Increase to the Wisconsin Grant-UW

**\$13.50M Ongoing**

This funding request is in response to the federal legislation that will result in more students being eligible for the Wisconsin Grant and to allow for a maximum award of up to \$4,500 to meet our goal of reaching 50% of the average tuition and fees at the UW comprehensive universities.

## 2025-27 Performance Measures

State budget instructions require all agencies to report on the performance measures identified for previous biennial budgets. The instructions say that the measures should relate to the agency's Chapter 20 programs. The Universities of Wisconsin reported on four measures in 2023-25 and will continue to report on those measures this biennium.

The four measures for which the UW System will report are:

1. Undergraduate Degrees (Conferred)
2. Participation Rate – the percentage of Wisconsin high school graduates who enroll immediately after graduation
3. Retention Rate – the rate at which new freshmen return to the same institution for the second year of study
4. Graduation Rate – rate at which new freshmen earn a bachelor's degree at the same institution within six years.

**DOA Required 2025-27 Biennial Budget Performance Measures  
for the Universities of Wisconsin**

**Measure 1: Undergraduate Degrees**  
**Goal: Meet or exceed current plans to increase undergraduate degrees conferred (Associate and Bachelor's).**

---

Year	Prior Plan*	Current Plan**	Actual
2005-06			24,103
2006-07			25,096
2007-08			25,465
2008-09			25,992
2009-10	26,317		26,297
2010-11	26,910		27,087
2011-12	27,254		28,189
2012-13	27,723		28,789
2013-14	28,041		28,971
2014-15	28,723		29,375
2015-16	28,976		29,192
2016-17	28,498		29,140
2017-18	28,424		29,181
2018-19	28,093		28,766
2019-20	28,258		29,687
2020-21	28,258		28,458
2021-22	28,258		27,668
2022-23	28,258		27,301
2023-24	28,258	28,009	
2024-25		28,694	
2025-26		29,380	

---

**Progress:** Undergraduate degrees have declined slightly due to declining freshmen and transfer enrollments, changing composition of student body and resource challenges. Although this performance measure focuses on undergraduate degrees, graduate education remains an important part of the UW System’s mission.

\*Two prior plans are represented in these data, University of Wisconsin System’s More Graduates initiative which was developed in 2009-10 and projections developed by institutions in accordance with Act 55 in Spring 2016.

\*\*The current plan reflects projections developed as a subset of targets associated with the UW System’s 2023-2028 Strategic Plan and institutional targets.

**Measure 2: Participation Rate**

**Goal:** Provide access by enrolling at least 32 percent of Wisconsin high school graduates immediately after graduation.

---

<b>Fall Term After HS Graduation</b>	<b>Plan</b>	<b>Actual</b>
2005	32.0%	32.6%
2006	32.0%	32.5%
2007	32.0%	33.1%
2008	32.0%	32.4%
2009	32.0%	31.9%
2010	32.0%	31.7%
2011	32.0%	31.9%
2012	32.0%	31.5%
2013	32.0%	32.1%
2014	32.0%	31.5%
2015	32.0%	31.7%
2016	32.0%	31.4%
2017	32.0%	31.8%
2018	32.0%	29.3%
2019	32.0%	28.6%
2020	32.0%	27.2%
2021	32.0%	27.1%
2022	32.0%	26.1%
2023	32.0%	27.0%
2024	32.0%	
2025	32.0%	

---

**Progress:** The University of Wisconsin System is committed to serving the residents of the State of Wisconsin, not only through the enrollment of high school graduates but also through the enrollment of transfer students and nontraditional-aged students.

**Measure 3: Retention Rate**

**Goal:** Meet or exceed current plans to increase the rate at which new freshmen return to the same institution for the second year of study.

---

Year (Entering Class)	Prior Plan*	Current Plan**	Actual
2006-07 (Fall 2005)			79.2%
2007-08 (Fall 2006)			79.2%
2008-09 (Fall 2007)			79.3%
2009-10 (Fall 2008)			80.2%
2010-11 (Fall 2009)	79.5%		80.8%
2011-12 (Fall 2010)	80.4%		79.6%
2012-13 (Fall 2011)	80.5%		80.2%
2013-14 (Fall 2012)	80.9%		80.7%
2014-15 (Fall 2013)	81.3%		82.1%
2015-16 (Fall 2014)	81.8%		81.6%
2016-17 (Fall 2015)	82.0%		81.7%
2017-18 (Fall 2016)	82.2%		81.4%
2018-19 (Fall 2017)	82.5%		81.8%
2019-20 (Fall 2018)	82.7%		82.1%
2020-21 (Fall 2019)	82.7%		82.7%
2021-22 (Fall 2020)	82.7%		80.9%
2021-22 (Fall 2021)	82.7%		81.3%
2022-23 (Fall 2022)		82.7%	82.6%
2023-24 (Fall 2023)		82.7%	
2024-25 (Fall 2024)		82.7%	

---

**Progress:** Students' persistence to the second year of study is an important, early indication of accomplishing the long-term graduation objective. The Universities of Wisconsin continue to seek improvements in persistence as a path toward improved graduation rates and the number of undergraduate degrees.

\*The prior plan reflected the University of Wisconsin System's More Graduates initiative developed in 2009-10 with the expectation that new and existing resources would support an increase in retention rates.

\*\*The current plan reflects projections developed as a subset of targets associated with the UW System's 2023-2028 Strategic Plan and institutional targets.



**Measure 4: Graduation Rate**

**Goal:** Meet or exceed current plans to increase the rate at which new freshmen earn a bachelor's degree at the same institution within six years.

