

UNIVERSITY OF
WISCONSIN

OSHKOSH

Cost Recovery Training

Where excellence and opportunity meet.™

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OSHKOSH What is a Cost Recovery Program?

Administrative Services

- Program which allows the unit to keep the tuition/fees associated with the program.
- Separate from 102 (GPR) funding
- Does not include 100% Grant funded programs

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When can Cost Recovery Programs be Utilized?

- Attracting new audiences to campus opportunities
 - Credit or non-credit programs
 - Not part of the normal program array
- Offerings tied to programs (degree, certificate, etc.)
 - Does not apply to individual courses.

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What is different?



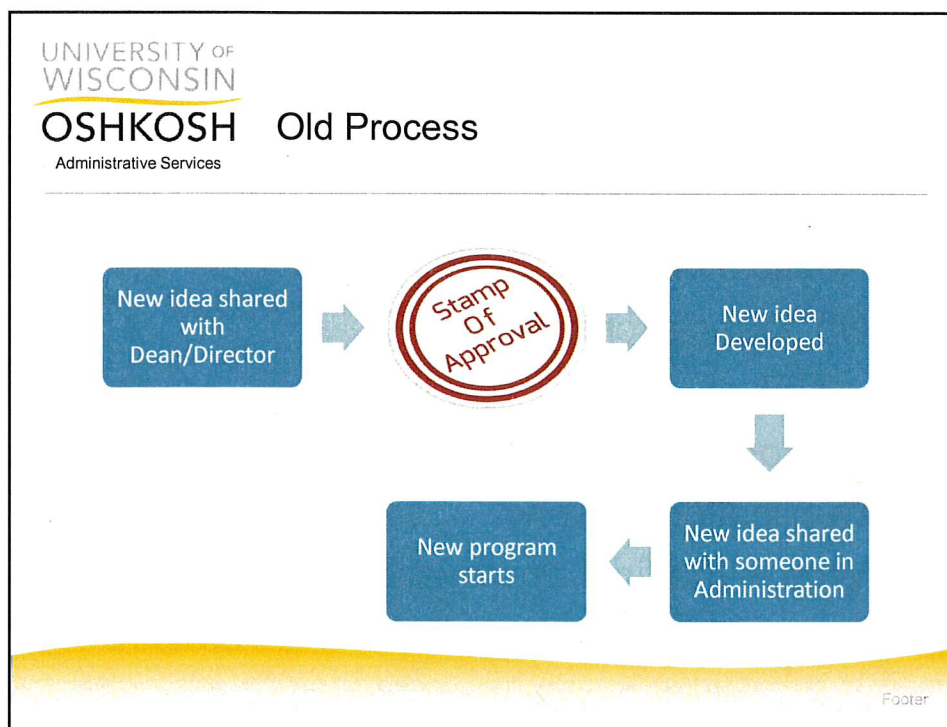
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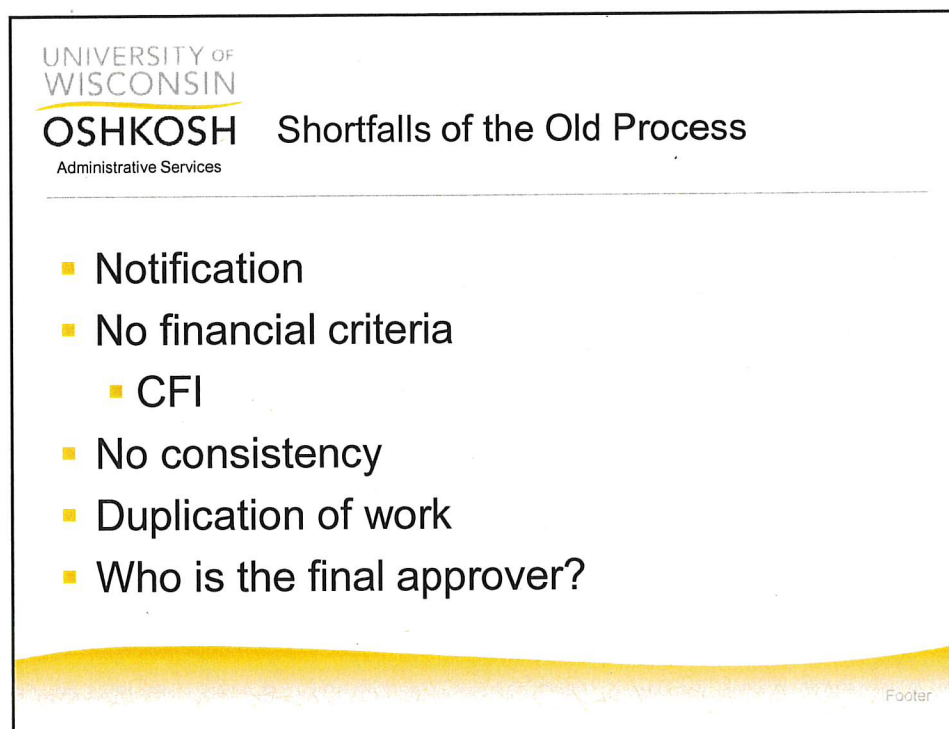
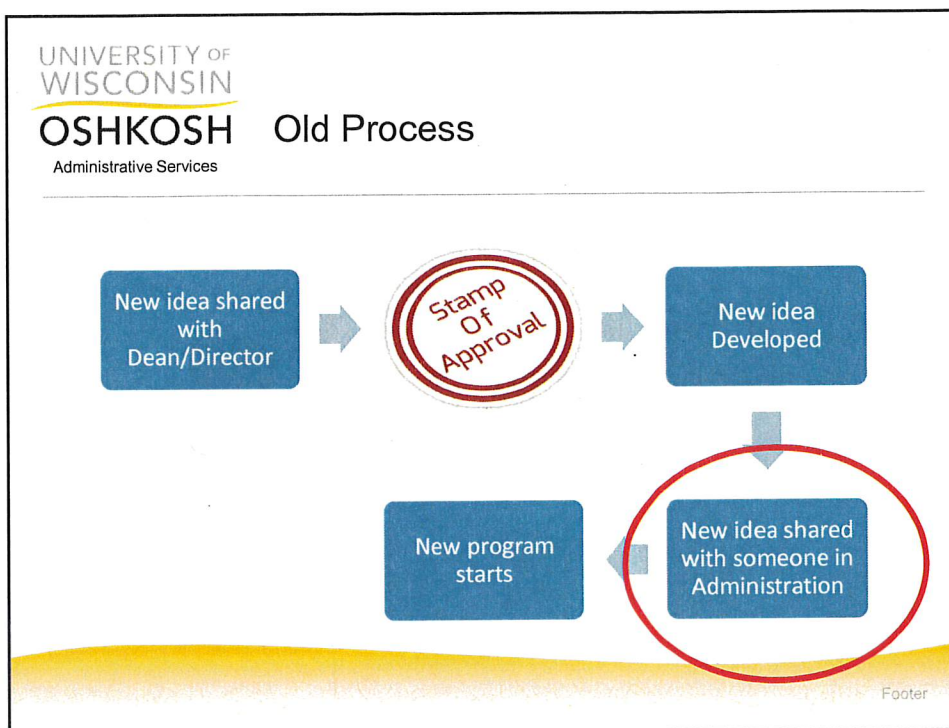
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OSHKOSH Old Process:
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- A Dean/Faculty member had a good idea



