

SUMMER TERM IMPLEMENTATION COMMITTEE

Report to Sarah Mangelsdorf,
Provost and Vice Chancellor for Academic Affairs

January 2016



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Executive Summary

Efforts to grow Summer Term continue to advance. In December 2014, the **Summer Term Committee**, appointed by Provost Sarah Mangelsdorf, began studying the complexities of the summer budget model. The group was also responsible for benchmarking peer institutions and formulating policy recommendations. The Committee made nine recommendations, including the suggestion to appoint an Implementation Committee, which was appointed in August 2015 to:

- oversee implementation of the new budget model
- explore structural changes to the compensation policies
- provide input on Summer Term policies
- evaluate the new pilot budget model after its first year of use

Key achievements and milestones reached include:

- new pilot budget model now in place for summer 2016
- newly created planning tools for schools and colleges in place
- expanded marketing and promotional campaign launching in January, for 2016 Summer Term
- financial aid for summer term students has been increased tenfold

To continue open communication and collaboration, we will continue engaging campus stakeholders through a new **Summer Term Steering Committee**. It is clear that ongoing coordinated efforts will ensure that we are best serving students and achieving our goal of better utilizing summer.

Overview

This report summarizes the work put forth by the members of the ad-hoc Summer Term Implementation Committee from July through December 2015. The Committee has completed the following:

1. Established 5-year Summer Term vision and goals,
2. Developed strategies to achieve the vision and goals,
3. Documented current Summer Term compensation practices and made recommendations for new human resource flexibilities to foster growth in Summer Term
4. Built the infrastructure and began implementing a pilot budget model for summer 2016

Background

Phase I

In December 2014, Provost Sarah Mangelsdorf created the **Summer Term Committee** to:

- Develop a summer budget model that would incentivize new instructional activity;
- Improve the level of transparency in the funding allocation process; and
- Identify summer session policies that required review.

The Summer Term Committee met from January through May 2015, studying the complexities of the summer budget, benchmarking peer institutions, and formulating policy recommendations. In their report to Provost Mangelsdorf, the Summer Term Committee made nine recommendations to strengthen and grow Summer Term at UW-Madison. One of those nine recommendations was the formation of an implementation committee that would advance plans for a summer 2016 pilot budget model and begin to address topics that would have implications for the future expansion of Summer Term.

Phase II

In August 2015, the **Summer Term Implementation Committee** was charged to continue the original committee's work, to:

- Provide oversight on the implementation of the new summer budget model for summer
- Explore structural compensation changes for summer instruction in conjunction with the Office of Human Resources
- Provide input on policies related to Summer Term
- Evaluate the model after the first full year of implementation

For the full committee charge and membership, please see Appendix A and B.

Committee Structure & Process

Summer Term Implementation Committee

The Summer Term Implementation Committee met six times from July 2015 to November 2015. **Figure 1** shows a summary of the meeting dates and topics.

| Figure 1 Implementation Committee Meeting Dates Meeting Topics | |
|--|---|
| July 29, 2015 | -Summer Term overview -Committee charge discussion |
| August 14, 2015 | -Review Campus Communication & Meetings -Discussion of subcommittee structure |
| September 10, 2015 | -Updates on Summer Deans, Housing, Deans Council, Administrative Council meetings -Discussion of Academic Calendar and Minimum Enrollment Guidelines -Subcommittee led discussions. |
| October 2, 2015 | -Discussion of growth opportunities surrounding new audiences |
| October 29, 2015 | -Individual updates/feedback on roll out of summer 2016 pilot -Review and discuss Summer Term Work Plan |
| November 20, 2015 | -Individual updates/feedback on roll out of summer 2016 pilot -Final report overview -HR subcommittee discussion -Next steps |

Subcommittees to the Implementation Committee

Given the number of complex issues that needed to be addressed, the Summer Term Implementation Committee also created and charged four subcommittees to focus on specific objectives. The subcommittees scheduled their own meetings during fall 2015 with work completed in November 2015.

Figure 2 summarizes each subcommittee's focus and major deliverable.

Figure 2

| Subcommittee | Deliverables |
|----------------------------|---|
| Data | Summer course revenue reports |
| Fund Infrastructure | Academic year budget payment Summer revenue management & budgeting process |
| Human Resources | Catalog of summer HR/compensation practices, issues, opportunities |
| Student Audiences | UW-Madison Summer Experience vision |

Data Subcommittee

As part of the implementation committee, a data subcommittee was required to develop revenue and enrollment data, establish guidelines and standards for that data, and develop an implementation plan.

Fund Infrastructure Subcommittee

The fund infrastructure subcommittee actively engaged school and college budget officers and other key partners in the development of the summer revenue and budgeting processes.

Human Resources Subcommittee

The HR subcommittee was charged by the Summer Term Implementation committee to review compensation practices and provide options to align with changes identified for the Summer Term.

Student Audiences

The purpose of this advisory group was to provide a framework for the development of new summer experiences for degree-seeking and visiting student audiences.

Each subcommittee submitted a report to the Implementation Committee detailing their work and outlining their recommendations. For the full subcommittee charges and reports please see Appendix C and D.

Committee Outcomes

The Implementation Committee and Subcommittees have completed the following work:

1. Established the 5-year Summer Term vision and goals;
2. Developed detailed strategies to achieve the vision and goals;
3. Documented current Summer Term compensation practices and made recommendations for new human resource flexibilities to foster growth in Summer Term;
4. Built the infrastructure and began the implementation of a pilot budget model for summer 2016.

Each will be described in brief in this section.

Established the 5-Year Summer Term Vision and Goals

The Implementation Committee and Summer Term staff created the Summer Term Work Plan (see Appendix E for the complete Summer Term Work Plan) which outlines the Summer Term vision and goals for 2020. **The vision is to generate 18,000 new credits (~3000 new students) in five years.** Summer Term will enrich the student experience through immersive learning experiences that can contribute to students' academic and professional goals. In doing so, it will reduce time-to-degree, help students avoid unnecessary debt, graduate faster, and enter the workforce sooner.