---

<b>Year (Entering Class)</b>	<b>Prior Plan*</b>	<b>Current Plan**</b>	<b>Actual</b>
2006-07 (Fall 2000)			58.0%
2007-08 (Fall 2001)			58.7%
2008-09 (Fall 2002)			59.3%
2009-10 (Fall 2003)			59.7%
2010-11 (Fall 2004)	59.4%		60.4%
2011-12 (Fall 2005)	59.8%		59.3%
2012-13 (Fall 2006)	59.9%		59.6%
2013-14 (Fall 2007)	60.4%		59.3%
2014-15 (Fall 2008)	60.8%		60.7%
2015-16 (Fall 2009)	61.0%		60.7%
2016-17 (Fall 2010)	61.2%		60.9%
2017-18 (Fall 2011)	61.9%		62.5%
2018-19 (Fall 2012)	62.9%		63.6%
2019-20 (Fall 2013)	63.4%		65.4%
2020-21 (Fall 2014)	63.6%		65.1%
2021-22 (Fall 2015)	63.6%		65.8%
2022-23 (Fall 2015)	63.6%		65.5%
2023-24 (Fall 2016)		65.8%	66.9%
2024-25 (Fall 2017)		65.8%	
2025-26 (Fall 2018)		65.8%	

---

**Progress:** Six-year graduation rates are at an all-time high.

\*Two prior plans are represented in these data, University of Wisconsin System's More Graduates initiative which was developed in 2009-10 and projections developed by institutions in accordance with Act 55 in Spring 2016.

\*\*The current plan reflects projections developed as a subset of targets associated with the UW System's 2023-2028 Strategic Plan and institutional targets.

**SEMIANNUAL REPORT ON GIFTS, GRANTS AND CONTRACTS  
JULY 1, 2023 THROUGH JUNE 30, 2024**

**REQUESTED ACTION**

No action is required; this item is for information only.

**SUMMARY**

Attachment A provides a summary report on gifts, grants, and contracts awarded to the Universities of Wisconsin from July 1, 2023, through June 30, 2024. Total gifts, grants, and contracts for the period were approximately \$2.2 billion, a decrease of 2.1% (\$48.7 million) from fiscal year 2023.

Federal awards decreased \$154.7 million (11.0%). Most of this decrease relates to UW-Madison's federal research and public service awards, specifically with several large awards from the Department of Agriculture, National Institute of Health, and Centers for Disease Controls and Prevention that were reported in fiscal year 2023. UW-Milwaukee, UW-Stevens Point, UW-Superior, and UW Administration also reported notable decreases in research and public service awards for their institutions.

Non-federal awards increased \$106.0 million (12.0%). Changes in non-federal research and public service awards and Other awards were noted at several UW universities. These changes between years are primarily due to receipts from campus foundations for capital projects.

**Presenter**

- Sean Nelson, Vice President for Finance and Administration

**BACKGROUND**

Regent Policy Document 13-1, "General Contract Approval, Signature Authority, and Reporting", requires that a summary of extramural gifts, grants, and contracts be reported semiannually to UW Administration for presentation to the Business and Finance Committee of the Board of Regents. The report, included as Attachment A, is intended to

meet that requirement and reflects gifts, grants, and contracts awarded for the given reporting period. It does not include what has been expended or total amounts beyond the given reporting period.

The categories defined in this report are based on UW Administration program activity codes and are further defined in Attachment B.

### **Previous Action or Discussion**

The mid-year report was presented to the Business and Finance Committee in April 2024.

### **Related Policies**

- [Regent Policy Document 13-1](#), "General Contract Approval, Signature Authority, and Reporting"

### **ATTACHMENTS**

- A) Universities of Wisconsin Gifts, Grants and Contracts Awarded Fiscal Year 2023-24 (through June 2024)
- B) Report Category Descriptions and Examples

**UNIVERSITIES OF WISCONSIN  
GIFTS, GRANTS AND CONTRACTS AWARDED  
FISCAL YEAR 2023-2024 (through June)**

Institution	TOTAL AWARDS - ALL CATEGORIES								
	Total Fiscal Year to Date			Federal Fiscal Year to Date			Non Federal Fiscal Year to Date		
	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)
<b>Total</b>	<b>2,243,172,772</b>	<b>2,291,899,281</b>	<b>(48,726,510)</b>	<b>1,254,624,888</b>	<b>1,409,326,611</b>	<b>(154,701,722)</b>	<b>988,547,883</b>	<b>882,572,671</b>	<b>105,975,212</b>
Madison	1,910,650,532	1,927,924,385	(17,273,853)	1,006,959,057	1,124,508,837	(117,549,780)	903,691,474	803,415,547	100,275,927
Milwaukee	93,787,128	80,587,671	13,199,457	69,702,419	56,007,372	13,695,047	24,084,709	24,580,299	(495,590)
Eau Claire	29,437,302	19,577,770	9,859,532	24,627,381	13,903,559	10,723,823	4,809,921	5,674,211	(864,290)
Green Bay	28,062,307	25,595,756	2,466,551	19,262,264	16,221,739	3,040,525	8,800,043	9,374,017	(573,975)
La Crosse	12,921,037	18,482,183	(5,561,146)	7,496,094	14,007,179	(6,511,085)	5,424,943	4,475,003	949,940
Oshkosh	20,495,945	29,724,828	(9,228,884)	19,015,458	27,466,607	(8,451,149)	1,480,487	2,258,221	(777,734)
Parkside	14,007,521	14,080,225	(72,703)	11,980,346	12,155,944	(175,598)	2,027,176	1,924,281	102,895
Platteville	14,439,133	15,790,779	(1,351,646)	9,277,356	11,754,525	(2,477,169)	5,161,777	4,036,254	1,125,523
River Falls	9,933,351	12,244,166	(2,310,815)	6,986,404	7,910,295	(923,891)	2,946,947	4,333,871	(1,386,924)
Stevens Point	30,882,151	34,151,021	(3,268,870)	20,856,958	29,043,720	(8,186,761)	10,025,193	5,107,302	4,917,891
Stout	16,515,751	22,798,051	(6,282,300)	12,007,885	18,611,564	(6,603,679)	4,507,866	4,186,487	321,379
Superior	15,623,474	25,586,557	(9,963,084)	13,673,406	23,130,173	(9,456,768)	1,950,068	2,456,384	(506,316)
Whitewater	30,754,457	28,670,860	2,083,597	25,152,616	22,397,374	2,755,242	5,601,841	6,273,486	(671,646)
System Administration	15,662,684	36,685,029	(21,022,345)	7,627,243	32,207,722	(24,580,479)	8,035,441	4,477,308	3,558,134