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OSHKOSH New Process Goals

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- Enhance communication
- Include financial criteria
 - Minimum criteria for a program to be considered
- Narrative modeled after System document
- Consistent request documents

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OSHKOSH Location of New Process Documents?

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- Budget Office Website
- Sharepoint
 - Budget Site
 - Cost Recovery Folder



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OSHKOSH Location of New Process Documents?

Administrative Services

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Budget

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Budget

Our office is responsible for the coordination, building and input of the University of Wisconsin Oshkosh annual operating budget. We work with people across campus to assist them with all aspects of the annual budget process. If you need assistance with budget related questions, you may contact any member of our staff.

Mission Statement

The UW Oshkosh Budget Planning and Development Office provides leadership and resources on campus budget planning and development, and provides the University of Wisconsin System with UW Oshkosh campus budget information.

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OSHKOSH Location of New Process Documents?

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Cost Recovery Program (CRP) Request Process

University of Wisconsin Oshkosh Implementation Process for UW System Policies

Cost Recovery Program (CRP) Criteria

UW Oshkosh Cost Recovery Program (CRP) Process Flow Chart

Please follow process below to submit proposals for review

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graph LR
    A[Download the CRP Documents from the Budget Office Website: Request Process (General) Procedures, Narrative Proposal and Budget Workbook] --> B[Review the CRP Procedures, paying close attention to minimum financial criteria requirements.]
    B --> C[Conduct pre-planning meeting with department Faculty and Staff involved in the new program.]
    C --> D[Complete first draft of the CRP Narrative Proposal and Budget]
  
```

Download the CRP Documents from the Budget Office Website: Request Process (General) Procedures, Narrative Proposal and Budget Workbook

Review the CRP Procedures, paying close attention to minimum financial criteria requirements.

Conduct pre-planning meeting with department Faculty and Staff involved in the new program.

Complete first draft of the CRP Narrative Proposal and Budget

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 Funding and Appropriation Structure
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Budget and Planning Forms

Budget Transfers

Cost Recovery Program (CRP) General

Cost Recovery Program (CRP) Short Term - UNDER CONSTRUCTION - LINKS PROVIDED SOON!