Developed Strategies to Achieve Vision and Goals

To achieve the Summer Term vision and goals, the university needs a multifaceted plan that leads to changes in the curriculum and student composition, new sources of financial aid, innovative teaching methodologies, and an aggressive promotional plan designed to change behavior. In the Summer Term Work Plan, the Implementation Committee outlined six strategies to pursue to achieve the summer vision and goals.



The strategies generally fall into two groups – a set of internal changes designed to create an irresistible “pull” toward Summer Term, and a broad marketing effort designed to “push” students and their influencers toward summer enrollment.

We must enhance summer offerings in a manner that provides an inherently attractive opportunity for both current UW-Madison students and those enrolled at other institutions. At the same time, we must attempt to influence student behavior, encouraging them to see Summer Term in a new perspective and enroll in larger numbers. Strategies 1, 2, 4, 5 and 6 are “pull” strategies. Strategy 3 is the “push” effort.

The first four strategies listed (Adopt New Summer Budget Model, Build Curriculum Offerings, Execute Promotions Plan, and Increase Need-based Aid) are the primary focus for 2016 and 2017. The remaining two strategies will be pursued concurrently, but results will not be seen for up to five years. For more details about the strategies see the Summer Term Work Plan in Appendix E.

Documented Current Summer Term Compensation Practices and Made Recommendations for New Human Resource Flexibilities

Led by the Human Resources Subcommittee, current Summer Term pay practices were documented, future summer pay options were explored, and three recommendations to change summer compensation practices in the future were made. The recommendations are intended to support the campus goal of increasing Summer Term enrollments.

Current Summer Term Pay Practices

Figure 3 provides a summary of current Summer Term Pay practices.

Figure 3

Current Summer Term Pay Practices

1. Faculty and Academic Staff (C-Basis/9-month) appointments are paid at the same pay rate in summer as during the academic year.
 - For some schools/colleges, if a temporary-base adjustment (TBA) is paid during the academic year (e.g., for chairs), the TBA is removed in the summer and the summer compensation is based on the employee’s permanent 9-month base rate
 - If an academic staff is in non-instructional title during the academic year and if they are hired to teach in the summer in an instructional appointment, the rate of pay may be different
2. Summer term teaching compensation for 9 month faculty and academic staff is calculated by considering a combination of factors: the pay rate (1/9 of the previous academic year’s salary for faculty per Faculty Policies and Procedures, Chapter 11.03), the teaching period (3 weeks, 1 month, 2 months, etc.) and the workload or Full Time Equivalent (FTE). Each school/college makes its own determination of what constitutes a full-time or part-time teaching load in summer. Some factors that may be taken into account when figuring appointment percentage includes the number of students enrolled and whether there is a Teaching Assistant (TA) assigned to the course or not.

| |
|--|
| |
| 3. Faculty and Academic Staff who have 12 month positions and who meet their teaching obligations in fall/spring semester are not paid extra for teaching in the summer. |
| 4. It is the policy of UW-Madison that a faculty member or academic year academic staff appointee may not exceed eight months of summer salary support over any consecutive three-year period per campus guidelines (https://www.ohr.wisc.edu/polproced/UPPP/1102.htm). |
| 5. School/colleges use the HRS Easy Access to Reporting Tools (HEART) to track number of months of summer salary support so they do not exceed eight months over any consecutive three-year period. |
| 6. Some school/colleges require the Dean's office approval of all summer appointments (not just those over 2/9s). |
| 7. Current policies that address summer compensation include: <ul style="list-style-type: none"> – Unclassified Personnel Policy and Procedures, Chapter 11: Maximum Levels of Appointments and Summer Session Appointments http://www.ohr.wisc.edu/polproced/uppp/1102.htm – Faculty Policies and Procedures, Chapter 11: Summer Session http://www.secfac.wisc.edu/chapter-11.htm – UW System Academic Planning Statement No. 4 (APS-4) https://www.wisconsin.edu/program-planning/download/acps_documents/Academic%20Year%20Definition%20and%20Assorted%20Derivatives.pdf |

Future Summer Term Pay Options and Recommendations

The committee recommends providing additional Summer Term compensation options to schools and colleges. **Figure 4** provides a summary of the flexibilities being requested.

Figure 4

Current Summer Term Pay Practices

1. COMPENSATION FLEXIBILITY

Request and Background

Input from campus leadership and governance groups is being sought on a proposal from the Summer Term Implementation Committee to offer schools and colleges additional compensation options to pay faculty and academic staff to teach in the summer. The most common current Summer Term pay practice is to compensate 9-month faculty and academic

staff 1/9 of the previous academic year's salary per [Faculty Policies and Procedures, Chapter 11.03](#).

Policy Needing Change

No changes needed to [Faculty Policies and Procedures, Chapter 11.03](#) but committee would like input from campus leadership as these are different payment practices than have been traditionally used. *Note: Units would be free to continue to pay faculty and academic staff in Summer Term the way it is currently done.*

Recommendation

a. CONTRACTS BASED ON WORKLOAD

Support the option of offering contracts with different compensation amounts depending on anticipated course enrollments. Contracts can also contain a cancellation clause if there is insufficient enrollment and staff given sufficient notice. *EXAMPLE: Compensation amount #1 for enrollments 0-15, compensation amount #2 for enrollments 15-35, compensation #3 for enrollments over 35*

b. LUMP SUM PAYMENTS

Support the option to pay faculty and staff their summer salary using the lump sum method. *EXAMPLE: A faculty associate paid \$90,000 on a 9-month contract to teach 4 courses during academic year, is paid \$22,500 to teach each course. Currently, if they teach that same course in summer in a 4-week session, they are paid 1/9 of \$90,000 or \$10,000. A lump sum payment option would allow a unit to adjust pay appropriately. Note: if staff are paid via lump sum payments, they still cannot exceed 8 months of summer compensation over any three-year period.*

2. BLANKET DUAL ROLE WAIVER FOR NON-TEACHING STAFF IN SUMMER

Request and Background

Currently, the University Committee reviews and approves/denies dual role waivers for an academic staff member who wants to take on a second area of responsibility, particularly in the case of those who have the ability to serve the unit's teaching mission.

