Reimagining UW Extended Campus

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Executive Summary

The UW System Online Strategic Growth Task force report titled "Accelerating Online Education: Recommendations of the UW System Online Strategic Growth Task Force" included a number of recommendations for reimagining UW Extended Campus. The following report describes the reimagined organization, including:

- A new name that comports with its place within the Division of Academic and Student Affairs in the Universities of Wisconsin Administration:
  - the Office of Online and Professional Learning Resources (OPLR).
- A new mission and vision for OPLR that focuses on its role of valued partner in support of online and professional learning growth across the Universities of Wisconsin.
- Revisions to the online collaborative program–planning process that will be led by Provosts of the Universities of Wisconsin in researching, decision-making and developing new academic programs.
- Revisions to the online collaborative program financial model that will actualize costs and expenses, incentivize participation and enrollment growth, and maximize financial returns to Universities of Wisconsin campus partners.
- OPLR will expand the availability of its online teaching and learning resources beyond just participating in collaborative programs, including but not limited to:
  - Serving as an online and continuing education program service provider whereby OPLR and a campus will agree on pricing for any number of services provided in a one–time–only manner, leaving ongoing program maintenance to the campus;
  - Devoting time and resources to discovering new online teaching and learning technologies and methods for improving existing programs and teaching professional development; and,
  - Investigating collaborative opportunities with continuing education departments to provide reskilling and upskilling resources to employers.
- OPLR will focus on building strong partnerships within and across the Universities of Wisconsin and commit to revisiting the program planning and financial model regularly to ensure continued effectiveness.

Contents

Reimagining UW Extended Campus

INTRODUCTION: In early 2023, Universities of Wisconsin President Jay Rothman accepted the recommendations of the report, "Accelerating Online Education: Recommendations of the UW System Online Strategic Growth Task Force." This report includes six strategies and 21 tactics intended to increase online program growth and student enrollments. One of the core recommendations calls for the reimagination of UW Extended Campus (UWEX) as a centralized online program support center (Tactic 1). In pursuit of this recommendation, the report calls for the benchmarking of UWEX to other online units at higher education institutions and systems, as well as a review of the current budget model, program review, revenue distribution model and staffing and support model. The following incorporates those benchmarking efforts in the formulation of a reimagined unit and business plan.

BRIEF HISTORY: The University of Wisconsin Extended Campus (UWEX) took its current name in 2018 as a result of the UW System–initiated restructuring of the UW Colleges and UW-Extension. Prior to that date, it was a division of UW-Extension and was known as Continuing Education, Outreach and E–Learning (CEOEL). Following the UW System restructuring, UWEX became a unit of UW System Administration.

The current UWEX and former CEOEL are responsible for numerous services and online support activities.
1. Continuing Education Funding Distribution: Historically, UWEX is the entity responsible for distribution of state funding to all Continuing Education offices throughout the Universities of Wisconsin. These funds support non–credit adult education, youth camps, workforce development and many other outreach activities. This obligation continues after the UW System restructuring and is outlined in UW System policies SYS 125–130. The funding allocation was just over $16 million for fiscal year 2024.

2. Independent Learning: UWEX has been supporting Independent Learning since the early days when it originated as part of UW-Extension in the 1960s as a correspondent course program. Independent Learning now is a collection of courses offered 100% online designed to fulfill undergraduate requirements in several curricular areas. These are stand-alone courses, not part of any degree program, developed and instructed by Universities of Wisconsin faculty. UWEX supports participating campuses to develop high quality, media rich courses and along with mechanisms for student engagement including coaching, registration, and records maintenance. UWEX also maintains a website for the program and a catalog of course offerings for student use.

3. BSN@Home: Since 2004, UWEX has been supporting BSN@Home. BSN@Home is an online nursing education program for RN to BSN degree completion. This is a collaboration between five campus partners: UW-Madison, UW-Milwaukee, UW-Oshkosh, UW-Stevens Point and UW-Eau Claire. UWEX facilitates the development of courses, hosts the courses, manages Canvas enrollment services and technical support. UWEX also provides marketing services for the program and some recruitment support and develops and hosts the BSN@Home website. UWEX has a position on the Steering Committee and serves as a consultant in various initiatives as required.

4. Semester–based Collaborative Online Degree and Certificate Programs: Since 2010, UWEX has administered semester–based collaborative online degree programs with partnerships across all 13 Universities of Wisconsin. Resources provided from UWEX to support the programs include instructional design, media services, information technology, student success coaching, marketing,

recruitment, and program management The current array of online collaborative programs includes associate (1), bachelor's (4) and master's (8) degrees as well as certificate programs (14).

5. Competency–based Education (CBE): UWEX supports self–paced CBE programs offered through UW–Milwaukee (5) and UW–Parkside (1). There are also a number of certificates offered in the CBE format. The CBE programs are collectively known as the UW Flexible Option and include one an associate degree program and five bachelor's degree programs. Resources provided by UWEX to support the UW Flexible Option include instructional design, media services, information technology, student success coaching, marketing, recruitment, program management, and enrollment services and financial aid support.

    The majority of students enrolled in these collaborative and CBE online programs are adult or non–traditional students.

UWEX services are currently funded by a combination of state provided revenue (General Purpose Revenue or GPR) and tuition generated by the collaborative programs (program revenue or PR). Today, UWEX administers 38 collaborative degree and certificate programs for campus partners in the Universities of Wisconsin.

BENCHMARKING OBJECTIVES & ACTIONS: Tactic 1 in "Accelerating Online" involves "creat[ing] a centralized UW System online program support center to facilitate the UW System online growth agenda and expand campus–driven online programming." Specifically, the report suggests the services that a new UWEX could include:
*   provide support in "jump starting" campus–driven online program development, whether curricular delivery is collaborative or at a single institution;
*   provide startup and ongoing administrative support for collaborative online programs in emerging niche markets for which individual campuses may not have initial adequate capacity;
*   support and manage updates to the proposed Wisconsin Online portal promoting online education across the UW campuses;
*   provide start–up support of programming for opportunities related to workforce development, upskilling, and reskilling;
*   develop and deliver programming, in consultation with OPID and campus Teaching and Learning Centers, in topics of interest related to online program development, instruction, and delivery to consortia of campus stakeholders;
*   house and provide administrative support for existing UWS initiatives that focus on collaborative online delivery of courses for mission–aligned program areas, e.g., the Collaborative Language Program;
*   provide administrative support for the Flexible Option competency–based degree programs; and,
*   provide administrative support for the current UW Extended Campus Collaborative degree programs, including a phased transition where/as necessary to align expenses to revenues, in concordance with benchmarking results.

Three benchmarking exercises were undertaken to inform the reimagining of UWEX:
1. The University Professional and Continuing Education Association (UPCEA) conducted a benchmarking survey of its membership to discover whether and how a central unit of a university or a system provided support to online programming. The UPCEA survey garnered 38 responses from across the country and UPCEA leadership conducted three focus group discussions among

5

many of those respondents to gather further information on online program support. The Universities of Wisconsin contracted UPCEA to conduct this work. (See Appendix A.)

2. A workgroup with Provosts, academic leaders and a faculty shared governance representative was formed to review the collaborative program planning process previously utilized by UWEX and suggest an alternative approach. The workgroup was led by Associate Vice President Tracy Davidson and made several recommendations on how to revise the process to ensure that academic program decisions remain solidly in the purview of Provosts and other campus academic leaders. (See Appendix B.)

3. Another workgroup was formed with financial experts from across the Universities of Wisconsin to review UWEX's current financial model for administering collaborative online programs. Senior Associate Vice President Julie Gordon led a workgroup of Chief Business Officers and a Budget Director to review and make suggestions on how to revise the collaborative program financial model that would be transparent, scalable and maximize returns to campus partners across the Universities of Wisconsin. (See Appendix C.)

Summary: UPCEA National Benchmarking

In the report's key findings, UPCEA affirmed, among other things, that while online program support and development can look different at different higher education institutions, there are areas of consistency. For example, enrollments in fully online programs are a significant source of revenue for a vast majority of institutions in higher education, that the majority of survey respondents had some degree of online program support that came from a central unit, and that academic decisions are most effectively made by academic leaders at the campus, school or college level while a central unit can be most effective in providing administrative program support, especially in certain areas. A central and coordinated marketing approach was deemed by most respondents to be most beneficial and productive when marketing for online students.

UPCEA made a number of recommendations after considering the data gathered from the benchmarking survey and focus groups. The recommendations that are most relevant to the reimagining of UWEX include:

- A central unit providing online programs and potentially professional education support should have clear decision–making structures. The report suggests that, in particular, the central support unit would be most effectively charged with administrative support. Academic guidance and decisions should be made by academic leaders at the campus or unit level.
- It is important that the expectations, goals and progress of a central administrative online program support unit be adequately and effectively communicated.
- A funding model should be created that is equitable, transparent and that accurately measures the "true cost" of administering programs.
- The report recommends a strategic and coordinated marketing approach that targets prospective online students and increases visibility and accessibility of online programs across all universities.
- It is imperative for the success of a central administrative support unit that system and institutional leadership support the unit's efforts.

Summary: Collaborative Program Planning Workgroup

In the past, the research and development of new online collaborative programs started with UWEX and ended with UWEX. The workgroup recommends significant changes to this process, aligning with recent changes to SYS 102 policy. Affirming that programmatic decision making appropriately belongs with the Provosts, the report recommends involving Provosts at the start of the research process where emerging workforce trends and aligned program opportunities are identified. The recommendations include:

6

- Provosts and Office of Academic Affairs (OAA) will review and inform UPCEA's analysis in the biennial review of programs listed in the Occupational Opportunity Model (OOM) report.
- The analysis to determine how to narrow the initial list of programs from the OOM for further consideration will be reviewed and informed by the Provosts and OAA.
- Provosts will identify new program opportunities as a result of these analyses and determine which programs could be pursued as online collaborative partnerships.
- Curriculum planning for collaborative programs will begin earlier than it had before to increase opportunity for shared governance feedback and input into curriculum and course development.
- UWEX and OAA will work together to annually review this process for continued improvement.

Summary: Financial Model Workgroup

The workgroup identified a number of concerns with the current financial model. First, the workgroup questioned whether the amounts received by UWEX for services performed in administration of the programs were too high and were based on formulas instead of actual costs incurred. Second, the amounts campus partners received for academic activities performed in support of the collaborative programs were too high and did not accurately reflect the amount of work necessary. Third, when a program had net positive revenue at the end of a fiscal year, the model called for equal disbursement of net positive revenues to all campus partners and UWEX, which the workgroup felt incentivized participation but not enrollment. Finally, in studying the financial results from collaborative programs in fiscal year 2022–23, only 5 of 12 semester–based collaboratives had net positive revenues, while all Flexible Option programs were performing well.

Recognizing the administrative differences between multi–partner and single–partner collaborations, the workgroup recommends different financial models for each: respectively, income–statement and percent–of–revenue approaches. Following identified principles such as simplicity, scalability, transparency, and maximizing returns to campus partners, the workgroup recommends:
- Multi–partner collaborative programs should use an income–statement model that:
  - Adjusts program costs as programs mature, lowering expenses for campus academic activities and UWEX, which better reflects the decreasing levels of work performed as programs mature;
  - Actualizes and caps UWEX expenses at all lifecycle stages of a collaborative program; and,
  - Strikes a balanced profit–distribution formula between participation and enrollment incentivization.
- For one partner relationships, the UW institution can choose between an income–statement financial model like described above, or a percent–of–revenue model, where, for example, the agreed upon split percentage of revenue generated could be 60% to the campus, 40% to UWEX.

The workgroup used the fiscal year 2022–23 financial results of semester–based collaborative programs to model how the proposed revisions would work. Using the newly proposed income-statement model, the group found that the number of net positive revenue programs increased from 5 to 8.