RESEARCH & PUBLIC SERVICE									
Institution	Total Fiscal Year to Date			Federal Fiscal Year to Date			Non Federal Fiscal Year to Date		
	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)
<b>Total</b>	<b>1,620,051,856</b>	<b>1,749,039,716</b>	<b>(128,987,860)</b>	<b>994,158,575</b>	<b>1,150,015,126</b>	<b>(155,856,551)</b>	<b>625,893,281</b>	<b>599,024,591</b>	<b>26,868,690</b>
Madison	1,509,200,865	1,618,467,469	(109,266,604)	917,571,973	1,049,911,057	(132,339,084)	591,628,892	568,556,412	23,072,480
Milwaukee	42,693,119	48,595,588	(5,902,469)	29,845,421	34,923,415	(5,077,994)	12,847,699	13,672,173	(824,475)
Eau Claire	2,876,374	3,059,524	(183,149)	2,063,538	2,114,138	(50,600)	812,836	945,386	(132,550)
Green Bay	9,123,037	6,174,899	2,948,139	5,423,929	4,128,033	1,295,896	3,699,108	2,046,866	1,652,242
La Crosse	2,734,354	1,184,828	1,549,526	2,012,014	597,578	1,414,436	722,340	587,249	135,091
Oshkosh	5,638,114	5,420,240	217,874	4,710,568	3,684,515	1,026,053	927,546	1,735,725	(808,179)
Parkside	773,714	458,268	315,446	469,900	434,595	35,305	303,814	23,673	280,141
Platteville	1,999,474	2,782,722	(783,248)	1,087,073	2,310,987	(1,223,914)	912,401	471,735	440,666
River Falls	948,811	2,495,064	(1,546,253)	783,440	1,879,169	(1,095,729)	165,371	615,895	(450,524)
Stevens Point	11,514,598	14,938,935	(3,424,337)	7,028,233	11,802,675	(4,774,442)	4,486,365	3,136,260	1,350,104
Stout	2,107,998	2,107,135	863	1,679,028	1,262,034	416,994	428,970	845,101	(416,131)
Superior	3,656,200	15,925,011	(12,268,810)	3,248,903	15,354,270	(12,105,367)	407,297	570,740	(163,443)
Whitewater	11,478,491	9,268,821	2,209,671	10,607,312	7,737,878	2,869,434	871,179	1,530,942	(659,763)
System Administration	15,306,706	18,161,214	(2,854,508)	7,627,243	13,874,781	(6,247,538)	7,679,463	4,286,433	3,393,030

INSTRUCTION									
Institution	Total Fiscal Year to Date			Federal Fiscal Year to Date			Non Federal Fiscal Year to Date		
	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)
<b>Total</b>	<b>81,108,437</b>	<b>101,102,959</b>	<b>(19,994,522)</b>	<b>42,020,284</b>	<b>60,398,301</b>	<b>(18,378,018)</b>	<b>39,088,153</b>	<b>40,720,362</b>	<b>(1,632,209)</b>
Madison	49,655,220	58,931,479	(9,276,259)	23,988,249	34,513,371	(10,525,121)	25,666,970	24,418,108	1,248,862
Milwaukee	12,479,236	15,522,038	(3,042,802)	3,042,312	4,767,598	(1,725,286)	9,436,924	10,754,440	(1,317,516)
Eau Claire	12,975,566	4,185,528	8,790,038	10,880,626	1,103,212	9,777,414	2,094,940	3,082,316	(987,376)
Green Bay	1,127,819	1,675,074	(547,254)	920,628	473,352	447,276	207,191	1,201,722	(994,530)
La Crosse	421,357	438,719	(17,362)	405,532	425,940	(20,408)	15,825	12,779	3,046
Oshkosh	2,183,607	18,079,408	(15,895,801)	2,183,607	18,075,008	(15,891,401)	0	4,400	(4,400)
Parkside	675,488	1,266,662	(591,173)	420,998	924,237	(503,239)	254,490	342,425	(87,934)
Platteville	148,079	133,389	14,690	15,548	0	15,548	132,531	133,389	(858)
River Falls	0	68,429	(68,429)	0	0	0	0	68,429	(68,429)
Stevens Point	973,194	371,323	601,871	12,250	26,360	(14,110)	960,945	344,963	615,981
Stout	350,508	294,946	55,561	124,749	64,474	60,275	225,759	230,472	(4,714)
Superior	16,389	0	16,389	0	0	0	16,389	15,704	684
Whitewater	101,974	135,964	(33,989)	25,785	24,750	1,035	76,189	111,214	(35,024)
System Administration	0	0	0	0	0	0	0	0	0