Policy Needing Change

Adaptation of ["Rule waivers for dual role appointments for academic staff"](#) prepared by the University Committee

Recommendation

a. DUAL ROLE WAIVER

University Committee approve a blanket dual role waiver for 12-month non-teaching academic staff who want to teach in summer.

3. OVERLOAD FLEXIBILITY

Request and Background

The Provost has tasked a small working committee to review the campus overload policy for fall, spring, and summer. This committee is expected to have its recommendations to the Provost by March 2016.

Policy Needing Change

[UPPP Chapter 11.01 Overloads for Faculty, Academic Staff and Limited Appointees](#). The section on Special Consideration for Faculty Overloads would need to be changed or the interpretation amended.

Recommendation

Provide flexibility in the summer and align with the working committee recommendations.

The HR subcommittee also reviewed the 8/9s UW-Madison policy, which states that any faculty, academic staff, or limited appointee on an academic year (9-month) appointment may not exceed eight months summer salary over any three-year period (Chapter 11.02). The HR subcommittee recommends no change to this policy at this time.

Built Infrastructure and Began Implementation of Pilot Summer 2016 Budget Model

As a result of the Implementation Committee's guidance and the work completed by the Data and Fund Infrastructure Subcommittees, the pilot budget model for summer 2016 is well underway.

The Data Subcommittee created the Summer Tuition Revenue Course Reports. These reports are the foundation of the summer pilot which is the basis for allocating summer tuition revenue to schools and colleges. The Subcommittee established the structure, guidelines, and standards for the reports. They also conducted training with school and college Summer Deans and Fiscal Officers on the use of the reports. Finally, the Subcommittee established an annual distribution process and timeline.

The Fund Infrastructure Subcommittee was responsible for setting the Academic Year Budget Payment for 2016 and establishing the process for which revenue is managed and annual budgeting is handled in the pilot model. The Academic Year Budget Payment is the share of the baseline summer tuition revenue that the schools and colleges collectively owe central campus. This subcommittee also outlined the transition from using 101 budget funds to using 131 budget funds. Summer Term push forward budgeting practices and reserve balance management was also undertaken by this Subcommittee.

A review of the pilot at the conclusion of summer 2016 will be crucial.

One additional piece of business undertaken by the Summer Term Implementation Committee was a reexamination of implementing a campus-wide enrollment minimum policy. The Committee determined that each school and college should implement and enforce a minimum enrollment policy rather than creating blanket, campus-wide policy.

Outstanding Items

The Implementation Committee has identified outstanding items that were not addressed during their tenure from July through December 2015. Those items with brief descriptions are listed below.

Outstanding Items

1. Next steps for HR recommendations:

The Human Resources subcommittee recommended some Summer Term compensation options in their report to the Implementation Committee (Appendix D). The subcommittee recommended providing additional Summer Term compensation options to schools and colleges, recommended no changes to the 8/9's policy at this time, and recommended requesting from the University Committee a blanket dual role waiver for 12-month non-teaching academic staff who want to teach in the summer. Next steps need to be identified to bring any implementable recommendations to completion.

2. Overload practices:

The Provost appointed a working group to review the campus overload policy for fall, spring and summer. Recommendations from this group are expected by March 2016. Follow-up on this topic is needed.

3. Academic Calendar and summer-related issues:

The 2016-2017 academic year faculty contract year begins on August 29, 2016 and ends on May 28, 2017. The new 4-week summer session begins on May 15, 2017. The implications of the 13day overlap are being reviewed by OHR, Legal Services, HRS Service Center, and the new ad hoc Academic Calendar Committee. The following two items are specifically related to summer.

- Faculty contract overlap with new 4-week session
- Spring probation decisions that may overlap with new 4-week session

The Implementation Committee also made recommendations that will need follow-up in the near future. One key recommendation is to continue engaging campus stakeholders through the creation of a **Summer Term Steering Committee** (see Appendix F for draft charge). It is clear that continued coordinated efforts will ensure that we are best serving students and achieving our goal of better utilizing summer.

Next Steps

1. Review the pilot budget model.
2. Continue planning and structure to execute the six strategies and review them annually.
3. Create a Summer Term Steering Committee (and other advisory groups as needed) to insure Summer Term vision and goals are achieved.

Appendix A: Summer Term Implementation Committee Charge

Summer Term Implementation Committee Charge

In May 2015, the Summer Term Committee outlined nine immediate and long-term budget and policy recommendations:

Immediate

1. Adopt a new summer budget model
2. Establish implementation committee
3. Create minimum enrollment policies
4. Modify academic calendar

Long-Term

5. Evaluate summer compensation practices
6. Adopt per-credit summer tuition rates
7. Create strategies to attract new student audiences
8. Revise faculty policies
9. Elevate Summer Dean role

The Summer Term Implementation Committee will continue this work, undertaking the following tasks:

- A. Provide oversight on the implementation of the new summer budget model for summer 2016
 1. Engage with schools and colleges and key support units
 2. Provide revenue and enrollment data and processes, in conjunction with Academic Plan and Institutional Research
 3. Calculate the institutional baseline and the Academic Year Budget Payment, (i.e., the campus share of baseline revenue), in conjunction with the Madison Budget Office
 4. Develop annual summer term planning tools and processes
 5. Create the fund infrastructure and processes
- B. Explore structural compensation changes for summer instruction in conjunction with the Office of Human Resources
- C. Provide input and assist when requested on policies that relate to Summer Term, including, but not limited to:
 1. UW-Madison academic calendar
 2. Summer tuition rate structure
 3. Chapter 11 of the Faculty Policies and Procedures, titled “Summer Session”
 4. Role of Summer Deans

- D. Evaluate the model after the first full year of implementation. This includes:
1. Examining the use of the allocation rate in the calculation of individual school and college Academic Year Budget Payments
 2. Evaluating the loss adjustment practice
 3. Exploring the appropriateness of professional programs in the summer budget model

Given the number of issues that need to be addressed, their complexity and relationship to other units, and the ranging expertise required, we propose a subcommittee structure that aligns with specific tasks and objectives. This will allow more flexibility in adding constituencies and expertise to the process without slowing down the process. The following subcommittees and advisory groups, in addition to implementation committee, are needed to achieve this scope of work.