All of the collaborative programs currently supported by UWEX are governed by a Memorandum of Understanding (MOU). The workgroup recommends that UWEX immediately adjust its expense calculation as suggested, but that the academic activities and other suggested revisions be implemented for all new programs developed and for all existing collaborative programs as MOUs come due for renewal. MOUs are for three or five-year terms and have been agreed to at different times, so the end dates and process for revisions in renewed MOUs will necessarily be staggered over the next few years, with at least one MOU revised and renewed every year.

7

THE REIMAGINED UWEX: UWEX has participated in all online implementation team meetings and has received feedback and suggestions on its new direction from across the Universities of Wisconsin. The reimagining of the organization will encompass the suggestions from the report, "Accelerating Online Education: Recommendations of the UW System Online Strategic Growth Task Force," from the benchmarking and workgroup suggestions, and from its continuing coordination of funding and administrative support for continuing education departments across the Universities of Wisconsin.

Name of Organization

The organization will take on a name that comports with its place in the Universities of Wisconsin Administration departments and underscores its service role in online programming and in continuing education. The new name will be:

Office of Online and Professional Learning Resources (OPLR)

This new office, OPLR, will join the other offices within the Division of Academic and Student Affairs. As such, this renamed entity will not exist as or market itself as a sub–brand with the Universities of Wisconsin, as is currently the case with UW Extended Campus. The office of OPLR will continue to market programs per agreements with campus partners for administration of semester-based and competency-based collaborative programs. (more detail below).

Mission and Vision

The revised mission of OPLR will reflect its commitment of providing services and support to the Universities of Wisconsin and to the Universities of Wisconsin administration in online and continuing education, teaching and learning, and workforce training:

To serve the Universities of Wisconsin by promoting innovation, excellence, and growth for online and professional learning.

The vision of OPLR will illustrate its commitment to contributing to the respective missions of the campuses and administration of the Universities of Wisconsin:

To be the valued partner that elevates the Universities of Wisconsin to achieve new levels of excellence, distinction, collaboration, and growth in all online and professional learning.

Online and Continuing Education Service Areas

OPLR will provide services to support the Universities of Wisconsin's various activities in distance and continuing education:

- Continuing Education - OPLR will continue to provide administrative, facilitative, and financial services to continuing education departments across the Universities of Wisconsin. OPLR will continue to support the Continuing Education Executive Council (CEEC) and provide opportunities and support to collective or individual initiatives to grow revenues and expand the reach of continuing education.
    - o For example, OPLR has facilitated conversation among CEEC members about offering services to support workforce reskilling and upskilling program opportunities. Workforce skills programming is an objective of the UW System 2023-28 strategic plan and is a recommendation from the UW System online strategic growth report.

8

- Wisconsin Online portal administration – OPLR staff will provide maintenance and support of all content on the portal as well as market and promote Wisconsin Online via digital marketing regionally and nationally. OPLR will market the Wisconsin Online portal using the following brand identity: Universities of Wisconsin Online. OPLR will also support and maintain a central CRM to distribute prospective student inquiries to all Universities of Wisconsin.
  - The UW System online strategic growth report included this recommendation specifically and the UPCEA report also recommends a coordinated marketing approach. The Wisconsin Online portal is exactly that, a means to view fully online programs at all Universities of Wisconsin and provide a pathway to the campus program pages to enroll.
- Wisconsin Online collaborative programs support – OPLR will continue to provide administrative support for multi–partner collaborative programs. OPLR services will include instructional design, media services, marketing, recruitment, student success coaching, information technology, and program operations support. OPLR will market these collaborative programs under the brand identity of Universities of Wisconsin Online collaboratives, as well as promote individual programs by program name.
  - Continued administrative support of collaborative programs is listed as a recommended service in the UW System strategic online growth support, with the specific suggestion that OPLR follow a 'phased transition...to align expenses to revenues, in concordance with benchmarking results.' The financial model workgroup has suggested revisions that will accomplish this task and OPLR is committed to them and to continued review of the model.
- UW Flexible Option – OPLR will continue to provide administrative support to competency-based programs in the UW Flexible Option. OPLR services include teaching and learning resources, media services, marketing, recruitment, student success coaching, enrollment services, information technology, program operations support and financial aid administration. OPLR will market these programs under the brand identity of UW Flexible Option.
  - This support is a suggestion of the UW System online strategic growth report and competency-based education programs present a growth opportunity for the Universities of Wisconsin. The current UW Flexible Option programs have experienced consistent growth and continue to expand.
- Online Program Development - OPLR will provide service and support to Universities of Wisconsin Provosts to inform programmatic decisions made in accordance with UW System policy. The UWsA Office of Academic Affairs and the Provosts will determine the new programs to be developed and identify which are collaborative or one–campus opportunities. If there are online program development opportunities, with one campus partner or many, especially in a 'niche' market for which campuses may not have initial capacity, OPLR will be available to provide development support for 'starting up' a program and in providing ongoing administration if the campus chooses.
  - Two of the recommendations of the UW System online strategic growth report recommend this type of service to be provided by OPLR. The UPCEA report also suggests that there can be value and efficiency in a central unit providing support to colleges and universities who decide which online academic programs to pursue.
- Online Program Service Provider - OPLR will engage with the Universities of Wisconsin as an online program service provider. Depending on needs, OPLR can provide a full list of teaching and learning services. These services may include the startup and maintenance of an online program in collaboration with one or more UW institutions, the development of online training resources (e.g., research compliance training videos), or specialized learning tools (e.g., instructional design and media production). Depending on the project and partners, OPLR can develop flexible financial arrangements and agree with a campus on a percentage split of tuition revenue generated by that

9

program. OPLR can also provide any of its services in a one -time only manner for an agreed upon fee and then leave the ongoing maintenance of the program to the campus. Available OPLR services include but are not limited to:

- o instructional design,
- o media and production,
- o student success coaching,
- o digital marketing,
- o creative design,
- o recruitment,
- o market research, or
- o administrative program support.

In addition, OPLR may investigate providing its services to nonprofit or for–profit entities needing online program development or workforce re/upskilling resources.

CONCLUSION AND NEXT STEPS: By implementing the recommendations of the UW System online strategic growth report and the suggestions of the benchmarking workgroups and reports, OPLR will provide additive value to online programs and continuing education endeavors across the Universities of Wisconsin. It will take on and embrace a service role to all campuses and to the Universities of Wisconsin Administration. To ensure a successful transition to the new name, mission and vision of the office, the following steps will be imperative:

1. Communication – This report and summary of the new direction will be shared with important stakeholders, as determined by the Senior Vice President of Academic and Student Affairs. Feedback and suggestions can help focus the direction of OPLR and help with awareness of the new name and expectations.
2. Organizational Structure - OPLR will establish an organizational structure that will best position the office to accomplish the goals and functions outlined in this report.
3. Financial Assessment – The new financial model for multi-partner collaborative programs will need to be assessed to determine whether it achieves in practice, and not just in theory, the principles established by the workgroup to maximize returns to campus partners, be understandable and transparent, and to be scalable. In addition, flexibility in financial models for relationships with one UW partner provides opportunities for enhanced program development and will warrant further exploration to ensure success. The financial model workgroup report recommends a review of the new model after the first biennium and annually thereafter. The appropriate office in Universities of Wisconsin Administration will conduct that review.
4. Program Planning – Provosts will lead the revised process for researching and determining development of new online programs. The Associate Vice President of the Office of Academic Affairs (OAA) and OPLR agree to annually review the process to ensure the revised process is valuable, collaborative, and follows the intention in the revised policy regarding academic program review and introduction (SYS 102). The OAA Associate Vice President will determine, in consultation with the Provosts, when the revised process will be implemented.
5. Innovation – OPLR will devote resources to discovering teaching and learning trends and technologies to enhance quality and grow enrollments in online and continuing education programs. As examples:

10

    a. OPLR will continue to develop expertise in online teaching and learning methods and technologies to improve both existing online programs and teaching professional development.

    b. OPLR will continue to engage with national organizations to identify educational opportunities and delivery options to best align with labor market trends.

    c. OPLR will seek collaborative opportunities with continuing education departments to provide reskilling and upskilling resources for employers across Wisconsin.

6. Strategic Priorities – OPLR will continue to refine its strategic priorities to best meet the needs of campus partners and the Universities of Wisconsin Administration. Three initial strategic priorities are:

    a. Review the competency-based UW Flexible Option program operations to better enable scalability and growth.

    b. Identify, develop and provide professional development opportunities and resources in online teaching and learning in partnership with the Office of Professional & Instructional Development (OPID) in the Universities of Wisconsin Administration.

    c. Collaborate with continuing education directors across the Universities of Wisconsin and with the Director of Employer Engagement in the Universities of Wisconsin Administration to develop and offer upskilling and reskilling programs in the most effective ways to employers across Wisconsin.

Following the above steps and continually striving to discover new ways to provide value to the mission of the Universities of Wisconsin through communication and innovation, the Office of Online and Professional Learning Resources will establish strong partnerships and provide valuable resources in online and continuing education programs.

Appendix A

Strategic Growth Initiative

UNIVERSITY OF WISCONSIN
extended
campus

Submission by:

UPCEA®
The Online & Professional
Education Association

January 2024

I.   Objectives and Methodology

The leadership of the University of Wisconsin Extended Campus (UW Extended) desires to better understand how university systems support program growth, quality, and online student success. In late June 2023, UW Extended partnered with UPCEA to conduct a multi-phased project to gather informative and actionable insights. Each phase brings into the process certain benefits as to the scope and range of information. Phase I started with a survey of UPCEA Members through the monthly poll to better understand how online programs and academic supports are administratively organized. Phase II consisted of in-depth interviews to capture additional information from Phase I items, as well as revenue–sharing/cost–recovery models, efforts that foster communities–of–practice, policies or practices centered on instructional quality and effective administration of online programs, management of new program development and start–up funding.

The Phase 1 benchmarking study included 38 institutions, 7 of which represented university, state, or multi-campus systems, that started the survey and 18 completed it in its entirety. The survey was implemented during September and October of 2023. The Phase 2 focus group and interview phase of the project was conducted in October and November of 2023 and included 14 participants spread across 3 focus groups.

Other insights have been incorporated into the key learnings and recommendations sections of the report based on the experience of the UPCEA team, other related UPCEA research and through other outside research and trends. Most recently, UPCEA conducted a series of focus groups with member institutions around business models and professional education. Insights from these groups were incorporated into the recommendations.

II.   Key Learnings

- **From the survey, the research team learned that fully online degree programs continue to be a significant source of enrollment for member institutions**, particularly at the graduate level. In total, 94% of survey participants indicated that they offer fully online degree programs at their university and 41% said that 16% or more of their total enrollment comes from fully online students. It is important to note that 60% of the respondents representing a state or multi-campus system said that less than 10% of their enrollment is fully online. While this was only 3 of 5 respondents, this is a striking comparison to the single institutions with only 18% saying their fully online enrollment was less than 10%. Fully online graduate program enrollment is more than twice that of undergraduate online enrollment, consistent with national trends. However, other research suggests that part-time undergraduate could grow in the future.

  It should be noted that some forecasts suggest that graduate enrollment is likely to stay flat or slightly decline. Recent research by Encoura shows that graduate enrollments may be impacted by micromasters, microcredentials and other credential alternatives[1]. Encoura has long argued that while supply of online graduate degrees is increasing, demand may not necessarily be keeping pace.

  While graduate enrollments are forecasted to be stifled in the near future, the National Student Clearinghouse notes from its Fall 2023 report that overall undergraduate enrollment has grown for the first time since the pandemic, a result primarily fueled by the returning disengaged students, community college students and credit certificate students. The report also shows that first-time students declined by 3.6%[2]. These findings suggest that part-time adult learning has the potential to grow further in the future, both at the graduate and undergraduate levels.

