

UW-Oshkosh Financial and Strategic Assessment

Opportunity Report

Updated April 2024

Objectives for Today

The main objectives of today's meeting are to **1)** review the business cases for the prioritized opportunity catalog and **2)** discuss next steps for the project.

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Project Objective:

The **main objective** of the project is to assist the UW System in addressing the following questions:

Financial Health Assessment

- *What is the current operating performance on each campus and what do current revenue and expense trends portend for future performance?*
- *How diversified are the campus revenue streams and what strategies are in place to manage costs?*
- *How strong is each campus's balance sheet?*

Operational Review

- *Are non-academic programs effective in meeting student recruitment, retention, and success?*
- *Are administrative services effective in supporting the mission and are they conducted in an efficient manner?*
- *Is the current academic portfolio aligned to student demand and the needs of the region and state?*
- *Are there mission-aligned revenue opportunities that the institution is not pursuing that could materially impact the overall financial position?*

Project Overview

In July 2023, the Universities of Wisconsin engaged the team to conduct a financial and strategic assessment across its 12 member institutions (excluding UW-Madison) to guide a path toward a more sustainable future.

Approach:

The work at each campus is guided by **2 phases**, grounded in strong collaboration with leadership.

1 Current State Assessment

- **14 stakeholder interviews** to identify potential strengths, challenges and opportunities
- **Financial health analysis** to assess revenue and expense trends, tuition pricing setting, ratios (CFI, etc.) and pro-forma financials
- **Operational assessment** to assess operational efficiencies and/or deficiencies
- **Academic program analysis** to reflect the current state of program demand in the context of state workforce needs
- **High-level facilities analysis** to assess classroom utilization efficiency

2 Future State Opportunities Development

- **Development of an opportunity catalogue** to promote a more sustainable future, taking into account the unique culture and context of each campus
- **Leadership workshop** to prioritize which opportunities the institution wants to continue evaluating with an eye toward implementation

Focus Area of this Report



Executive Summary

The Case for Change: GPO Reserves are Nearly Exhausted

The current state review of financial health, enrollment trends, and operations aligns with the understanding of UW-Oshkosh’s leadership - that without significant and immediate change, including the Institutional Realignment Plan (IRP), the future of the institution is at risk.

UW-Oshkosh’s mission is to provide a high-quality liberal arts education that prepares leaders in a diverse and global society



UW-Oshkosh is a **long-serving institution** in the northeast Wisconsin economy, **strategically located** between Green Bay, Milwaukee, and Madison, and embedded **within a rich employer ecosystem**. UW-Oshkosh provides a **research-enhanced education** and values shared governance, inclusive excellence, and sustainability.

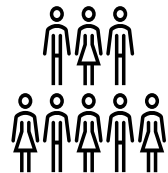


With an **academic portfolio that is well-aligned to the regional workforce**, a **strong location**, and **nationally recognized DIII athletics** programs, UW-Oshkosh has the foundational assets it needs to reset its fiscal trajectory through focused improvements.

...but challenges including declining UG enrollment, lower retention, and financial instability threaten its future;



Declining UG enrollment FTE (-31.9%¹ from Fall 2011-2023), competition from Fox Valley Technical College, and a shrinking pool of HS graduates **threaten UW-Oshkosh’s student base**.

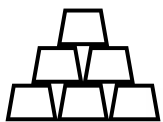


Retention has emerged as a significant challenge in recent years. While Fall '23 retention improved to 72.3%, student support personnel were heavily impacted by IRP reductions, leading to a revised approach to student supports.

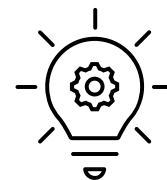


Reductions in revenue due to enrollment declines, along with rising costs in several areas, **created a structural deficit at UW-Oshkosh** (originally estimated at \$15M for FY24) while **reserves have largely been depleted**, prompting a restructuring initiative to close the gap.

thus, UW-OSH should follow through on its restructuring and academic realignment plans while refreshing its strategic focus



UW-Oshkosh has implemented an Institutional Restructuring Plan (IRP) that uses a combination of voluntary retirement incentives (VROIP), layoffs, furloughs, elimination of open positions, and academic workload adjustments to close much of its structural deficit for FY24 (leaving a \$3.1M deficit for FY24), while spending down most of the tuition fund reserves. Continued work is critical to realize savings from academic restructuring for FY25 and beyond.



To secure a viable future for UW-Oshkosh, student recruitment and retention should be bolstered with fresh approaches. The academic portfolio may need refinement and the institution will need to consider being more transfer-friendly. A unique academic identity as an experiential-based learning institution may be a way to leverage local employers and communicate value to their prospective students.

1. VROIP stands for Voluntary Retirement Option Incentive Plan
Source: * Includes undergraduate enrollment FTE across main campus, Fox Cities, and Fond Du Lac.

The Path Forward Should Leverage Institutional Strengths...

Through interviews with 14 stakeholders, the following strengths and themes were identified – each of which can serve as part of the foundation to help UW-Oshkosh drive necessary change in the future and achieve the vision of its strategic plan.

1 Willingness to Make Transformational Changes

UW-Oshkosh leaders were **responsive and decisive** in addressing the structural deficit. They **accelerated a restructuring plan** to enable employees to transition without a prolonged process. Confidence around recent leadership changes will also support continued transformation in critical areas such as academics and enrollment.

2 Desirable Location with Diverse Employer and Internship Base

Located in a city of approximately 67,000 people and embedded within **a rich employer** ecosystem across manufacturing, education, and health care industries*, UW-Oshkosh can continue **to grow its experiential-based education** as a unique brand among other comprehensive universities, leveraging its favorable location.

3 Strong Academic Programs Well-Aligned to the Regional Workforce

UW-Oshkosh has a **well-developed academic portfolio** centered on a liberal arts education with strong professional programs including nursing, business, education, engineering and others **that align well with the regional workforce** needs.

4 Large Dual-enrollment Population

Nestled near some of the largest high school districts in Wisconsin, UW-Oshkosh has **one of the largest dual-enrollment programs** among UW campuses, serving approximately 5,000 high school students. Improving the yield of these students will be critical to success as stakeholders noted a relatively low share (less than 10%) of these students currently matriculate to UW-Oshkosh.

5 Successful DIII Athletics Programs

With **49 national championships**, UW-Oshkosh is a DIII powerhouse with recent Advancement wins to support new athletic facilities. Athletics is a strong part of the **student culture**, a meaningful **recruitment tool**, a source of **residential student revenue**, and something that encourages **alumni engagement and giving**.

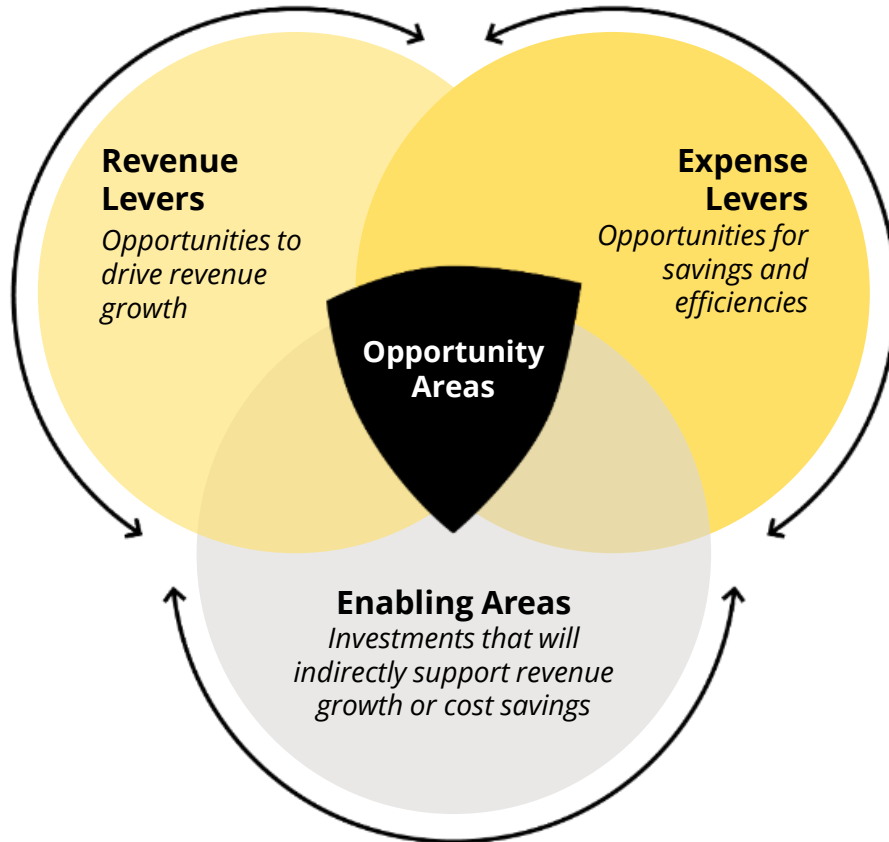
...And Seek to Address Existing External and Internal Challenges

The current external environment, coupled with internal operating model pain points, make overcoming the ongoing structural deficit challenging; similarly, top line pressure and limited expendable balances make investing in growth difficult.

1	2	3	4	5	6
Declining UG Enrollment	Limited State Appropriations	Leading in the Aftermath	Reversing Retention Trends	Legacy Reputation Issues	Data-informed Decisions
<p>Since Fall 2011, UG FTE enrollment has declined 31.9% from 12,321 to 8,388 as of Fall 2023 (3.2% per year on average), including the main campus, Fox Valley, and Fond Du Lac.</p> <p>Significant declines have resulted in closure of in-person instruction at Fond Du Lac as of June 2024.</p>	<p>According to the <i>Wisconsin State Journal</i>, Wisconsin ranks 43rd in the nation in state funding per student.</p> <p>Future state budgets, regulatory complexity, and economic uncertainty add further risk to UW-Oshkosh's long-term outlook as the institution has become increasingly dependent on state appropriations.</p>	<p>Given the restructuring efforts, faculty, staff, and students have a sense of uncertainty for what UW-Oshkosh will look like as transformations take place. Some inaction as stakeholders wait for the "dust to settle" is both natural and likely.</p> <p>Articulating a compelling vision for the future and charting a path forward will help to rally stakeholders.</p>	<p>Since Fall '18, UW-OSH's 1 year retention rate for FTFT freshmen has deviated from the UW-campus average and declined from 77.9% to 67.8% as of Fall '22.</p> <p>While Fall '23 retention improved to 72.3%, student support personnel were heavily impacted by IRP reductions. A fresh look at the student support strategy is needed.</p>	<p>Many stakeholders cited a weakened reputation due to historic challenges with the management of the Foundation, and/or a reputation among students as a 2nd choice school.</p> <p>Being intentional about rebuilding the school's brand and reputation, internally and externally, will be key in building a more sustainable future.</p>	<p>Many stakeholders observed a lack of data analytics infrastructure as a key operating model challenge to overcome. Leadership across the University must also embrace data in decision making.</p> <p>To secure the future, a culture of change will need to be embraced that takes a strategic lens to data-driven, performance-based decisioning.</p>
EXTERNAL MARKET PRESSURE		INTERNAL OPERATING MODEL CHALLENGES			

UW-Oshkosh Opportunity Overview

Through a review of the qualitative information and insights gathered through interviews and analysis of the quantitative data provided by both UW-Oshkosh and the UW System, the following five opportunities were identified.



#1 Implement Academic Restructuring Plan to Streamline Academic Administration

Evaluate effectiveness of proposed academic restructuring plans to identify a “best path forward” to realize substantial cost savings while also preparing academic units for future success.

#2 Expand Experiential Learning as a Core Element of the Student Experience to Improve Outcomes

Leverage UW-Oshkosh’s rich employer ecosystem across manufacturing, education and healthcare industries¹ to expand experiential learning as a core element of the student experience (e.g., opportunities for service-based learning, paid and unpaid internships).

#3 Create Stronger Pathways to Improve Dual Enrollment Yield

Collaborate with local school districts to develop stronger pathways for dual-enrolled high school students to improve the yield of this targeted population. Utilize a more focused dual enrollment portfolio that has a high student engagement strategy to develop rapport with students and UWO staff and faculty.

#4 Enhance Student Success Ecosystem to Improve Retention

Identify potential gaps in the student success ecosystem (across people, process, technology, and data) based on evolving student needs to target intervention.

#5 Utilize Data Driven Decision Making to Create a Culture of Accountability

Mature utilization of Salesforce, Navigate and other recently acquired tools, while placing data at the center of decision-making processes for expense management and investment.

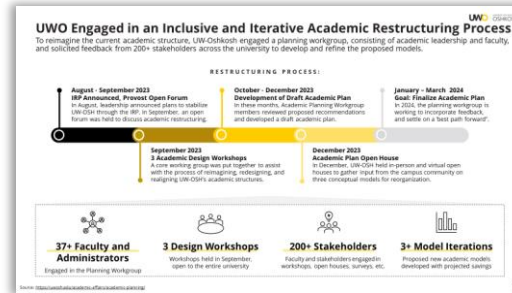


#1 Implement Academic Restructuring Plan to Streamline Academic Administration

Business Case Overview: Implement UWO Academic Restructuring Plan

Recognizing the current academic structure was not sustainable, and with a short-term mission to close the remaining gap in the FY24 budget, academic leaders and faculty have worked to reimagine the academic structure. The following slides will present an overview of the restructuring process, including guiding principles, structures, and costs to consider for the two proposed future state models.

UWO has engaged in an inclusive and iterative Academic Restructuring process since August 2023...



OUR ROLE

- Review the current proposed academic structures, including UWO’s restructuring process and projected costs
- Advise on the guiding principles to apply as the restructuring process finalizes
- Provide targeted considerations based on our analysis

QUESTIONS MOVING FORWARD

- **Academic Alignment:** How well do the proposed models align academic programs / departments among the respective colleges, where natural pairings, interdisciplinary collaborations or related career pathways may exist?
- **Cost Structure:** How do the cost structures of the proposed models compare with UW-Oshkosh’s status quo structure and where are savings realized?
- **Administrative Staffing:** How do key ratios of academic administration to faculty and students by school compare across the proposed models? Is academic leadership and front-line management support balanced across the university?

...through multiple iterations, UWO has developed two proposed future state academic models...

Assess Academic Alignment of the Proposed Model B: 3 Colleges | 8 Schools

Assess Academic Alignment of the Proposed Model A: 3 Colleges | 6 Schools

The proposed "Career Clusters" model organizes 55 total departments/programs into 6 Schools within 3 Colleges.

College	Department/Program	College	Department/Program	College	Department/Program
College A	Medical Center - B.A.N.I.Z.	College B	Business (BA)	College C	Health Professions, Health Professions & EMS
	Advertising, Multimedia, Journalism, Public Relations		Developmental Curriculum		African American Studies
	Accounting		Human Kinetics & Health Ed.		Anthropology
	ATI		Human Services Leadership		Arts and Sciences
	Communication Studies		Leadership, Strategic Health, Education		Global Languages & Cultures
	English		Professional Counseling		Global Religions
	Information Systems		Social Ed.		History
	Music		Teaching & Learning		International & Global Studies
	Radio, TV, Film				Latin Studies
	Theatre				Military Science
College B	Interactive Web Management	College C	Philosophy	College D	Political Science
	Leadership & Organizational Studies		Social Justice Studies		Psychology
	Management		Supply Chain Management		Supply Chain Management
	Marketing				
	Supply Chain Management				

Legend
 College
 School
 Program/Dept.

Key Consideration: While interdisciplinary programs and collaborations can emerge across colleges, programs with natural overlap in course requirements, content, and career applications should be considered high-potential partners to embed within the same college and/or school.

...the models are projected to provide \$1.5M - \$1.75M in savings, which is critical to resolving UW-OSH’s deficit.

Compare Status Quo vs. UWO Proposed Academic Models and Costs

UWO OSH needs to save ~\$2M from academic restructuring and has developed 2 proposed new academic models that approach those savings.

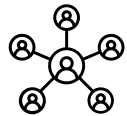
Category	Status Quo Structure	Model A (3 Colleges + 6 Schools)	Model B (3 Colleges + 8 Schools)
Deans' Office	\$12,000,000	\$1,000,000	\$1,000,000
Assistant Deans	\$954,077	\$877,820	\$1,117,820
Deans' Office Support Staff	\$1,412,758	\$835,242	\$768,256
Other Faculty Support Staff	\$239,169	\$194,000	\$194,000
Other Faculty Support Staff	\$88,817	\$43,775	\$47,686
Program Directors	\$750,733	\$608,738	\$627,670
Other Admin Personnel	\$1,204,324	\$1,038,013	\$1,721,883
Other Prof. Staff	\$988,015		
Total	\$23,006,881	\$5,917,693	\$6,108,991

Model A is projected to provide \$1.75M in savings while Model B could provide \$1.5M in savings, which is critical to narrowing UWO-OSH's projected \$2.5 deficit; however, does not fully close the remaining FY23 budget gap.

UWO Engaged in an Inclusive and Iterative Academic Restructuring Process

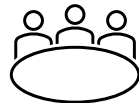
To reimagine the current academic structure, UW-Oshkosh engaged a planning workgroup, consisting of academic leadership and faculty, and solicited feedback from 200+ stakeholders across the university to develop and refine the proposed models.

RESTRUCTURING PROCESS:



37+ Faculty and Administrators

Engaged in the Planning Workgroup



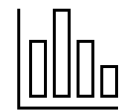
3 Design Workshops

Workshops held in September, open to the entire university



200+ Stakeholders

Faculty and stakeholders engaged in workshops, open houses, surveys, etc.



3+ Model Iterations

Proposed new academic models developed with projected savings

Assess Academic Alignment of the Proposed Model A: 3 Colleges | 6 Schools

The proposed "Career Clusters" model organizes 55 total departments/programs into 6 Schools within 3 Colleges.