Institution	STUDENT AID								
	Total			Federal			Non Federal		
	Fiscal Year to Date			Fiscal Year to Date			Fiscal Year to Date		
	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)
<b>Total</b>	<b>249,623,280</b>	<b>221,637,283</b>	<b>27,985,997</b>	<b>197,258,003</b>	<b>170,890,968</b>	<b>26,367,034</b>	<b>52,365,278</b>	<b>50,746,315</b>	<b>1,618,963</b>
Madison	88,142,227	72,828,631	15,313,596	49,977,369	35,814,383	14,162,986	38,164,858	37,014,248	1,150,610
Milwaukee	35,271,781	15,394,136	19,877,646	35,270,081	15,392,336	19,877,746	1,700	1,800	(100)
Eau Claire	12,938,700	11,874,010	1,064,691	11,683,217	10,686,209	997,008	1,255,483	1,187,801	67,682
Green Bay	14,195,556	12,584,810	1,610,746	12,785,747	11,492,946	1,292,801	1,409,809	1,091,864	317,945
La Crosse	5,189,231	12,589,484	(7,400,254)	4,529,813	11,256,502	(6,726,689)	659,417	1,332,983	(673,565)
Oshkosh	11,910,991	6,098,464	5,812,527	11,496,283	5,707,084	5,789,199	414,708	391,380	23,328
Parkside	11,570,778	11,422,583	148,195	10,680,324	10,338,506	341,818	890,454	1,084,077	(193,623)
Platteville	7,402,799	9,255,764	(1,852,965)	7,245,054	9,145,988	(1,900,934)	157,745	109,776	47,969
River Falls	6,760,691	6,288,340	472,351	5,648,147	5,175,669	472,478	1,112,544	1,112,671	(127)
Stevens Point	16,883,628	17,039,502	(155,874)	13,801,676	15,699,963	(1,898,287)	3,081,953	1,339,539	1,742,413
Stout	10,494,495	17,736,645	(7,242,150)	9,196,270	16,428,086	(7,231,816)	1,298,225	1,308,559	(10,334)
Superior	11,664,283	9,275,947	2,388,336	10,424,503	7,768,903	2,655,600	1,239,780	1,507,044	(267,264)
Whitewater	17,198,120	16,904,466	293,653	14,519,519	13,639,894	879,625	2,678,600	3,264,572	(585,972)
System Administration	0	2,344,500	(2,344,500)	0	2,344,500	(2,344,500)	0	0	0

Institution	ALL OTHERS*								
	Total			Federal			Non Federal		
	Fiscal Year to Date			Fiscal Year to Date			Fiscal Year to Date		
	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)	2023-24	2022-23	Increase (Decrease)
<b>Total</b>	<b>292,389,198</b>	<b>220,103,619</b>	<b>72,285,579</b>	<b>21,188,027</b>	<b>28,022,215</b>	<b>(6,834,188)</b>	<b>271,201,172</b>	<b>192,081,404</b>	<b>79,119,768</b>
Madison	263,652,220	177,696,806	85,955,414	15,421,466	4,270,027	11,151,439	248,230,754	173,426,779	74,803,975
Milwaukee	3,342,992	1,075,910	2,267,083	1,544,606	924,024	620,582	1,798,386	151,886	1,646,501
Eau Claire	646,661	458,708	187,953	0	0	0	646,661	458,708	187,953
Green Bay	3,615,894	5,160,973	(1,545,079)	131,960	127,408	4,552	3,483,934	5,033,565	(1,549,632)
La Crosse	4,576,095	4,269,151	306,944	548,735	1,727,159	(1,178,424)	4,027,360	2,541,992	1,485,369
Oshkosh	763,233	126,716	636,517	625,000	0	625,000	138,233	126,716	11,517
Parkside	987,541	932,712	54,829	409,124	458,606	(49,482)	578,417	474,106	104,311
Platteville	4,888,781	3,618,904	1,269,876	929,681	297,550	632,131	3,959,099	3,321,354	637,745
River Falls	2,223,849	3,392,333	(1,168,484)	554,818	855,457	(300,640)	1,669,032	2,536,876	(867,844)
Stevens Point	1,510,731	1,801,261	(290,530)	14,800	1,514,722	(1,499,922)	1,495,931	286,539	1,209,392
Stout	3,562,750	2,659,325	903,426	1,007,838	856,970	150,868	2,554,913	1,802,355	752,558
Superior	286,602	369,895	(83,294)	0	7,000	(7,000)	286,602	362,895	(76,294)
Whitewater	1,975,871	2,361,609	(385,738)	0	994,852	(994,852)	1,975,871	1,366,758	609,113
System Administration	355,978	16,179,315	(15,823,337)	0	15,988,441	(15,988,441)	355,978	190,874	165,104