- **Online programs without connections to other credential pipelines will be less competitive than other similar programs in the marketplace.** The UPCEA benchmarking survey notes that 65% of respondents indicated that their online programs are not strategically aligned with non-credit professional programs. Given the rise in demand for more flexible options, including courses that stack to credit, this is a missed opportunity for many campuses and systems. As noted earlier, graduate enrollment is projected to be flat over the next few years. It is becoming increasingly important to differentiate in a crowded market and non-credit programming that complements degree programs and stacks to credit will become increasingly important to drive enrollments.

  Focus group research also confirmed that many institutions also lack a strategy for the use of professional or noncredit programs to serve as a conduit for online degree

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[1]   https://encoura.org/have-we-cracked-the-case-of-missing-graduate-students-a-non-degree-market-boom/
[2]   https://www.studentclearinghouse.org/undergraduate-enrollment-grows-for-the-first-time-post-pandemic-despite-freshmen-declines/

programs. Many institutions continue to struggle with noncredit to credit transfer and the awarding of prior learning to credit, especially at scale. Overcoming these struggles could reinvigorate learners back into the credit degree pipeline, both for online and on-campus programming and thus negating some of the impacts of the demographic cliff.

- **The organization of the online unit is critical to success, not only for the institution but also for the student**. The majority of the institutions engaged in both phases of research indicated that they have some centralization of support services for their online enterprise. Based on UPCEA's experience with other institutions, the model that seems to be most effective is the administratively centralized, academically decentralized structure. In this model, a central unit focused on online programs manages a suite of services. These most often include instructional design and faculty training, marketing, student services, finance, and budgeting. In some cases, instructional design and/or faculty training may reside outside of the online unit and in the center for teaching and learning, however, generally there is a set of consistent standards and training required for faculty teaching online.

  It should also be noted that this central group or central units must know how to serve adult and professional learners and not just put them through traditional student pipelines. For some institutions, central university marketing groups, trained and experienced in serving undergraduate populations, are deployed to market to adult learners who often span many generational cohorts and industry groupings. The same could also be said with teaching and learning groups where faculty are taught how to teach in the classroom or to the traditional student and not to adult and professional audiences. Different approaches based on generational preferences, technological readiness and learning priorities can be applied to the adult learner in both of these examples.

  While the recommended and more prevalent structures tended to be administratively centralized with academic decentralization, silos often exist between online and professional education. Incorporating professional education into a more strategic structure will also require more thought and established guidelines as to revenue sharing, cost recovery and resource allocation.

  Interviews and focus group research also revealed that support from leadership and having a culture to support not only a more strategic online initiative, but also one that integrates microcredentials, is critical to advance changes in higher education. Some focus group participants stated that they were able to advance initiatives more quickly because of president and/or provost support or that they had a faculty culture that embraced or was aware of change and innovation.

Governance and leadership of a centralized group focused on online and other credentials may be a challenge, as the power, politics, financial pressure, and influence of various stakeholders across a system or campus impacts decision-making.

- **A central unit can provide administrative program support, while schools, colleges and academic departments can make academic decisions, which can lead to increased efficiency and more student focus than in legacy processes.** There are several reasons that this model is emerging as the most common. First and foremost, this model allows for a more efficient utilization of limited resources. When online programs are managed individually by schools or colleges, they have to create individual teams to manage processes and services such as marketing and student support. This generally leads to different people managing the same function in different areas of the university.

  A central administrative team can also ensure greater consistency. Academically decentralized structures allow for a strong sense of ownership among the school/college and program, but often create duplication and hamper an institution's ability to deepen its expertise in some areas. While academically decentralized structures help to ensure buy-in and commitment from faculty, it also alleviates potential concerns around quality.

  Academic units that manage administrative functions are often motivated to do so based on financial reasons, as well as having the ability to control more elements of program support and development. The research showed that some academic units prefer to manage administrative and support services. These units were often more resourced or did not necessarily have a relationship with an established central online support unit. Conversely, there were some academic units forced to take on administrative functions that lacked the knowledge, experience, or resources to do so efficiently or effectively.

- **Notably, marketing is an area that people feel overwhelmingly should be coordinated centrally.** Everything from lead generation to the website experience to the inquiry experience is different for the online learner and many institutions feel that their university marketing team simply does not know how to reach this audience. Whether marketing is done by a dedicated team within the online unit, or with an Online Program Management partner, centralization is viewed as the best model.

  Marketing expertise clearly varies by institution. Focus group research showed that larger units tend to have more expertise in marketing and enrollment management. Smaller institutions stated that they are often under-resourced and rarely have marketing staff directly working on online programs and often resort to working with a centralized university marketing group or have non-marketing staff work on marketing functions. Even within the institution, academic units also differ significantly, as business schools and engineering colleges tend to have more expertise and resources to market their online programs more effectively, as compared to other less resourced schools, such as those in the liberal arts, humanities, social work or education.

In an academically decentralized system, marketing efforts done by more resourced schools can inadvertently compete with other schools or campuses within the system. For example, there is one land grant that has a business school that is very effective in paid and organic search marketing. An unexpected by-product of the business school's success is that direct searches for this institution's graduate online social work degrees are pushed down in many search engine results.

- **Differences also exist not only with marketing, but also with customer relationship management (CRM) systems and enrollment management.** While the study found that only 26% of inquiries are being managed centrally by respondents, online inquiry management is another area that benefits significantly from centralization. The expectations of the online inquiry/applicant are very different from those of campus-based students, requiring a much more nimble, customized, and relational response.

  Units with decentralized structures often maintain their own inquiry response systems and processes. If these are being handled within an academic school or college, there is likely to be inconsistency in response times and content. Recent research from UPCEA found that only 60% of digital inquiries receive a response from an institution, with a median response time of 3 hours and 3 minutes.[3] The response from the school or college may be quick and great, but how is it managed through enrollment? Is there a dedicated resource? Can the number of inquiries grow with the existing resources? Without an economy of scale that a centralized effort has, individual decentralized colleges often do not produce real-time metrics and reporting due to lack of dedicated staff to CRM.

  Decentralized systems often also lack processes or policies that refer misdirected inquiries to other, more pertinent academic colleges within the system. If the goal is to increase enrollment, a centralized inquiry management team is critical to ensure consistent, timely follow up and to nurture those prospective students until they are matriculated.

  A final benefit of a centralized process for CRM is the creation of a data-driven culture where various stakeholders are more informed in discussions. A data-driven or informed culture allows for decisions to be made more quickly and for the overall benefit of the enterprise. It also creates greater trust, accountability, enhanced communication and transparency.

- **Some student services, including technology support, are another area of potential coordination from a central administrative unit.** Academic advising is done within the school or college, but a central student services unit could provide day-to-day guidance, help online students to navigate campus resources, and serve to build connection to the

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[3] Inquiry Experience of the Adult Learner (UPCEA & InsideTrack) - Not Yet Published

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university. Student service team members are the primary connection the online student has to the university. They are focused on student success, fostering a sense of belonging that helps online students to persist, leading to increased retention and completion rates. The impact of the student success team can often be underestimated and the universities with robust online units recognize the value of this group.

- **Program development is most typically decentralized and managed by the school or college, but a central unit can help to identify trending, yet not so obvious new program ideas, as well as provide validation for internally identified ideas.** It could be important for a central online unit to be a partner in the selection of programs for consideration to ensure student interest and employment demand exists, as well as to assist in the definition of the target student audience.

    Decentralized systems also often do not encourage interdisciplinary programming, as well as the integration of professional programs that feed into online degree programs. New program identification as it pertains to interdisciplinary programs is often lacking in a decentralized system, as efforts tend to be highly focused within the academic unit. One successful example is how business and technology schools collaborate, as do various academic units work together around the many applications of data analytics. Market research tends to be less for smaller institutions or among under-resourced academic units in a decentralized model. The institutions that are administratively centralized often have a person, small team or outsource partner relationship dedicated to working with the academic departments to assess market conditions and competition as they pertain to program development decisions.

- **An administratively centralized unit can be more efficient and effective with tapping into one of the institution's biggest assets … <u>alumni</u>**. A recent UPCEA survey showed that approximately one-half of the membership does not have significant access to engage alumni in programming.[4] Further examination of this reveals that rather than put in place processes and checkpoints, roadblocks and restricted access prevent PCO units from deepening potential relationships and generating new revenues for the institution. The concept of the sixty-year curriculum, which is an approach to lifelong learning, suggests that institutions will need to deepen relationships with alumni in response to reskilling needs.

    An administratively centralized group can better engage alumni while respecting the need to protect them for capital campaigns and other fundraising needs. In a decentralized approach, list overuse or a poor effort by a sole academic unit to promote a single program can cause adverse effects and close off or limit future access for all. In addition, being able to present a larger porfolio of program offerings, as opposed to

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[4] Alumni as an Audience - October/November Snap Poll 2021
https://core.upcea.edu/viewdocument/alumni-as-an-audience-snap-poll-res?CommunityKey=82a51688-4da7-42af-9cee-7de58d6f6eef&tab=librarydocuments

being limited to those of a single academic unit with a sole program, is likely to be more beneficial.

- **An administratively centralized unit can be more efficient in its corporate outreach initiatives.** UPCEA has observed a number of decentralized land grant units stumble regarding its corporate outreach initiatives. For example, one land grant in the East had its business school and nursing school not knowingly bid for the same corporate training contract. Another land grant in the South, upon a UPCEA programming audit, found duplication of similar noncredit professional programming scattered throughout its system, all with different price points. While some academic units have a strong track record and resources in place to engage the corporate community, other units do not. In addition, a centralized administrative unit has a better ability to search out the resources of the institution, often seeking out faculty and programming assets that are sometimes interdisciplinary.

- **Some larger institutions with centralized administrative units for online or a combined professional and online unit have staff devoted to alumni and corporate outreach**, which includes its own liaison to the alumni association or development, alumni outreach and programming development, workforce development, corporate and customized training, career development, community outreach and veterans/military affairs and benefits. One West Coast institution has a director of corporate relations working for their school of professional studies and he has many of these functions reporting to him, but also strategic partnerships, such as with bootcamp providers and massive open online course (MOOC) providers.

- **Stackable pathways offer increased value to the online learner.** Many larger institutions and land grant providers are implementing more integrated and stackable approaches to their academic porfolios. The chart below shows as of May 2023, what the main campus of Big Ten schools are offering for online programs. The chart shows that many institutions have stackable strategies. Upon further review many of the providers below have certificates that lead into degrees. What is not shown is that many are also offering or developing noncredit professional programs that have the potential to lead into degrees. For example, Rutgers University offers a noncredit executive bootcamp called its "miniMBA." Upon completion of this program, students can receive three credits off towards one of three online graduate degrees. Penn State University has built an extensive credit porfolio for homeland security degrees and certificates that is enhanced with noncredit professional programs. The homeland security degrees and certificates are also interdisciplinary with academic contributions from its College of Information Science and Technology, Milton Hershey Medical Center, Harrisburg Campus, College of Earth and Mineral Sciences, College of Liberal Arts, College of Agriculture and its Great Valley campus.

Institution	Undergraduate Certificate	Undergraduate Degree	Graduate Certificate	Graduate Degree
Indiana University	38	15	61	71
Penn State University	16	48	66	59
University of Illinois	12	4	81	49
University of Maryland	26	44	22	44
Rutgers University	0	3	0	16
Michigan State University	0	1	49	51
Purdue University	12	46	7	35
University of Minnesota	10	21	20	15
University of Nebraska	2	2	17	32
Ohio State University	6	6	17	24
University of Wisconsin	0	7	14	21
University of Iowa	8	7	10	11
Northwestern University	7	5	12	10
University of Michigan	4	1	3	16

It should be noted that the previous table shows a number of institutions with administratively centralized online units, i.e. Penn State and its World Campus, Purdue Online (not to be confused with Purdue Global), and the University of Maryland Global Campus, although UMGC operates independently with the ability to create their own degrees. Northwestern University has a School of Professional Studies but works in collaboration with the other academic schools and colleges to deliver programs. Institutions such as the University of Minnesota, Michigan State University and Rutgers are fairly decentralized with pockets of centralization, mostly at the noncredit level. The University of Illinois, similar to Wisconsin, has many campuses operating their online programs independently and in a self-sustaining manner.