College of Business, Media, Communication		College of Culture, Society & Education		College of Nursing, Health Professions & STEM	
Media, Comm., & Art (7)	Business (10)	Education (7)	Culture & Society (17)	Nursing & Health (5)	STEM (9)
Advertising, Multimedia Journalism, Public Relations	Accounting	Developmental Curriculum	African American Studies	Kinesiology	Biology
Art	Aviation Management	Human Kinetics & Health Ed.	Anthropology	Medical Imaging	Chemistry
Communication Studies	Economics	Human Service Leadership	Criminal Justice	Medical Laboratory Science	Computer Science
English	Finance/Business Law	Leadership, Literacy, Social Foundations	Global Languages & Cultures	Nursing	Engineering & Engineering Technology
Music	Information Systems	Professional Counseling	Global Religions	Social Work	Environmental Studies
Radio, TV, Film	Interactive Web Management	Special Ed	History		Geology
Theatre	Leadership & Organizational Studies	Teaching & Learning	Hmong Studies		Mathematics
	Management/HR		International & Global Studies		Physics & Astronomy
	Marketing		Indigenous Studies		Psychology
	Supply Chain Management		Latinx Studies		
			Military Science		
			Philosophy		
			Political Science		
			Social Justice Studies		
			Sociology & Public Administration		
			Fire & Emergency Response Management		
			WAGS		

Legend

- College
- School
- Program/Dept.

General Education, Graduate Programs, Honors College & Interdisciplinary Institutes

Key Consideration: While interdisciplinary programs and collaborations can emerge across colleges, programs with natural overlap in course requirements, content, and career application should be considered high-potential partners to embed within the same college and/or school.

Assess Academic Alignment of the Proposed Model B: 3 Colleges | 8 Schools

The proposed Model B organizes 55 total departments/programs into 3 Colleges and 8 Schools.

College of Business & STEM		College of Culture, Society, & Education				College of Nursing & Health	
Business (10)	STEM (8)	Education (7)	Media, Comm. (7)	Culture, Society (10)	Public Admin. & Sustainability (8)	Nursing (1)	Health Professions (4)
Accounting	Biology	Developmental Curriculum	Advertising, Multimedia Journalism & PR	African American Studies	Anthropology	Nursing	Kinesiology
Aviation Management	Chemistry	Human Kinetics & Health Education	Art	Global Languages & Cultures	Criminal Justice		Medical Imaging
Economics	Computer Science	Human Service Leadership	Communication Studies	Global Religions	Environmental Studies		Medical Lab Science
Finance & Business Law	Engineering/Engineering Tech.	Leadership, Literacy & Social Foundations	English	History	Indigenous Studies		Social Work
Information Systems	Geology	Professional Counseling	Music	Hmong Studies	Military Science		
Interactive Web Management	Mathematics	Special Education	Radio, TV, Film	International & Global Studies	Political Science		
Leadership & Organizational Stud.	Physics & Astronomy	Teaching & Learning	Theatre	Latinx Studies	Sociology & Public Administration		
Management/HR	Psychology			Philosophy	Fire & Emergency Response Mgmt.		
Marketing				Social Justice Studies			
Supply Chain Management				WAGS			
General Education, Graduate Programs, Honors College & Interdisciplinary Institutes							

Legend

- College
- School
- Program/Dept.

Key Consideration: While interdisciplinary programs and collaborations can emerge across colleges, programs with natural overlap in course requirements, content, and career application should be considered high-potential partners to embed within the same college and/or school.

Identify the Status Quo Colleges' Administrative Structure and Costs

UW-Oshkosh provided the current academic administrative structure and related costs which require nearly \$8 million annually.

College	Business	Education & Human Serv.	Letters and Science	Nursing	Total
Dean's Office	\$470,940 <i>1 Dean, 1 Dean Assistant, 1 Office Admin. Support, 1 Unit Business Officer, 2 Department Assistants</i>	\$554,395 <i>1 Dean, 1 Dean Assistant, 3 Office Admin. Support, 1 Unit Business Officer, 3 Department Assistants</i>	\$780,467 <i>1 Dean, 1 Dean Assistant, 2 Office Admin. Support, 1 Unit Business Officer, 11.5 Department Assistants</i>	\$440,788 <i>1 Dean, 1 Dean Assistant, 1 Office Admin. Support, 1 Unit Business Officer, 6 Department Assistants</i>	\$2,246,590
Associate Dean	\$153,416 <i>1 Associate Dean</i>	\$206,040 <i>2 Associate Deans</i>	\$453,228 <i>4 Associate Deans</i>	\$141,393 <i>3 Associate Deans</i>	\$954,077
Dept. Chair Release	\$259,822 <i>6 Department Chairs (45 credits)</i>	\$192,718 <i>5 Department Chairs (60 credits)</i>	\$960,218 <i>25 Department Chairs (303 credits)</i>	-	\$1,412,758
Dept. Chair Summer Serv.	\$73,494 <i>6 Department Chairs</i>	\$28,908 <i>5 Department Chairs</i>	\$132,767 <i>26 Department Chairs</i>	-	\$235,169
Other Faculty Summer Serv.	\$22,167	\$30,338	\$37,112	-	\$89,617
Program Directors	\$85,644	\$66,029	\$468,016	\$136,044	\$755,733
Other Admin. Release/Sup.	\$355,751	\$234,248	\$378,884	\$325,441	\$1,294,324
Other Prof. Staff	-	-	\$688,615 <i>Unique to COLS</i>	-	\$688,615
Total	\$1,421,234	\$1,312,676	\$3,899,307	\$1,043,666	\$7,676,883

Notes: *Number reflect FTE count. ** To estimate certain FTE (e.g., for chair release, program coordinator release, etc.), analysis assumes that a typical full faculty workload is 4-4 or 24.0 credit hour (CH) per year. Therefore, assumes release of 3 CH = 14 0.125 FTE; 6 CH = 0.25 FTE; 9 CH = 0.375 FTE; 12 CH = 0.5 FTE; 18 CH = 0.75 FTE.; Source: UW-Oshkosh

Compare Status Quo vs. UWO Proposed Academic Models and Costs

UW-Oshkosh needs to save ~\$2M from academic restructuring and/or other areas and has developed 2 proposed new academic models that approach those savings.

Status Quo Structure		Proposed Future State Academic Models		
College	4 Colleges	College	A: 3 Colleges + 6 Schools	B: 3 Colleges + 8 Schools
Dean's Office	\$2,246,590 <i>4 Deans, 4 Dean Assistants, 7 Office Admin. Support, 4 Unit Business Officers, 22.5 Department Assistants</i>	Dean's Office	\$1,926,880 <i>3 Deans, 3 Dean Assistants, 5.8 Office Admin. Support, 4 Unit Business Officers, 18 School Assistants</i>	\$1,884,864 <i>3 Deans, 3 Dean Assistants, 5.8 Office Admin. Support, 4 Unit Business Officers, 17 School Assistants</i>
Associate Dean	\$954,077 <i>10 Associate Deans</i>	School Assoc. Dean/Director	\$877,829 <i>6.4 School Directors, 1 Assoc. Directors</i>	\$1,117,829 <i>8.4 School Directors, 1 Assoc. Directors</i>
Dept. Chair Release	\$1,412,758 <i>36 Department Chairs (408 credits)</i>	Program Coordinators	\$835,262 <i>39 Prog. Coordinator (240 credits)</i>	\$768,256 <i>36 Prog. Coordinator (216 credits)</i>
Dept. Chair Summer Serv.	\$235,169 <i>36 Department Chairs</i>	Prog. Coord. Summer Serv.	-	-
Other Faculty Summer Serv.	\$89,617	Other Faculty Summer Serv.	\$43,175	\$47,686
Program Directors	\$755,733	Program Directors	\$608,738	\$627,870
Other Admin. Release/Sup.	\$1,294,324	Other Admin. Release/Sup.	\$1,636,013	\$1,721,883
Other Prof. Staff	\$688,615	-	-	-
Total	\$7,676,883	Total	\$5,927,895	\$6,168,388

Model A is projected to provide \$1.75M savings while Model B could provide \$1.5M savings, which is critical to narrowing UW-OSH's projected FY25 deficit; however, does not fully close the remaining FY25 budget gap.

Notes: Number in parenthesis indicates total positions/appointments. Source: UW-Oshkosh

Assess the Status Quo vs. UWO Proposed Models Staffing Ratios

Comparing key ratios of academic administration to faculty and students by School is an important consideration in balancing administrative oversight and support across the University. Student-to-faculty ratios by School are also a relevant factor to balance.

Key Takeaways

Status Quo Staffing Variability

The status quo model shows greater staffing variability among colleges, with COLS having the largest FTE count and smallest Student : Faculty Ratio. With the reduction in Dept. Chair releases and a reduction in Dean's Office staff, the proposed models show greater smoothing across Total Est. Administrative FTE.

Student : Admin FTE Ratios

Among the proposed models, CNHS and CBS have the largest ratios, partly driven by the inclusion of STEM. The 3+6 Model has moderately less variability among the colleges.

Model Legend

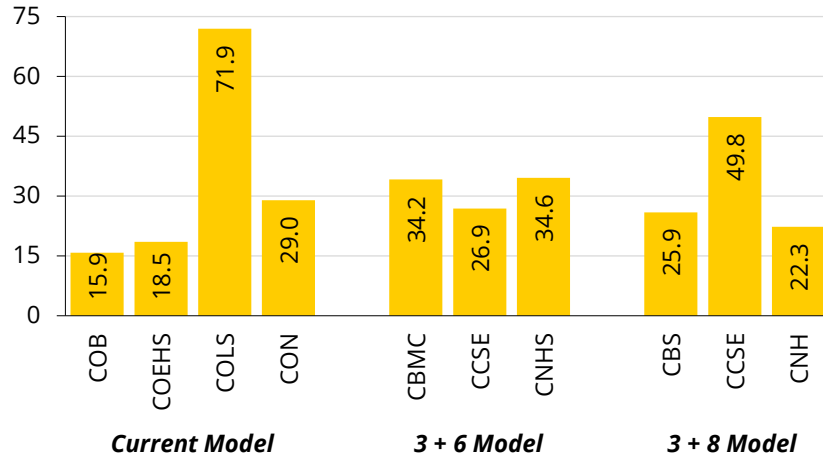
Model A: 3 Colleges + 6 Schools

- College of Business, Media, Comm. (CBMC)
- College of Culture, Society, Ed. (CCSE)
- College of Nursing, Health, STEM (CNHS)

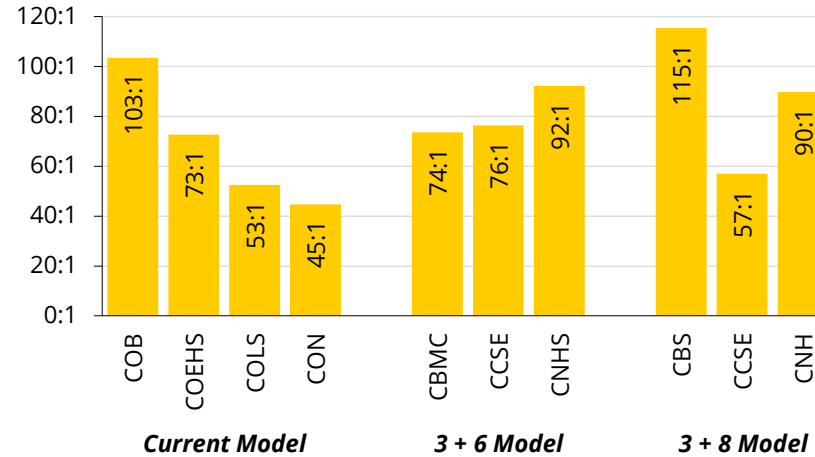
Model B: 3 Colleges + 8 Schools

- College of Business, STEM (CBS)
- College of Culture, Society, Ed., (CCSE)
- College of Nursing, Health (CNH)

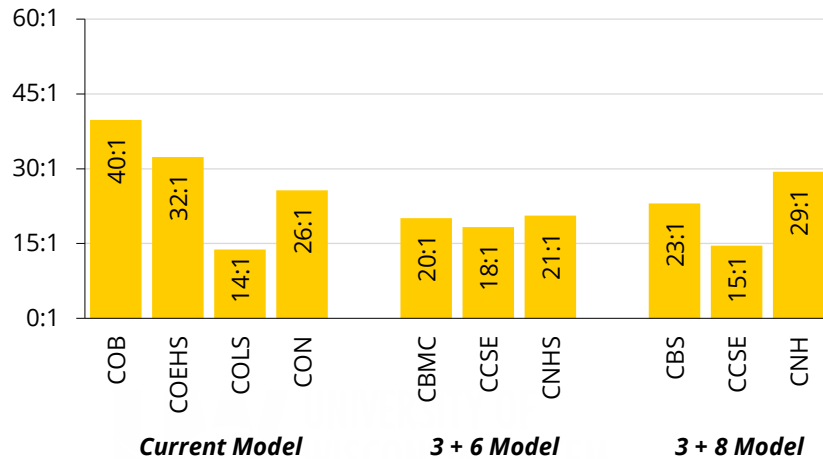
Total Estimated Administrative FTE



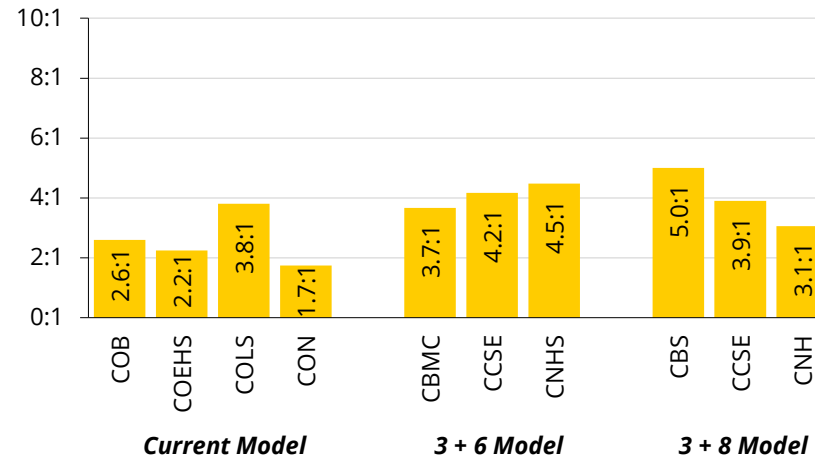
Est. Student : Administrative FTE Ratio



Est. Student : Faculty FTE Ratio



Est. Faculty : Administrative FTE Ratio



Notes: * Total Estimated FTE includes Deans Office, Associate Deans / School Directors, Dept. Chair Release / Program Coordinator Release, Summer Service, Program Directors, Other Faculty/Staff Admin Release, Other Admin Support and Other College/Dept. Support Staff. ** To estimate certain FTE (e.g., for chair release, program coordinator release, etc.), analysis assumes that a typical full faculty workload is 4-4 or 24.0 credit hour (CH) per year. Therefore, assumes release of 3 CH = 0.125 FTE; 6 CH = 0.25 FTE; 9 CH = 0.375 FTE; 12 CH = 0.5 FTE; 18 CH = 0.75 FTE.; Source: UW-Oshkosh

Adopt a Set of Guiding Principles for Academic Restructuring

As UW-Oshkosh deliberates various options for its future academic administrative structure, a complex set of interdependent principles are proposed below and should be evaluated with both quantifiable and qualitative considerations at play.

Maintain Student-Centered Academic Operations that Prioritize Student Experience

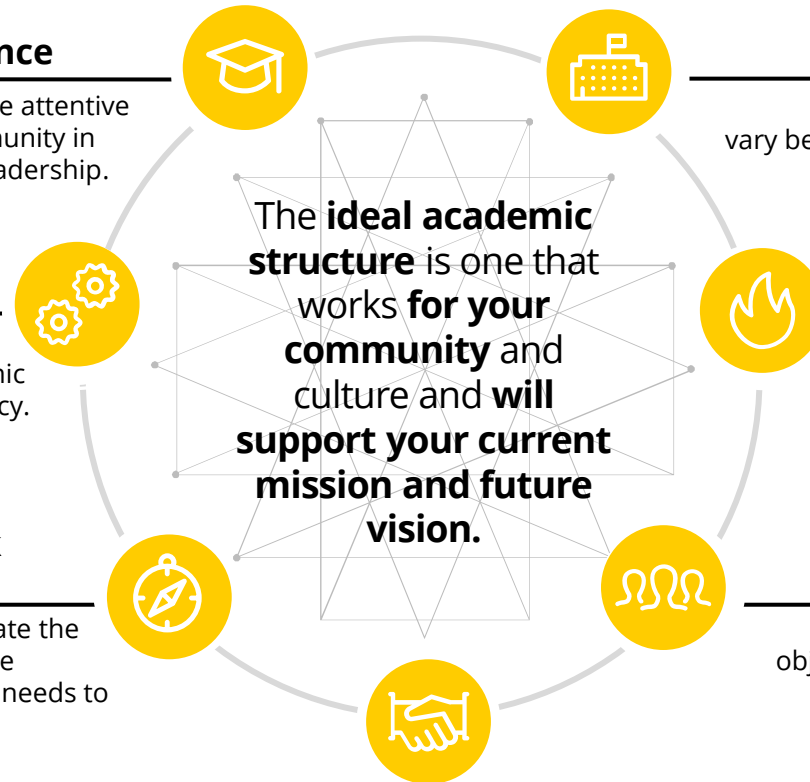
The academic administration should be able to serve and be attentive to students with a physical presence in the academic community in addition to their responsibilities to faculty and university leadership.

