Leadership Workshop Facilitation: Summary Report

*11.27.2023*

**Engagement Objectives and Approach**

In October 2023, $4.4M in reductions were targeted and implemented to mitigate Fiscal Year 2024 deficits, while an additional $5M budgetary shortfall was projected for Fiscal Year 2025 for the University of Wisconsin, Parkside. At this time, UWP leadership engaged Huron Consulting Group to assist all campus units at the University of Wisconsin, Parkside to identify opportunities for improvement and considerations as to how units might better operate together as part of a comprehensive service and stewardship model to mitigate the $5M shortfall and identify potential long-term areas of reinvestment. For these efforts:

* Areas targeted for FY24 reductions were evaluated for possible expansion or, in rare instances, reversal starting in FY25.
* Program Revenue accounts were deemed largely out of scope.
* The opportunity selection process would serve as an entry point for further analyses by campus leaders, with additional meetings to be scheduled in 2023 to select opportunities for implementation.

To achieve these objectives, Huron facilitated a series of Leadership Workshop to identify and prioritize opportunities encompassing revenue generation and efficiencies to fill the deficit. In advance of this Workshop, Huron held initial interviews with select Academic and Administrative leaders across campus, collected institutional data, and conducted benchmarking of UW-Parkside against 10 peer institutions in order to devise a preliminary list of opportunities for group discussion.

**Identified Opportunities and Next Steps**

The following opportunities were assessed within the Workshop on 11/15 and selected for further analysis by UWP leaders. Owners of further analyses will need to be established for opportunities pertaining to Academic Affairs and Student Affairs / Enrollment Services. “Potential Financial Impact” represent a maximum potential dollar range based on Workshop analysis conducted.