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Location of New Process Documents?

Cost Recovery Program (CRP) General

- [CRP Request Process](#)
- [CRP Procedures](#)
- [CRP Narrative Proposal](#)
- [CRP Budget Workbook](#)

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OSHKOSH Budget Office CRP Sharepoint Site

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BO Budget Office
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Documents > Cost Recovery

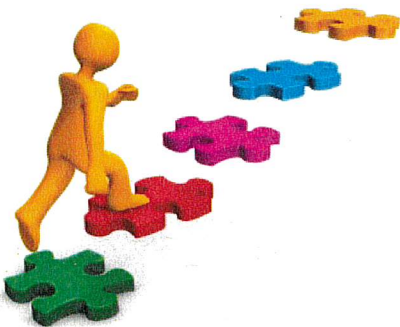
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📁 Approved CRPs	May 10	Metke, Angela M	
📁 CRP Proposals	July 16	Metke, Angela M	
📁 CRP Templates	May 10	Metke, Angela M	
📄 Active_CRP_Details.xlsx	May 31	Metke, Angela M	

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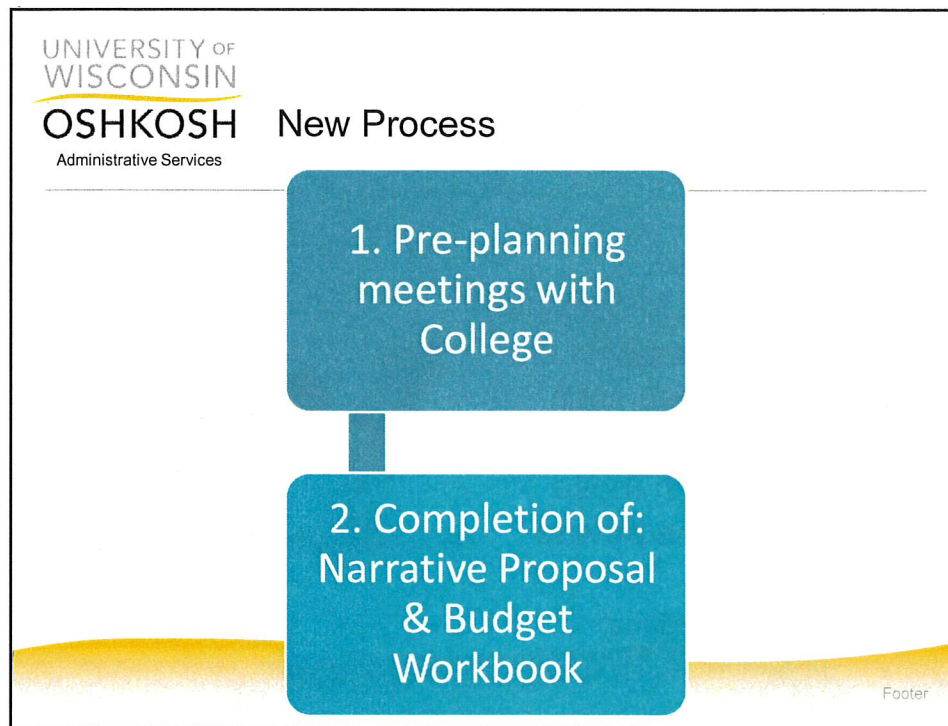
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OSHKOSH The Process Steps

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OSHKOSH Financial Criteria
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For proposals to be considered:

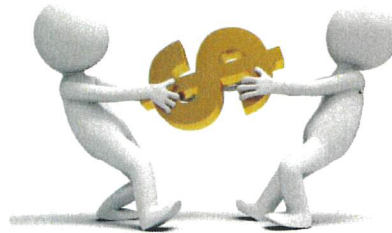
- Positive Net Present Value
- A 10% Return on Investments
- Payback of two years or less
 - Three years for cohorts ONLY

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OSHKOSH Noncompete Policy: 21-1

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- University is responsible to consider providing products or services when such products/services may compete with those offered in the private sector
 - Non-instructional programs



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OSHKOSH Noncompete Policy: 21-1

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- Units should review:
 - Issues involved in the institution offering new competitive activities
 - Pricing structure of major new competitive activities

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OSHKOSH Noncompete Policy: 21-1

Administrative Services

- Criteria for judging appropriateness of competitive activities:
 - Compelling reasons for economic efficiency
 - The product/service is unavailable elsewhere
 - Providing the product/service is a major convenience for students, faculty, staff, and the public who participate in institutional activities.
 - Offering the product is of major importance to maintaining the quality of the institution.

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OSHKOSH New Process

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3. Pre-planning
meeting with
Administrative Staff

4. 1st Review: Unit
Business Officer

5. 2nd Review:
Dean

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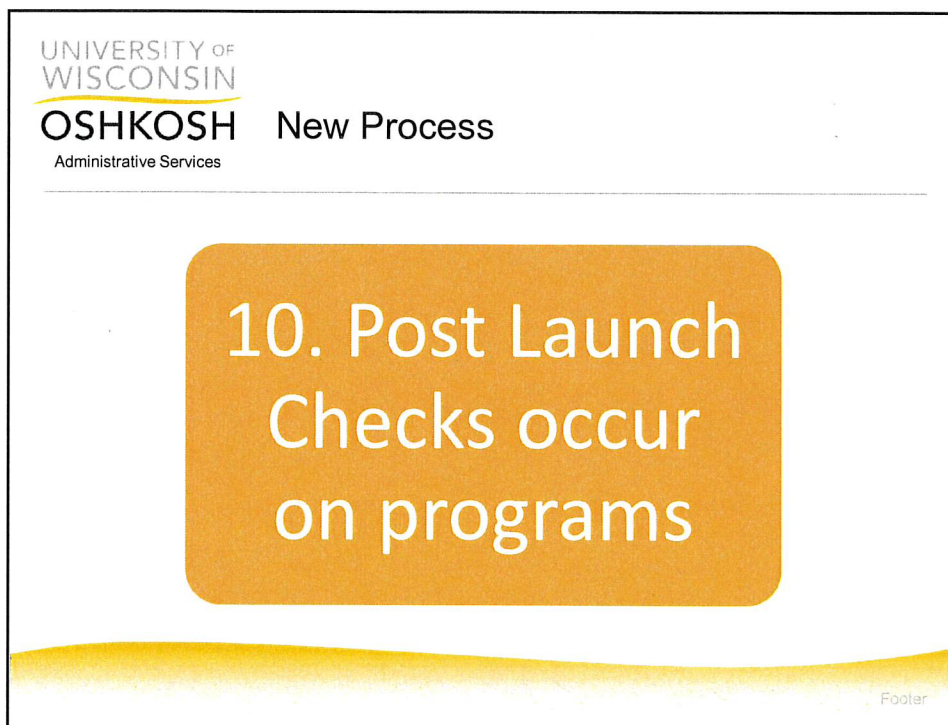
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6. 3rd Review:
University
Business Officer

7. 4th Review:
AVC for
Academic Affairs

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Questions/Comments/Concerns?

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