Focus on Operational Efficiency Across Broader Units

While historical practices may feel more comfortable, there are administrative duties that can be shared across academic units using technology-enhanced processes to gain efficiency.

Account for the Work Ahead, Not the Work Behind

While reorganizing the work that needs to be done to operate the academic enterprise, carefully consider the work that can be unburdened from academic administrators and what work needs to be added to drive emerging priorities.



Achieve Equitable Key Support Ratios Across Colleges and Schools

Student-to-administrator and faculty-to-administrator ratios may vary between academic units due to accreditation, clinical oversight, etc., however, vast differences should be scrutinized carefully.

Pay Attention to Risk Management for the University

An academic administration that is too lean to provide supervision of the teaching and learning enterprise and student experience can be costly to a university as risks go unchecked.

Consider Both the Talent You Have and the Talent You Seek to Attract

As restructuring conversations mature, step back and look objectively at the options considering not just the talent UW-OSH has but the talent UW-OSH wishes to attract in the future.

Encourage Collaboration Across Functions

Academic administrators will need to collaborate closely with Enrollment Management, Marketing and Communications, Student Success and Retention and other functional units to operate optimally.

While cost savings is a crucial outcome for the UW-Oshkosh academic restructuring effort, a carefully constructed academic model is essential to support the future vision and emerging opportunities that Oshkosh needs to achieve sustainable success.

Refine the Academic Models with the Following Considerations

UW-Oshkosh’s process to explore alternate academic structures has been inclusive and iterative. With two models being socialized broadly with the campus, there may need to be a final round of refinement from academic leadership before the new model is finalized. After assessing the models in collaboration with UWO academic leadership, these considerations emerged.



Align Academics for Program and Career Collaborations

- UW-Oshkosh sought to reorganize academic departments to **improve inter-disciplinary collaboration, program design and career preparation**.
- **Model A (3 colleges – 6 schools) appears to do a better job at academic alignment** with Business and Media & Communications being a natural pair, as well as Nursing and Allied Health with STEM. However, programs like Art, Music and Theater would have strong alignment with the School of Culture & Society.
- **Model B (3 colleges – 8 schools) appears to come closer to your existing academic structure** yet creates School pairings that don’t naturally complement each other.



Reimagine Roles Without Demoting Titles

- Considerable **effort was made to reimagine the work of academic administrators so that efficiencies could be gained** in restructuring.
- While redistribution of work in the administrative hierarchy is an important consideration, **departing from traditional titles may have unintended consequences**.
- For example, renaming “Associate Deans” as “Directors” **may impact your ability to attract the right talent** to those position in the future.
- Additionally, existing personnel who are Assoc Deans or Chairs may **feel like they received more work and a demotion in title** to be called a Director or Coordinator, respectively, **potentially threatening your ability to retain your top talent**.



Redesign for the Work Ahead

- **How the work gets done will need to evolve** in a leaner administrative model. This includes redesigning processes, identifying and enforcing accountabilities, and communicating effectively across the organization.
- Strategic initiatives around **student success, improving relationships with dual enrollment students, expanding experiential learning, and improving data-informed decision making** will take administrators’ time in addition to consolidation of status quo responsibilities.
- The proposed models A and B will reduce total admin FTE from 135.3 to 95.6 (~ 29% reduction) or to 98.0 (~ 28% reduction), respectively. These reductions will feel substantial when implemented. Once the redistribution of work has been realized, further tweaks may be necessary.

All changes to the Academic structures should optimize the academic enterprise for future delivery of mission-aligned programs, enable UWO to attract and retain needed talent, and execute strategic initiatives to improve the financial position of the University.

Consider These Action Items for Opportunity #1

UW-Oshkosh has a unique and timely opportunity to restructure its academic administration for long-term sustainability and success. While small details such as course release credits or number of support staff can be adjusted over time, the larger structure is likely to endure for the foreseeable future.

Opportunity Delivery Check List

Refine the Preferred Model with Careful Consideration toward Short- and Long-Term Sustainability and Enabling Strategic Initiatives

- Continue the process of gathering feedback from the UW-Oshkosh academic community** inclusive of administrators, faculty and students
- Refine and confirm financial projections for FY25** to ensure that the short-term savings realized from the academic restructuring effort will cover the tuition fund imbalance for the next fiscal year and be sustainable for the long-term
- Integrate feedback received from all sources and prioritize executive changes to the model**, balancing the various competing priorities outlined within this report, as well as the feedback obtained from the academic community
- Ensure that the administrative work has been allocated, redistributed, and/or reimaged** in a sustainable manner for the new model
- Follow shared governance procedures to arrive at a final academic structure to be implemented** at the end of FY24

Develop and Implement a Communications and Change Management Process to Roll Out the New Structure

- Develop a communications plan** that includes community-wide town halls, more direct College- and School-level meetings led by academic leadership that can champion the new structure and answer questions from faculty and students, and written communications to key stakeholders including System leaders, University employees, students, alumni and key industry partners
- Establish a clear structure of where people can go to get questions answered** including a web site that communicates the rationale and benefits of the new structure and has FAQs for common questions, as well as names and contact information for key academic leaders that can answer questions not found on the web site
- Track ongoing feedback and concerns as the model is rolled out** to help refine the implementation and execution of the model through its early stages of implementation and **leverage an Academic Leadership Council that includes shared governance representatives to iterate on solutions to pressing concerns**

Develop and Track Key Performance Indicators that Align to Strategic Priorities

- Develop internal KPI dashboards** that can be reviewed on a consistent basis (e.g., monthly), inclusive of multiple, standardized metrics, customized for academic leaders and aligned to strategic initiatives and priorities that need to be supported with the new academic model



#2 Expand Experiential Learning as a Core Element of the Student Experience to Improve Outcomes

UW-Oshkosh Has a Strong Foundation for Experiential Learning

Through multiple student resources and a rich employer base, UW-Oshkosh offers students many experiential learning opportunities.



HANDSHAKE

Students seeking jobs/internships are encouraged to use Handshake, UW-Oshkosh's one-stop-shop online recruiting system and job database for students, faculty and staff, alumni, and employers, to connect with active position posting.



STUDENT TITAN EMPLOYMENT PROGRAM (STEP)

The Student Titan Employment Program offers undergraduate and graduate students unique high-impact learning opportunities. As a student worker in STEP, students can earn money while working on innovative projects for a campus department or unit.



CROSS CULTURAL SOLUTIONS INTERN ABROAD PROGRAM

Students interested in education, health or social services can intern in one of 10 countries, including China, Costa Rica, and Guatemala through Cross-Cultural Solutions (CCS), a leader in international volunteering.



ON CAMPUS INTERVIEWS

UW-Oshkosh offers several on-campus interviews throughout the semester for students to learn about top local employers and interview for full-time, part-time, internship and co-op positions. In Fall 2023, UWO had about 75 companies participate.



UWO INTERSHIP AND CAREER FAIR

At UWO's bi-annual Internship and Career Fair, students can connect with employers to learn about full- and part-time positions, internships, co-ops, practicums, volunteering, and networking opportunities. UWO also offers Healthcare and Education Career Fairs.



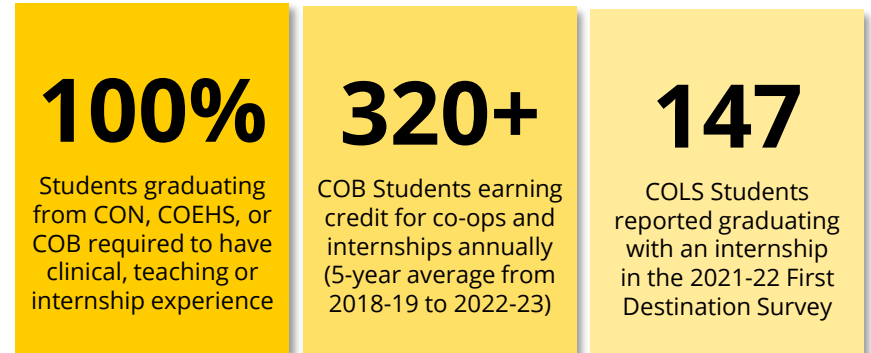
FIRST DESTINATION DASHBOARD

In this online dashboard, UW-Oshkosh students can select their academic college, desired industry, and/or major, and then scroll down to see a list of employers and job positions related to their selection.

UWO Sample Corporate Sponsors and Partners

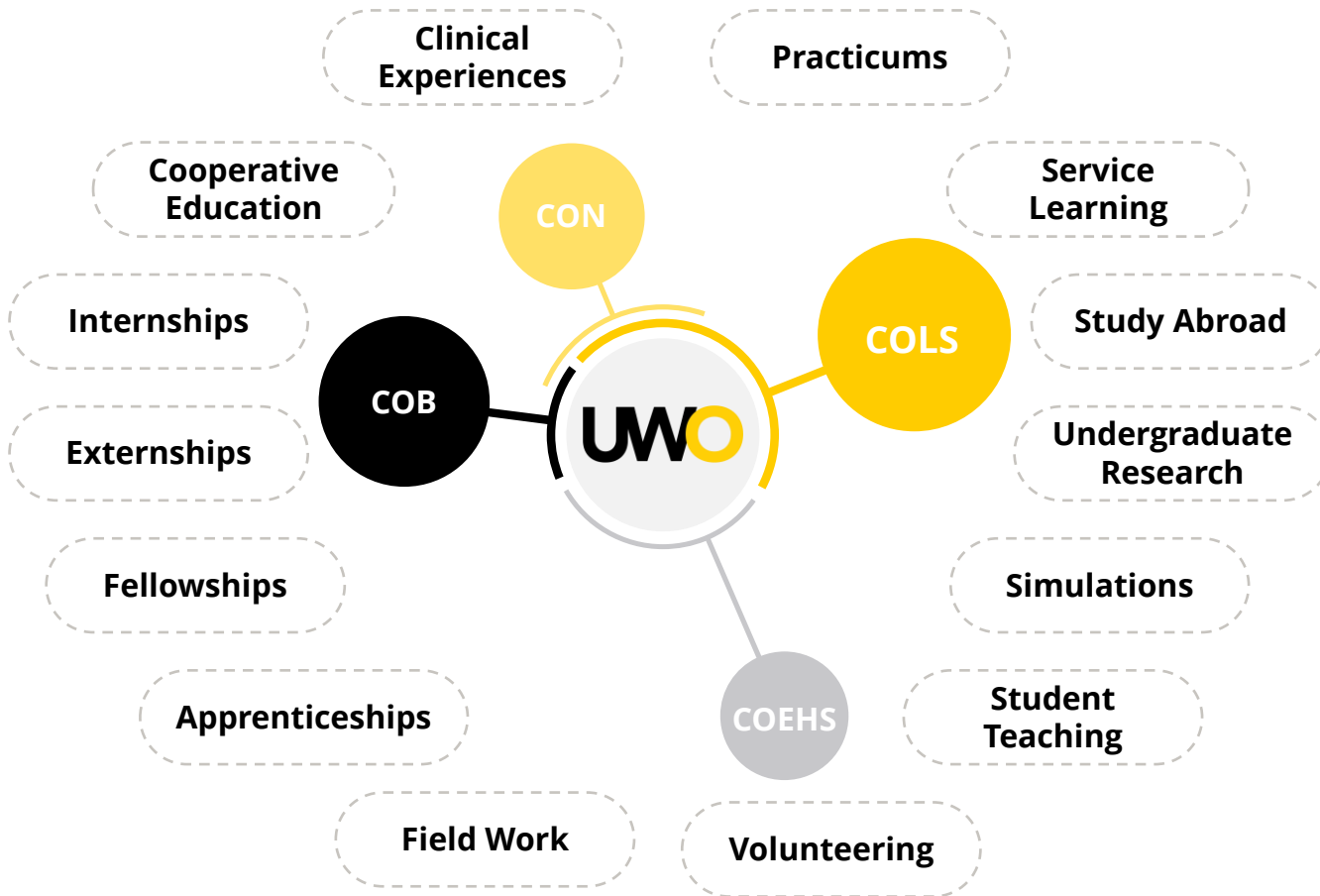


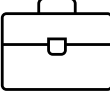
UWO Experiential Learning Metrics




Expand Experiential Learning as a Core Element for All Students

Experiential learning opportunities can come in many different forms outside of the classroom, preparing students for success. Some of those modes of learning are outlined below with a snapshot of current practices by the four colleges at UW-Oshkosh.






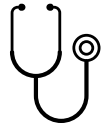
COB requires all graduates to have an internship prior to graduation and utilizes leading practices such as a professional skills course and faculty supervision of internships that help to guide the students' experience. Close collaboration with Career Services (CS) was reported with CS staff often running the professional skills course.



COEHS also requires experiential learning as a part of its core academic mission with the Education program being governed by accreditation standards and Human Services operating with similar practices to the COB.



COLS has the most students and least number of programs requiring internships. Herein lies the greatest opportunity for expansion in this area.



CON provides clinical experiential learning as a part of its core academic mission and is governed by accrediting boards that require these experiences.

Expanding experiential learning as a core element of the student experience for all students and programs builds upon UW-Oshkosh's strength as a leader among UW campuses and will require considerable buy-in and investment from faculty and academic leaders.

Case Study: Co-Op at University of Cincinnati Improves ROI

As a global leader in cooperative education, University of Cincinnati believes in experience-based learning and putting education into action beyond the classroom.



University of Cincinnati

University of Cincinnati is a public research university in Ohio with an enrollment of nearly 48,000 students. UC is ranked #4 in the nation for co-ops and internships by U.S. News & World Report (#1 among public institutions), where students earn a collective \$75 million annually while working for about 1,300 employers.

Business Case Overview

- University of Cincinnati offers students a variety of traditional, part-time and project-based co-op opportunities to supplement classroom learning and help students jump-start their early career.
- Traditional or **full-time co-ops are required for many UC colleges**, including UC's Linder College of Business, School of Information Technology and the College of Engineering and Applied Science.
- In this program, students alternate academic semesters with semesters working full-time (35+ hours per week) in their chosen field (onsite, remote or on-campus).
- **Part-time co-ops are a flexible option** allowing students to work part time while attending classes.
- **Students can also gain experience through project-based co-ops** (typically 5-40 hours for a single project) related to a their major.



Takeaways

- **Preparing Students for Future Success:** Students participating in co-op programs not only graduate with a degree but also a resume, with first-hand experience to jump start their career.
- **Marketing Student Outcomes and ROI:** According to University of Cincinnati, about 75% of UC students in the College of Engineering and Applied Science receive at least one full-time job offer from their co-op employers. Marketing strong outcomes of co-op students for job placement can attract prospective students.

Case Study: Project Based Learning at WPI Builds Essential Skills

Worcester Polytechnic Institute (WPI) is a leader in project-based learning, placing project work at the center of education and requiring students to apply their skills and knowledge to solve real-world problems.



Worcester Polytechnic Institute (WPI)

Worcester Polytechnic Institute (WPI) is a leader in project-based learning with a total enrollment of nearly 7,400 as of Fall 2023.

The institution was founded in 1865 on the principle that students learn most effectively by applying the theory learned in the classroom to the practice of solving real-world problems.

Business Case Overview

- Worcester Polytechnic Institute places projects at the heart of education through **the WPI Plan**.
- **Curriculum is structured into 7-week terms** (four in the traditional academic year and two during an optional summer term) **to create space for project work** and allow for more focused engagement.
- WPI's project-based curriculum **requires students to apply their skills**, knowledge and abilities **to develop solutions to real world problems**. Additionally, students are guided, rather than directed, by faculty to tackle tangible, open-ended problems.
- Students are engaged heavily in projects on campus and at more than 50 project centers across the Americas and the globe.
- In the last decade, WPI has also launched the Center for Project-Based Learning, to support colleges and universities across the globe to advance and integrate project-based learning at their campuses.



Takeaways

- **Developing and Applying Key Skills through Practical Experience:** Through WPI's curriculum structured around group project work, students develop important skills that will prepare them for careers. This includes leadership, teamwork, collaboration, communication, problem solving, and critical thinking.
- **Serving Potential Employers Results in Jobs for Students:** WPI's graduate employment rate, median starting salary, and long-term outcomes are exceptional. This is highly related to the skills and employer relationships students develop.

Build on Existing Foundation to Establish a Results-Oriented Brand

Through additional investment, focus, and story telling, UW-Oshkosh can leverage its existing strengths and seek to improve the student experience, student outcomes, and enrollment with an experiential-based and outcomes-focused brand in the Wisconsin market.

Existing Foundation of Success

UW-Oshkosh is already well-connected to a rich employer community and has engaged those employers for internships, job fairs, on-campus recruiting, etc.; however, more can be done to truly integrate experiential learning as part of the University's culture and identity.

Experiential Learning



Partner with Faculty to Integrate with Academics: Many UWO programs have internship requirements, yet the largest college (COLS) does not require internships as part of the expectations for graduation. To expand experiential learning as a shared experience of all Titans, it will be critical to gain faculty buy-in and provide support to faculty for course and program integration.



Provide Internship Support: To maximize learning and improve student experiences, internships should be paired with an accompanied course and campus supervision.

Early Career Engagement



Involve Career Services in Academic Planning: Career services should not just be engaged at the end of the academic journey, but career exploration dovetailed with the academic experience in selecting majors and forming professional identity for students as they mature.



Prepare Job-Ready Graduates: Employers want graduates that add immediate value and don't require extensive onboarding. Experiential learning builds those job-ready skills.

Telling the Story



Identify Brand Ambassadors: Who tells the story is as important as the story itself. Identify students, parents, alumni, faculty and administrators that can connect with an audience and provide a compelling narrative.