III.   Recommendations

Based on the benchmarking survey and focus group findings, UPCEA recommends the following:

1. <u>Strategically organize online degree programming initiatives to avoid unintended internal competition and encourage a pathway approach that leans more heavily on stackability and the use of microcredentials</u>. This could mean not just focusing on online, but creating a centralized unit to incubate, coordinate and support new initiatives. This unit could focus on programmatic areas that lean more heavily on collaborative efforts such as interdisciplinary programs or occupational pathways that require greater stackability, such as the development of credit certificates leading into degrees or noncredit programming re-engaging lost learners or those requiring new skills to advance. This unit should also either have responsibility for or provide validation to UW campuses with market research to assist the campuses in making academic program decisions.

2. <u>As the system considers and plans for comprehensive and improved online program support from a central unit, seek the support from the highest levels of leadership in the university system</u>. This is essential for stakeholder acceptance and will accelerate efforts to grow and support such a unit.

3. Should UW create a central unit to support online programs and possibly professional education together, <u>a clear governance structure is needed as to decision-making authority</u>. The title of the unit and the position to lead it and what he or she is tasked to do is essential. However, leadership and the system will need guidance. Many administratively centralized units are often guided through advisory committees. A best practice example would be Penn State and its World Campus, which is guided by an academic advisory committee with representatives from the various academic colleges and campuses. This advisory committee provides academic insight (but not operational) and recommendations to the Vice Provost and Associate Vice Provost for Online Education. World Campus is also guided on operational issues from a team of staff, with some faculty representation. This operations team meets regularly to discuss high level operational decision. Lastly, World Campus also gains external insight through a corporate advisory committee that meets in person annually and occasionally via virtual meetings. These best practice advisory committees are also present at other deeply centralized institutions but have different compositions.

    An academic advisory committee could be tasked with the challenging issues of what complex or multi-campus systems face, some of which could include:

    -   New program development
    -   Attracting new faculty
    -   Identifying pathways into existing programs
    -   Sunsetting programs that have reached the end of their lifecycles
    -   Exploring interdisciplinary opportunities between academic units
    -   Preventing or managing duplication of programs between academic units

- Faculty development

4. <u>Identify a fair and equitable funding model to incent academic units to participate</u>. This funding model should be transparent and encourage innovation, but also communicates the true cost of doing business with the apparent risks associated with the level of service provided. A central support unit could potentially operate as an internal OPM, but in an improved manner. External OPMs are often negatively perceived because of a lack of transparency. A central support unit can overcome what OPMs struggle with by having more open accounting and mutually beneficial cost-recovery models. It is critical for the enterprise to identify true costs, including staffing, at the programmatic level. UPCEA acknowledges that creating financial models can be challenging and often individualized for the institution, but having measures of true costs helps to level-set revenue goals and forecasts and ultimately provide a stronger mechanism and more positive environment for revenue sharing.

5. Marketing could be a shared effort; however, <u>UW should create a more strategic and coordinated marketing approach that would create greater consistency, be more efficient and provide better overall systemwide enrollment results</u>. It is also more likely that a coordinated effort reaches a larger national audience. UPCEA recommends that efforts be put in place to improve the visibility of all online programs, while providing more targeted support for those in deeper revenue and risk sharing agreements.

6. <u>Review the enrollment and inquiry management process for consistency or differences in response, as well as for a student-centered approach</u>. This tactical approach may provide further evidence as to whether or not a more aggressive effort to centralization is needed. A more centralized approach to enrollment management is likely to increase inquirer-to-student conversion rates, better direct prospects to the appropriate program or department, and improve corporate outreach efforts. Dashboards, metrics, and data transparency are key elements of centralization, particularly as it pertains to student success, enrollment management, marketing effectiveness and corporate engagement results.

7. Should a reimagined comprehensive central administrative online support and resource unit emerge, <u>UW should allocate staffing and resources to effectively communicate the goals of the unit and the opportunities it will create</u>. On-going communications will also be essential to help communicate progress, as well as how academically decentralized units can benefit and connect with the administratively centralized unit.

8. Should a reimagined comprehensive central administrative unit emerge, <u>UW should develop a plan to better engage corporate and alumni audiences through its programmatic offerings, whether it is online degrees or microcredentials</u>. This unit could include career development, strategic partnerships, corporate engagement, and alumni programming among other services.

22

UWS Multi-Campus Collaborative Program
Identification and Development

Project Charge

The project scope included a reimagining of the historical program development process for the semester-based collaborative programs administered by UW Extended Campus (UWEX). The review included analysis of the program development timeline, determination of how best to increase opportunities for campus partner involvement in this process, and clarification of the role of the newly formed Wisconsin Online Advisory Board in this process.

The workgroup included:

- Provost Kate Burns (UW-Green Bay)
- Provost David Travis (UW-River Falls)
- AVC for Academic Affairs (PPR liaison) Sandy Grunwald (UW-La Crosse)
- Collaborative Program Academic Director Tim Krause (UW-Stevens Point)
- Faculty Governance Chair Nelu Ghenciu (UW-Stout)
- Tracy Davidson, Associate Vice President for Academic Affairs, UWSA (Committee Chair)

The workgroup was supported by Alissa Oelfke and Jason Beier from UWEX and Stephen Schmid from UWSA.

Context

The recommendations, below, are drafted in the context of conversations with our workgroup members, and are also intended to align the systemwide collaborative program planning process on two fronts:

1. Alignment with recent changes to SYS 102 which explicitly acknowledge the provost's expertise in regional program development and makes them the primary advisors to UWSA on systemwide program array.
2. Alignment with the reimagining of the role of UWEX within the UsW system. Providing development support for selected systemwide collaborative programs is one element of this reimagining that includes a continuum of online curriculum development, and teaching and learning resources for institutions as they navigate online delivery of academic programs.

Important Changes to Historical Workflow

A revision of the historical workflow for the identification and development of UWEX administered Universities of Wisconsin collaborative programs is outlined in the table that starts on page 3, below. There are several important recommended changes to this process:

1. **Better alignment of the process with recent revisions to SYS 102, which has centered provosts as system experts on building academic program array**.
   a. We recommend using UPCEA research on workforce growth opportunities to inform an annual UWS array conversation among provosts. The identification of potential collaborative online opportunities would be **one** outcome of this conversation. Provosts

might also use these data to identify non-UWEX collaborative opportunities, single institution opportunities, and non-online opportunities that would flesh out the UWS array. UWEX would be available to support institutions as they undertake any of the online models.

   b. While UPCEA data are collected bi-annually, this "array analysis" conversation among the provosts should take place at least annually. This will allow an ongoing data-informed discussion of systemwide array and continue the annual on-boarding of collaborative programming opportunities.

   c. We see this revised selection process as one driven by the provosts and facilitated by the Office of Academic Affairs. UWEX would work with UPCEA to manage data analysis.

2. **More involvement of provosts in the UWS collaborative program identification process**.

   a. Once a list of potential collaborative programs has been identified, provosts will be more involved in vetting the current algorithms used to filter programs. This filtering has historically occurred iteratively with different criteria being utilized at each filtering stage.

   b. Provosts will discuss and/or be updated on the results of each stage of the collaborative program winnowing process, rather than simply informed of the final results of this process. The provosts will be engaged in an ongoing discussion to find the right balance of their time to devote to this process.

3. **Announcements of new collaborative programs will be made by provosts rather than UWEX.**

4. The revised process includes **earlier conversations with campus faculty** to better identify potential concerns or barriers before curriculum development is initiated. In particular, it is recommended that there is an early conversation between the campus academic directors and their faculty to explain the vetting process by which collaborative programs were chosen and provide early notice of the pending program development to key campus stakeholders, *e.g.*, curriculum committees, faculty governance, department chairs, and deans. This step precedes the formal development of the curriculum and is intended to provide an early "heads up" and opportunity to provide feedback regarding any potential faculty/campus concerns that stem from the program.

5. We propose revision **of the language in the current Joint Creation and Ownership Agreement** (JCOA) to reflect that it is not the intention to keep institutions from offering non-collaborative sections of courses on their campus. The proposed revision can be found in the attached, revised JCOA.

6. The revised process includes **iterative evaluation of the collaborative program selection and development process**.

Multi-Campus Collaborative
Program Identification and Development Workflow

Identification/Development Step	Recommended Process Revisions	Additional Comments
UPCEA is hired every other year to prepare the Occupational Opportunity Model (OOM) – this model identifies the top 200 occupational growth opportunities (based on UPCEA algorithm) Last study received – Fall 2022; will want to ask for an update in Summer / Fall 2024	The program identification process is initiated when UPCEA generates an initial, lengthy list of approximately 200 potential programs. This list is shaped, in part, via a UWEX algorithm that considers such things as the current UWS program array, existing faculty resources, and obstacles that might be created by, for example, specialized accreditation. Recommended updates to this process include: 1) The methodology for the filtering analysis should come before OAA and the provost council for discussion. 2) Sharing the initial program list with provosts and facilitation of a high-level discussion at a provost council meeting . UPCEA could be present to answer questions, etc.	In addition to considering the development of collaborative programs, we recommend that the UPCEA research, aligned with the UWEX analysis, facilitate a provost discussion of systemwide program array. UWEX would be available (as requested) to support campuses in the development of single-institution online programs and/or collaborative programs, regardless of whether those programs would ultimately be administered by UWEX. As part of this process, provosts would work with their campuses to identify programs that would lend themselves well to the collaborative model.
The OOM is internally evaluated, resulting in ranking of the top 15 to 20 opportunities for the UW system. This ranking will be facilitated by provost discussion. This list of programs will also be compared to the current OAA pending program list.	Recommended updates to this process include: 1. The methodology for the filtering analysis should come before OAA and the provost council for discussion. 2. Following discussion and analysis, provosts should receive a list confirming the top 15-20 program opportunities that result from this analysis.	
Based on the ranked list, above, 5-10 programs will be selected for deeper competitive internal and external analysis (UWEX and UPCEA). This analysis will include job postings, occupational growth projections, and determination of where the	Recommended updates to this process include: 1. The methodology for the filtering analysis should come before OAA and the provost council for discussion. 2. Provosts should be involved in prioritizing the top programs that will be moved to the "deep	

Identification/Development Step	Recommended Process Revisions	Additional Comments
need is most urgent and resources across the system are most robust	dive" research stage. Perhaps via discussion of a summary analysis and recommendations from UWEX.	
UPCEA is hired to conduct deep dive viability analyses of top 2 to 3 potential high need programs.	Presentation of the "deep dive" results and recommended collaborative programming should be made to the provost council. For the sake of time, this might be in the form of a summary report and analysis that could be discussed, as necessary. Results should be shared with WOAC for feedback.	
Provosts announce new programs. (January, year 1). UWEX will work with institutions to identify interested institutions and formalize the partner base.	Since provosts will now be aware of candidate programs, this would simply be a formal solicitation of interest in participation.	We are hopeful that the iterative involvement of provosts will increase the transparency of this process and make this a more provost driven process.
Curriculum planning begins in spring of year 1 with faculty consultation and continues throughout summer of year 1. Program competencies, learning outcomes, curriculum map, titles, and descriptions, and draft syllabi are prepared.	Recommended updates to this process include: In order to remain nimble and responsive to emerging opportunities, we'd propose to maintain the current timeline. To facilitate communication and curricular development, we suggest that faculty and ADs meet briefly in January to a) set the charge b) provide an overview of how the new programs were vetted and selected c) charge ADs to vet the program with their campus colleagues and leadership (before summer) and make sure they understand the local governance steps. Then, a summer meeting would start with any concerns raised in that process (the chance to feel ownership in the decision to move forward, or not), but with the presumption that the summer meeting then moves to curriculum development.	Note: It appears that Academic Directors (ADs) would benefit from additional professional development as well as other support, perhaps a community of practice. UWEX will also explore other opportunities to provide non-financial support to ADs. Include this AD preliminary discussion/introduction work in evaluation of the program development process.
A lead campus is selected, and program authorization documents are submitted to the Office of Academic Affairs to be prepared for		