\*Includes Libraries, Physical Plant and Miscellaneous categories

## Report Category Descriptions and Examples

Report Category	Program Name	Description	Examples
Research and Public Service	Sponsored Research	Activities specifically organized and separately budgeted to produce research outcomes, whether commissioned by an agency external to the institution or separately by an organizational unit within the institution.	Institutes and research centers Individual and project research
Research and Public Service	Public Service	Activities that are established primarily to provide noninstructional services beneficial to individuals and groups external to the institution. Examples include Community Services; Cooperative Extension Services; and Public Broadcasting Services.	Community services Cooperative extension Public broadcasting
Instruction	Instruction	Activities that are part of an institution's instructional program. Included are credit and noncredit courses for academic, vocational, and technical instruction; remedial and tutorial instruction; regular, special, and extension sessions; and community education. Includes departmental research and sponsored instruction.	General academic instruction Vocational/technical instruction Special session instruction Community education Preparatory/remedial instruction
Student Aid	Student Aid	All forms of financial aid assistance to students including scholarships, fellowships, and loans.	Scholarships Fellowships Loans Federal grants (i.e. Pell)
All Others: Split Libraries and Miscellaneous	Academic Support	Support services for the institution's primary missions: instruction, research, and public service. Examples include Libraries; Museums and Galleries; Educational Media Services; Academic Computing Services; Ancillary Support; Academic Administration; Academic Personnel Development; and Course and Curriculum Development.	Libraries Museums and galleries Educational media services Academic computing services Ancillary support Academic administration Academic personnel development Course and curriculum development
All Others: Miscellaneous	Student Services	Admissions and registrar offices and those activities whose primary purpose is to contribute to the student's emotional and physical well-being and to his or her intellectual, cultural, and social development outside the context of the formal instructional program. Examples include Student Services Administration; Social and Cultural Development; Counseling and Career Guidance; Financial Aid Administration; Student Admissions; Student Records; and Student Health Services.	Student services administration Social and cultural development Counseling and career guidance Financial aid administration Student admissions Student records Student health services
All Others: Miscellaneous	Institutional Support	1) Central executive-level activities concerned with management and long-range planning of the entire institution, such as the governing board, planning and programming, and legal services; 2) fiscal operations, including the investment office; 3) administrative data processing; 4) employee personnel and records; 5) logistical activities that provide procurement, storerooms, printing, and transportation services to the institution; 6) support services to faculty and staff that are not operated as auxiliary enterprises; and 7) activities concerned with community and alumni relations, including development and fundraising.	Executive management Fiscal operations General administrative and logistical services Administrative computing services Public relations/development
All Others: Physical Plant	Operation and Maintenance of Plant	Operation and maintenance of physical plants for all institutional activities, including auxiliary enterprises and independent operations	Physical plant administration Building maintenance Custodial services Utilities Landscape and grounds Major repairs and renovations
All Others: Miscellaneous	Auxiliary Enterprises	An entity that exists to furnish goods or services to students, faculty, or staff, and that charges a fee directly related to, although not necessarily equal to, the cost of the goods or services. This also includes Division I Intercollegiate Athletics.	Provides goods and services for a fee to students, faculty, and staff Intercollegiate athletics

**COST-BENEFIT ANALYSIS OF FOUNDATIONS AND ASSOCIATED  
AFFILIATED ORGANIZATIONS  
FISCAL YEAR 2022-23**

**REQUESTED ACTION**

No action is required; this item is for information only.

**SUMMARY**

The Universities of Wisconsin identified 77 foundations and associated affiliated organizations that supported their missions in fiscal year 2022-23. UW-Madison identified 44 foundations and associated affiliated organizations, the most of any UW university. Of the 77 reported entities, 29 organizations (37.7%) are primary fundraising foundations or alumni associations.

In fiscal year 2022-23, UW universities received a total of \$402.2 million from primary fundraising foundations. UW universities provided \$11.3 million in support to these foundations.

**Presenter**

- Sean Nelson, Vice President for Finance and Administration, UW Administration

**BACKGROUND**

Regent Policy Document 21-11, *Cost-Benefit Reporting for Foundations and Associated Affiliated Organizations*, was created in October 2020. In accordance with this policy, UW institutions must annually prepare a cost-benefit report for all primary fundraising foundations or for any associated affiliated organization that received administrative support valued at \$100,000 or greater during the fiscal year. If the total administrative support to an associated affiliated organization does not exceed \$100,000, the accounting of administrative support and benefits must be provided at least once every five years. Administrative support includes staffing, dedicated space and indirect costs, such as information technology assistance and utilities.



Regent Policy Document 21-11 also requires this information to be presented to the Board of Regents in summary form.

### **Related Policies**

- [Regent Policy Document 21-9](#), "Institutional Relationships with Foundations"
- [Regent Policy Document 21-10](#), "Institutional Relationships with Associated Affiliated Organizations"
- [Regent Policy Document 21-11](#), "Cost-Benefit Reporting for Foundations and Associated Affiliated Organizations"

### **ATTACHMENT**

- A) Summary of Cost-Benefit Reports for Foundations and Affiliated Organizations, FY 2022-23

## UW Foundations and Associated Affiliated Organizations and Related Cost-Benefit Reporting Fiscal Year (FY) 2022-23

Primary fundraising foundations and associated affiliated organizations provide tangible and intangible value to the Universities of Wisconsin. Though legally distinct from the Universities of Wisconsin, they are organized and operated for the benefit and in support of the universities and serve a critical role in advancing the universities' missions and achieving their strategic goals. As such, the 2023-2028 UW Strategic Plan includes a goal of growing philanthropic activity.

The Board of Regents, Universities of Wisconsin Administration, and each UW university continue to be proactive in ensuring effective management and transparency of UW primary fundraising foundations and associated affiliated organizations. The Board of Regents adopted Regent Policy Document (RPD) 21-9, *Institutional Relationships with Foundations*, in 2017 and RPD 21-10, *Institutional Relationships with Associated Affiliated Organizations*, in 2020, to provide the framework for how campuses may interact with these organizations. The Board also approved RPD 21-11, *Cost-Benefit Reporting for Foundations and Associated Affiliated Organizations*, which required the periodic reporting of the administrative support provided to and benefits received from all affiliated organizations. The FY 2022-23 report on foundations and associated affiliated organizations and their related cost-benefit reporting is the fourth annual report provided to the Board of Regents under these regent policies.