| Subcommittee | Purpose | Members |
|---|--|--|
| Revenue Report Subcommittee | Develop the revenue and enrollment data, process, and tools to implement budget model | Jocelyn Milner (lead) Clare Huhn Sarah Barber Keri Johnson |
| Fund Infrastructure Subcommittee | Establish the fund mechanism and process for which revenue is managed in the new model. Set the Academic Year Budget Payment for summer 2016 | Sarah Barber (lead) Tim Norris Ann Bourque Laura Ingram Stephen Elmer James Montgomery |
| Summer Compensation and Human Resources Subcommittee | Identify summer compensation and employment practices requiring review and/or modification | Laura Ingram (co-chair) Mark Walters (co-chair) Carol Hillmer Cheryl Adams Jake Blanchard James Montgomery Tim Gattenby Steve Smith Catharine DeRubeis (ex-officio) Brian Vaughan (ex-officio) Sarah Barber (ex-officio) |

| | | |
|---|--|---|
| Student Audiences Advisory Group | Provide feedback on summer initiatives targeting new student audiences | Judith Strand (lead) Lori Berquam Keri Johnson Amy Gunderson Kristopher Olds Brian Ward Brian Bridges |
|---|--|---|

Appendix B: Summer Term Implementation Committee Charge Membership

Implementation Committee and Subcommittee Members (August 2015 - Present)

**indicates Implementation Committee member*

Jeffrey Russell, Vice Provost for Lifelong Learning, Dean, Division of Continuing Studies, Committee Chair*

Lori Berquam, Vice Provost for Student Life and Dean of Students, Division of Student Life*

James “Jake” Blanchard, Senior Associate Dean, College of Engineering*

Michelle Holland, Academic Service Coordinator, Graduate School*

Jocelyn Milner, Director, Academic Planning and Institutional Research*

Karen Mittelstadt, Assistant Dean, School of Nursing*

James Montgomery, Associate Dean, College of Letters and Science*

Timothy Norris, Associate Vice Chancellor, Madison Budget Office*

Elizabeth Odders-White, Senior Associate Dean, School of Business*

David Rosenthal, Associate Dean, School of Education*

Steven Smith, Secretary of the Faculty*

Judith Strand, Associate Dean, Division of Continuing Studies*

Richard Straub, Senior Associate Dean, College of Agricultural and Life Sciences*

Cheryl Adams Kadera, Assistant Dean, College of Letters and Science

Timothy Gattenby, Distinguished Faculty Associate, School of Education

Anne Gunther, Associate Dean, College of Letters and Science

Carol Hillmer, Assistant Dean, College of Agricultural and Life Sciences

Kristopher Olds, Professor, College of Letters and Science

Mark Walters, Director, Office of Human Resources

Brian Ward, Assistant Director, University Housing

Associated Students of Madison (ASM) student representative

Staff to Committees and Subcommittees

Sarah Barber, Summer Term Director, Division of Continuing Studies

Ann Bourque, Budget and Policy Analyst Advanced, Madison Budget Office

Catherine DeRubeis, HR Specialist Advanced, Office of Human Resources

Stephen Elmer, Accountant, Division of Continuing Studies

Clare Huhn, Senior Policy Analyst, Academic Planning and Institutional Research

Laura Ingram, Associate Dean, Division of Continuing Studies

Keri Johnson, Special Projects Coordinator, Division of Continuing Studies

Appendix C: Subcommittee Charges

REVENUE REPORT (DATA) SUBCOMMITTEE

As part of the implementation committee, a data subcommittee is required to develop revenue and enrollment data, establish guidelines and standards for that data, and develop an implementation plan.

Data Subcommittee Charge

The proposed summer budget model is based on tuition revenue and enrollment metrics that have not previously been available. The revenue report implementation sub-committee is responsible for:

- Developing the tuition revenue and enrollment reports that align with the metrics recommended by the Summer Term Committee and Summer Term Implementation Committee
- Establishing and documenting guidelines and standards, including what data sources are used, what data is included in the report, and how revenue and enrollment is calculated
- Developing an implementation plan, including a training plan for users of the reports, a timeline outlining when the reports will be run throughout the year, and a process for distributing the data

Timeline

The Data Subcommittee unofficially began its work in June 2015 with an official appointment in July 2015. The deadline for completing the reports, guidelines and standards, and implementation plan is October 15.

Members

Jocelyn Milner, Associate Provost and Director, Academic Planning and Institutional Research

Clare Huhn, Senior Policy Analyst, Academic Planning and Institutional Research

Keri Johnson, Special Projects Coordinator, Division of Continuing Studies

Sarah Barber, Summer Term Director, Division of Continuing Studies

FUND INFRASTRUCTURE SUBCOMMITTEE

Fund Infrastructure Subcommittee Charge

The charge of this subcommittee will be to:

- Establish the process for which revenue is managed and annual budgeting is handled in the new model
- Set the Academic Year Budget Payment for summer 2016
- Provide recommendation on a transparent calculation to determine each school and college's share of the Academic Year Budget Payment and baseline for summer 2016

The subcommittee must actively engage school and college budget officers and other key partners in the development of the summer revenue and budgeting processes.

Timeline

The subcommittee will begin work in August with completion in December 2015.

Members

Tim Norris, Associate Vice Chancellor, Madison Budget Office

Ann Bourque, Budget and Policy Analyst, Madison Budget Office

James Montgomery, Associate Dean for Fiscal Initiatives, College of Letters and Science

Laura Ingram, Associate Dean, Division of Continuing Studies

Stephen Elmer, Accountant, Division of Continuing Studies

Sarah Barber, Summer Term Director, Division of Continuing Studies

SUMMER COMPENSATION AND HUMAN RESOURCES SUBCOMMITTEE

Summer Compensation and Human Resources Subcommittee Charge

The charge of this subcommittee was to:

- Compile a list of current summer term HR and compensation practices
- Identify additional summer term HR and compensation options for faculty and academic staff that could better address the campus goal of increasing summer term enrollments
- If necessary, suggest topics and constraints that need additional investigation.