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| **Opportunity** | **Potential Financial Impact (Max. $)** | **One-Time / Recurring** | **Year Available** | **FY25 ($)** | **FY26+ ($)** | **Owner of Further Analysis** | **Additional Considerations or Further Analyses to Conduct** |
| Align to Peers on Community/Theater/Legal/ Arts Staff Expenditures | $1,000,000 | Recurring | FY25 | $500,000 | $500,000 | Finance and Administration | Areas of further analysis include studying local and regional talent needs for students supported by these staff types, analyses of programs supporting these roles, and potential impacts to private donations to departments staffing these roles. A 26% reduction basis was assumed. |
| Institute Further Travel Restrictions | $250,000 | One-Time | FY25 | $250,000 | - | Finance and Administration, Athletics, Advancement, | Athletics, Advancement, and Admissions travel needs will remain. Athletics represents 11% of total travel spend. Consider instituting 1) staff role restrictions, 2) dollar thresholds. |
| Revise Maintenance Coverage per Sq. Ft. in line with APPA Standards | $250,000 | Recurring | FY25 | $125,000 | $125,000 | Human Resources, Finance & Administration, Facilities | Savings identified through elimination of $100K - $200K in fringe for in-sourced staff. |
| Close All Vacant Administrative Staff Lines | $1,000,000 | Recurring | FY25 | $500,000 | $500,000 | Finance & Administration | $700K from potential $900K in identified vacancies will be assumed. |
| Increase Managerial Span of Control to Peer Median | $1,000,000 | Recurring | FY25 | $500,000 | $500,000 | Human Resources | A 60% reduction basis was assumed. |
| Add Athletic Sponsors | $250,000 | Recurring | FY25 | $125,000 | $125,000 | Athletics | A 33% increase was assumed. |
| Raise Athletics Events Ticket Pricing | - | Recurring | FY26+ |  | - | Athletics |  |
| Increase Fundraising Revenue | $250,000 | Recurring | FY26+ |  | $250,000 | Advancement | Potential opportunities include an increase in endowment to support faculty, or to support new opportunities. $40-50K budget increase for the Foundation is assumed to support increased solicitations. Assumes 2 positions endowed annually ($100K annual salary).  |
| Increase Athletics and Arts Venue Rentals | $250,000 | Recurring | FY25 | $125,000 | $125,000 | Athletics and CAH |  |
| Evaluate Work Study Usages | $250,000 | Recurring | FY25 | $125,000 | $125,000 |  | Cannot use students for a position that can be utilized by an FTE. Policy should be developed, standardized, and enforced for use of student workers, as student workers are prohibited from use in a position that can be filled by an FTE. Currently, work study dollars are not available to cover full salaries of student workers.  |
| Conduct Employee Compensation and Classification Review | - | Recurring | FY26+ | - | - |  | Review current salary structure to ensure alignment with leading practice (e.g., salary band width, midpoint progression, etc.), collect diverse array of market data and match incumbent and new job titles to market data, and assign job titles to ranges within the new structure |
| Optimize Course Offerings and Curricula | - | - | - | - | - |  | Efficiencies can be found through reducing faculty effort and overhead for sections with low utilization (e.g., <20%).  |
| Reduce Supplemental Pay for Faculty Members | - | - | - | - | - |  | Efficiencies can be found by revising supplemental pay rates for faculty teaching above load. |
| Analyze High Course Release Amounts | - | - | - | - | - |  | Efficiencies can be found by revising policies to reduce course releases for faculty, or by reducing supplemental pay for faculty members who are teaching below load expectations. |
| Assess and Optimize Non-Instructional Staff Spend and Faculty Time Towards Advising  | - | - | - | - | - |  | Efficiencies can be found through increasing faculty expectation of salary towards academic advising, thereby reducing the necessity of centralized academic advising models. |
| Assess Academic Program Portfolio | - | - | - | - | - |  |  |
| Raise Tuition, Including Self-Supporting Programs and Differentials | - | - | - | - | - |  |  |
| Meet Peer Median for Student Service Expenditures  | - | - | - | - | - |  | Efficiencies can be found by decreasing salary or headcount to meet Peer Median (benchmarking indicated overall spend on Student Support per student FTE was $40 above peer median). |
| Revise Student Housing Policy to Increase Occupancy | - | - | - | - | - |  | Efficiencies can be achieved through many means (e.g., revising Housing Policy to apply to 2Y student). FY23 Occupancy Rate was 65%. *Already in process of implementation.* |
| Pursue System-Wide Shared Library Services/Functions | - | - | - | - | - |  | Efficiencies can be found by reducing library subscriptions and memberships to align with student enrollment trends. |
| Increase International Enrollment | - | - | - | - | - |  | Additional Revenue can be realized by increasing the number of International Students. Due to agreements with student recruitment firms, UWP may not realize a gross tuition rate for these students but will instead pay a percentage of tuition/housing expenses to the recruiting firm. Additional revenue will be generated through segregated fee collections, housing, and meal plans. |
| Increase Housing and Dining Revenue  | - | - | - | - | - |  | - |
| Reconsider Financial Aid Approach | - | - | - | - | - |  | Opportunity can be realized by offering diverse types of aid to attract students, though pricing sensitivity will have to be considered. Utilize financial aid to target high-yield students and retain current students. |
| Add or Increase Graduate Tuition Differential | - | - | - | - | - |  | All 12 universities requested increases this school year, with some increases as much as $1,000. Every UW institution except for UW-Parkside has a tuition differential for at least one of its programs. |
| Devise Comprehensive Marketing Plan | - | - | - | - | - |  | - |
| Review J-Visa Requirements (International Enrollment) | - | - | - | - | - |  | *Already in process of implementation.* |
| Explore 9-month contract for administration | - | - | - | - | - |  | Analyze administrative roster and identify roles with 9-month feasibility to identify corresponding savings to salaries for 3-month delta. Opportunity costs (e.g., talent retention) must be considered for 12-month to 9-month contract shifts. |
| Switch from DII to DIII Athletics Division | - | - | - | - | - |  | Benchmark average athletic travel expenditure at a Division III school to Parkside to determine comparable athletic travel spend. Analyze enrollment by zip-code to devise a targeted marketing strategy to attract more local students, and identify potential net revenue gains from elimination of DII scholarships. |
| Assess 4 college model | - | - | - | - | - |  | Assess costs (salaries, supplies and services) of each Dean's office. |
| Explore undergraduate/graduate degree structures (4+1) | - | - | - | - | - |  | Analyze student attrition rates at peer institutions to understand market demand, and calculate additional revenue from an additional year of enrollment. |
| Refine segregated fee structure | - | - | - | - | - |  |  |
| **TOTAL** | **$4,750,000** | **-** | **$2,250,000** | **$2,250,000** |  |  |

**Key Themes**

The following themes emerged during interviews, Chancellor’s Cabinet meetings, and the Leadership Workshop, and will be pertinent to future efforts to mitigate budget shortfalls and broadly envision the role of the campus in the lives of UWP students.