Identification/Development Step	Recommended Process Revisions	Additional Comments
BOR approval. UWEX assists with this process. (Fall, year 1)		
Programs go through governance approvals. UWEX assists with preparing documentation for campus governance approvals. (Fall, year 1)		We would propose to collect data on any delays that occur in governance approvals to determine the degree to which these reflect substantive vs. technical concerns. These data will be utilized in our process evaluation to improve operations, as necessary.
Programs go to BOR for approval (February, year 2)		
Programs go to HLC for approval, if required. UWEX provides materials and support as requested in this campus-led process (March-April, year 2)		
Following BOR and HLC approvals, institutional faculty proceed with course development, as needed. UWEX provides instructional designers and media development, as necessary. Spring and/or Summer of Year 2		Currently consulting with the Office of General Counsel regarding the elimination of current JCOAs. Need to make the distinction as to the purpose for the JCOAs.
After the program is launched, the ADs must begin to collect data to serve the program assessment plan. UWEX assists with the establishment of the assessment plan, positions the ADs to lead this process, and produces summary reports of the assessment data.		
Workflow Evaluation	Recommend that OAA and UWEX work collaboratively to develop an annual evaluation of this workflow.	

Multi-Campus Collaborative
Proposed Revisions to Joint Creation and Ownership Agreement (JCOA)

UW Extended Campus

Joint Creation and Ownership Agreement

Course: _____

Author:_____

Online Courses in the UW Graduate Certificate in Emerging Technologies in FinTech

Agreement Summary

The undersigned author (the "Author") has agreed to develop course content for a course(s) in the online *UW Graduate Certificate in Emerging Technologies in FinTech*, as further described in Attachment A to this agreement. The content developed will be owned by the Author(s) of such content. The University may use course content as it wishes under a license from the Author to the Board of Regents of the University of Wisconsin System (the "University"), and the Author may also use the course content consistent with the terms of this agreement. The actual online courses that are developed and based on course content will be the exclusive property of the University.

The Agreement

The Author and the University agree that:

1. Rights Granted - Contributions of original course content will be owned by the Author(s) of such content. The Author grants the University a perpetual, royalty-free, non-exclusive license to use course content for educational or research purposes. The online courses and any and all works based upon, derived from, or incorporating the online courses that are developed from this content for the UW Graduate Certificate in Emerging Technologies in FinTech are the exclusive property of the University.

2. Completion of Author's Contribution to the Course(s); Other Obligations
   A. The Author agrees to prepare the course content including collateral material such as syllabi, illustrations, charts, graphs, handouts, reference lists, and other related items on the schedule and in the form agreed to in Attachment A.
   B. The Author will make a good faith effort to attend all training sessions relating to this online degree program.
   C. The University, in consultation with the Author, will make all decisions concerning course design.
   D. In the performance of work under this agreement, the Author will make a good faith effort to perform all work with a high degree of professionalism and consistent with prevailing academic standards.
   E. The Author agrees that the University may terminate this agreement if the Author fails to meet the obligations herein including those described in the Attachment A, in which case the University will be entitled to recover any sums or other resources advanced to the Author in connection with this agreement.

F. The University agrees that the Author may terminate this agreement if the University fails to meet any of its obligations herein, in which case the Author may keep any compensation already earned under this agreement.

3. Quoted Material - The Author and the University will use copyrighted material in compliance with State and Federal laws and Board of Regents' Policies.

4. Publication of the Work - The online course(s) will be distributed, transmitted, or published by the University as soon as circumstances permit, at the University's expense, in a manner deemed appropriate by the University.

5. Copyright - The University will decide whether to register copyright for the online courses in the University's name and at its expense.

6. Author's Warranty
    A. The Author warrants that he or she is the owner of the course content or has cleared the necessary rights in the course content to enter into this agreement and fulfill its obligations. The Author acknowledges that he or she has made a good faith effort to follow applicable laws and the University of Wisconsin System Policy on Copyrightable Instructional Materials Ownership, Use and Control (GAPP27) and that the course content does not infringe any copyright, violate any property rights, or contain any scandalous, libelous, or unlawful matter.
    B. The Author will defend, indemnify, and hold harmless the University against all claims, suits, costs, damages, and expenses arising from any scandalous, libelous, or unlawful matter contained or alleged to be contained in the course content or any infringement or violation by the course content of any copyright or property right.

7. Consideration
    In consideration of this agreement, the University may contribute the following resources to the creation of the online courses for the *UW Graduate Certificate in Emerging Technologies in FinTech program*:
    a) graphics
    b) instructional design
    c) production assistance
    d) course maintenance and backup
    e) marketing to prospective students
    f) hardware
    g) technical assistance
    h) teaching load credit for the first semester of course
    i) funding

    The specific resources to be provided to the Author under this agreement are detailed in Attachment A.

8. Subsidiary Rights - The Author may freely use this work for educational or research purposes at any institution within the Universities of Wisconsin/the University of Wisconsin System. The Author will seek prior written consent of the University to use any portion of this work outside of the Universities of Wisconsin/the University of Wisconsin System.

9. Revisions - The Author will update and revise the course content at the University's request during the term of this agreement. The Author agrees to update the content within one hundred twenty (120) days of receipt of a written request from the Associate Vice President University of Wisconsin Extended Campus or his/her designees. If the Author is unable or unwilling to make any requested revisions, the University may have revisions made by an author approved by the appropriate department.

10. Term and Termination - This agreement will remain in effect until further notice and can be terminated by either party with 120 days' written notice. Upon termination, the rights granted to the University and Author relating to the course

29

content will remain in effect. The rights to the online courses in the UW Flexible Option Associate of Arts & Sciences degree will remain the exclusive property of the University.

11. Amendments - The written provisions contained in this agreement are the entire agreement made between the author and the University concerning this course content, and any amendments to this agreement will not be valid unless made in writing and signed by all the parties.

12. Construction, Binding Effect, and Assignment - This agreement will be construed and interpreted according to the laws of the State of Wisconsin and will be binding upon the parties hereto.

In Witness Whereof, the parties have duly executed this agreement as of the date below.

_____   _____

Author   Date

_____   _____

By Authorized Officer   Date

The University of Wisconsin Extended Campus

Reviewed and approved by UW System Legal Affairs, June 2016.

<h1 style="text-align:center">ATTACHMENT A</h1>
<p style="text-align:center">Author Development Timeline</p>

Due date for all course materials in their final form is: _____ .

Course Development Process and Timeline

Planning		Design & Development			Development & QA
December	January	February	March	April	May
Course Author Identify objectives Submit technology needs (if applicable) Research primary resource(s) (e.g., textbooks, journal articles) Faculty enrolled in Level Up courses	**Course Author & ID** Initial consultation Submit Attachment A Align objectives to specific assessments in alignment map Create or revise course outline (e.g., lesson objectives, activities, assessments and resources) and syllabus Submit course outline and syllabus	**Course Author** Begin assessment development **Course Author, ID & Media** Media consultation Finalize media plan	**Course Author** Create and submit: -50% of course content -50% of assessments -50% of media pieces to be developed (includes ID review and editing) **Course Author, AD, PM & ID** (mid month) 🚩 Update Meeting	**Course Author** Create and submit: -100% of course content -100% of assessments -100% of media pieces developed (includes ID review and editing) **Course Author, AD, PM & ID** (mid month) 🚩 Go/No Go Meeting to discuss if the course can be completed and ready to launch within the necessary timeframe	**ID & Media** Complete course development in the digital learning environment Complete final QA of all course content: -QA review -Media review -Link review -Editor review -ADA compliance **Final sign-off by Course Author** Faculty reminded of Level Up teaching course

Deliverables and Dates

Note: This is not an exhaustive list. Items may be added or removed as necessary based on the scope of the course development.

Item	Description	Due Date
Technology	Submit the required software and other technology needed to teach the subject. It is critical to verify any technology required well in advance, in case it requires UW-System approval.	**1/31/2024**
Attachment A	Review Attachment A dates and verify timeline is acceptable.	**1/15/2024**
Program & Course Objectives	List program and course-level objectives to be covered in the course.	**1/31/2024**
Alignment Map	Work with ID to compile alignment map (template provided).	**1/31/2024**
Textbook	Submit primary resources (e.g., required textbook materials).	**1/15/2024**
Course Outline	Compile list of all course content including objectives, activities, assessments, learning resources, etc. (template provided).	**2/15/2024**
Media Plan	Compile list of media to be developed. A media consultation is scheduled as part of this process.	**2/28/2024**

Development and Deliverables for Content, Assessments and Media

Item	Description	Due Date
Course Content	This is all items listed in the course outline. The items are complete, require no additional revisions and are ready for inclusion in the course.	**(50%)** 3/15/2024 **(100%)** 4/30/2024
Media Items	Examples: Storybook+ presentations, screencasts, videos, visual art, audio recordings, interactive pieces. The items are complete, require no additional revisions and are ready for inclusion in the course.	**(50%)** 3/15/2024 **(100%)** 4/30/2024
Update Meeting	Progress update meeting including PM, AD, Course Author* and ID	**3/15/2024**
Go/No Go Meeting	Meeting between PM, AD, Course Author* and ID to determine if the course can be completed and ready to launch within the necessary timeframe	**4/30/2024**
Course Timeline	Final list of all assignments and their corresponding due dates for the course	**4/30/2024**
Final Syllabus	Finalize all of the information in the syllabus (e.g., grading, course expectations)	**5/15/2024**
Final Sign-Off	Course Author confirms with instructional designer that online course is ready for preview week (e.g., quiz settings and discussion settings are in place).	**5/31/2024**

If the course author is also an AD, an additional campus representative may be invited.

Appendix C
Collaborative Program Financial Model Report

Introduction

The UW Extended Campus (UWEX) Financial Review Workgroup was charged by Vice President for Academic and Student Affairs Johannes Britz on September 26, 2023. This workgroup is an outgrowth of the UW Online Strategic Growth Task Force's report, "Accelerating Online Education," which identified benchmarking UWEX's financial model as a foundational component. The workgroup charge is included as Appendix A.

The Financial Review Workgroup's work included:

- gaining an understanding of the current UWEX financial model;
- informally gathering feedback from campus constituents regarding concerns with that model;
- developing principles to achieve and adhere to when evaluating possible future models;
- analyzing options for change; and
- establishing consensus for a recommended model.

Workgroup membership focused on bringing financial expertise together from UW universities of various sizes and with varying levels of participation with UWEX. Workgroup members are identified in Appendix B. Members appreciate the opportunity to provide recommendations for the future and welcome the opportunity to address questions that UWEX constituents may have in the future.

Current State of Collaborative Programs

Current Financial Model: UWEX has offered administrative support, online teaching and learning resources, and financial administration of collaborative programs since 2010. The bachelor's and master's degree programs are partnerships with campuses across all the Universities of Wisconsin. The collaborative programs are offered in a traditional semester-based format and also in the competency-based UW Flexible Option. UWEX and participating campus partners enter into a memorandum of understanding (MOU) that includes respective roles, responsibilities, and allotment for how tuition generated in the program will be distributed to each campus partner and to UWEX to address, at least in part, expenses incurred in the development and delivery of instruction in the program.