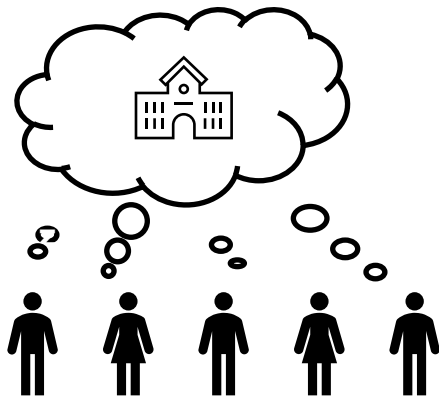
Embrace a Multi-channel Marketing Strategy with Consistent Messaging: While it is tempting to tell all the stories, a singular theme told repetitively across a multitude of channels is what strengthens a brand. For UWO, this can include web site, video assets, billboards, text and email, as well as presentations to parents and prospects.

Leverage Direct Admissions to Increase Brand Awareness

As the experiential-based and outcomes-focused brand is matured, targeting your communication of that brand to strategic audiences will be critical. As direct admissions is launched in 2024 (for class of 2025), there is an opportunity to increase brand awareness.

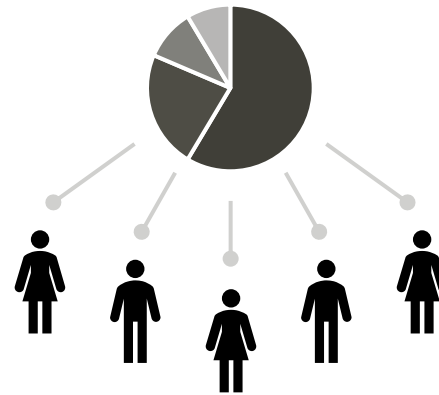
Increase Brand Awareness via Targeted Messaging

Leveraging direct admissions, there is an opportunity to increase awareness of the UW-Oshkosh brand within usual catchment areas and beyond. Focusing on **early, targeted messaging** (e.g., via digital marketing, partnering with community orgs., building relationships with local K-12 leadership and organizing HS visits), can amplify recruitment efforts.



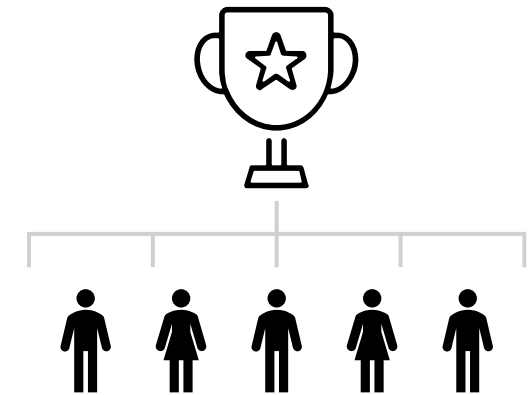
Expand Reach to Growing Student Segments

As direct admissions become more common, there is an opportunity to attract a greater number of qualified students from growing demographics or geographic areas (e.g., first-generation, low income, athletics, etc.). Similarly, it will be critical to ensure marketing and outreach vehicles reflect each targeted segment.



Articulate the Excellent Value of a Degree from UW-Oshkosh

In tandem with early, targeted messaging to high school students to promote awareness and engagement with direct admissions, it is critical that UW-Oshkosh distinguish the unique value proposition the institution offers for each segment (e.g., the outcomes-driven approach that relies upon experiential learning at Oshkosh) to strengthen engagement.



Leveraged effectively, direct admissions has the potential to increase brand awareness and prospective student engagement; it will be critical to ensure that early, targeted messaging distinguishes the brand to mitigate potential enrollment losses to competitors.

Monitor Key Performance Metrics for Marketing Campaigns

The saying “you don’t get what you don’t measure” is highly applicable when it comes to all the effort, time, expense, and external variables associated with marketing, recruiting and enrollment – making it *critical* to carefully define and monitor a set of KPIs.

Sample KPIs to Help Measure Performance

Efficiency Metrics



- **ROI of Marketing Campaigns:** Return on investment associated with the total cost of marketing Oshkosh and specific student segments/programs
- **Marketing Cost Per Enrollment / Lead:** Total cost of marketing operations attributable to each additional lead/enrolled student
- **Applications Started / Completed:** Share of started applications that are completed, submitted, and qualified
- **Matriculation Rates:** Share of admitted students (by student segment/program) that matriculate and enroll at Oshkosh
- **Funnel Efficiency:** Efficiency generating awareness in Oshkosh and then converting each prospect to the following phase in the funnel from ‘Unengaged Prospect’ to ‘Alum’
- **Program Success:** Number of new/existing programs created annually that meet minimum enrollment/student credit hour threshold
- **School & Stakeholder Satisfaction:** Survey results from institutional stakeholders regarding satisfaction with marketing services/materials

Productivity Metrics



- **Page Visits and Click-Through Rates:** Total unique visitors to website and number of visitors directed to college and program site pages from the Oshkosh website
- **Inquiries:** Total inquiries and contact information received from students/families for additional information about programs
- **Total Leads:** Number of contacts with qualified prospective students
- **Applications Started & Completed:** Number of qualified applications started and received as completed by admissions teams for programs
- **Admits, Deposits, and Enrollees:** Number of students who have been admitted, made deposits and, fully enrolled
- **Enrollment Growth by Population/Program:** Enrollment growth by targeted populations/programs (e.g., number of adult students enrolled in fully-online and hybrid degrees)

UWO leadership should defines the key metrics that will be evaluated, using a combination of the metrics above. Then, using tools to evaluate these metrics in real time, adapt its marketing and communications strategy accordingly.

Consider These Action Items for Opportunity #2

The table below outlines a menu of potential high-level activities that UW-Oshkosh could undertake to help to expand experiential learning as a core element of the Titan student experience and begin to build a brand around the same.

Opportunity Delivery Check List

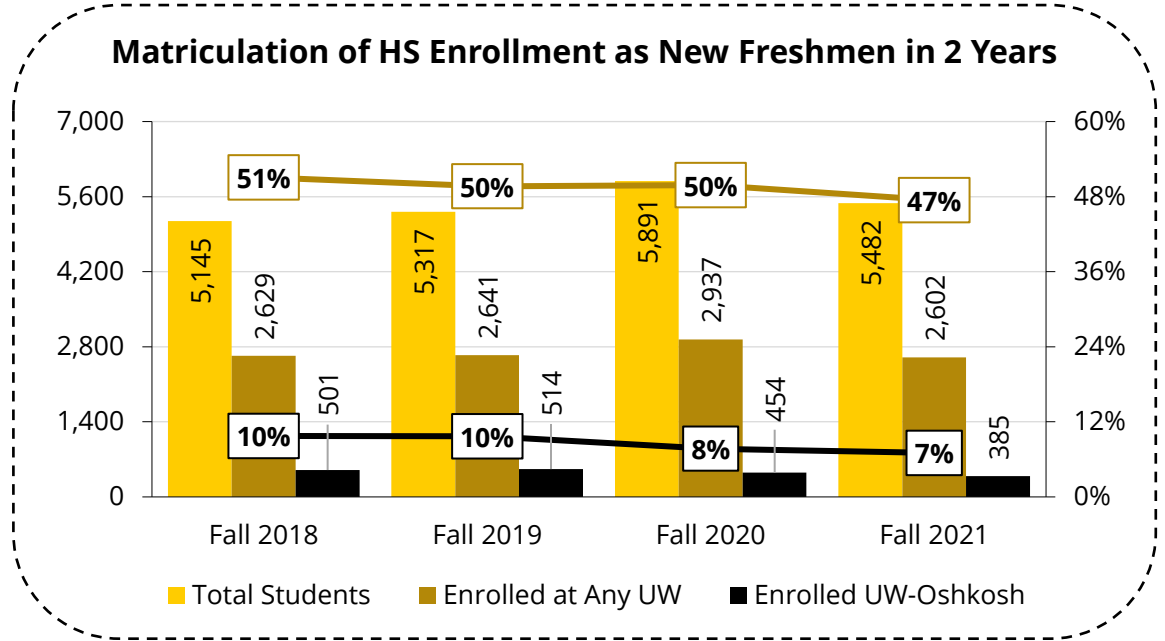
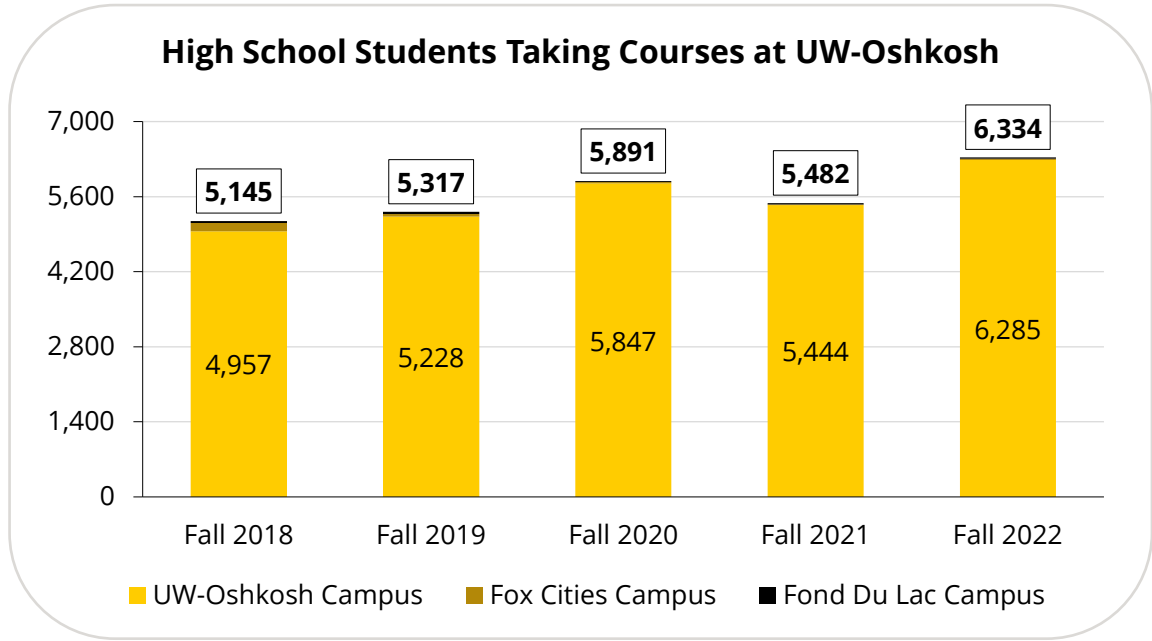
Project Initiation (1-2 Months)	
Decide Upon Academic Restructuring Model and determine future state of college/schools and leadership of academic programs	<input checked="" type="checkbox"/>
Form an experiential learning task force that brings academic leaders together with Career Services leadership with the aim of standardizing experiential learning as a core element of the Titan student experience and leveraging existing and best practices from within and outside OSH	<input checked="" type="checkbox"/>
Analysis and Design (2-3 Months)	
Establish a Center of Excellence in Experiential Learning to support program directors, chairs, and faculty in reimagining their curricula and courses to infuse experiential learning both within and outside the classroom into their academic programs	<input checked="" type="checkbox"/>
Obtain student feedback on existing experiential learning support and execution to identify pain points for students, as well as leading practices from within UW-Oshkosh	<input checked="" type="checkbox"/>
Identify the academic majors that do not currently require experiential learning outside of the classroom and obtain faculty feedback on challenges, barriers, and opportunities they perceive for the integration of experiential learning into their curricula and courses	<input checked="" type="checkbox"/>
Structure an ideal framework for experiential learning that includes both in-class and outside of the classroom experiences that students at UW-Oshkosh ought to have as part of their academic experience and outline the supports the University will provide to help academic departments deliver on that expectation	<input checked="" type="checkbox"/>
Seek funding support either through the Foundation or through local employers that are eager to support UW-Oshkosh internships to bolster any necessary resources to support the framework	<input checked="" type="checkbox"/>
Implement and Communicate (12-24 Months)	
Implement the framework for experiential learning and hold academic departments accountable for integrating these experiences	<input checked="" type="checkbox"/>
Update brand images, voice, and video, in collaboration with Marketing and Communications , showcasing student engaged in experiential learning and prioritize an outcomes-focused marketing message to prospective students, parents, and employers	<input checked="" type="checkbox"/>



#3 Create Stronger Pathways to Improve Dual Enrollment Yield

UW-Oshkosh Serves a Large Dual Enrollment Market With Low Yield

UW-Oshkosh's Cooperative Academic Partnership Program (CAPP), the only concurrent enrollment program in WI accredited through NACEP, serves over 6,000 high school students per year. However, less than 10% of these students matriculate to UW-OSH post-graduation.



UW-OSH has the largest dual enrollment program...

- **As of Fall 2022***, UW-Oshkosh had the largest dual enrollment program with **6,334 total high school students (headcount) taking courses** across UW-OSH main campus, Fox Cities campus and Fond Du Lac campus
- By comparison, UW-Green Bay has the second largest dual enrollment program serving about 3,300 high school students
- **Over the last five years** from Fall 2018 to Fall 2022*, UW-Oshkosh reported a **23% increase** in high school dual enrollment

... but less than 10% of these students enroll at UW-OSH

- While UW-OSH has seen a meaningful uptick in dual enrollment, this has not translated to new freshmen enrollment growth
- In the last several years, **UW-OSH's dual enrollment yield** (measured by high school enrollment as new freshmen within 2 years) **has declined from 10% to only 7% as of the most recent years** for which data exists
- **Nearly half (47% as of the most recent year)** of UW-OSH's dual enrollment students **attend a UW Campus** somewhere in the system

Assess Current State and Implement Targeted Interventions

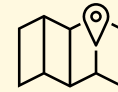
The Cooperative Academic Partnership Program (CAPP) has been focused on delivering a quality academic program within partner high schools. Increased engagement with these students and a stronger partnership between academics and admissions can transform yield.

Considerations for Success



CURRENT STATE

- ✓ **Operating Structure:** The current CAPP program is operated by Academic Affairs with a focus on quality credit accumulation for high school students, while prioritizing relationships with high school administrators and teachers
- ✓ **Recent Leadership Changes:** The director of the CAPP program recently retired and new leadership has been identified with an increased focus on collaboration between Academic Affairs and Enrollment Management
- ✓ **Served Geography:** The distribution of CAPP students appears to be geographically disparate, creating a challenge for high on-campus and face-to-face engagement of students



TARGETED INTERVENTIONS

- ❑ **A stronger partnership between Academic Affairs and Enrollment Management** in the design and operation of the program with an increased focus on building relationships with the students is recommended
- ❑ **Reinvestment of the program revenue in critical capabilities** (e.g., dedicated admissions support, increased on-campus engagement with teachers and students) may pay immediate dividends as student yield increases
- ❑ Leveraging this moment of transition in CAPP leadership to **take a holistic view of the size, scale, engagement level, and expected results of the program** can help to reverse declining yield among these students
- ❑ A highly engaged program strategy and widely dispersed map of CAPP high schools may need to be reconciled in the UWO strategy with a **decrease in size and increase in high-quality engagement yielding better overall results**

Apply Leading Practices to Increase Dual Enrollment Yield

Opportunities to strengthen dual enrollment yield can be achieved through engaging with the dual enrollment students *as existing UW-Oshkosh students* inclusive of providing support services, career advising, dedicated enrollment management and transition support.

Specialized Admissions Support

Assign dedicated admissions counselors to the dual enrollment population, and/or specify yield targets for these students within existing territories. Admissions counselors should have frequent physical presence in the high schools and develop relationships with key prospects.

Faculty Engagement with Students

While most dual enrollment courses are being taught by high school teachers, increased exposure to and connections with UW-Oshkosh faculty can help to encourage matriculation.

Access to Support Services

Dedicate advisors or partner with local guidance counselors to provide additional student services to dual enrollment students, such as academic advising, career coaching, enrollment support, and credit transfer assistance.

Financial Aid

Offer financial assistance to those coming from economically disadvantaged populations and special merit aid to high-achieving dual enrollment students to encourage matriculation to UW-Oshkosh.

Career Exploration Services

Enlist career center counselors to provide programming and group sessions to dual enrollment students at their high schools, helping them navigate early career exploration and alignment with UW-Oshkosh academic programs.

