



2025-27

**Biennial Operating
Budget and Financial
Aid Request**

Universities of Wisconsin
August 2024

**2025-27 BIENNIAL OPERATING AND FINANCIAL AID BUDGET REQUEST
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SUMMARY AND BACKGROUND

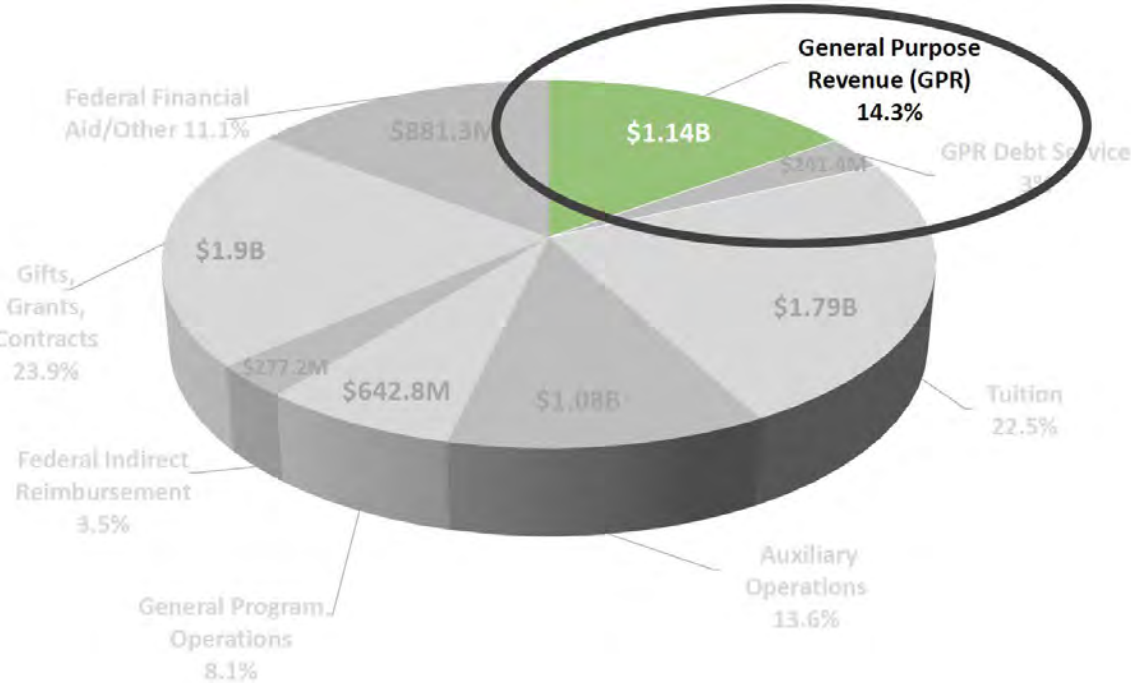
The UW Board of Regents is required to submit a budget request to the Department of Administration (DOA) by September 15 of each even numbered year. The UW President provides the Regents, for their consideration, a recommended submission at the August meeting in the same even numbered year.