All tuition for a collaborative program received by a campus partner is transferred to UWEX as the fiscal agent for the program. UWEX then transfers funding back to campus partners for academic activities performed by each campus partner in amounts provided in the MOU. For each campus partner, those activities and amounts are:

- For a collaboration with 1-5 partners - $25,000 plus an amount to cover fringe benefit costs for an academic director for each program; for a collaboration with more than 6 partners, $20,000 plus fringe benefit costs for an academic director.
- $5,000 plus fringe benefit costs to support the development or conversion of a new course for online delivery;
- $7,500 plus fringe benefit costs to support instructional costs for each course section in a bachelors' degree program; $9,000 plus fringe benefit costs for a masters' degree program;
- $5,000 plus fringe benefit costs for student services support;

- $2,000 plus fringe benefit costs for any course revision in a bachelors' degree program; $3,000 plus fringe benefits costs for a course revision in a masters' degree program;
- $500 per course section taught for supplies and equipment costs; and
- $7,000 for local marketing for the program.

UWEX then accounts for expenses it incurred in support of the program for the services listed as its responsibilities in the MOU. Those services are in the following categories and itemized in Appendix C:

- Program Management
- Instructional Design and Media Services
- Student Success Coaching
- Marketing and Recruitment
- Media and Advertising Purchases
- Virtual Lab

Once all expense accounting is completed, any net positive revenue is shared in equal amounts across all participating campus partners and UWEX. For programs that have net negative revenue, UWEX absorbs that deficit and does not pass it on to campus partners. An example of the current model for one program can be found in Appendix C.

Financial Results: All collaborative programs administered by UWEX generated revenue of $17.4 million in fiscal year (FY) 2022-23, while incurring expenses of $14.5 million (expenses for campus partners and UWEX).

The workgroup reviewed data regarding the last several fiscal years' performance for UWEX administered collaborative programs. The Flexible Option programs were all generating net positive returns and are all one-partner relationships. The Flexible Option programs in FY 2022-23 generated $4.6 million in revenue and incurred $3.3 million in expenses, for a net return of $1.3 million. All but one of the semester-based collaborative programs are multi-partner collaborations, and these programs generated revenue totaling nearly $12.8 million and reported expenses of $11.2 million, for a surplus of $1.6 million, in FY 2022-23. Under the current model, only 5 of the 12 programs generated net positive revenue that year.

Potential Concerns: Several concerns were raised by UWEX constituents regarding the current model. First, costs related to campus academic activities may be too high and not reflect actual university expenses or needs. For example, for each UWEX program, each university receives $20,000 - $25,000 plus fringe benefits for a program director. Under the current model, this amount does not change as the program matures and the same level of effort is not necessarily required from the directors after the first years of program development.

Second, campus partners perceived UWEX expenses as being too high and too reliant on dated formulas, instead of actual incurred costs. In addition, they were static and did not adjust for actual services performed. For example, UWEX receives funds for an estimated number of program revisions that would be needed based on the age of the program, instead of actual course revisions. Percentages of full-time equivalent (FTE) positions were applied to each program regardless of program enrollments or needs. The guaranteed and often inflated costs at both the universities and UWEX make it challenging to accurately analyze a program's financial health and determine when programmatic changes may be needed (i.e., program revisions, sunset).

Lastly, as noted above, any available surplus was distributed evenly across all participating universities. Enrollments were not considered in the distributions. A university that enrolled 100 students receives the same share of the surplus as a university that enrolled 10 students.

Because the expenses are higher than necessary, the workgroup noted that the true financial performance and viability of programs is not accurately measured. Finally, in terms of general observations, the workgroup noted that sharing the net positive revenue among campus partners and UWEX in equal shares only provided incentive to participate in the program and not necessarily to increase enrollment.

Principles for Future Model

When evaluating the pros and cons of possible future models, the Financial Review Workgroup identified six principles that were important to achieve. These principles include:

- Simplicity/understandability – Non-finance staff should be able to quickly understand the processes within the model. An "elevator" speech is possible to explain the model.
- Transparency – University staff have insight and input into how factors and amounts within the model are calculated.
- Maximization of returns to universities – UW universities should cover their costs related to the UWEX programs and where possible, generate sufficient revenue to address other university costs and campus-identified priorities/initiatives. As a service organization, UWEX needs to cover its costs as well, but its focus is assisting the campuses' achieve their missions and setting campuses up to succeed.
- Scalability – The model should accommodate multiple partners and support the ability to grow online programs.
- Collaboration – Several UWEX programs were developed in a joint, cooperative manner, with campuses bringing their areas of expertise to the table. The underlying goal is to enroll students, adding to the Wisconsin workforce and economy and addressing state needs; it was not intended to be territorial with campuses lobbying for students to enroll specifically with their institution. The model must strike a balance between incentivizing enrollment and incentivizing participation in collaborative endeavors.
- Data-informed – Though other online universities and programs are often unwilling to share their financial models, there are national standards or benchmarks related to ancillary support services and program design. These standards should be incorporated into the UWEX model when possible.

Recommendations for Future Collaborative Program Financial Models

UWEX staff contracted with the University Professional and Continuing Education Association (UPCEA) to benchmark best practices regarding financial models for collaborative online programs. Given the proprietary nature of the industry, UPCEA was unable to provide any information that could be considered a successful financial model and workable in all situations. There does not appear to be an industry standard or best practice for online financial models.

The workgroup realized there were stark differences and opportunities in a one-partner relationship relative to a multi-partner collaborative and provides the recommendations below.

Multi-partner Collaborative Programs: For the multi-partner collaborative programs, the workgroup recommends utilizing a financial model that more accurately reflects an income statement or, in other words, revenues received less actual, incurred expenses. This approach ensures all instructional costs continue to be reimbursed. For other program support costs, it also provides initial financial incentives for campuses to participate that taper to lesser amounts as a program matures and enrollments increase. An example would be maintaining the $25,000 plus fringe benefits for a program director at each campus as programs are being developed and getting established in years one through three but stepping that amount down in years four and beyond, as programs should be more mature. In addition, the workgroup recommends that the itemization for the reimbursement should be 'Program Support,' not specifically for academic director or other specific functions. It should be noted that the workgroup considered having one program director across all universities when a program is mature, but determined it was important for each campus to have a 'voice' in program governance.

With regard to UWEX expenses, the workgroup recommends that expenses be accounted for in a manner that reflects actual services performed, the overall amount of expenses be capped, and the expense amounts are lowered as a program matures, similar to the reductions identified for the universities. By having expenses reduced to reflect actual amounts incurred, net revenues would increase.

The increased net positive revenue then will be split amongst campus partners, excluding UWEX, in a way that balances incentivizing participation and growing enrollment at a partner campus. To strike that balance, the workgroup recommends that 80% of the net positive revenue be divided and shared in equal parts across all campus partners. The remaining 20% would be distributed proportionally to the campus partners based on the number of enrollments in the program that each campus contributed to the collaborative. The workgroup recommends the greater weight on collaboration, instead of enrollments, to recognize the value of participation, when UW universities may be providing program instruction or may be marketing in such a way that enrollments occur at other campuses.

UWEX will continue to use the general-purpose revenue (GPR) it receives to provide funding to campus partners in the first three development years of a program, to bolster underperforming programs regardless of the age of such a program, and to cover program deficits and administrative costs, such as rent, information technology and administrative staff.

See Appendix D for a multi-year example of the recommended model. The workgroup recommends that this model apply prospectively to all new multi-partner collaborative programs that enlist UWEX to provide services, with the new MOUs reflecting this approach. For existing multi-partner collaborative programs, the workgroup recommends that UWEX immediately actualize, cap and reduce its expenses but that the academic activities expenses accounting for services provided by campus partners be implemented when the existing MOUs come due for renegotiation and renewal.

Using this recommended model, 8 of the 12 semester-based collaborative programs would have generated net positive revenue in FY 2022-23 (see Appendix E). UWEX has traditionally used its GPR in part to cover program deficits. With the reduction of some university and UWEX costs, there will theoretically be fewer deficits to address in the future. The workgroup recommends that GPR usage and program revenue balances be monitored in the future. Specifically, the workgroup recommends that at the end of the 2025-27 biennium, a workgroup be reconvened to review the results of the proposed revisions to the financial model and recommend any revisions, if necessary. It further recommends that UWEX work with the Vice President for Academic and Student Affairs and through the UWEX governance process to determine the best use of any program revenue balances.

<u>One Partner Relationships</u>: The workgroup recognized that there is more room for flexibility in financial model considerations when only one campus works with UWEX in delivering online programming. One campus partner could choose the model described above for the multi-partner relationship or could agree to split revenue on a percentage basis with UWEX. For example, a campus partner could agree to keep 60% of revenue generated in an online program and share 40% of that revenue with UWEX.

Similar to implementing the revised model in multi-partner collaborative programs, the workgroup recommends that this model apply prospectively to all new one partner programs that enlist UWEX to provide services. For existing one partner programs, the workgroup recommends that UWEX immediately actualize, cap and reduce its expenses but that the academic activities expenses accounting for services provided by campus partners be implemented when the existing MOUs come due for renegotiation and renewal.

Appendix A

<p style="text-align:center">Financial Review of UW Extended Campus
Workgroup Charge September 2023</p>

The UW Online Strategic Growth Task Force report, "Accelerating Online Education," identified benchmarking UW Extended Campus (UWEX) as a foundational component. Included as part of the benchmarking effort is the need to analyze UW Extended Campus' financial model, operations, and MOUs.

Senior Vice President for Academic and Student Affairs Johannes Britz has asked Julie Gordon, Senior Associate Vice President for Finance, to lead this workgroup. At Julie's discretion, the workgroup will be formed from finance leaders from across UW System and will include Jason Beier, Interim Associate Vice President for UW Extended Campus, and Stephen Schmid, Online Implementation Team Lead.

The project scope includes a review and analysis of the UW Extended Campus' financial model, revenue distribution, MOUs, and related financials for the semester-based and Flexible Option collaborative programs. It is anticipated that this review will lead to recommendations for revisions to the UWEX financial model. Analysis of the financials will likely precipitate changes to future memorandums of understanding with participating UW institutions, and recommendations for proposed changes are desired.

Recommendations to Vice President Britz are expected in December 2023. The recommendations will be shared with provosts, chancellors and UW System leadership for additional feedback.