Campus Exposure and Engagement

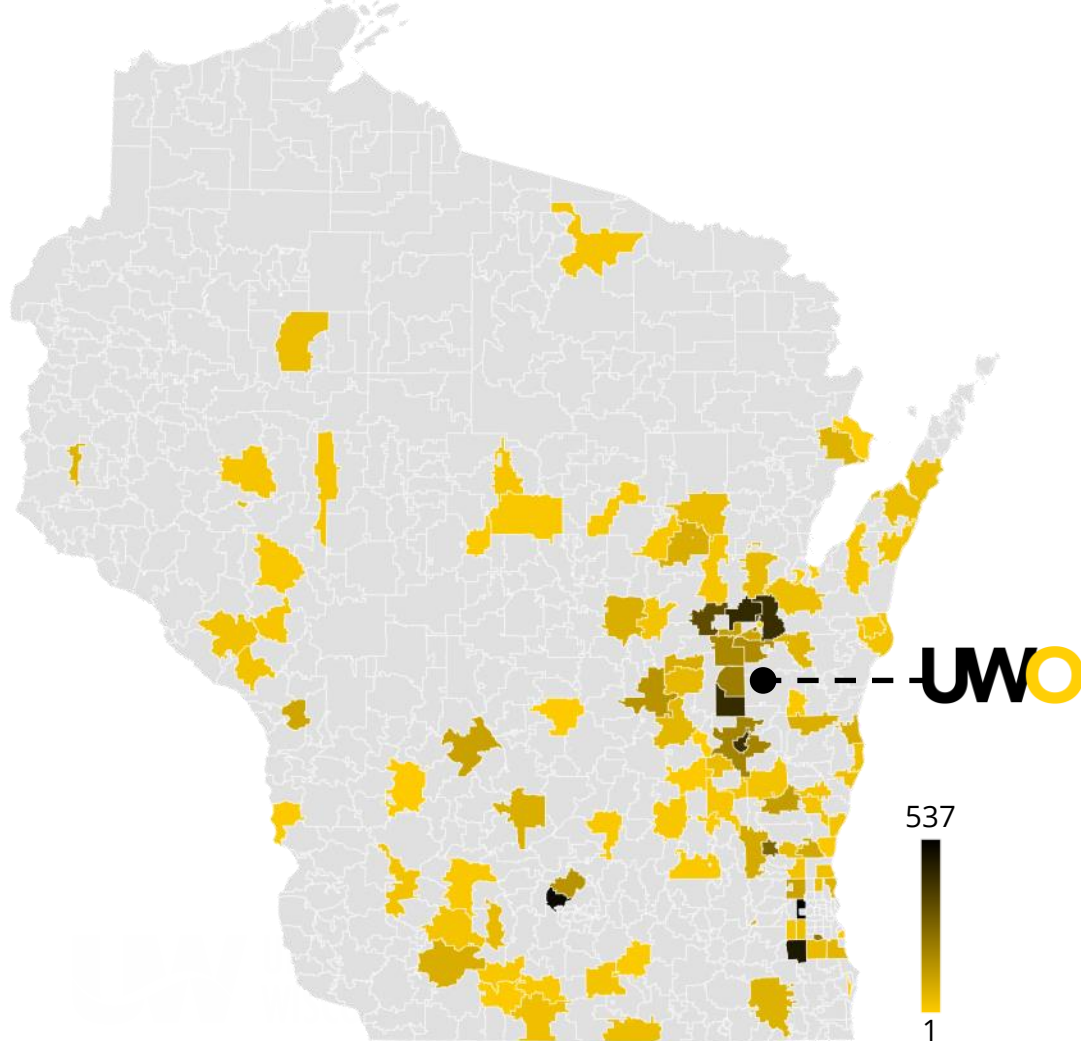
Aim to bring dual enrollment students on campus for dedicated or more general events that showcase the college experience and help them develop a sense of belonging to the campus.



Focus High-Engagement Interventions on High-Potential Yield Programs

UW-Oshkosh’s dual enrollment programs are widely distributed throughout the state of Wisconsin and even a few out-of-state. While dual enrollment engagement has inherent value to the students and state, a more focused approach may be warranted.

UW-Oshkosh WI CAPP Enrollment by Zip-code



Key Considerations



Geographic Proximity Matters

UW-Oshkosh’s ability to bring students on campus, and deploy academic leaders, career professionals, and faculty to these high school students or high-impact engagements, may be limited given the geographic dispersion of the CAPP schools.



Competition with Local UW's

While UW-Oshkosh should and does have a state-wide enrollment strategy, operating a low-engaged CAPP school in your system competitor's backyard may have only incremental benefits for Oshkosh while providing a more substantial benefit to the local UW, who could be operating that program instead of UW-Oshkosh.



Focus on Improving Participation and Quality

A reduction in the number of programs but an increase in student participation within those more geographically proximal programs, and an increase in quality of student experience and engagement, can meaningfully increase yield of CAPP students.

Case Study: High Engagement Improves Yield at Rising Phoenix Program

UW-Green Bay has the second largest dual enrollment program among UW campuses and has seen recent success in attracting and ultimately yielding students through its Rising Phoenix program.



UW-Green Bay

UW-Green Bay is a regional, public institution part of the Universities of Wisconsin. The institution serves 10,338 enrollment (headcount) as of Fall 2023, across its main campus and 3 branch campuses.

In Fall 2020, UW-Green Bay launched its Rising Phoenix program, which allows students to earn an Associate's degree while still in high school.

Business Case Overview

- UW-Green Bay's **Rising Phoenix program** is a collaboration with local school districts to provide students with a blend of dual enrollment and ongoing student success coaching. Students can **earn an Associate of Arts Degree while still in high school.**
- Eligible sophomores at partnering high schools can apply to enroll during their junior and senior year. Students have **access to** any of UW-Green Bay's **four locations**, including branch campuses, **and online courses.**
- UW-Green Bay's **Student Success Coaches work closely with students** on admissions and academic success. The coaches also help students balance courses with high school life, providing social and emotional support.
- **Tuition is billed to partnering K-12s** and is structured such that UW-Green Bay campus and online courses are offered at 1/3rd of resident tuition credit. At the branch campuses courses are offered at 1/2 of resident tuition.
- Currently, the Dept. of Public Instruction's **"Gear Up" grant** covers half of this program.



Takeaways

- **Higher Student Yield:** In the first cohort, UW-Green Bay noted over 90% of students graduated with an Associate's degree. Furthermore, as of the latest cohort yield, **approximately 1/3rd of high school students subsequently entered Bachelor's programs at UW-Green Bay.**
- Compared to UW-Green Bay's average yield of dual enrolled students (7%), **this increased level of engagement appears to have resulted in much higher success in yielding dual enrollment students.**

Drive Revenue Through Improved Conversion of Dual Enrollment Students

UW-Oshkosh has an opportunity to improve the yield of its dual enrollment students as new freshmen and drive increased revenue that could improve its financial situation as early as the coming fiscal year.

POTENTIAL IMPACT OF SCENARIO:

+1% Improvement to Dual Enrollment Yield to 8%

- Based on AY 2021-22 dual enrollment cohort data, improving UW-Oshkosh's yield to 8% from 7% has the potential to drive about 54 new enrollments or **\$440K in estimated additional revenue per year**, based on current tuition rates

+3% Improvement to Dual Enrollment Yield to 10%

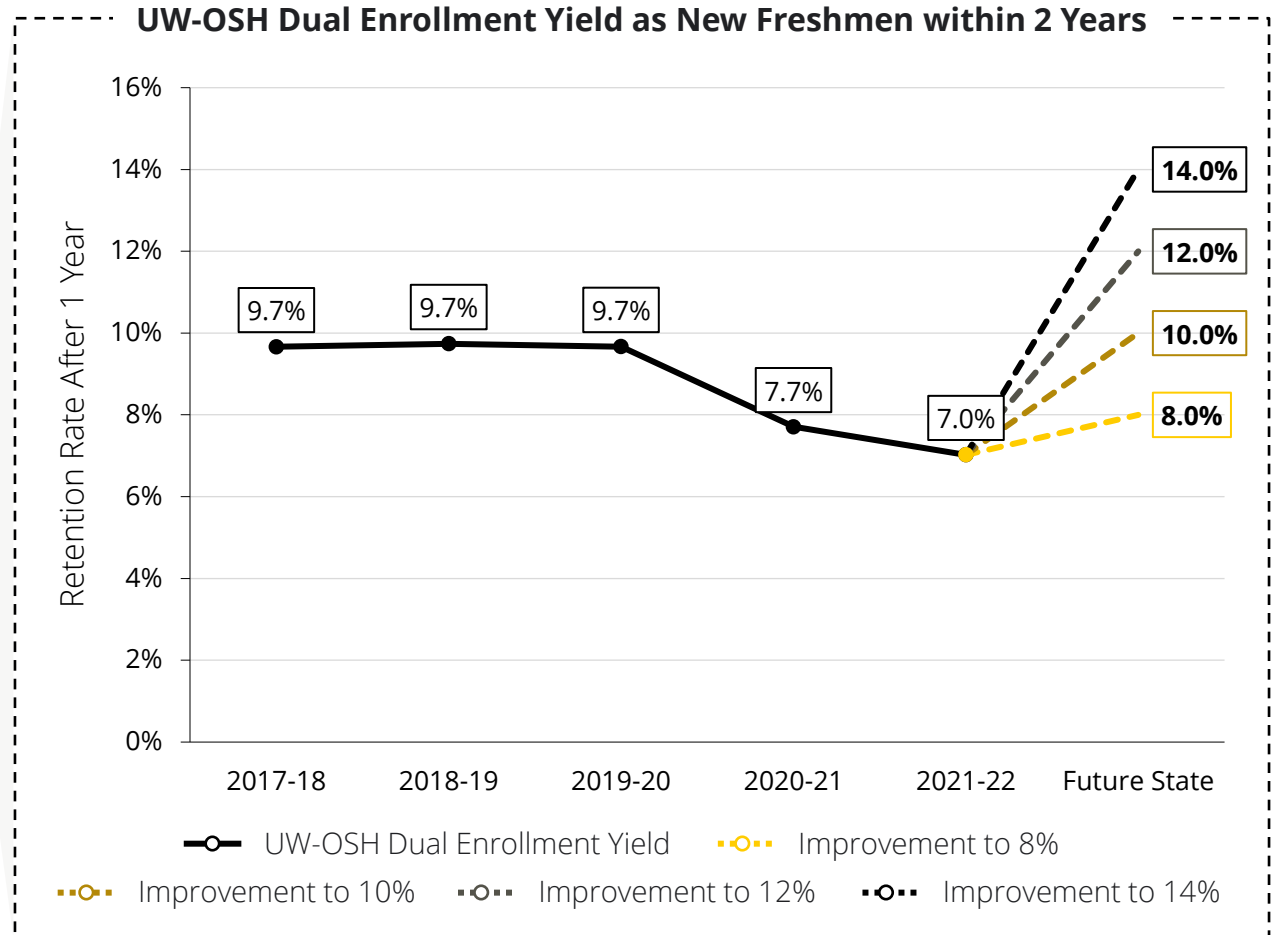
- Similarly, improving UW-Oshkosh's dual enrollment yield to 10% has the potential to drive about 163 new enrollments or **\$1.3M in estimated additional revenue per year**

+5% Improvement to Dual Enrollment Yield to 12%

- Similarly, improving UW-Oshkosh's dual enrollment yield to 12% has the potential to drive about 273 new enrollments or **\$2.2M in estimated additional revenue per year**

Doubling Dual Enrollment Yield to 14%

- Finally, doubling UW-Oshkosh's dual enrollment yield to 14% has the potential to drive about 382 new enrollments or **\$3.1M in estimated additional revenue per year**



Improving dual enrollment yield by a minimum of 3% has the potential to drive up to \$1.3M in recurring revenue. However, this will require alignment of resources and engagement from CAPP, Enrollment Management, Student Support Services, and more.

Consider These Action Items for Opportunity #3

The table below outlines a menu of potential high-level activities that UW-Oshkosh could undertake to help to improve the yield of dual enrollment students.

Opportunity Delivery Check List

Project Initiation (1-2 Months)	
Identify co-sponsor(s) (e.g. across CAPP, enrollment management, student supports) to define goals for improving dual enrollment yield and establish a timeline for periodic check-ins to track progress	<input checked="" type="checkbox"/>
Align on key data points, sources and KPIs to measure performance	<input checked="" type="checkbox"/>
Analysis and Design (2-3 Months)	
<p>Analyze lost admit data to understand why students choose to attend other institutions. This can include:</p> <ol style="list-style-type: none"> 1) Conduct exit surveys to provide insights for decisions, such as financial, academic program, or location considerations 2) Track student enrollments to understand where these students end up enrolling, whether at other UW campuses or other competitors 3) Collaborate with partnering high schools to understand students' decision-making processes and potential pain points as it relates to UW-Oshkosh's admissions processes or offerings 	<input checked="" type="checkbox"/>
Analyze the effectiveness of current engagement strategies from across functions (e.g., enrollment management, academic departments, student supports, and career services) geared toward dual enrolled students to identify barriers and low-value processes, improve information sharing and identify high-value services and strategies (e.g., stop, start, continue)	<input checked="" type="checkbox"/>
Develop a coordinated strategy and establish priorities to increase yield (e.g., considering several tactics outlined on slide 32 and balancing available resources)	<input checked="" type="checkbox"/>
Consider expanding high school programming to include a higher engagement program aimed at high school students obtaining an associate's degree and assess resources needed and implementation timelines	<input checked="" type="checkbox"/>
Implement (Ongoing)	
Implement prioritized strategies (potentially using a pilot for expanded programming) to target dual enrolled high school students	<input checked="" type="checkbox"/>
Continuously monitor progress as needed to expand high-performing efforts and terminate efforts that are not yielding results	<input checked="" type="checkbox"/>

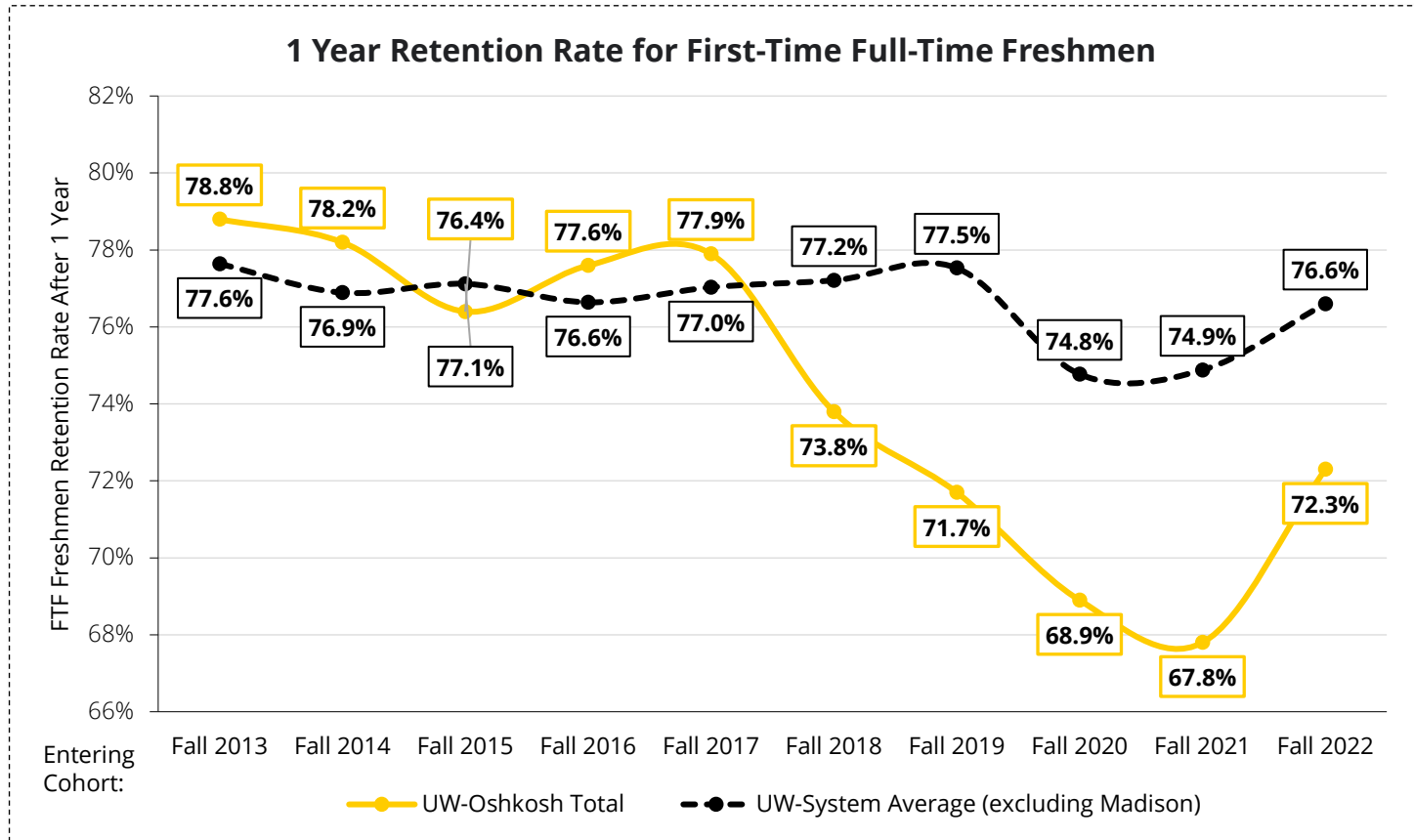


#4 Enhance Student Success Ecosystem to Improve Retention

Falling Retention Rates Create Urgency Around Student Supports

Although retention rebounded in FY23, UW-Oshkosh's retention rates continue to lag UW peers and its own historical performance. As several market disruptions drive more competition for fewer traditional students, it is critical to enhance retention to stabilize enrollment

The Main Driver for Change: Historic Retention Rates



Market Disruptions



Declining High School Graduates

The total number of graduates completing high school in Wisconsin every year has begun to decline and is forecasted to continue decreasing, with current projections showing greater than an 11% decline from 2024 to 2036.



Shifting Target Market for Students

The demographic composition of WI high school graduates is undergoing rapid change. At the same time, the number of Wisconsinites with some college, no degree has grown an average of over 3% YoY from 2018 - 2022, outpacing the state's population growth.



Weakening Perceptions of Higher Ed

Perceptions of the value of higher education have been declining, evidenced rather sharply by *The New York Times*' reporting that "the percentage of young adults who said that a college degree is very important fell to 41% percent from 74 percent".

With the need to bolster enrollment and the University aligned that retention is a critical priority, the following slides will present a pathway to reverse the downward trend in retention shown above.

Optimize Student Support Services Using a Multifaceted Approach

While Higher Education has historically focused on increasing employee headcount to increase support services, leading practices suggest a thoughtful combination of these critical enablers can optimize these supports and meaningfully impact student retention.