The subcommittee needs to be sensitive to the ongoing HR Design processes, especially with respect to the compensation and job titling work expected to occur in the future. The subcommittee will begin their work in mid-August and complete their report by November 2015. They will keep various campus stakeholders and constituents informed as they proceed.

Membership:

- Mark Walters, Senior Director of HR Operations, OHR (Co-chair)
- Laura Ingram, Associate Dean for Administration, DCS (Co-chair)
- Carol Hillmer, Assistant Dean, CALS
- Cheryl Adams Kadera, Assistant Dean, L&S
- Jake Blanchard, Professor/Associate Dean, ENGR
- James Montgomery, Professor/Associate Dean, L&S
- Tim Gattenby, Distinguished Faculty Associate, EDU
- Steve Smith, Secretary of the Faculty
- Ex-Officio: Catharine Derubeis, OHR; Brian Vaughan, Legal Services; Sarah Barber, DCS

STUDENT AUDIENCES ADVISORY GROUP

The purpose of this advisory group was to provide a framework for the development of new summer experiences for degree-seeking and visiting student audiences.

The charge of this group will be to:

- Outline a campus vision for Summer Term at UW-Madison, including defining values of a unique badger summer experience.
- Establish best practices for Schools/Colleges developing new summer experiences.
- Identify curricular opportunities using existing campus data and research on summer experiences at peer institutions.
- As they emerge, suggest topics and constraints that need additional investigation.

Timeline

The subcommittee will begin their work in mid-August with completion by November 1, 2015.

Members

Judith Strand (Chair), Associate Dean, Division of Continuing Studies

Lori Berquam, Vice Provost for Student Life and Dean of Students, Division of Student Life

Keri Johnson, Special Projects Coordinator, Division of Continuing Studies

Amy Gunderson, Marketing Strategist, Division of Continuing Studies

Kristopher Olds, Senior Fellow, Educational Innovation, Provost's Office

Brian Ward, Assistant Director, University Housing

Brian Bridges, Police Captain, University Police Department

Appendix D: Subcommittee and Advisory Group Reports

REPORT FROM THE REVENUE REPORT (DATA) SUBCOMMITTEE

The Data Subcommittee unofficially began its work in June 2015 with an official appointment in July 2015. The Data Subcommittee developed revenue and enrollment data reports, established guidelines and standards for that data, and developed an implementation plan by October 2015.

The list of completed tasks with descriptions is below:

✓ **Develop the tuition revenue and enrollment reports that align with the metrics recommended by the Summer Term Committee and Summer Term Implementation Committee**

The proposed summer budget model is based on tuition revenue and enrollment metrics that have not previously been available. Metrics needed for reporting were identified and modeled by the data subcommittee.

✓ **Establish and document guidelines and standards, including what data sources are used, what data is included in the report, and how revenue and enrollment is calculated**

Data sources and data types were identified by the subcommittee and modeled to ensure data values were being calculated accurately. The subcommittee created course revenue reports using queries developed by Academic Planning and Institutional Research (APIR). The reports contained course level data that included the following:

- Enrollment
- Paid Enrollment
- Allocated Paid Pooled Tuition
- Paid Credits
- Student Credit Hours

✓ **Develop an implementation plan, including a training plan for users of the reports, a timeline outlining when the reports will be run throughout the year, and a process for distributing the data**

The subcommittee trained School/College Summer Deans and Budget Officers on how to use the reports as a planning tool. Reports will be run 4x by APIR (timing TBD, last report in September) and be distributed by Summer Term to the Summer Deans and Budget Officers via Box accounts.

REPORT FROM THE FUND INFRASTRUCTURE SUBCOMMITTEE

The Fund Infrastructure Subcommittee began work in August to set the Academic Year Budget Payment for summer 2016, determine the calculation of each school and college's share of the Academic Year Budget Payment and baseline for summer 2016, and establish the process for which revenue is managed and annual budgeting is handled in the new model. All tasks were completed by December 2015 and a summary of the Summer Budget Process is below.

Red Book Budget Process:

- For summer 2016 (FY17), all budgeting for summer will be done in 131-A93XXXX-2. Salary costs must be budgeted as lump sums. New for summer: you will need to budget your fringe costs. Historically, fringe costs for summer salary have been approximately 18%, but you should use the fringe percentage that best approximates your school/college's estimated costs.
- Division of Continuing Studies will not be giving you any budget numbers to tie out to. You must budget your estimated 131 expenses in light of your anticipated revenues.

Fiscal Year Process

- The Red Book summer budget load for your school/college will occur in May as usual
- In the beginning of the fiscal year, your summer expenditures will be offset against your 131 Red Book budget. Your current fund balance will be negative. Actual revenue transfers will not occur until sometime in September. The revenue transfer will be less your school/college Academic Year Budget Payment. 80% of any revenue earned over your school/college historical revenue baseline will also be included in this transfer. A final revenue transfer will occur later in the fiscal year as students continue to pay their summer term tuition bills.
- Prior to the processing of the first revenue transfers, use course reports to ensure revenue is on track to cover expenses.
- It is recommended that you do NOT use projects to track your 131 expenses because of administrative and reporting issues. This includes the difficulty of managing the year-end fund 131 cash balance roll forward process which is not automatic and may result in errors.
- All revenue earned in 131-A93XXXX must stay within the school/college A93 departments. Revenues cannot be transferred off to other school/college 131 accounts or other funds. Expenses can be transferred on or off.

May/June Push Forward

- State statute requires that all summer instructional expense be paid in one fiscal year
- The May/June push forward of summer expenditures into the next fiscal year will continue as usual. This usually happens at the end of the fiscal year. Summer expenditures for FY17 are assumed to be for the time period: May2016 to April 2017.

- Going forward, all May/June expenses charged against 131-A93XXXX-2 (even non-summer related expenditures) will be pushed forward into the next fiscal year.