Appendix B

UWEX Financial Model Review Workgroup:

- Sheronda Glass, Interim Vice Chancellor for Finance & Administration, UW-Parkside
- Julie Gordon, Senior Associate Vice President for Finance, Universities of Wisconsin Administration
- Erik Guenard, Vice Chancellor for Business, Finance, and Administrative Services, UW-Stout
- Jeffrey S Kahler, Vice Chancellor Administration & Finance, UW-Superior
- Paul Klajbor, Divisional Finance Officer, UW-Milwaukee

Supported by:

- Jason Beier, Interim Associate Vice President, UWEX
- Montana Polans, Director of Business Services, UWEX
- Stephen Schmid, Special Assistant, Universities of Wisconsin Administration

UW-Milwaukee, Oshkosh, Platteville, River Falls, Stevens Point, and Extended Campus   a s of 30-Jun-202

Fiscal Year 2022-23

Applied Computing - Undergraduate Program

	MIL	OSH	PLT	RVF	STP	UWEX	2022-23 Total Actual
Program Tuition Revenues							
Summer Semester	46,965	9,090	13,635	4,545	22,725	0	96,960
Fall Semester	180,600	63,000	47,250	15,750	80,325	0	386,925
Spring Semester	166,950	69,300	58,275	12,600	81,900	0	389,025
	394,515	**141,390**	**119,160**	**32,895**	**184,950**	**0**	**872,910**
UW Institution - Academic Activities:							
Program Director / Program Support	33,125	33,125	33,125	33,125	33,125	0	165,625
Faculty /Content Development / Revisions	2,650	5,300	0	2,650	2,650	0	13,250
Faculty Course Instruction	59,627	51,015	59,628	79,503	68,771	0	318,544
Faculty Course Instruction (S&E)	3,000	2,500	3,000	4,000	4,000	0	16,500
Student Support Services	6,625	6,625	6,625	6,625	6,625	0	33,125
Marketing - Local	7,000	7,000	7,000	7,000	7,000	0	35,000
	112,027	**105,565**	**109,378**	**132,903**	**122,171**	**0**	**582,044**
UWEX - Support of Campus Program:							
Program Management	0	0	0	0	0	69,613	69,613
Instructional Design & Media	0	0	0	0	0	66,932	66,932
Curriculum Software & Hosting	0	0	0	0	0	93,226	93,226
Student Engagement	0	0	0	0	0	38,829	38,829
Marketing & Recruitment	0	0	0	0	0	39,639	39,639
Marketing - Media Buys	0	0	0	0	0	79,808	79,808
	0	**0**	**0**	**0**	**0**	**388,047**	**388,047**
Total Expenditures	112,027	105,565	109,378	132,903	122,171	388,047	970,091
Net Cash Flow	**0**	**0**	**0**	**0**	**0**	**0**	**(97,181)**

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Appendix C

FY2022-23 Bachelor of Applied Computing

UW Institution - Academic Activities:	MIL	OSH	PLT	RVF	STP	Total
Salary						
Institution Program Director	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,00	$ 125,000
Faculty Course Instruction @ **$7,500 / course section**	$ 45,000	$ 38,500	$ 45,000	$ 60,000	$ 51,900	$ 240,400
Faculty Content Development / Revision @ **$2,000 / course**	$ 2,000	$ 4,000	$	$ 2,000	$ 2,000	$ 10,000
Student Support Services	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 25,000
Fringes @ 32.50%	$ 25,02	$ 23,565	$ 24,378	$ 29,90	$ 27,27	$ 130,14
S&E						
Faculty Course Instruction @ **$500 / course section**	$ 3,000	$ 2,500	$ 3,000	$ 4,000	$ 4,000	$ 16,500
Marketing (Local)	$ 7,000	$ 7,000	$ 7,000	$ 7,000	$ 7,000	$ 35,000
Tota	$ 112,027	$ 105,565	$ 109,378	$ 132,903	$ 122,17	$ 582,043

Appendix C

FY2022-23 Bachelor of Applied Computing

UWEX - Support of Campus Program:	FTEs	Salary	Fringes	S&E	Average Cost Per FTE	Cost Alloc. To Programs
			32.50%			
Program Management	0.50	$ 40,88.	$ 13,28	$ 15,443	$ 69,61.	$ 69,613
Instructional Design	0.50	$ 64,74.	$ 21,04	$ 1,15	$ 86,93%	$ 43,469
Media Design	0.25	$ 69,80.	$ 22,68(	$ 1,35(	$ 93,84%	$ 23,462
Student Engagement	0.48	$ 59,45	$ 19,32	$ 2,118	$ 80,89!	$ 38,829
Marketing	0.30	$ 54,60(	$ 17,74	$ 1,15(	$ 73,50!	$ 22,053
Recruitment	0.25	$ 51,73(	$ 16,81	$ 1,792	$ 70,34.	$ 17,586
Curriculum Software Hosting						$ 93,22(
Marketing Media Buys						$ 79,80%
						$ 388,04(

Appendix D

Campus 1, Campus 2, Campus 3, Campus 4, Campus 5 and UWEX
Program XYZ - Undergraduate Program - YEAR 42

	Campus 1	Campus 2	Campus 3	Campus 4	Campus 5	UWEX	Total
Course Sections Offered	0	0	0	0	0		0
Number of courses Developed	0	0	0	0	0		0
Number of courses Revised	0	0	0	0	0		0
Course Enrollments (at 20th business da	0	0	0	0	0		0
Enrollments Ratio	0.00	0.00	0.00	0.00	0.00		
Program Tuition Revenues							
Summer Semester	0	0	0	0	0	0	0
Fall Semester	0	0	0	0	0	0	0
Spring Semester	0	0	0	0	0	0	0
	0	**0**	**0**	**0**	**0**	**0**	**0**
UW Institution - Academic Activities:							
Program Director / Program Support	25,000	25,000	25,000	25,000	25,000	0	125,000
Faculty / Content Development	0	0	0	0	0	0	0
	0	0	0	0	0	0	0
Faculty Course Instruction	0	0	0	0	0	0	0
Faculty Course Instruction (S&E)	0	0	0	0	0	0	0
Student Support Services	0	0	0	0	0	0	0
Marketing - Local (S&E)	0	0	0	0	0	0	0
	25,000	**25,000**	**25,000**	**25,000**	**25,000**	**0**	**125,000**
UWEX - Support of Campus Program:							
Salary & Fringes							
Program Management	0	0	0	0	0	0	0
Instructional Design & Media	0	0	0	0	0	0	0
Student Engagement	0	0	0	0	0	0	0
Marketing & Recruitment	0	0	0	0	0	0	0
S&E							
Program Management	0	0	0	0	0	0	0
Curriculum Software & Hosting	0	0	0	0	0	0	0
Marketing - Media Buys	0	0	0	0	0	0	0
	0	**0**	**0**	**0**	**0**	**0**	**0**
Total Expenditures	**25,000**	**25,000**	**25,000**	**25,000**	**25,000**	**0**	**125,000**
Net Cash Flow	**0**	**0**	**0**	**0**	**0**	**0**	**(125,000)**

Appendix D

Campus 1, Campus 2, Campus 3, Campus 4, Campus 5 and UWEX
Program XYZ - Undergraduate Program - YEAR 43

	Campus 1	Campus 2	Campus 3	Campus 4	Campus 5	UWEX	Total
Course Sections Offered	0	1	5	3	3		12
Number of courses Developed	2	2	2	2	2		10
Number of courses Revised	0	0	0	0	0		0
Course Enrollments (at 20th business da	18	8	16	31	21		94
Enrollments Ratio	0.19	0.09	0.17	0.33	0.22		
Program Tuition Revenues							
Summer Semester	0	0	0	0	0	0	0
Fall Semester	5,940	2,970	7,425	17,820	2,970	0	37,125
Spring Semester	20,790	8,910	16,335	28,215	28,215	0	102,465
	26,730	**11,880**	**23,760**	**46,035**	**31,185**	**0**	**139,590**
UW Institution - Academic Activities:							
Program Director / Program Support	25,000	25,000	25,000	25,000	25,000	0	125,000
Faculty / Content Development	10,000	10,000	10,000	10,000	10,000	0	50,000
	0	0	0	0	0	0	0
Faculty Course Instruction	0	7,500	37,500	22,500	22,500	0	90,000
Faculty Course Instruction (S&E)	0	500	2,500	1,500	1,500	0	6,000
Student Support Services	5,000	5,000	5,000	5,000	5,000	0	25,000
Marketing - Local (S&E)	7,000	7,000	7,000	7,000	7,000	0	35,000
	47,000	**55,000**	**87,000**	**71,000**	**71,000**	**0**	**331,000**
UWEX - Support of Campus Program:							
Salary & Fringes							
Program Management	0	0	0	0	0	35,000	35,000
Instructional Design & Media	0	0	0	0	0	100,000	100,000
Student Engagement	0	0	0	0	0	4,230	4,230
Marketing & Recruitment	0	0	0	0	0	25,000	25,000
S&E							
Program Management	0	0	0	0	0	15,000	15,000
Curriculum Software & Hosting	0	0	0	0	0	26,112	26,112
Marketing - Media Buys	0	0	0	0	0	80,000	80,000
	0	**0**	**0**	**0**	**0**	**285,342**	**285,342**
Total Expenditures	**47,000**	**55,000**	**87,000**	**71,000**	**71,000**	**285,342**	**616,342**
Net Cash Flow	**0**	**0**	**0**	**0**	**0**	**0**	**(476,752)**

Appendix D

Campus 1, Campus 2, Campus 3, Campus 4, Campus 5 and UWEX
Program XYZ - Undergraduate Program - YEAR 44

	Campus 1	Campus 2	Campus 3	Campus 4	Campus 5	UWEX	Total
Course Sections Offered	3	4	6	4	4		21
Number of courses Developed	2	2	2	2	2		10
Number of courses Revised	0	0	0	0	0		0
Course Enrollments (at 20th business da	36	16	32	62	42		188
Enrollments Ratio	0.19	0.09	0.17	0.33	0.22		
Program Tuition Revenues							
Summer Semester	6,950	3,089	6,178	11,969	8,108	0	36,293
Fall Semester	23,522	10,454	20,909	40,511	27,443	0	122,839
Spring Semester	22,988	10,217	20,434	39,590	26,819	0	120,047
	53,460	**23,760**	**47,520**	**92,070**	**62,370**	**0**	**279,180**
UW Institution - Academic Activities:							
Program Director / Program Support	25,000	25,000	25,000	25,000	25,000	0	125,000
Faculty / Content Development	10,000	10,000	10,000	10,000	10,000	0	50,000
	0	0	0	0	0	0	0
Faculty Course Instruction	22,500	30,000	45,000	30,000	30,000	0	157,500
Faculty Course Instruction (S&E)	1,500	2,000	3,000	2,000	2,000	0	10,500
Student Support Services	5,000	5,000	5,000	5,000	5,000	0	25,000
Marketing - Local (S&E)	7,000	7,000	7,000	7,000	7,000	0	35,000
	71,000	**79,000**	**95,000**	**79,000**	**79,000**	**0**	**403,000**
UWEX - Support of Campus Program:							
Salary & Fringes							
Program Management	0	0	0	0	0	35,000	35,000
Instructional Design & Media	0	0	0	0	0	100,000	100,000
Student Engagement	0	0	0	0	0	8,460	8,460
Marketing & Recruitment	0	0	0	0	0	25,000	25,000
S&E							
Program Management	0	0	0	0	0	15,000	15,000
Curriculum Software & Hosting	0	0	0	0	0	26,112	26,112
Marketing - Media Buys	0	0	0	0	0	80,000	80,000
	0	**0**	**0**	**0**	**0**	**289,572**	**289,572**
Total Expenditures	**71,000**	**79,000**	**95,000**	**79,000**	**79,000**	**289,572**	**692,572**
Net Cash Flow	**0**	**0**	**0**	**0**	**0**	**0**	**(413,392)**

Appendix D

Campus 1, Campus 2, Campus 3, Campus 4, Campus 5 and UWEX
Program XYZ - Undergraduate Program - YEAR 45