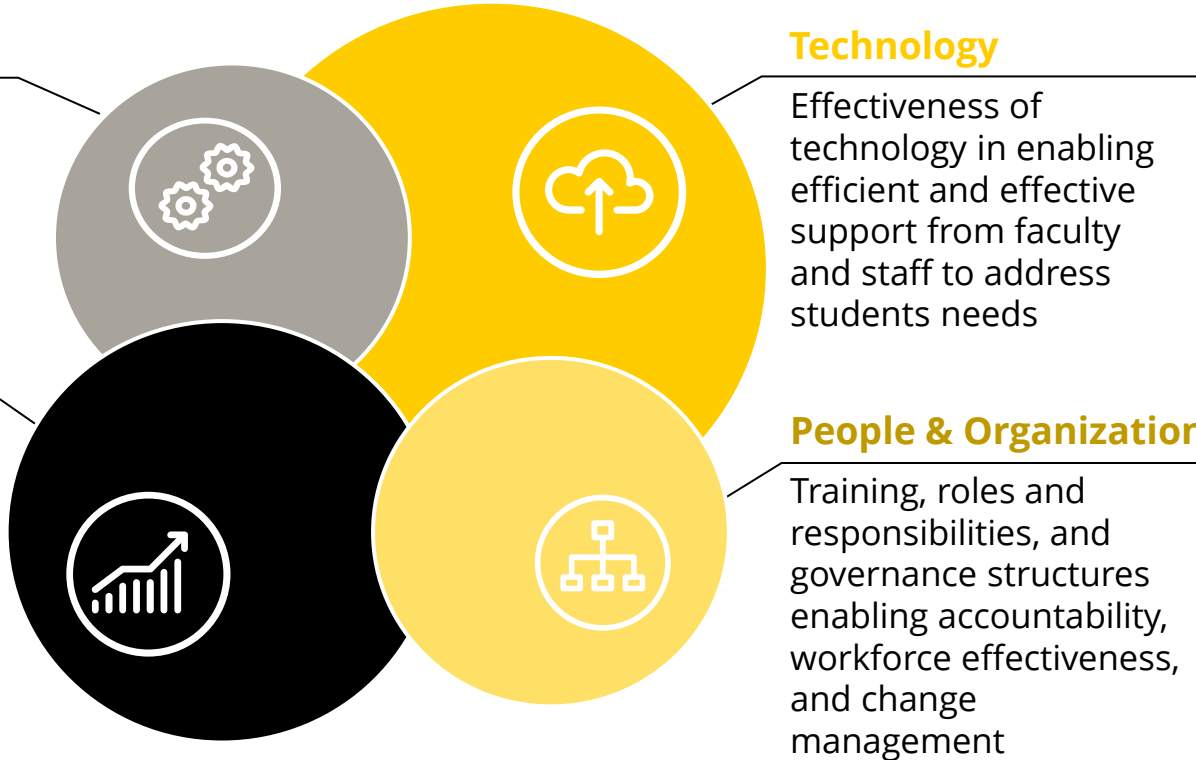
Critical Enablers of a Student Success Delivery Model

Business Practices

Business norms, processes, and policies connecting faculty, staff, and students

Data & Information

Standardization of data definitions and level of access to accurate, real-time data and reports to enable decision-making and timely intervention



Technology

Effectiveness of technology in enabling efficient and effective support from faculty and staff to address students needs

People & Organization

Training, roles and responsibilities, and governance structures enabling accountability, workforce effectiveness, and change management

- ❑ Student Success Center or similar that oversees coordination, policies and practices
- ❑ Clear governance for the model, with defined escalation paths for issues and challenges
- ❑ Clear, documented, and transparent roles and responsibilities
- ❑ Cross-trained employees, who bring a problem-solving mindset to their work
- ❑ Technology-enabled electronic processes that are straightforward and utilize workflow
- ❑ Effective professional development for faculty and staff
- ❑ Timely, accurate access to data at the appropriate levels of the organization

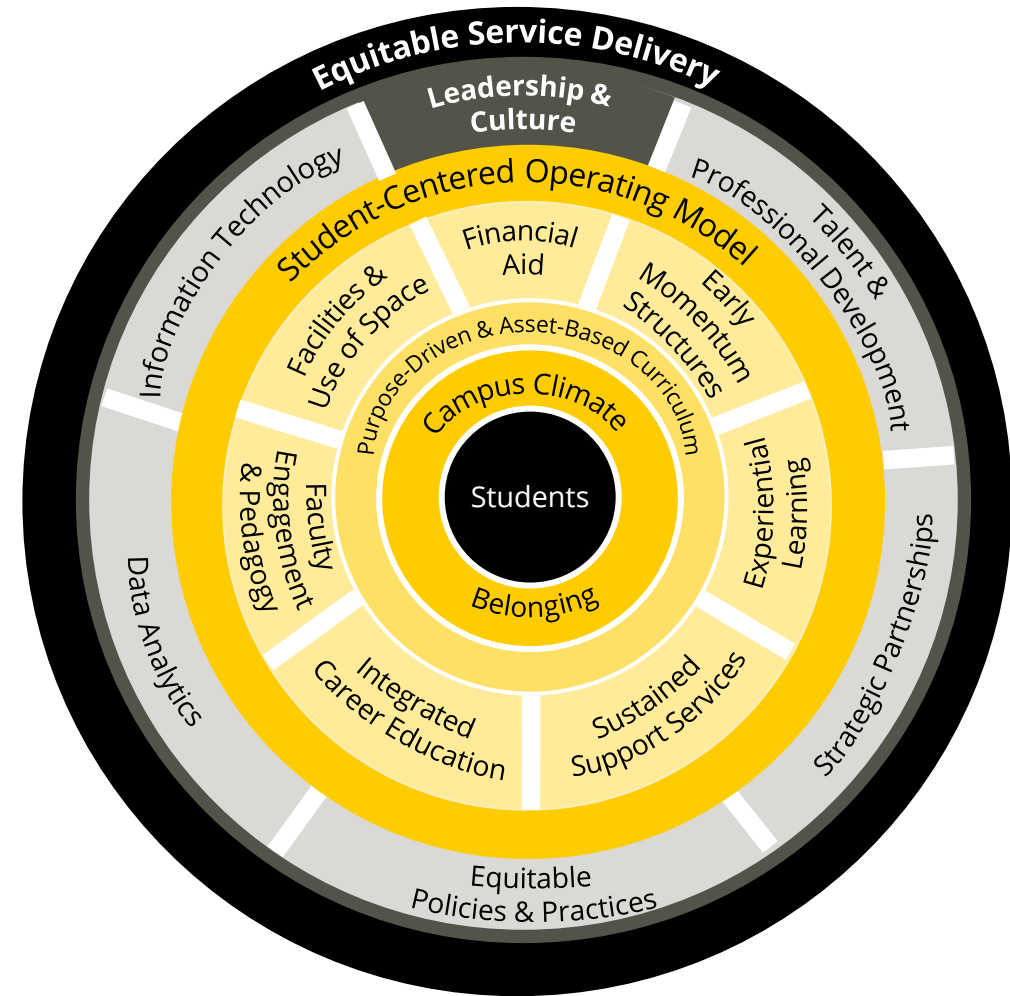
Given that UW-Oshkosh reduced student support services staff through the Institutional Realignment Plan (IRP), enhancements to each of the critical enablers above in relation to your student success ecosystem is an important step.

Apply the Enablers to a Holistic Framework for Student Success

UW-Oshkosh should reimagine its student success ecosystem within a student-centered operating model versus an organizational-driven operating model and map out the key elements of the student experience along with who is supporting those students and when.

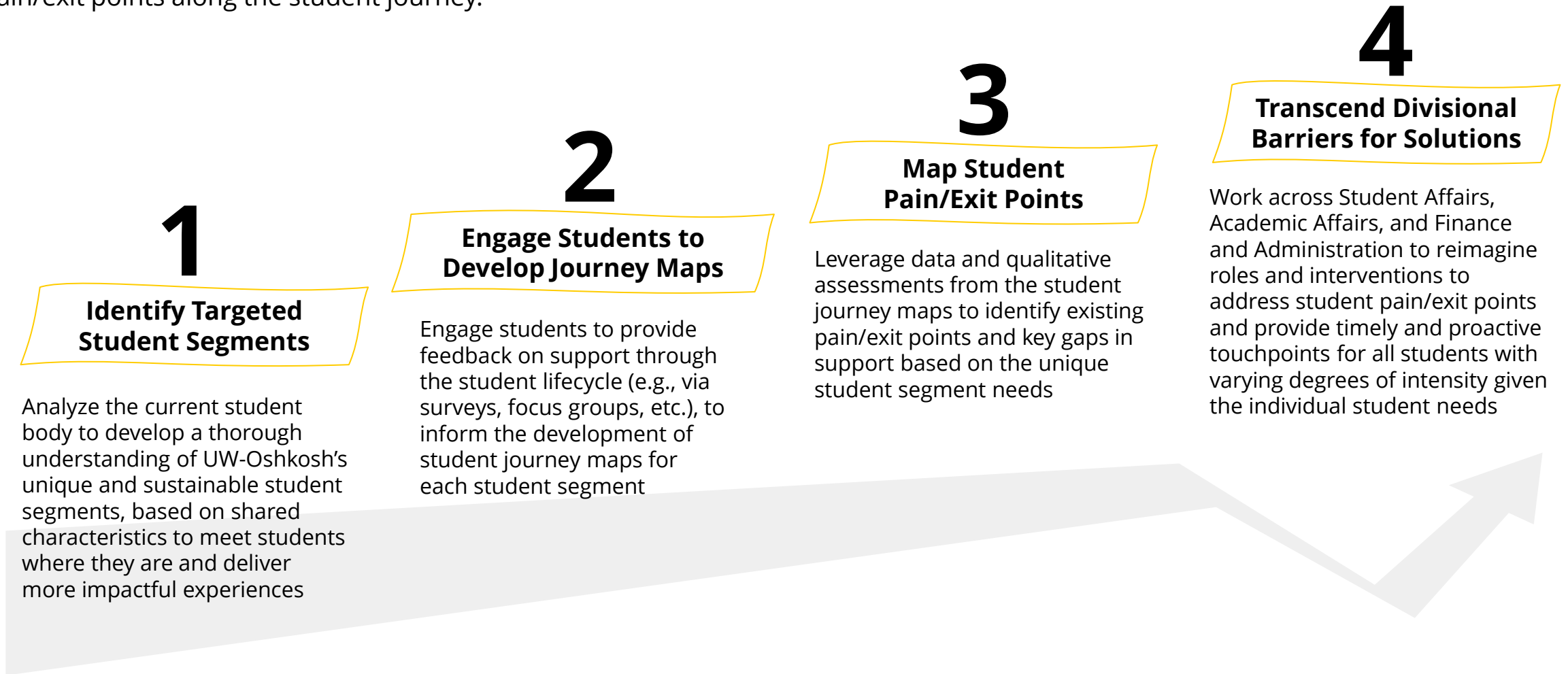


...Applied to Holistic Framework for Student Success Ecosystem¹



Engage Students to Identify Pain/Exit Points within the Ecosystem

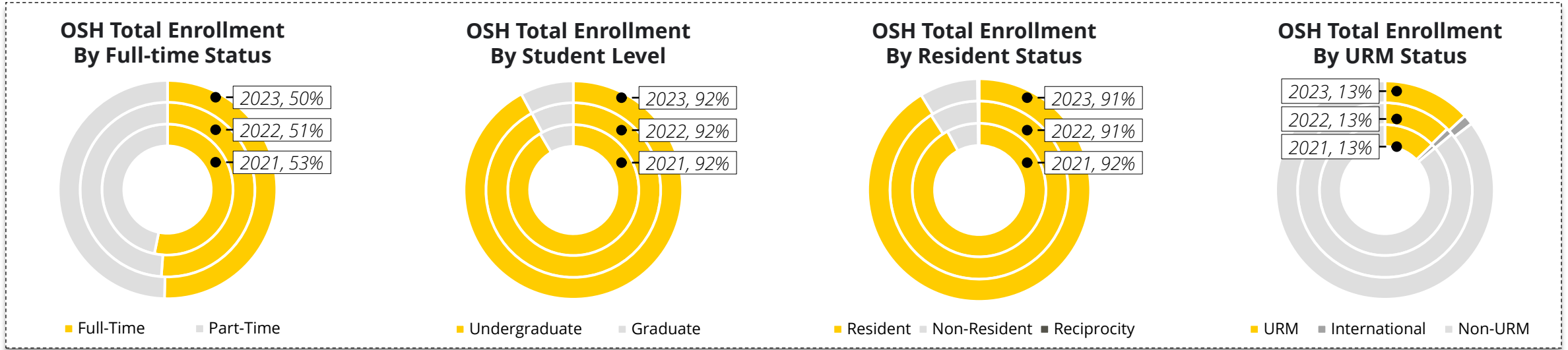
As a part of the process UW-Oshkosh is taking to bolster student success, there is an opportunity to further engage students to identify pain/exit points along the student journey.



A robust understanding of UW-Oshkosh's student segments, their unique needs, and pain/exit points along the student journey can enable the institution to better target intervention efforts and deliver more impactful student experiences.

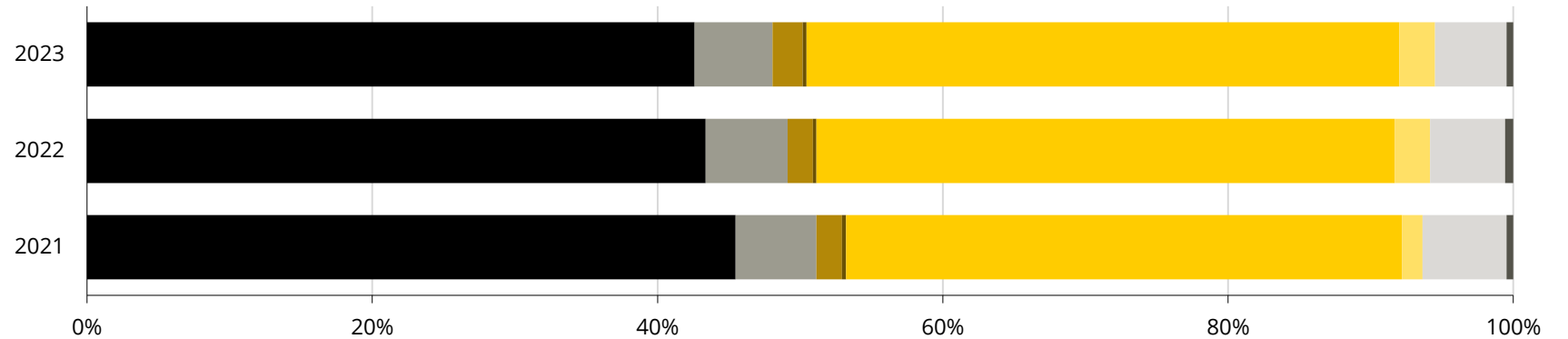
Understand UW-Oshkosh's Existing Student Segments

Understanding UW-Oshkosh's existing student segments and their unique needs is a critical first step to identifying potential gaps in support and opportunities to more effectively target and tailor retention and student success strategies.



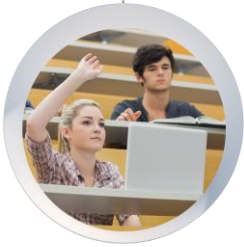
UW-OSHKOSH STUDENT SEGMENTS:

- Full-Time - Undergraduate, WI Resident
- Full-Time - Undergraduate, Non-Resident*
- Full-Time - Graduate, WI Resident
- Full-Time - Graduate, Non-Resident*
- Part-Time - Undergraduate, WI Resident
- Part-Time - Undergraduate, Non-Resident*
- Part-Time - Graduate, WI Resident
- Part-Time - Graduate, Non-Resident*



Note that the system-sourced data above includes a considerable headcount number of dual enrollment students. This over-inflates the number of part-time students and under-represents the URM students that are full-time students at UW-Oshkosh.

Consider the Unique Experience of Each Student Segment



Full-time, Undergrad, WI Resident
Undergraduate students who are enrolled in courses full time and are Wisconsin residents



Full-time, Undergrad, Non-resident
Undergraduate students who are enrolled full time and are out-of-state students



Full-time, Graduate, WI Resident
Graduate students who are enrolled in courses full time and are Wisconsin residents



Full-time, Graduate, Non-resident
Graduate students who are enrolled in courses full time and are out-of-state students



Part-time, Undergrad, WI Resident
Undergraduate students who are enrolled in courses part time and are Wisconsin residents



Part-time, Dual Enrollment, WI Resident
High School students who are enrolled part time and are Wisconsin residents



Part-time, Undergrad, Non-Resident
Undergraduate students who are enrolled part time and are out-of-state students



Part-time, Graduate, WI Resident
Graduate students who are enrolled in courses part time and are Wisconsin residents



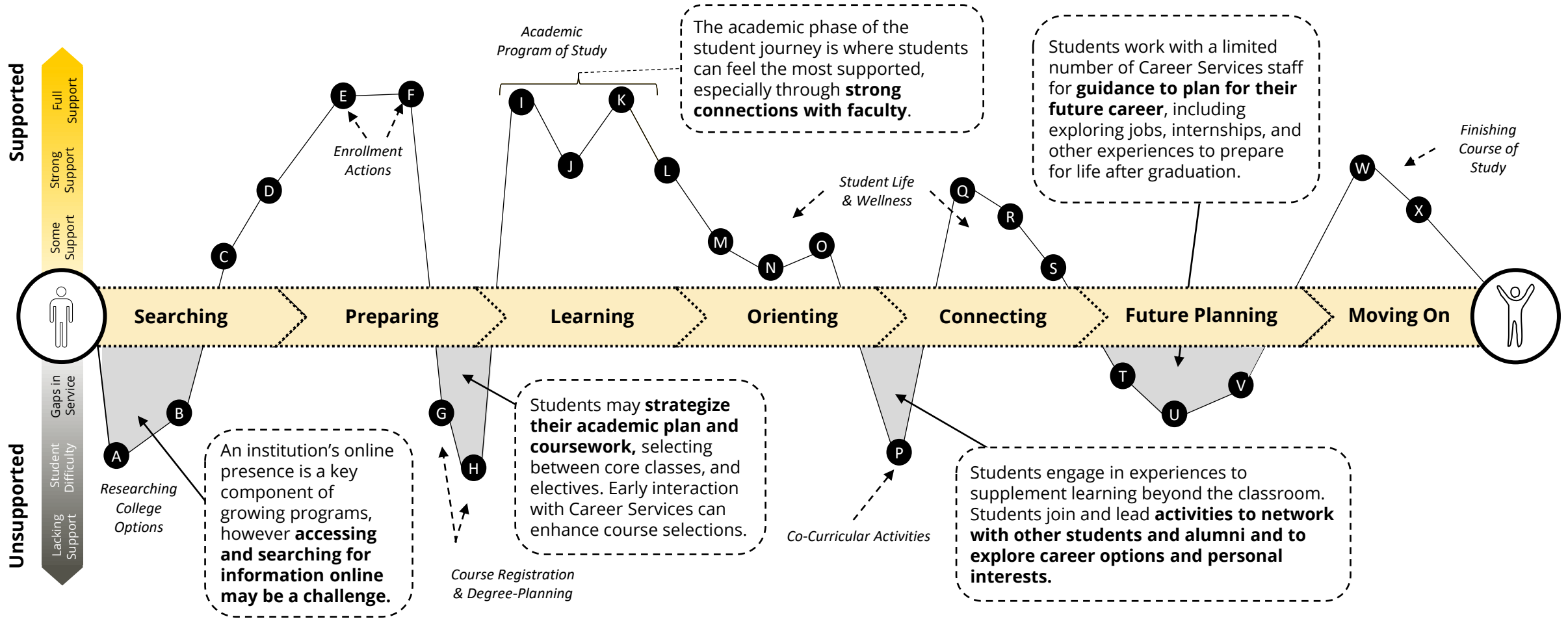
Part-time, Graduate, Non-resident
Graduate students who are enrolled in courses part time and are out-of-state students

In addition to understanding UW-Oshkosh's student segments by factors such as full-time / part-time status, age and residency, it is also important to consider shifting demographic profiles to effectively tailor retention and student success strategies.