Reserves

- The reserve target for fund 131 is \$0 at year end. All positive reserves will require documentation. Since the reserve balances reside in the Division of Continuing Studies, we will be asking you for this documentation at year's end.
- Revenue reserve balances will be loaded to your 131 account in August as usual

REPORT FROM THE SUMMER COMPENSATION AND HUMAN RESOURCES SUBCOMMITTEE

November 19, 2015

Executive Summary

The Human Resource (HR) subcommittee was charged by the Summer Term Implementation Team to review compensation practices and provide options to align with changes identified for the summer term. The subcommittee report is divided into four sections: HR subcommittee charge, current summer pay practices, future summer pay options and recommendations, and topics that need additional investigation. A summary of survey results from other institutions regarding their summer pay practices is provided after this report.

It is recommended that this report be vetted by campus leadership and both faculty and academic staff governance groups. The recommendation that the University Committee (UC) grant a blanket dual role waiver for 12 month non-teaching academic staff who want to teach in the summer would clearly need to be determined by the UC.

It is hoped that this document can serve as a campus resource to provide clarity to schools and colleges about current summer pay policies and practices and also serve as informational resource for future compensation and job titling work.

Summer Term HR Subcommittee Charge

The charge of this subcommittee was to:

- Compile a list of current summer term HR and compensation practices
- Identify additional summer term HR and compensation options for faculty and academic staff that could better address the campus goal of increasing summer term enrollments
- If necessary, suggest topics and constraints that need additional investigation.

The subcommittee needs to be sensitive to the ongoing HR Design processes, especially with respect to the compensation and job titling work expected to occur in the future. The subcommittee will begin their work in mid-August and complete their report by November 2015. They will keep various campus stakeholders and constituents informed as they proceed.

Membership:

- Mark Walters, Senior Director of HR Operations, Office of Human Resources (OHR) (Co-chair)
- Laura Ingram, Associate Dean for Administration, Division of Continuing Studies (DCS) (Co-chair)
- Carol Hillmer, Assistant Dean, College of Agricultural and Life Sciences (CALS)
- Cheryl Adams Kadera, Assistant Dean, College of Letters & Science (L&S)
- Jake Blanchard, Professor/Executive Associate Dean, College of Engineering (ENGR)

- James Montgomery, Professor/Associate Dean, L&S
- Tim Gattenby, Distinguished Faculty Associate, School of Education (EDU)
- Steve Smith, Secretary of the Faculty
- Ex-Officio: Catharine Derubeis, OHR; Brian Vaughan, Legal Services; Sarah Barber, DCS

Current Summer Term Pay Practices

1. Faculty and Academic Staff (C-Basis/9-month) appointments are paid at the same pay rate in summer as during the academic year.
 - For some schools/colleges, if a temporary-base adjustment (TBA) is paid during the academic year (e.g., for chairs), the TBA is removed in the summer and the summer compensation is based on the employee's permanent 9-month base rate
 - If an academic staff is in non-instructional title during the academic year and if they are hired to teach in the summer in an instructional appointment, the rate of pay may be different
2. Summer term teaching compensation for 9 month faculty and academic staff is calculated by considering a combination of factors: the pay rate (1/9 of the previous academic year's salary for faculty per Faculty Policies and Procedures, Chapter 11.03), the teaching period (3 weeks, 1 month, 2 months, etc.) and the workload or Full Time Equivalent (FTE). Each school/college makes its own determination of what constitutes a full-time or part-time teaching load in summer. Some factors that may be taken into account when figuring appointment percentage includes the number of students enrolled and whether there is a Teaching Assistant (TA) assigned to the course or not.
3. Faculty and Academic Staff who have 12 month positions and who meet their teaching obligations in fall/spring semester are not paid extra for teaching in the summer.
4. It is the policy of UW-Madison that a faculty member or academic year academic staff appointee may not exceed eight months of summer salary support over any consecutive three-year period per campus guidelines (<https://www.ohr.wisc.edu/polproced/UPPP/1102.htm>).
5. School/colleges use the HRS Easy Access to Reporting Tools (HEART) to track number of months of summer salary support so they do not exceed eight months over any consecutive three-year period.
6. Some school/colleges require the Dean's office approval of all summer appointments (not just those over 2/9s).
7. Current policies that address summer compensation include:
 - Unclassified Personnel Policy and Procedures, Chapter 11: Maximum Levels of Appointments and Summer Session Appointments
<http://www.ohr.wisc.edu/polproced/uppp/1102.htm>

- Faculty Policies and Procedures, Chapter 11: Summer Session
<http://www.secfac.wisc.edu/chapter-11.htm>
- UW System Academic Planning Statement No. 4 (APS-4)
https://www.wisconsin.edu/program-planning/download/acps_documents/Academic%20Year%20Definition%20and%20Assorted%20Derivatives.pdf

Future Summer Term Pay Options and Recommendations

The subcommittee is recommending some summer term compensation options, a recommendation to preserve the 8/9's rule and a recommendation to request from the University Committee a blanket dual role waiver for 12 month non-teaching academic staff who want to teach in the summer.

Compensation Options:

The subcommittee recommends providing additional summer term compensation options to schools and colleges. Each school/college can continue to define its own summer term workload policy and can take into consideration the anticipated course enrollment when calculating workload.

Compensations options include

1. Continue to pay faculty and academic staff for summer term in the same way that we currently do
2. Both faculty and academic staff can be offered contracts with different compensation amounts depending on anticipated course enrollments (e.g., compensation amount #1 for enrollments 0-15, compensation amount #2 for enrollments 15-35, compensation amount #3 for enrollments over 35.) Before the class begins, enrollments need to be checked and the compensation amount finalized. Contracts can also contain a cancellation clause if there is insufficient enrollment and staff are given sufficient notice.
3. Both faculty and academic staff can be paid their summer salary using the lump sum process. Since summer has a shorter teaching period than the academic year, teaching staff can get paid less in summer for doing the same amount of work that they would do in the academic year. For example, if a faculty associate is paid \$90,000 on a 9-month contract to teach 4 classes during the academic year, they are paid \$22,500 to teach each class. If they teach that same class during the 8 week session, they would be paid, at most, 2/9's or \$20,000. In order to pay teaching staff at the same pay rate in the summer that they earn in the academic year, departments can choose to pay staff via lump sum payments (in the above example, 2 lump sum amounts for \$11,250 each.)