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

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

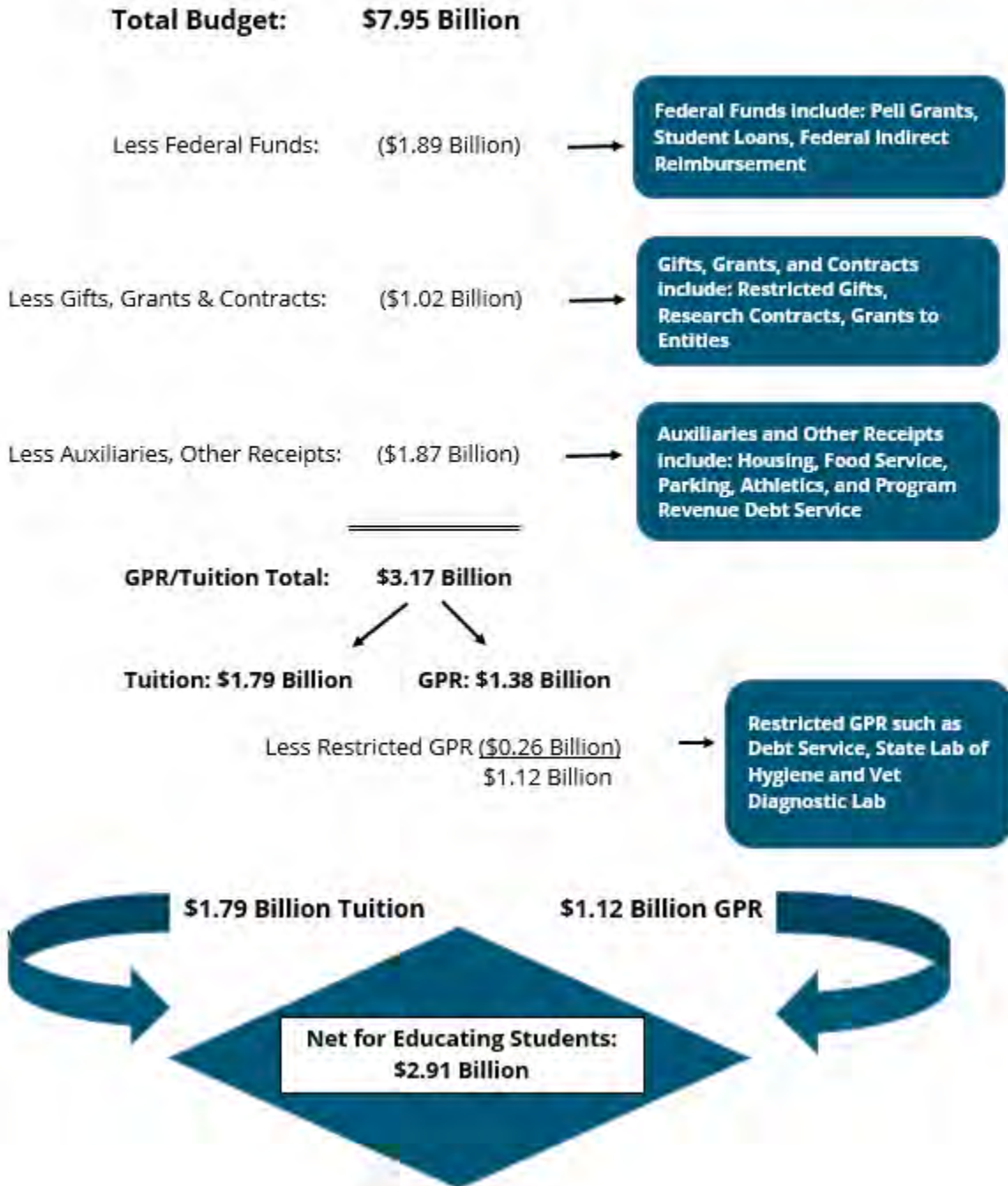
BIENNIAL BUDGET REQUEST SUMMARY			
Strategic Goal	FY26	FY27 Ongoing Request	Biennial Request
Increasing Affordability	\$ 56,360,000	\$ 72,610,000	\$ 128,970,000
Preserving Accessibility	\$ 113,100,000	\$ 156,870,000	\$ 269,970,000
Developing Talent	\$ 41,819,000	\$ 41,819,000	\$ 83,638,000
Ensuring Quality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