Highlights of UW relationships with these organizations in FY 2022-23 include:

- UW universities identified 77 foundations and associated affiliated organizations. This is down by three from the prior year since one affiliated organization was added and four were removed due to merger or dissolution.
- UW-Madison identified 44 foundations and associated affiliated organizations, the most of any UW university. UW-Stevens Point reported seven, while the remaining UW universities reported between one and four.
- 29 of these organizations (37.7%) are primary fundraising foundations or alumni associations.
- All primary fundraising foundations and any associated affiliated organizations that received \$100,000 or more in administrative support were required to submit a cost-benefit report. The primary fundraising foundations generated a total of nearly \$402.2 million for UW universities, while receiving \$11.3 million in UW administrative support.

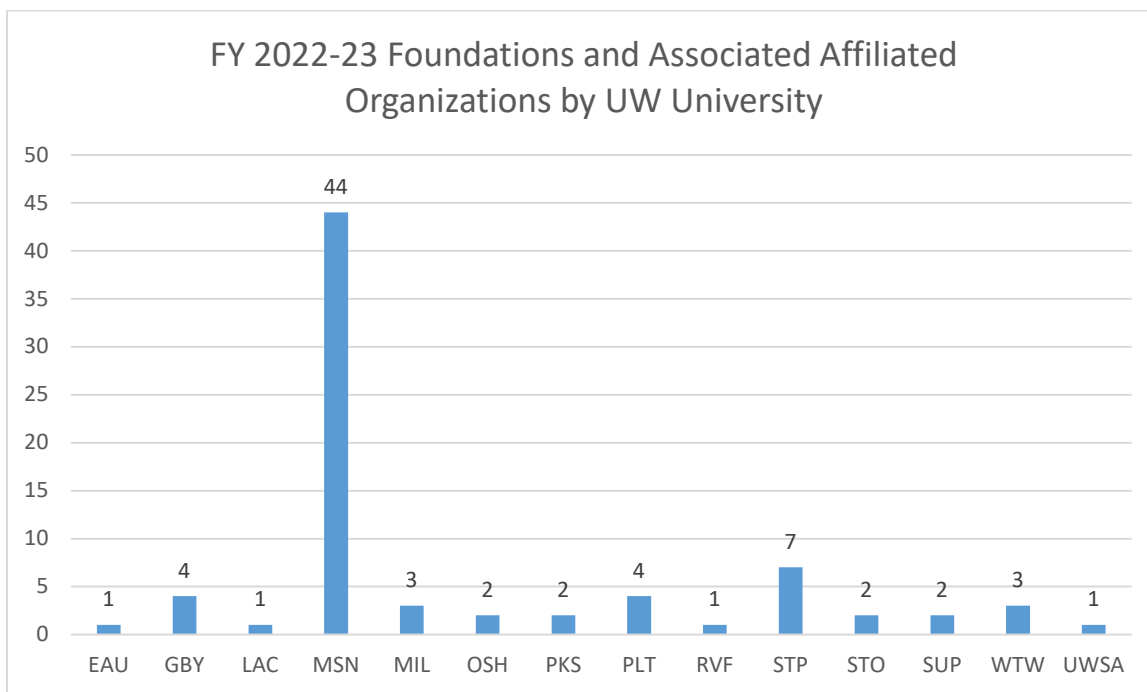
RPD 21-11 requires UW universities to provide an annual report of administrative support provided to and benefits received from all primary fundraising foundations and associated affiliated organizations that received administrative support valued at \$100,000 or greater. If the total administrative support to an associated affiliated organization does not exceed \$100,000, the accounting of administrative support and benefits must be provided at least once every five years. The cost-benefit reporting includes a comparison of the administrative support provided by the university in the form of staffing, dedicated space, and indirect resources, to the benefits received from the primary fundraising foundation or associated affiliated organization.

UW universities identified 77 foundations and associated affiliated organizations in FY 2022-23. A complete list of organizations is included as Appendix A. One new entity was identified at UW-Madison, the Human Computer Interaction Consortium (HCIC). The following four entities were removed:

- UW-La Crosse Alumni Foundation (UW-La Crosse),
- Wisconsin Technology Innovation Initiative (UW-Madison),
- UW Fond du Lac Foundation, Inc. (UW Oshkosh), and
- Richland County Campus Foundation Ltd (UW-Platteville).