	Campus 1	Campus 2	Campus 3	Campus 4	Campus 5	UWEX	Total
Course Sections Offered	4	4	6	5	6		25
Number of courses Developed	0	0	0	0	0		0
Number of courses Revised	1	1	1	2	2		7
Course Enrollments (at 20th business day	214	35	60	27	73		409
Enrollments Ratio	0.52	0.09	0.15	0.07	0.18		
Program Tuition Revenues							
Summer Semester	29,700	11,880	17,820	4,455	7,425	0	71,280
Fall Semester	135,340	19,695	29,795	20,200	44,945	0	249,975
Spring Semester	154,530	18,180	39,390	15,150	56,055	0	283,305
	319,570	**49,755**	**87,005**	**39,805**	**108,425**	**0**	**604,560**
UW Institution - Academic Activities:							
Program Support - SAL & FR	19,875	19,875	19,875	19,875	19,875	0	99,375
	0	0	0	0	0	0	0
Faculty / Revisions - SAL & FR	2,650	2,650	2,650	5,300	5,300	0	18,550
Faculty Course Instruction - SAL & FR	39,750	39,750	59,625	49,688	59,625	0	248,438
Program S&E	4,000	4,000	6,000	5,000	6,000	0	25,000
	0	0	0	0	0	0	0
	0	0	0	0	0	0	0
	66,275	**66,275**	**88,150**	**79,863**	**90,800**	**0**	**391,363**
UWEX - Support of Campus Program:							
Salary & Fringes							
Program Management	0	0	0	0	0	33,125	33,125
Instructional Design & Media	0	0	0	0	0	69,563	69,563
Student Engagement	0	0	0	0	0	24,387	24,387
Marketing & Recruitment	0	0	0	0	0	23,188	23,188
S&E							
Program Management	0	0	0	0	0	15,000	15,000
Curriculum Software & Hosting	0	0	0	0	0	26,112	26,112
Marketing - Media Buys	0	0	0	0	0	80,000	80,000
	0	**0**	**0**	**0**	**0**	**271,374**	**271,374**
Total Expenditures	**66,275**	**66,275**	**88,150**	**79,863**	**90,800**	**271,374**	**662,736**
Net Cash Flow	**0**	**0**	**0**	**0**	**0**	**0**	**(58,176)**

Appendix D

Campus 1, Campus 2, Campus 3, Campus 4, Campus 5 and UWEX
Program XYZ - Undergraduate Program - YEAR 46

	Campus 1	Campus 2	Campus 3	Campus 4	Campus 5	UWEX	Total
Course Sections Offered	4	6	5	9	8		32
Number of courses Developed	0	0	0	0	0		0
Number of courses Revised	2	2	1	1	1		7
Course Enrollments (at 20th business day	275	82	95	29	121		602
Enrollments Ratio	0.46	0.14	0.16	0.05	0.20		
Program Tuition Revenues							
Summer Semester	54,540	16,665	15,150	3,030	25,755	0	115,140
Fall Semester	176,750	55,045	65,650	23,735	73,730	0	394,910
Spring Semester	177,255	51,510	62,115	12,120	81,810	0	384,810
	408,545	**123,220**	**142,915**	**38,885**	**181,295**	**0**	**894,860**
UW Institution - Academic Activities:							
Program Support - SAL & FR	19,875	19,875	19,875	19,875	19,875	0	99,375
	0	0	0	0	0	0	0
Faculty / Revisions - SAL & FR	5,300	5,300	2,650	2,650	2,650	0	18,550
Faculty Course Instruction - SAL & FR	39,750	59,625	49,688	89,438	79,500	0	318,000
Program S&E	4,000	6,000	5,000	9,000	8,000	0	32,000
	0	0	0	0	0	0	0
	0	0	0	0	0	0	0
	68,925	**90,800**	**77,213**	**120,963**	**110,025**	**0**	**467,925**
UWEX - Support of Campus Program:							
Salary & Fringes							
Program Management	0	0	0	0	0	33,125	33,125
Instructional Design & Media	0	0	0	0	0	69,563	69,563
Student Engagement	0	0	0	0	0	35,894	35,894
Marketing & Recruitment	0	0	0	0	0	23,188	23,188
S&E							
Program Management	0	0	0	0	0	15,000	15,000
Curriculum Software & Hosting	0	0	0	0	0	26,112	26,112
Marketing - Media Buys	0	0	0	0	0	80,000	80,000
	0	**0**	**0**	**0**	**0**	**282,881**	**282,881**
Total Expenditures	**68,925**	**90,800**	**77,213**	**120,963**	**110,025**	**282,881**	**750,806**
Net Cash Flow	**0**	**0**	**0**	**0**	**0**	**0**	**144,054**
Revenue Share Equally - 80%	23,049	23,049	23,049	23,049	23,049	0	115,243
Revenue Share by Enrollments - 20%	13,161	3,924	4,547	1,388	5,791	0	28,811

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Appendix E

Proposed New Income Statement Model

	AAS	BSAPC	BSHIMT	BSHWM	BSMGT	MSABT	MSCYB	MSDS	MSHCA	MSHWM	MSITM	MSMGT	Total
Course Sections Offered	101	33	51	27	21	37	25	61	40	15	19	39	469
Number of courses Developed	6	0	0	0	0	0	0	0	0	0	0	0	6
Number of courses Revised	7	5	6	0	3	8	5	5	5	5	2	4	55
Course Enrollments (at 20th business day from c	1,941	572	918	365	396	385	219	1,047	670	195	118	766	7,592
Program Tuition Revenues													
Summer Semester	171,250	96,960	156,640	52,360	52,800	181,050	91,800	517,650	367,575	86,580	48,450	366,300	2,189,415
Fall Semester	814,720	386,925	532,800	209,440	245,700	362,950	199,750	1,139,250	534,325	193,500	130,050	606,000	5,355,410
Spring Semester	768,960	389,025	512,100	204,160	234,900	396,950	237,150	1,071,000	487,200	159,750	105,400	654,000	5,220,595
	1,754,930	872,910	1,201,540	465,960	533,400	940,950	528,700	2,727,900	1,389,100	439,830	283,900	1,626,300	12,765,420
UW Institution - Academic Activities:													
Program Support - SAL & FR	139,125	99,375	79,500	185,500	59,625	139,125	159,000	119,250	99,375	152,375	99,375	99,375	1,431,000
Faculty / Content Development - SAL & FR	30,210	0	0	0	0	0	0	0	0	0	0	0	30,210
Faculty / Revisions - SAL & FR	15,241	13,250	15,900	0	7,950	31,800	19,875	19,875	19,875	19,875	7,950	15,900	187,491
Faculty Course Instruction - SAL & FR	962,062	318,544	487,756	215,326	202,735	333,240	234,125	736,700	429,567	157,676	137,575	469,315	4,684,620
Program S&E	101,000	33,000	51,000	13,500	21,000	37,000	25,000	61,000	40,000	15,000	19,000	39,000	455,500
	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0
	1,247,637	464,169	634,156	414,326	291,310	541,165	438,000	936,825	588,817	344,926	263,900	623,590	6,788,821
UWEX - Support of Campus Program:													
Salary & Fringes													
Program Management	33,125	33,125	33,125	37,325	33,125	33,125	33,125	33,125	33,125	33,125	33,125	33,125	401,700
Instructional Design & Media	129,188	49,688	59,625	21,735	29,813	95,400	59,625	59,625	59,625	59,625	23,850	47,700	695,498
Student Engagement	57,866	34,106	54,736	20,424	23,612	22,956	13,058	62,427	39,949	11,627	7,036	45,673	393,468
Marketing & Recruitment	23,188	23,188	23,188	0	23,188	23,188	23,188	23,188	23,188	23,188	23,188	23,188	255,063
S&E													
Program Management	15,000	15,000	15,000	0	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	165,000
Curriculum Software & Hosting	0	93,226	5,290	0	0	27,678	72,302	79,225	10,262	0	13,036	7,484	308,503
Marketing - Media Buys	80,000	80,000	80,000	0	80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000	880,000
	338,366	328,332	270,963	79,484	204,737	297,346	296,297	352,590	261,148	222,564	195,234	252,169	3,099,231
Total Expenditures	1,586,003	792,501	905,119	493,810	496,046	838,511	734,297	1,289,415	849,965	567,490	459,134	875,759	9,888,051
Net Cash Flow	168,927	80,410	296,421	(27,850)	37,354	102,439	(205,597)	1,438,485	539,135	(127,660)	(175,234)	750,541	2,877,369

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Appendix E
Proposed New Income Statement Model

	EAU	GBY	LAC	MSN	MIL	OSH	PKS	PLT	RVF	STP	STO	SUP	WTW	UWEX	Total
Program Tuition Revenues															
Summer Semester	93,600	503,820	335,025	120,700	91,615	196,780	168,940	49,185	63,205	237,140	127,195	139,560	62,650	0	2,189,415
Fall Semester	315,620	975,400	659,895	234,600	404,280	458,020	526,380	136,350	227,060	674,685	194,475	307,115	241,530	0	5,355,410
Spring Semester	308,605	980,175	611,415	260,100	367,430	415,065	536,680	157,150	229,680	651,945	218,725	288,625	195,000	0	5,220,595
	717,825	**2,459,395**	**1,606,335**	**615,400**	**863,325**	**1,069,865**	**1,232,000**	**342,685**	**519,945**	**1,563,770**	**540,395**	**735,300**	**499,180**	**0**	**12,765,420**
UW Institution - Academic Activities:															
Program Support - SAL & FR	39,750	119,250	145,750	19,875	39,750	139,125	192,125	79,500	159,000	238,500	39,750	178,875	39,750	0	1,431,000
Faculty / Content Development - SAL & FR	4,770	0	0	0	4,770	4,770	4,770	0	4,770	6,360	0	0	0	0	30,210
Faculty / Revisions - SAL & FR	3,975	11,925	17,225	7,950	2,650	17,225	33,788	3,975	15,900	25,175	15,900	22,525	9,278		187,491
Faculty Course Instruction - SAL & FR	282,892	430,101	419,160	8,613	185,507	499,508	634,784	234,979	429,514	764,291	129,850	495,156	170,266	0	4,684,620
Program S&E	26,000	40,000	37,500	3,000	20,000	50,000	64,000	23,000	42,500	80,500	11,000	41,000	17,000	0	455,500
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	357,387	**601,276**	**619,635**	**39,438**	**252,677**	**710,628**	**929,466**	**341,454**	**651,684**	**1,114,826**	**196,500**	**737,556**	**236,294**	**0**	**6,788,821**
UWEX - Support of Campus Program:															
Salary & Fringes															
Program Management	0	0	0	0	0	0	0	0	0	0	0	0	0	401,700	401,700
Instructional Design & Media	0	0	0	0	0	0	0	0	0	0	0	0	0	695,498	695,498
Student Engagement	0	0	0	0	0	0	0	0	0	0	0	0	0	393,468	393,468
Marketing & Recruitment	0	0	0	0	0	0	0	0	0	0	0	0	0	255,063	255,063
S&E															
Program Management	0	0	0	0	0	0	0	0	0	0	0	0	0	165,000	165,000
Curriculum Software & Hosting	0	0	0	0	0	0	0	0	0	0	0	0	0	308,503	308,503
Marketing - Media Buys	0	0	0	0	0	0	0	0	0	0	0	0	0	880,000	880,000
	0	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**3,099,231**	**3,099,231**
Total Expenditures	**357,387**	**601,276**	**619,635**	**39,438**	**252,677**	**710,628**	**929,466**	**341,454**	**651,684**	**1,114,826**	**196,500**	**737,556**	**236,294**	**3,099,231**	**9,888,051**
Net Cash Flow	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**2,877,369**
Revenue Share Equally - 80%	211,104	382,876	337,344	11,707	29,758	353,350	304,193	110,834	39,719	378,809	206,348	321,846	28,600	0	
Revenue Share by Enrollments - 20%	70,595	170,920	114,933	13,517	32,169	78,228	54,234	12,811	8,966	77,356	48,015	32,909	22,332	0	
Revenue to Support Academic Activities	357,387	601,276	619,635	39,438	252,677	710,628	929,466	341,454	651,684	1,114,826	196,500	737,556	236,294	3,099,231	
Total Revenue Campus & UWEX Received	**639,086**	**1,155,072**	**1,071,912**	**64,662**	**314,604**	**1,142,205**	**1,287,893**	**465,100**	**700,369**	**1,570,991**	**450,863**	**1,092,310**	**287,226**	**3,099,231**	
Shared equally	601,016	1,108,832	1,014,829	70,295	342,960	1,130,182	1,308,718	480,404	737,377	1,582,277	425,866	1,113,211	299,273	3,304,889	

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