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



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

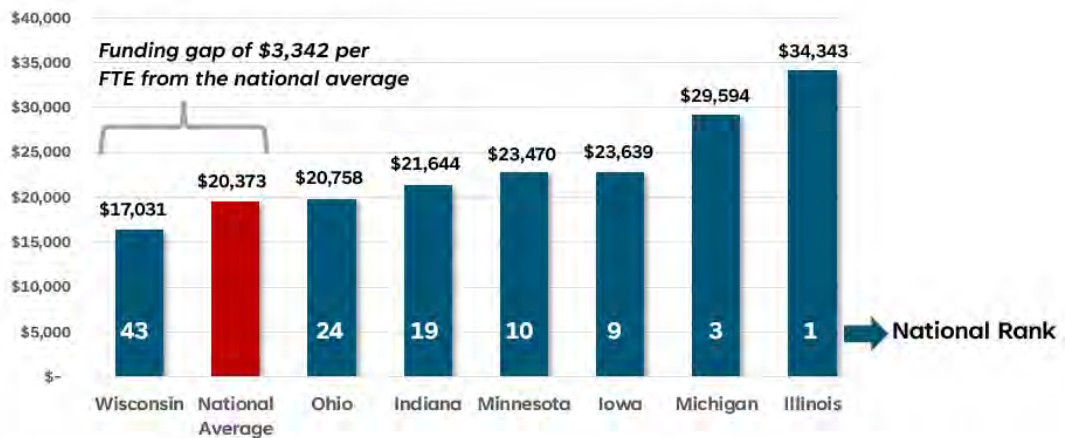
UNIVERSITIES OF WISCONSIN
2024-25 Ongoing Annual Base Budget



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

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

TOTAL TUITION AND STATE SUPPORT PER FTE



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

TUITION AND STATE SUPPORT IN MIDWEST



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

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

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

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

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

Increasing Affordability

Strategic Plan Goals:

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

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

Wisconsin Tuition Promise

\$28.11M Ongoing

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

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

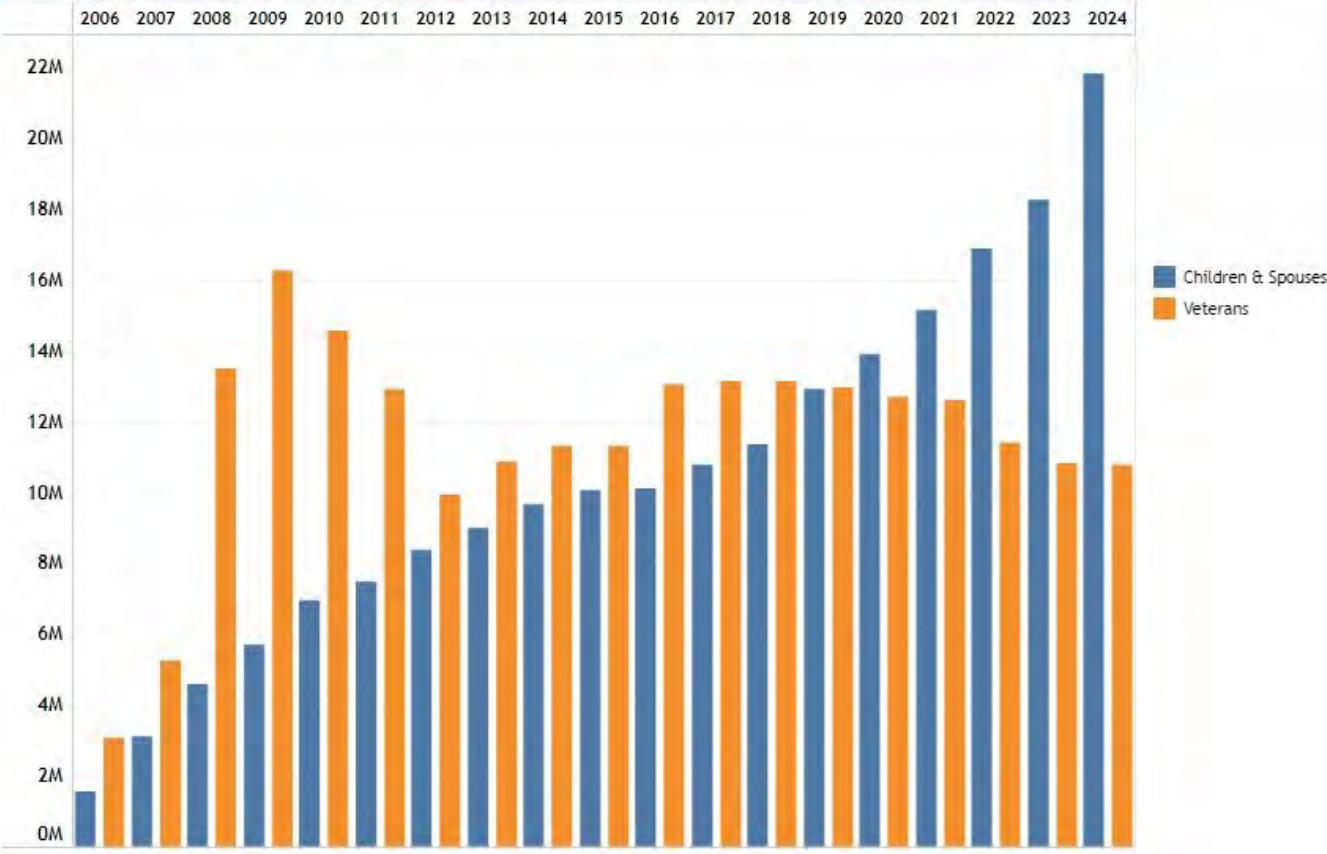
Veterans Support

\$42.0M Ongoing

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

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

UW Paid Funds Only, Veterans Compared to Children & Spouses



Tuition and Fee Remissions for Tribal Members

\$2.5M Ongoing

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

Preserving Accessibility

Strategic Plan Goals:

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

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

Operational Budget Increase

\$92.0M Ongoing

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

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

\$39.12M Ongoing

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

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

Tuition Share of Merit and Market Adjustments

\$12.0M Ongoing

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

Dual Enrollment

\$7.25M Ongoing

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

Expanding Recruitment and Outreach

\$3.0M Ongoing

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

Direct Admit Wisconsin

\$1.5M Ongoing

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

Welcome Back Wisconsin

\$1.25M Ongoing

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

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

Improving Transfer Pathways

\$750K Ongoing

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

Developing Talent

Strategic Plan Goals:

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

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

Mental Health and Well-being

\$11.0M Ongoing

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

Student Retention

\$9.9M Ongoing

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

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

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

Career Readiness

\$5.75M Ongoing

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

High Impact Practices

\$1.7M Ongoing

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

Civil Dialogue Training

\$2.5M Ongoing

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

Prior Learning Assessments

\$719K Ongoing

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

Teacher Loan Forgiveness

\$5.25M Ongoing

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

Continuing Education**\$5.0M Ongoing**

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

Ensuring Quality

Strategic Plan Goals:

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

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

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

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

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

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

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

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

Investing in Innovation

Strategic Plan Goals:

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

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

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

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

Faculty Recruitment and Development

\$5.7M Ongoing

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

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

Curriculum and Classroom Applications

\$5.0M Ongoing

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

Online Collaborative Programs

\$1.3M One-time

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

Research and Infrastructure

\$37.625M One-time

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

Freshwater Collaborative

\$2.5M Ongoing

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

Dairy Innovation

\$3.5M Ongoing

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

Standard Budget Adjustments

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

Fringe Benefits and Lease Rental Payments

Est. \$50.0M Ongoing

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

Wisconsin Veterinary Diagnostic Laboratory (WVDL)