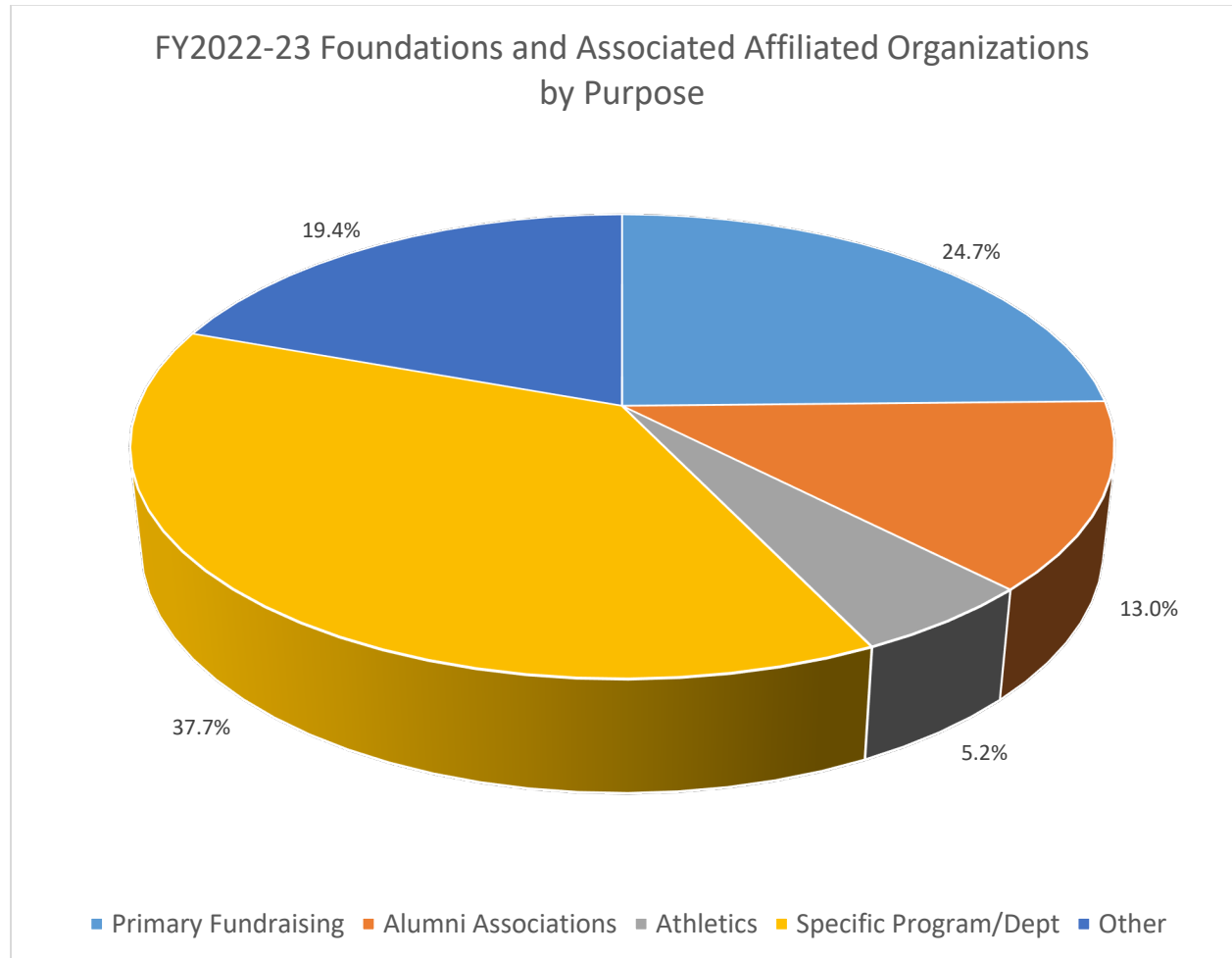
The UW-La Crosse Alumni Association was merged with its primary fundraising foundation, while the other three organizations were dissolved or affiliation agreements were not renewed.

As shown below, UW-Madison reported 44 foundations and associated affiliated organizations, or 57.1% of all organizations identified within the Universities of Wisconsin in FY 2022-23. UW-Stevens Point reported seven primary fundraising foundations and associated affiliated organizations (9.0%). All remaining UW universities identified four entities or less.



These foundations and associated affiliated organizations can also be categorized based on their purpose. As depicted below, 19 entities (24.7%) are primary fundraising foundations for UW campuses; 10 entities (13.0%) are alumni foundations. Four entities (5.2%) are related to athletics, while 29 entities (37.7%) were established for the benefit of a specific university program, department, or center. The remaining are a variety of affiliated organizations generally affiliated with a UW university, such as the

Stout Technology and Business Park at UW-Stout and UW-Madison’s Morgridge Institute for Research, University Research Park, and William Vilas Trust Estate. All UW real estate foundations are considered subsidiaries of the primary foundations. As a result, real estate foundations are not reported or counted separately in this analysis.



In total, these foundations and associated affiliated organizations generate significantly more resources for the Universities of Wisconsin than the administrative support provided to them. In FY 2022-23, UW universities received \$402.2 million from primary fundraising foundations, up approximately 5.9% from last year’s reported contributions of \$379.8 million. UW universities provided administrative support of nearly \$11.3 million to their primary foundations, down nearly 2.6% from the prior year.

In addition to the primary fundraising foundations, UW universities reported 4 affiliated organizations that received support of \$100,000 or more in FY 2022-23 and were required to provide an accounting of UW support provided and benefits received. These entities include the UW-Platteville Alumni Association and UW-Madison’s Wisconsin Union Association, Friends of the UW Odyssey Project, and American Institute of the History of Pharmacy.