Notes: * For high level illustration purposes, Non-Resident category includes MN Reciprocity students

Assess the Student Journey of Each Segment to Highlight Gaps

ILLUSTRATIVE STUDENT JOURNEY MAP FOR ONE STUDENT SEGMENT:

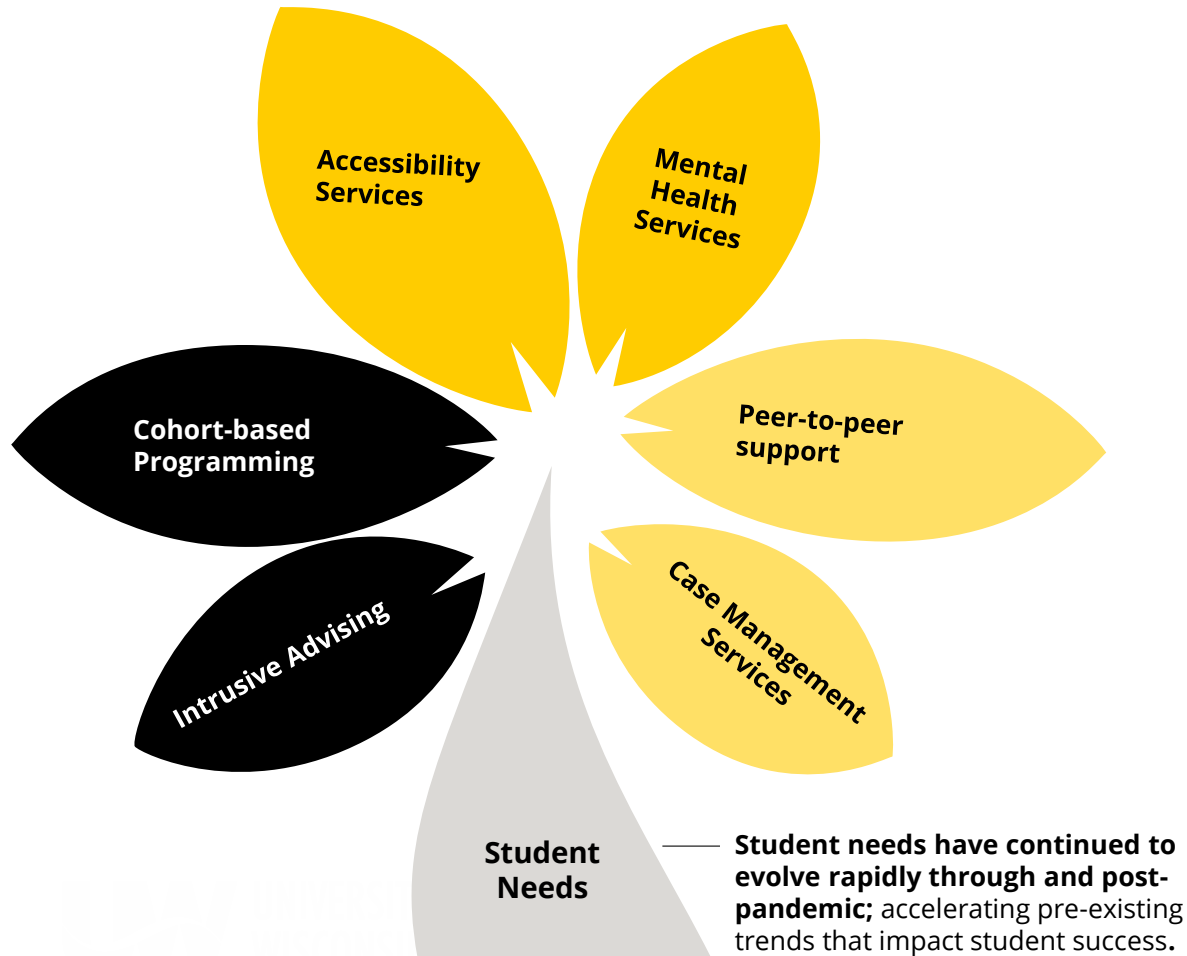



A student journey map, like the example above, holistically analyzes the student lifecycle for each unique student segment and can help identify strengths and potential gaps in service all the way from initial recruitment through graduation.


Reinforce the Essential Student Supports Needed Along the Journey


As student needs continue to evolve and potential gaps in the student support ecosystem are identified, it is critical that institutions reinforce essential support services.


Critical support services to sustain throughout the student journey:





- 

Intrusive Advising
This concept is based on the practice of proactive outreach to students to gain early and frequent awareness of academic and other issues that could be a barrier to success.
- 

Cohort-based Programming
Creating small and closely affiliated groups supports an increased sense of belonging to a community within the institution and encourages informal peer support.
- 

Accessibility Services
A rapid growth in the number and percentage of students needing accommodations has been well-documented.
- 

Mental Health Services
Higher education has been grappling with a mental health crisis for years. This was exacerbated by the pandemic which showed that more resources and cross-training are needed.
- 

Peer-to-peer support
UW-Oshkosh is already planning enhancements to its peer mentoring, tutoring and support services. Consider embedding peer tutoring support in high DFW courses.
- 

Case Management Services
Assign a single point of contact to each student that enables triage and follow-up of service referrals across the campus. This helps to build rapport and connection with the student.

Adopt Other Leading Practices Showing Success at Peer Institutions

Leading higher education institutions are deploying the following strategies to help students succeed and close service gaps.



Helping Students Develop Resiliency

- Leading institutions are focusing on developing student resiliency to help students succeed both academically and post-graduation
- Babson College’s Foundations of Management and Entrepreneurship program **teaches students how to “fail forward”** by having first year student teams create a business and take it through its entire lifecycle
- The “process of learning to fail” and using that as a foundation for future innovation can **help students cultivate professional resiliency**



Harnessing Innovation to Improve Mental Health

- According to a recent survey of higher education presidents, nearly 75% rated mental health as the most pressing issue
- The need for more counseling services has spurred institutions to think creatively about how to meet the increased demand, including through technology
- UArizona, for example, has implemented telehealth technology for remote counseling; UArizona is also implementing apps and **peer-to-peer networks where students certified in psychological first aid can offer virtual support** for other students



Leveraging Analytics to Target Intervention

- Many institutions are investing in their analytical capabilities to support data-driven insights for improving student success
- Monroe College, with a retention rate of 82% for example, uses data analytics to provide a macro view of performance data
- University of Central Florida **uses real-time Learning Management System (LMS) data on students’ performance in specific courses to scale intervention efforts**
- California State University, Fullerton (CSUF) has deployed a Student Success Dashboard which is used by graduation and retention specialists to target students for active interventions and advising



Targeting Inclusion for First-gen. Students

- Institutions are focusing on improving inclusion for first-generation students who may face greater challenges in staying enrolled
- UCLA offers an Advancement Program to provide better access to academic, personal, and professional development through academic advising, peer learning, and workshops
- CSUF has seen strong results from its **First Year Experience program, designed to build students’ sense of belonging,** proficiency, and confidence through summer bridge programs, student mentorships, and orientation programs

Realize Increased Revenue Through Improved Retention

UW-Oshkosh has an opportunity to improve retention and drive increased revenue by enhancing the student journey.

POTENTIAL IMPACT OF SCENARIO:

+2.0% Improvement to Retention to 74%

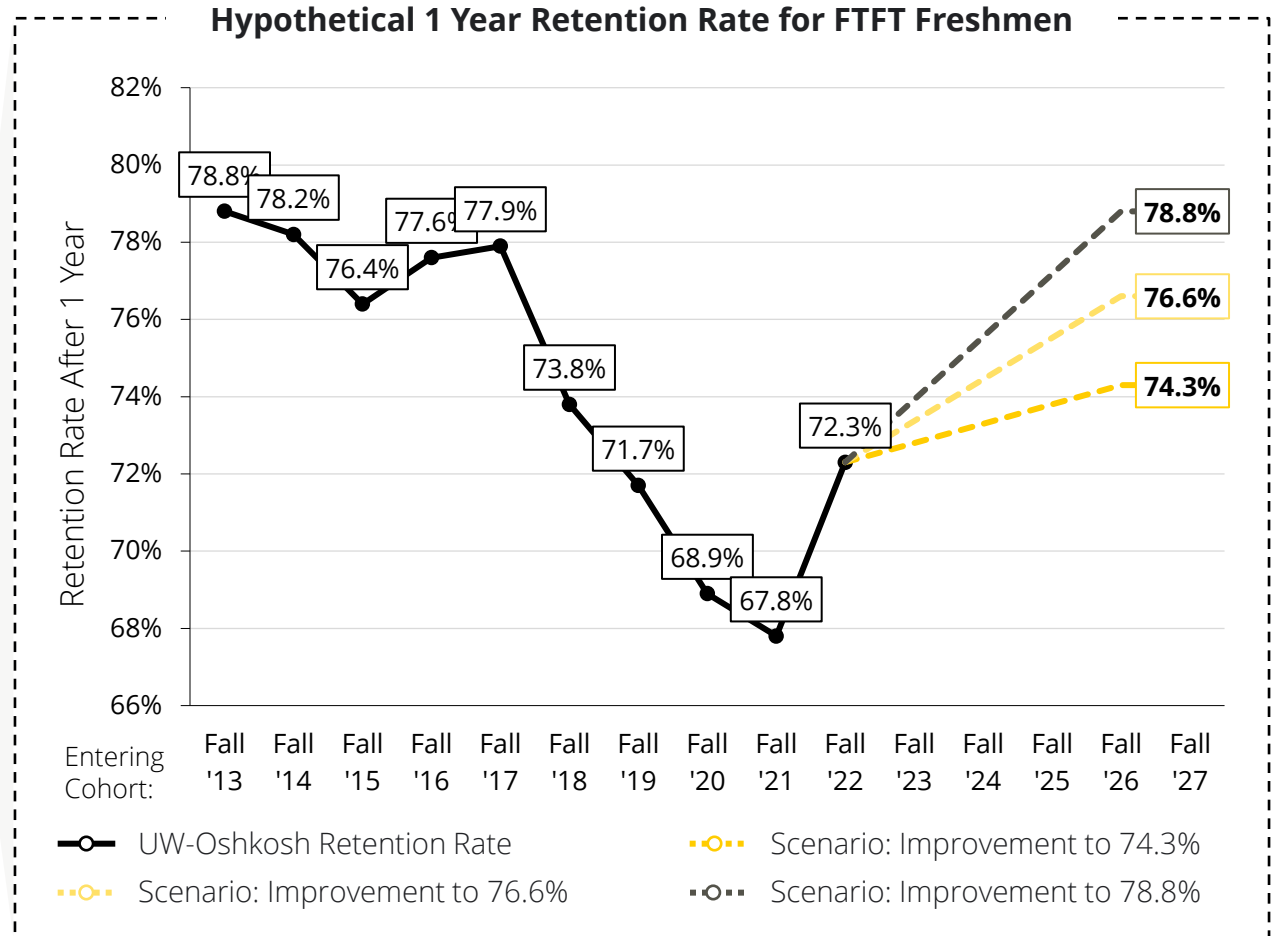
- Based on Fall 2023 cohort data, improving UW-Oshkosh's 1st year retention rate for FTFT freshmen by 2.0% to 74.3% has the potential to drive 28 more sophomore enrollments annually, or nearly 75 additional enrollments at steady state¹. Based on current tuition rates, this has the **potential to drive about \$600K additional revenue at steady state**.

+4.3% Improvement to UW Average² of 77%

- Targeting a 1st year retention rate of 76.6% (UW-Average² as of Fall 2022 cohort) has the potential to drive 61 more sophomore enrollments annually, or nearly 162 enrollments at steady state¹. Based on current tuition rates, this has the **potential to drive as much as \$1.3M annual revenue at steady state**.

+6.5% Improvement to Historic Peak of 79%

- Finally, targeting a 1st year retention rate of 78.8% (historic peak) has the potential to drive 92 more sophomore enrollments annually, or nearly 245 enrollments at steady state¹. Based on current tuition rates, this has **the potential to drive up to \$2.0M annual revenue at steady state**.



Improving the freshmen retention rate by a target of 2% to 7% has the potential to drive approximately \$600K to \$2.0M in recurring revenue at steady state. However, this will require alignment of resources and engagement from staff to faculty to achieve success.

Consider These Action Items for Opportunity #4

The table below outlines a menu of potential high-level activities that UW-Oshkosh could undertake to help to improve retention toward the UW Average and the institution’s historic peak.

Opportunity Delivery Check List

Project Initiation (1-2 Months)	
Convene a cross-functional Student Retention and Success task force to define goals, coordinate efforts, and establish timeline for periodic check-ins to track progress	<input checked="" type="checkbox"/>
Align on key data points, sources and KPIs to analyze student segments and student journeys and to measure performance	<input checked="" type="checkbox"/>
Assess student data systems, including Navigate, and form a strategy for data input and analysis considering the training needed for key stakeholders that may be under-engaging in data entry or utilization of data to drive student intervention	<input checked="" type="checkbox"/>
Analysis and Design (2-3 Months)	
Identify student segments where targeted investments will have the highest impact on retention (e.g., first-gen students from low-income families, part-time adult learners) as well as identify high DFW gateway courses where added in-class supports may be most valuable	<input checked="" type="checkbox"/>
Engage students and recent alumni to gather feedback on experiences through the student lifecycle via surveys and focus groups	<input checked="" type="checkbox"/>
Develop journey maps using the feedback to identify pain/exit points in the student lifecycle for each prioritized student segment	<input checked="" type="checkbox"/>
Review pain/exit points or other gaps in support along the student journey to identify commonalities across segments	<input checked="" type="checkbox"/>
Use a continue/add/stop framework as you assess current student success initiatives and identify whether they are addressing identified pain/exit points, uncover potential gaps in service, and/or identify services which are not having an impact and should be sunset	<input checked="" type="checkbox"/>
Redesign the student success ecosystem using a holistic and interdisciplinary framework that is both student-centered and that addresses the pain/exist points identified in your discover process	<input checked="" type="checkbox"/>
Implement (12-24 Months)	
Deploy a new framework along side professional development efforts to upskill key points of contact and improve data entry and utilization	<input checked="" type="checkbox"/>
Continuously monitor progress as needed to expand high-performing efforts and terminate efforts that are not yielding results	<input checked="" type="checkbox"/>



#5 Utilize Data Driven Decision Making to Create a Culture of Accountability

Create a Culture of Data-Informed Decision Making and Accountability

UW-Oshkosh leadership already understands the key Opportunity Areas proposed. However, enrollment and expense trends still indicate a growing need for action, leading to the question – *how can Oshkosh achieve a sustainable \$0 deficit over the long-term?*