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

Additional Staffing

\$568.5K Ongoing

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

Salary Equity Adjustments

\$217.3K Ongoing

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

Wisconsin Grant-UW

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

Increase to the Wisconsin Grant-UW

\$13.50M Ongoing

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

2025-27 Performance Measures

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

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

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

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

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

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

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

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

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

Measure 2: Participation Rate

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

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

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

Measure 3: Retention Rate

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

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

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

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

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

Measure 4: Graduation Rate

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

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

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

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

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

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

REQUESTED ACTION

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

SUMMARY

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

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

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

Presenter

- Sean Nelson, Vice President for Finance and Administration

BACKGROUND

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

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

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

Previous Action or Discussion

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

Related Policies

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

ATTACHMENTS

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

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

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

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

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

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

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

*Includes Libraries, Physical Plant and Miscellaneous categories

Report Category Descriptions and Examples

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

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

REQUESTED ACTION

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

SUMMARY

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

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

Presenter

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

BACKGROUND

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

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

Related Policies

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

ATTACHMENT

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

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

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

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

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

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

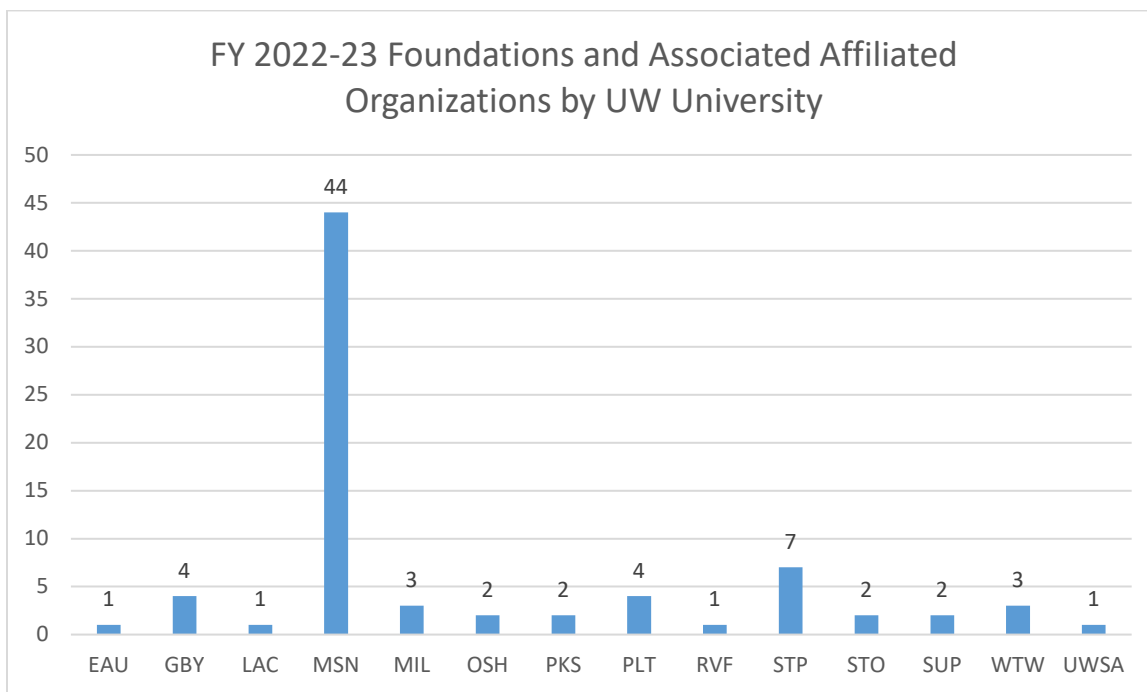
RPD 21-11 requires UW universities to provide an annual report of administrative support provided to and benefits received from all primary fundraising foundations and associated affiliated organizations that received administrative support valued at \$100,000 or greater. If the total administrative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