**Appendix A**

<b>Institution</b>	<b>Entity</b>	<b>Administrative Support Provided</b>	<b>Benefits/Funds Received</b>
Eau Claire	UW - Eau Claire Foundation, Inc.	\$449,313	\$7,008,117
Green Bay	UW-Green Bay Foundation, Inc.	\$188,212	\$6,814,306
Green Bay	Friends of Toft Point, Inc.		
Green Bay	University Village Housing, Inc. c/o U.W.G.B., Business & Finance		
Green Bay	Weidner Center Presents, Inc		
La Crosse	UW - La Crosse Foundation, Inc.	\$1,014,956	\$3,338,932
Madison	University of Wisconsin Foundation, Inc.	\$369,249	\$339,979,657
Madison	American Institute of the History of Pharmacy	\$123,301	\$0
Madison	Babcock House		
Madison	Badger Basketball Boosters, Inc.		
Madison	Center for Advanced Studies in Business, Inc. (CASB)		
Madison	Economic Justice Institute, Inc.		
Madison	Friends of Allen Centennial Garden		
Madison	Friends of Lake Superior Research Reserve		
Madison	Friends of Madison Student Radio, Inc.		
Madison	Friends of Max Kade Institute for German-American Studies, Inc.		
Madison	Friends of PBS		
Madison	Friends of the Arboretum, Inc.		
Madison	Friends of the Geology Museum UW-Madison, Inc.		
Madison	Friends of the Lakeshore Nature Preserve		
Madison	Friends of the School of Human Ecology at UW-Madison, Inc.		
Madison	Friends of the UW Odyssey Project Inc	\$123,746	\$29,700
Madison	Friends of the Waisman Center, Inc.		
Madison	Friends of the WI Singers		
Madison	Friends of WisCARES (formerly Friends of UW Veterinary Medicine Teaching Program, Inc.)	\$493	\$0
Madison	Healthy Minds Innovations, Inc.		
Madison	Human Computer Interaction Consortium (HCIC)*		
Madison	Kelab, Inc.		
Madison	Leadership Wisconsin, Inc.		
Madison	Madison Family Residency Corp., Inc.	\$16,152	\$0
Madison	Morgridge Institute for Research		
Madison	The French House		
Madison	The University of Wisconsin Trust (Brittingham)		
Madison	The UW-Madison Retirement Association, Inc.		
Madison	The Varsity Collective		
Madison	The Wisconsin Union Association, Inc	\$205,686	\$81,000
Madison	University of Wisconsin School of Pharmacy Alumni Association, Inc.		
Madison	University of Wisconsin-Madison Nurses Alumni Organization, Inc.		
Madison	University Research Park, Inc.		
Madison	UW Naval Reserve Officers Training Corps (NROTC) Alumni Association		
Madison	UW-Madison Ophthalmology Alumni Association, Inc.	\$16,059	\$0
Madison	UW-Madison School of Music Alumni Association, Inc.		
Madison	WiCell Research Institute		
Madison	William F. Vilas Trust Estate		
Madison	Wisconsin 4-H Foundation, Inc.		
Madison	Wisconsin Agricultural & Life Sciences Alumni Association, Inc. (WALSAA)		
Madison	Wisconsin Center for Education Products & Services (WCEPS)		
Madison	Wisconsin Crop Improvement Association, Inc. (WCIA)		
Madison	Wisconsin Public Radio Association		
Madison	Wisconsin Real Estate Alumni Association		
Milwaukee	UW-Milwaukee Foundation Inc	\$4,959,804	\$20,264,990
Milwaukee	Washington County Campus Foundation	\$7,956	\$237,407
Milwaukee	University of Wisconsin -Waukesha Foundation, Inc.	\$10,043	\$60,476
Oshkosh	UW-Oshkosh Foundation	\$936,591	\$1,288,278
Oshkosh	The University of Wisconsin - Fox Cities Foundation, Inc.**	\$0	\$0
Parkside	University of Wisconsin-Parkside Benevolent Foundation Inc	\$273,617	\$1,336,748
Parkside	The University of Wisconsin-Parkside Alumni Association	\$0	\$1,930
Platteville	UW - Platteville Foundation, Inc.	\$1,139,353	\$4,438,060
Platteville	Friends of the Campus, Inc. (Baraboo)	\$0	\$77,800

Platteville	University of Wisconsin Platteville Alumni Association	\$284,846	\$0
Platteville	UW-Platteville Pioneer Education and Development Foundation, Inc.	\$0	\$0
River Falls	UW - River Falls Foundation, Inc.	\$325,515	\$4,305,806
Stevens Point	UW - Stevens Point Foundation, Inc.	\$787,170	\$3,386,247
Stevens Point	University Foundation: UW - Marshfield/Wood County inc	\$2,106	\$231,500
Stevens Point	University of Wisconsin - Marathon County Foundation, Inc.	\$1,625	\$167,569
Stevens Point	American Suzuki Foundation of Stevens Point WI, Inc.		
Stevens Point	Becoming an Outdoors-Woman, Inc		
Stevens Point	Friends of Schmeckle Reserve, Inc.		
Stevens Point	UW - Stevens Point Paper Science Foundation		
Stout	Stout University Foundation Inc	\$96,018	\$3,014,218
Stout	Stout Technology and Business Park		
Superior	UW - Superior Foundation, Inc.	\$91,966	\$2,499,308
Superior	UW - Superior Alumni Association		
Whitewater	University of Wisconsin-Whitewater Foundation Inc	\$688,936	\$3,685,413
Whitewater	QB Club Booster Club		
Whitewater	Tip Off Club		
System Admin	Wisconsin Humanities Council		

\* New Associated Affiliated Organizations added to the FY 2022-23 report  
 UW-Madison Human Computer Interaction Consortium (HCIC)

Removed from the prior year report:

UW-La Crosse Alumni Foundation, UW-La Crosse (merged with foundation)  
 Wisconsin Technology Innovation Initiative, Inc., UW-Madison (Wi2, dissolved)  
 Fond du Lac Foundation, Inc., UW-Oshkosh (dissolved)  
 Richland County Campus Foundation Ltd, UW-Platteville (not renewed)

\*\* The University of Wisconsin - Fox Cities Foundation, Inc (UW-Oshkosh) affiliation agreement has expired. Discussion regarding its future association with the institution are ongoing.