* **Responsive and Inclusive Stakeholder Engagement:** Campus leaders and faculty have repeatedly claimed that budget deficits were communicated later than anticipated and resulted in decisions made without strategic rationale. A robust communication plan that outlines opportunities for campus engagement through a variety of channels – e.g., town halls, targeted leadership summits, one-on-one unit meetings – could alleviate these impacts in the future.
* **Vision of Desired Future Campus State:** Multiple opportunities selected for further review focus on organizational realignment, impacting either specific role types, units, or the Institution as a whole. Efforts to ‘right-size’ campus operations can be undertaken with a longitudinal view of how UWP can best serve its students and community over the coming 5-10 years.
* **Development of Standardized Policies and Plans:** Participants indicated that incremental policy revisions, policy standardization, and enforcement mechanisms – e.g., travel authorization or work study – can reduce inefficiencies across a variety of campus-wide business processes in the long term.
* **Openness to Curriculum Efficiencies:** Academic leaders displayed a willingness to explore various ‘levers’ to streamline instructional and academic support functions. However, recent examples of public institutions that have eliminated programs, schools, or academic units illustrate the operational and reputational risks of these initiatives given underlying stickiness of instructional costs and potential enrollment impacts.
* **Campus-Wide Involvement in Enrollment Services Planning:** Given the criticality of bolstering student recruitment and retention at both UWP and across the UW System, academic units indicated a broad lack of transparency around key enrollment services and admissions decisions as well as exclusion from the decision-making process.

Huron Consulting Group thanks you for the opportunity to facilitate these significant discussions and envision the wider impact that the University of Wisconsin, Parkside can make in its community over the coming years.

**Appendix 1: Interview and Workshop Participants**

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| **Name** | **Role** |
| **Scott Menke** | Interim Chancellor |
| **Sheronda Glass** | VP, Finance & Administration |
| **Robert Ducoffe** | Provost |
| **Emmanuelle Otu** | Dean, College of Natural & Health Sciences |
| **Lesley Heins-Walker** | Dean, College of Arts & Humanities |
| **Michele Gee** | Dean, College of Business, Economics, & Computing |
| **Seif Dana** | Dean, College of Social Sciences and Professional Studies |
| **Sherry Craig** | Department Assistant, Facilities Management (Governance Group) |
| **Carol Kinsley** | Financial Specialist, Student Life (Governance Group) |
| **Terry McGovern** | Associate Professor, Business Department (Governance Group) |
| **Robert Barber** | Professor, Biological Sciences (Governance Group) |
| **Laura Mason** | Chair, Academic Staff Committee |
| **Christopher Hudspeth** | Associate Professor, Philosophy |
| **Mary Lenard** | Director of Composition and Associate Professor, English |
| **Kathryn Mustell-Watkins** | Budget Planner, Finance & Administration |
| **Ann Iverson** | Financial Controller, Finance & Administration |
| **John Bruch** | Chief Facilities Officer, Finance & Administration |
| **Deann Possehl** | Assistant Provost for Student Success |
| **Crista Kruse** | Director, Continuing Education |
| **Steven Wallner** | Dean of Students |
| **Marissa Delwiche** | Executive Director of Advising and Student Success |
| **DeAndre Taylor** | Director of Housing and Residence Life |
| **Rhonda Kimmel** | Registrar |
| **Kristina Klemens** | Director of Scholarships and Financial Aid |
| **Adam Schemm** | Director of Athletics |
| **Tammy McGuckin** | Vice Chancellor of Student Affairs and Enrollment Services |
| **Theresa Castor** | Vice Provost |
| **Jacklyn Haas** | Assistant Vice Chancellor, Enrollment Services / Director of Admission |
| **Jordania Leon-Jordan** | Chief Information Officer |
| **Goretti Pereira** | Associate Director, Human Resources |
| **Hannah Wallisch** | Director of Development, University Advancement |
| **Anna Stadick** | Library Director |

**Appendix 2: UW - Parkside Institutional Peer List**

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| **​Schools** | **FTE Enrollment, Fall 2021** | **Operating Expense, FY22** |
| **University of Wisconsin-Parkside** | 3,287 |  $72,315,196  |
| **California State University-Monterey Bay** | 6,871 |  $203,201,673  |
| **Christopher Newport University** | 4,520 |  $98,023,890  |
| **Eastern Connecticut State University** | 3,856 |  $134,507,935  |
| **Eastern New Mexico University-Main Campus** | 3,392 |  $112,000,360  |
| **Indiana University-Northwest** | 2,761 |  $47,622,061  |
| **Midwestern State University** | 4,658 |  $121,866,163  |
| **Northwestern Oklahoma State University** | 1,491 |  $32,331,028  |
| **Rutgers University-Camden** | 5,484 |  $221,460,000  |
| **Southwestern Oklahoma State University** | 3,967 |  $67,030,005  |
| **Western Connecticut State University** | 4,015 |  $140,159,383  |
| **Worcester State University** | 4,388 |  $100,230,450  |

*\*Peer institutions selected by leadership*

*All data collected from IPEDS (2022 Fiscal and Academic Year)*