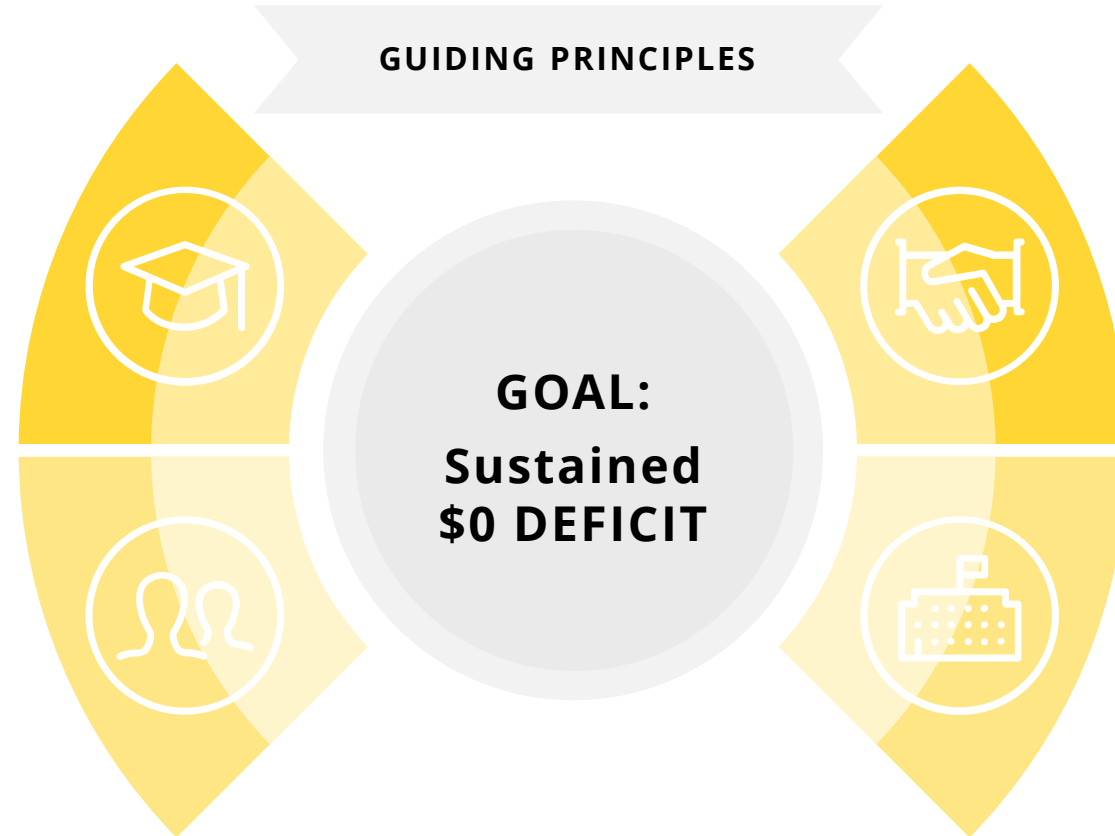
GUIDING PRINCIPLES

Leadership Through Accountability

Through 'leading by example', UW-Oshkosh leadership – and key committees or change champions – can set the tone for the rest of the campus community

Data-Informed Decision Making

Having the right data, KPIs, etc., in place will enable UW-Oshkosh to decide how / when to make difficult decisions



Create a Culture of Innovation

Higher Education is facing a rapid pace of change. UW-Oshkosh should create a culture that welcomes innovation and entrepreneurialism to position the institution for long-term sustainability and success

Rigorous Performance Management







Failure is acceptable if lessons are learned and tactics change. Setting and monitoring KPIs will enable UW-Oshkosh to thoroughly evaluate progress towards the sustained \$0 deficit goal

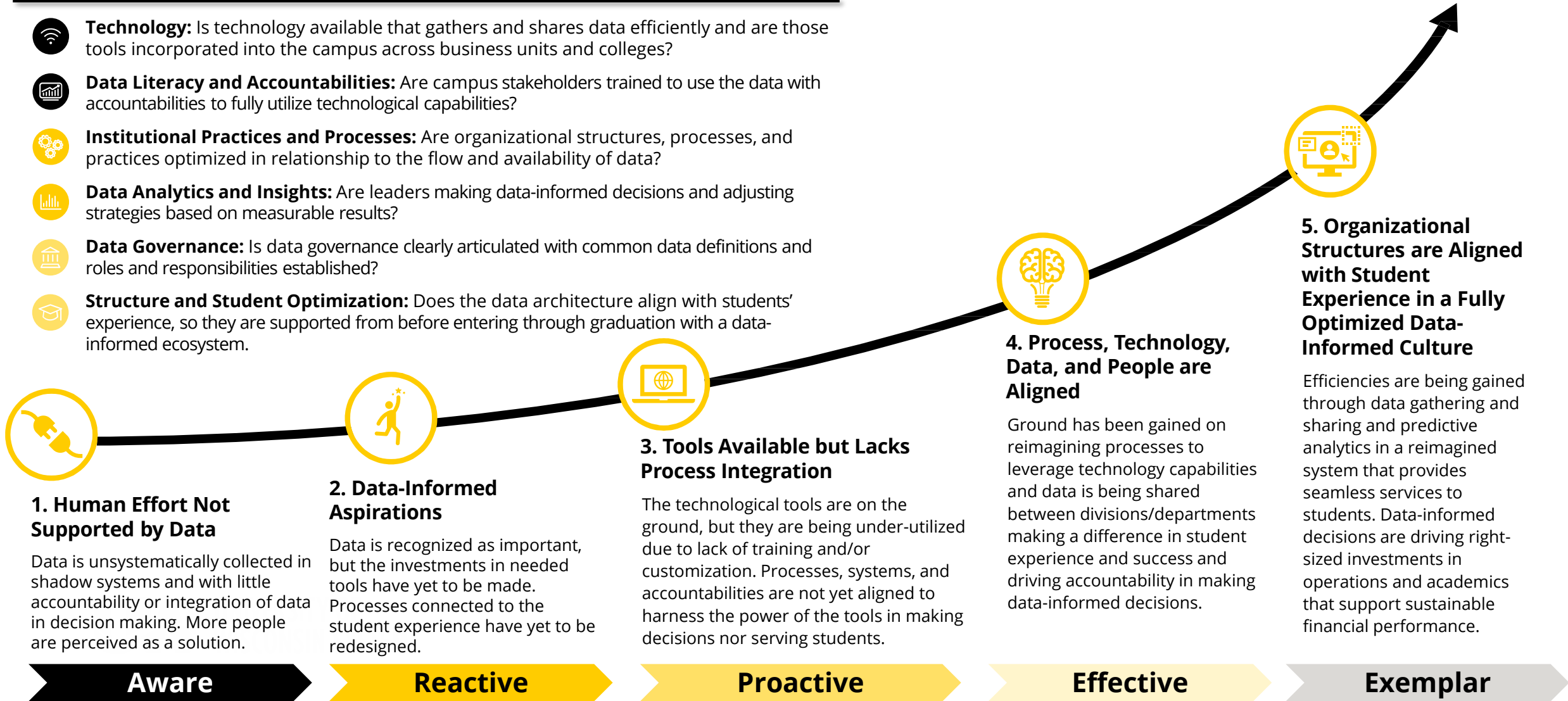
A culture of accountability and data-informed decision making starts from the top of the organization, requires data infrastructure including tools and capabilities to use them, and can encourage innovation and rapid adjustment to target with KPI tracking.

Assess the Campus Against a Data Maturity Scale and Set Targets

Understanding where UW-Oshkosh is along a maturity scale will both set a realistic baseline of where the campus is today and help to define the future vision of where it wants to be in the future.

Elements of Maturity

-  **Technology:** Is technology available that gathers and shares data efficiently and are those tools incorporated into the campus across business units and colleges?
-  **Data Literacy and Accountabilities:** Are campus stakeholders trained to use the data with accountabilities to fully utilize technological capabilities?
-  **Institutional Practices and Processes:** Are organizational structures, processes, and practices optimized in relationship to the flow and availability of data?
-  **Data Analytics and Insights:** Are leaders making data-informed decisions and adjusting strategies based on measurable results?
-  **Data Governance:** Is data governance clearly articulated with common data definitions and roles and responsibilities established?
-  **Structure and Student Optimization:** Does the data architecture align with students' experience, so they are supported from before entering through graduation with a data-informed ecosystem.



1. Human Effort Not Supported by Data

Data is unsystematically collected in shadow systems and with little accountability or integration of data in decision making. More people are perceived as a solution.

Aware

2. Data-Informed Aspirations

Data is recognized as important, but the investments in needed tools have yet to be made. Processes connected to the student experience have yet to be redesigned.

Reactive

3. Tools Available but Lacks Process Integration

The technological tools are on the ground, but they are being under-utilized due to lack of training and/or customization. Processes, systems, and accountabilities are not yet aligned to harness the power of the tools in making decisions nor serving students.

Proactive

4. Process, Technology, Data, and People are Aligned

Ground has been gained on reimagining processes to leverage technology capabilities and data is being shared between divisions/departments making a difference in student experience and success and driving accountability in making data-informed decisions.

Effective

5. Organizational Structures are Aligned with Student Experience in a Fully Optimized Data-Informed Culture

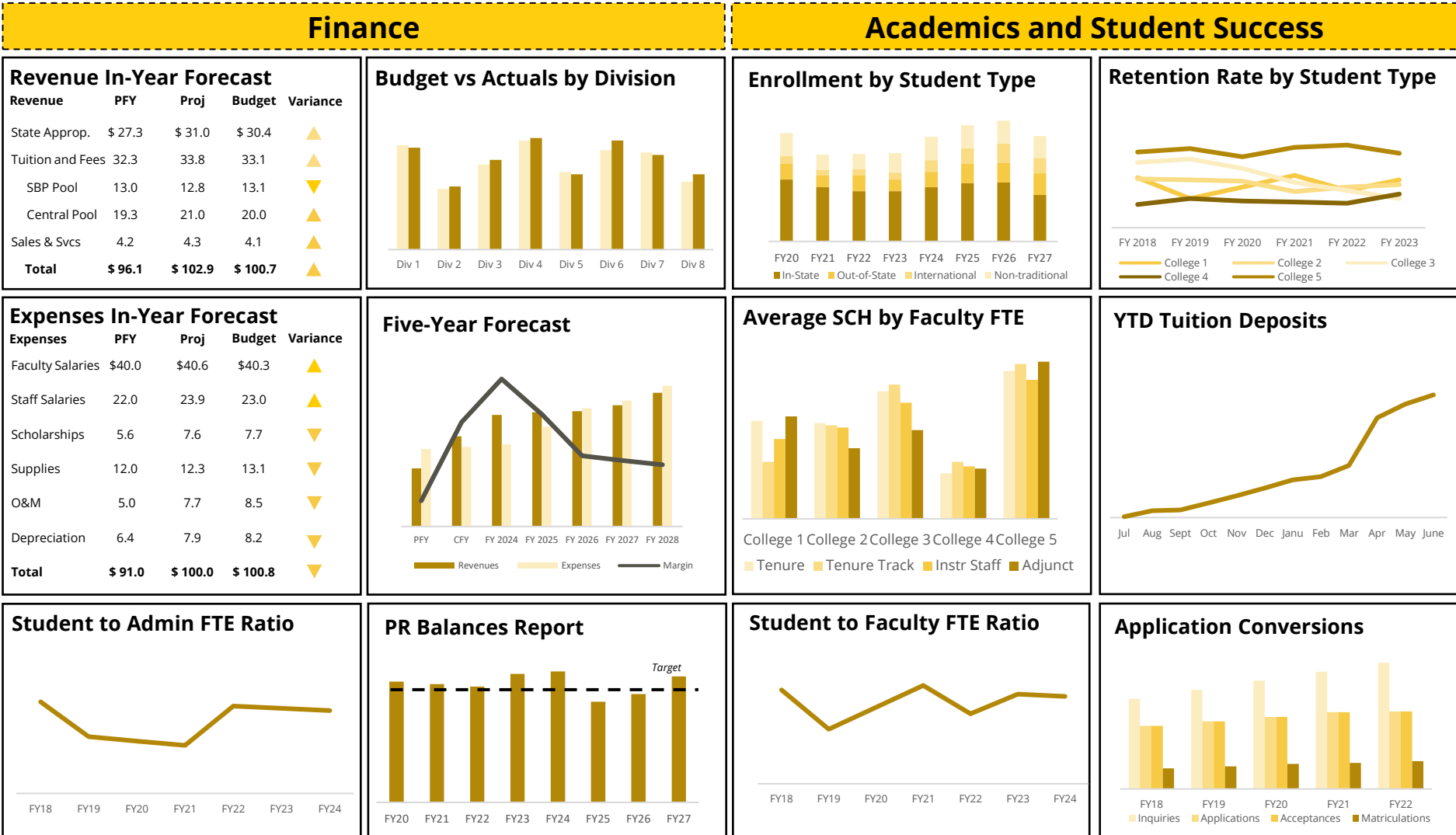
Efficiencies are being gained through data gathering and sharing and predictive analytics in a reimagined system that provides seamless services to students. Data-informed decisions are driving right-sized investments in operations and academics that support sustainable financial performance.

Exemplar

Enforce Data-Informed Decision Making through Financial Tools

UW-Oshkosh should create an executive dashboard for the Chancellor that displays at a glance the metrics that are most clearly tied to university financial performance. This dashboard can be used to drive cabinet agendas and keep a pulse on strategic initiative progress.

CHANCELLOR DASHBOARD IS ILLUSTRATIVE AND IS FOR DISCUSSION PURPOSES ONLY



Case Study: Data Systems at Bridgewater State University Drive Success

Bridgewater State University (BSU) is a highly relatable peer of UW-Oshkosh in terms of size, location, academic focus, and position within the overall state system. Bridgewater has built a substantial data infrastructure and exceeds peer benchmarks on student outcomes.



Bridgewater State

Bridgewater State University is one of 9 state universities in the Massachusetts public higher ed system and serves approximately 9,600 students, ~ 8,100 of which are undergraduates. They deliver a research-enhanced undergraduate education in a well-populated area about 45 mins outside of Boston.

They serve 48% first-generation students and have consistently exceeded state and national peers in retention and graduation rates.

Case Study Overview

- Bridgewater leadership sets the tone of data-informed decisions by having a **Chief Data Officer sit on the President’s executive council**
- Their **Office of Institutional Research and Decision Support** is well-staffed and goes well beyond mandated reporting to be **partners with administrative and academic departments** and committees to support data-informed decision making
- Focusing on student success, Bridgewater has **matured a predictive analytic framework** for over a decade refining the inputs and algorithm to their student population and using those data **to inform targeted student intervention**
- **A recent adopter of Navigate**, Bridgewater is working to integrate this tool into its ecosystem and streamline communications, notes, alerts and predictive models with the EAB platform
- Like many institutions, **Bridgewater continues to work on faculty adoption and participation** of technology including entering data for early alerts.



Business Case

- **Realizing a Positive Financial Return:** With a first-to-second year retention rate (79%) 5% above their national peers, and a 6-year graduation rate (62%) 6% above those peers, BSU is improving their financial position with their investments in data-informed student success interventions
- **Confidence in Decision Making:** By elevating data as a part of the leadership and decision-making culture, investing in data infrastructure, and building a culture of innovation with a pilot and deploy approach, BSU leaders have more confidence in their decisions and investments.

Facilitate Effective Change Management Through Cultural Shifts

Change management is foundational to any successful transformation and applies to all of the opportunities identified above. The seven principles delineated below can each serve as a helpful guide as UW-Oshkosh's advances a data-informed culture of accountability.



1 Start with the End in Mind

Successful change efforts must begin by bringing together the necessary players to drive alignment among key leadership and the major stakeholders who will be impacted by the change(s) proposed.

2 Understand Institutional Culture

An understanding of the existing culture at UW-Oshkosh will be key to the foundation of any undertaking to ensure that efforts align with, act on, and uphold the institution's values.

3 Communicate, Communicate, Communicate

Different people consume information in different ways. Knowing the media and language that works best for your audience(s) and creating opportunities for two-way dialogue will help build a critical mass of support.

4 Walk a Mile in the Shoes of Those Whose Roles May Change

The employee experience should be valued the same as the student experience. Therefore, it is important to understand every step of the change journey for faculty, staff, and administrators and how it could affect their day-to-day work.

5 Create Win-Wins and Align Incentives

Find ways for the colleges, divisions, and individuals to benefit from the envisioned changes.

6 Embrace Incrementalism to Drive Change

Starting with a bold goal in mind and taking small steps relentlessly can build organizational capital in the same way that compounding annual investment returns can build wealth.

7 You Won't Get What You Don't Measure

It's critical to ensure that leadership is aligned on the vision and success criteria from the start, including creating mechanisms for measuring and monitoring success. The resulting data and insights can then be used to continuously calibrate.

Consider These Action Items for Opportunity #5

UW-Oshkosh can work towards a sustained \$0 deficit by using some of the below tactics to guide leadership in developing and implementing a 'Culture of Data-Informed Decision Making and Accountability'.

Opportunity Delivery Check List

Strengthening the Data Ecosystem

- Assign executive leadership (e.g., Institutional Effectiveness) the role to oversee and connect the data ecosystem at UW-Oshkosh and include this person in executive meetings and decision-making processes going forward
- Form a data council that is convened by the executive data leader that has purview over all key data sources and uses (e.g., finance, HR, student, enrollment management, and alumni)
- Assess current state and maturity of data systems, using the maturity scale on slide 51 or similar to understand not only the technology stack UW-Oshkosh has but the effective utilization and connectivity of those tools
- Establish strategic goals and timelines considering the necessary resources, including talent support, upgrades and customizations needed to use UW-Oshkosh tools effectively, and prioritize investments according to highest potential impact on financial sustainability for the University

Improving Talent Through Training and Professional Development

- Identify gaps in data literacy and utilization across campus by identifying key points of contact within the data ecosystem that need to improve performance of data entry and/or utilization
- Improve processes related to data that make data entry and utilization repeatable, easy, and ingrained in the day-to-day culture of the University by mapping the flow of data and identifying any sticking points in the process where overly manual tasks create bottlenecks
- Provide multimodal training opportunities (e.g., lunch & learns, department specific training, one-on-one support) to improve data literacy

Mandate Data-Informed Decision Making as a Cultural Norm

- Develop internal KPI dashboards that can be reviewed on a consistent basis (e.g., monthly), inclusive of multiple, standardized metrics, customized for the functional leaders and their particular KPIs (e.g., Enrollment Management, Academic Leadership, Finance, Student Affairs, etc.)
- Build an integrated and comprehensive long-term planning approach that incorporates Finance, Human Resources, Technology/IT, Academics, Facilities, Faculty, Staff, etc., in tandem a long-range financial plan
- Reinforce the need for data to support key investments, expansion of pilots, and sunseting of ineffective programs