If staff are pay via lump sum payments, they still cannot exceed 8/9's compensation over any three-year period. In the example above, $\$22,500/\$10,000 = 2.25$ ninths of work.

4. Both faculty and academic staff can be awarded performance lump sum payments for exceptional summer course performance. These would be lump sum payments made on their primary C-basis appointment effective October 1st that cannot exceed 10% of the staff member's salary (Note: Performance awards – either lump sum amounts or base salary increases or a combination of both – generally cannot exceed 10%/year.). Performance lump sum payments would not be counted towards the 8/9's maximum.
5. All summer session and summer service payments added together cannot exceed the 8/9's summer compensation policy.

Review of 8/9's policy:

UW System's summer compensation policy states that compensation should not exceed 2/9's of the academic year salary of the faculty/academic staff member unless explicit exception is granted by the Chancellor. UW-Madison has already availed itself of the exception and extended the summer compensation policy so that any faculty/academic staff member should not exceed 8/9's salary over any three-year period. Eliminating the 8/9's policy and allowing staff to work each of the 3 months of summer would mean that the faculty/academic staff member is working fulltime. Fulltime staff should be moved to 12-month contracts.

Recommendation: Make no change to 8/9's policy at this time.

Allowing scientists/researchers on a 12 month contract to teach in the summer without requesting waiver

Currently, the University Committee reviews and approves/denies dual role waivers for an academic staff member who want to take on a second area of responsibility, particularly in the case of those who have the ability to serve a unit's teaching mission.

Recommendation: Request from the University Committee a blanket dual role waiver for 12 month non-teaching academic staff who want to teach in the summer and are qualified to do so.

Topics that Need Additional Investigation

Overloads:

The Provost has tasked a small working committee to review the campus overload policy for fall, spring and summer. This committee hopes to have its recommendations to the Provost by March 2016. Research and Sponsored Programs requests that this committee keep in mind the UW-Madison Effort Policy when making its recommendations for overloads for staff who are supported fulltime on research funding.

Academic Year Overlap:

The 2016-2017 academic year faculty contract year begins on August 29, 2016 and ends on May 28, 2017. The new 4 week summer session begins on May 15, 2017. The implications of the 13 day overlap between the academic year faculty contract period and the new 4 week summer session are being review by OHR, Legal Services, HRS Service Center, and the Academic Year Implementation Committee.

Recommendation: Decision on how to implement the new 4 week summer session will need additional investigation. No recommendation by the HR subcommittee.

Human Resource Subcommittee
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|--|---|--|--|--|---|---|---|--------------------------------------|
| For fiscal year (FY) faculty, they are paid at the same rate - no change. For academic year (AY) faculty, the base salary rate is the same but they are paid at the rate of 2.778% per week of their approved AY salary. So 4 weeks of summer pay is equal to approximately one month's pay. | Yes - This can vary in each School/College. | No | No - Most of Purdue's faculty are paid on an academic schedule (mid-August to mid-May). FY (12-mo.) faculty would not be paid additional compensation to teach during the summer unless it is truly equal to more than 100% effort. In that case, it would be an overload. | No | Yes - If the faculty member has spent time working on the class, then they will be compensated for the time worked. | Yes - There are 13 weeks during the summer sessions for AY faculty. They are allowed to work up to 10 weeks on general funding (if available) or up to 12 weeks if they have research funding. If they exceed 100% effort, that is considered an overload which requires prior approval from the President or his/her designee (for academic areas, that is the Provost). | | Purdue |
| Regular track academic year faculty are paid 2/9ths for teaching summer courses. Summer pay rates can differ based on faculty status (e.g., fixed-term) and course (e.g., number of students enrolled). | In some cases, the compensation is tied to the number of students enrolled. | No | Yes - Only if considered overload. | No | No | Yes For regular track academic year faculty, pay is tied to their academic year salary. | | Unknown |
| Different - These payments are being reconsidered. They MAY be different; past practice was to make them the same. That is being reconsidered with the onset of online teaching & more varied summer school session lengths and other summer programs. | No | No | No, just summer salary; no bonus on top of that. | No, we use "contract pay" functionality in PeopleSoft to define discreet academic year contract periods. Summer teaching is handled as a separate appointment/pay, not overlapping with academic year. | No, they get no payment. | We do not exceed 100% FTE with combined appointments. We do have an "overload" process which must be approved by the Provost Ofc. Its most common use is for faculty administrative roles. However, it has been known to rarely be used for instructional purposes, e.g. incentive for creation of new course content. | With the increase in online teaching & more varied summer session instruction we have used more non-tenure track faculty (lecturers) and are beginning to see more teaching staff. We do switch faculty to grant funding the summer to provide summer pay for research. | University of Kansas |
| Different - New academic-year faculty are appointed on 9-month contracts. We also have faculty who are grandfathered on 9.5 and 10-month contracts. Nine-month faculty can earn up to 30% for the summer to teach 3 courses. Nine and one-half and ten-month faculty can teach two courses. | University of Maryland has contingent contracts with a maximum salary. For a contingent contract if the enrollment revenue does not cover the maximum salary, the instructor is paid 80% of the revenue. For non-contingent contracts, the instructor is paid the full amount regardless of enrollment. | No bonuses. | Twelve-month employees who are employed at 100% of full-time employment work 12 months each year. If it is determined that an employee's services are needed to teach a course, he/she must be paid an overload for that additional assignment. The overload must be approved by his/her supervisor and must be taught at times that do not interfere with his/her regular duties. | All academic-year employees are paid over 22 equal pays. Their appointment dates are different than their payroll dates. On our campus, summer teaching contracts begin after the Spring Semester and there is no overlap. | See Number 2. | Academic year faculty can earn payments for summer pay for an administrative role, summer teaching and/or summer research. Depending on your appointment type, academic year faculty can earn up to 30% as a combination of three types of summer pay. A person spending 100% of their time on summer research must work 64 days during the summer excluding weekends and holidays. | Yes. We would like a summary of compiled data. Thanks, Jan Andrews | University of Maryland, College Park |
| Different | No | No | Occasionally | No. | Not generally. | May not exceed 3/9 of the academic year salary | | The University of Arizona |
| It varies by unit. | This is determined at the college or department level. | If so, it is determined at the college or department level. | Units may choose to pay overload in such situations. | Not a problem. | This is determined at the college or department level. | No. | No | Michigan State University |
| Same rate | Same rate | No | Full faculty receive 1/9 of salary to teach in summer. Post docs from other institutions and preceptors, etc. receive standard teaching rate. | N/A | A reduced payment may occur but has not yet :) so far as my contact knows. | Not to our knowledge | Hi, I spoke with a contact over at Continuing Ed to obtain this information. There are a wide variety of programs, so this is the best information that we can provide. | Harvard University |