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

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

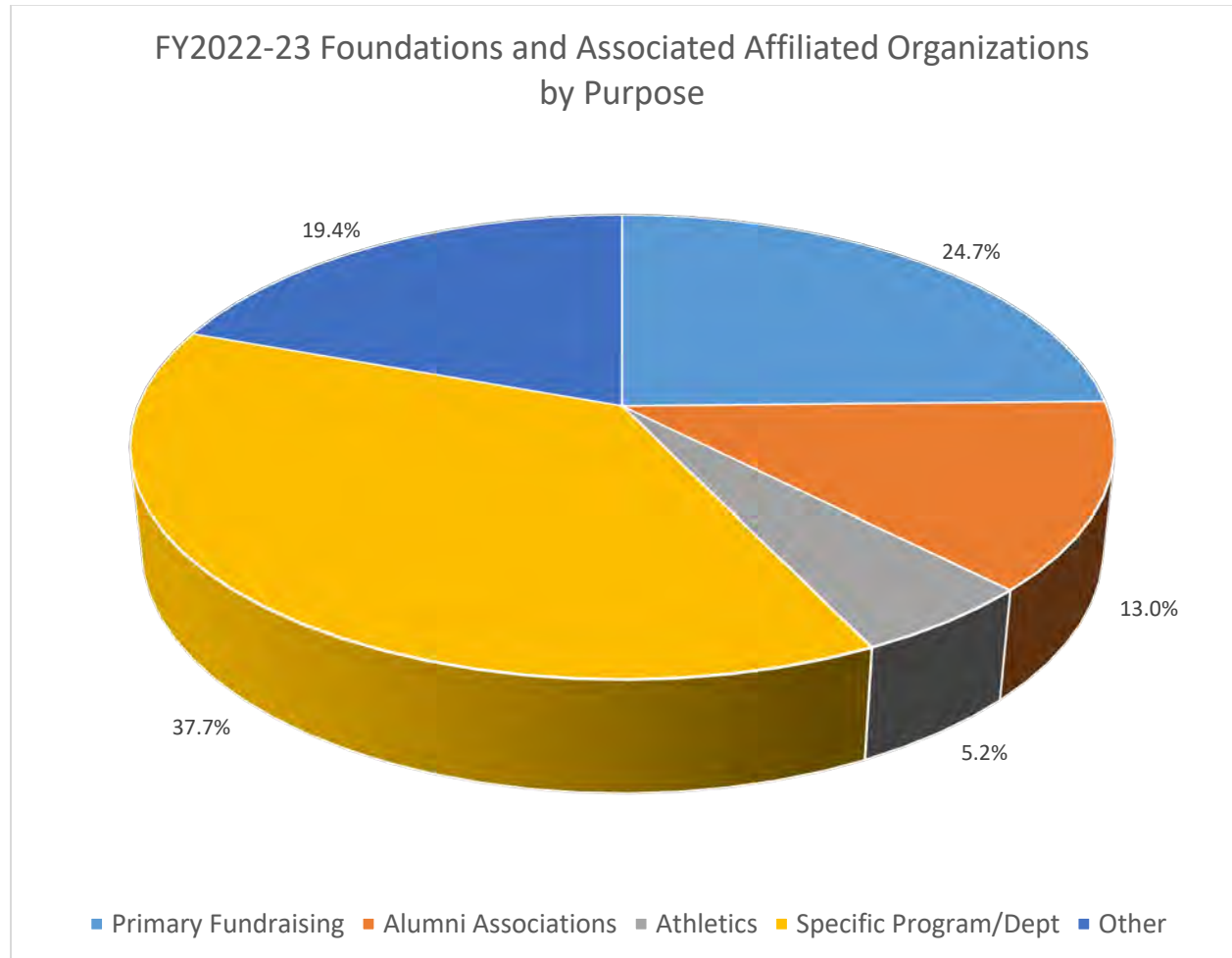
The UW-La Crosse Alumni Association was merged with its primary fundraising foundation, while the other three organizations were dissolved or affiliation agreements were not renewed.

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



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

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



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

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

Appendix A

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

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

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

Removed from the prior year report:

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

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