Human Resource Subcommittee
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|--|--|--|--|--|--|--|---|--|
| Different - Summer teaching is considered 'beyond routine duty' and salary earned is supplemental pay. | Our largest classes (from 30-90 students) are lab science courses. Instructors of lab science courses, according to policy, may earn up to 1/9th of their regular year salary for lecturing, leading weekly discussion sections, and overseeing labs. For non-regular rank salary, instructors of lab science courses receive a salary commensurate with market factors. In our context, a seminar class taught by a regular rank faculty member would carry a salary maximum of 1/12th of the regular year salary; however, the actual/final salary would be determined based upon actual enrollment. (For example, if the instructor could earn a maximum of \$8,000 based upon the 1/12th rule and needed 10 students to do so, it would be up to the instructor to decide if s/he wanted to teach for less than \$8,000 if the enrollment was less than 10.) | If a non-science lab course exceeds 20 students, then we would pay an additional amount in recognition of the additional grading responsibilities. Sometimes this additional amount goes to the instructor of the course when s/he is doing the grading. The additional salary can also be directed towards a graduate student, if the instructor prefers that someone else do the grading for the course. | We do not have any faculty/teaching staff on a 12-month contract. | They never overlap. | Almost all of our teaching contracts are contingent in nature. About one month before classes begin, we check with instructors of low enrollment classes to see if they are still willing to teach. Classes with two students or less are simply cancelled and a notification is sent to the instructor. | We have a couple of university policies that have some bearing on this question -- one is that regular rank faculty may not earn from than 3/9th in supplemental pay during one fiscal year and regular rank faculty may not earn more than 1/9th of their regular year annual salary in one month. The vast majority of regular rank faculty have 9-month contracts, but may request to have their salary apportioned over 12 months. Thus, a regular rank faculty member teaching in the summer is likely to receive 1/12th of their regular salary in a month and receive 1/2 of their summer salary if spread over two months or all of their summer salary if paid in a single month. | | Duke University |
| Same - One full summer month of service is paid at a salary of 1/9th the annual academic year base rate. If a faculty member makes \$90,000 for service 8/16/XX - 5/15/XX, one full summer month salary will be \$10,000. | Depends on the unit/college | No | For faculty paid on a 12 month basis for working 12 months, additional compensation would be paid in the summer if teaching obligations were met. | No, the academic year runs 8/16/XX - 5/15/XX. Summer teaching would begin 5/16/XX and run through 8/15/XX. | No payment would be made for teaching. It is possible some payment could be made for development of a course. | Yes. Yes. Yes. Summer salary is limited to two full months of service. If an exception is granted, a third month may be added. If full time equivalency is reached at any point during the year, a service in excess payment may be possible. For salary information, reference question 1. Service in excess is possible if exceeding 100% FTE. | http://www.ahr.illinois.edu/forms/AcadSummerExceptionForm.pdf | University of Illinois at Urbana-Champaign |
| Different - Individuals who teach during the summer are unit members of the Winter and Summer Instructors Unit, Rutgers Council of AAUP-AFT, AFL-CIO. This is different than the unit individuals belong to while teaching during the academic year. See http://academiclaborrelations.rutgers.edu/wsi-contract and http://academiclaborrelations.rutgers.edu/wsi-settlement-agreement . | No. | No | Faculty are compensated separately for teaching during the summer. | No | Yes. In special circumstances, an individual may be paid a lower salary (no lower than 60% of the base salary) that is mutually agreeable between the Instructor and University due to insufficient paid enrollment. | There is no limitation. One can receive summer salary for research and receive compensation for teaching over the summer. | I think you will find the union contract helpful. See links provided in question #1 above. | Rutgers University |

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|---|--|--|--|--|--|--|---|---------------------------------|
| Different - Note the actual answer is it varries, but it could be the same rate or more than the same rate without a sep approval process. (Note the rate would then change but the expected time would not.. Total time worked not greater than 100%) | Varies more by the teacher and topic than by class size.. | No | True teachers are only on the 9 month contract. | No | GT does not, however there is an allowance to do so in the University System Policy | They do not exceed 100% for the summer. | Academic Compensation in terms of the decision making process is mostly through the Provost office and HR is an implementer | Georgia Institute of Technology |
| <ul style="list-style-type: none">Typically different as there is less of a time commitment associated with teaching in the summer.Part-time lecturer (FT2), per course basis Compensation: Discretion of program with approval of Department Head. Recommendation: flat rate \$3,000 - \$6,000 per course, depending on highest degree, experience, record of success as instructor, and market considerations.Full-time instructor (FT1) Compensation: Paid by annual salary 36 wks = 8 assignments. 48 wks = 11 assignments. See “FT Faculty Assignment Form.”Tenure track: Compensation: (1) On load as with any other course in 2-2 typical teaching assignments. (2) Supplemental pay following formula (subject to an 11% cap of the 36-week base salary): Formula: # students * # cr. hrs. * \$125 or # students * # cr. hrs. * .1833 *(36 wk annual salary) | <ul style="list-style-type: none">No, Penn State has a minimum number of students required for the course to take place. If we meet that minimum, the instructor is hired and paid a flat rate which is not based on the number of students enrolled. (Some colleges within PSU do have the practice of paying instructors based on the number of students enrolled, however. Our Director of Admin Services gave me examples in Liberal Arts)Yes, see above (second bulleted response from above)No. The Department Heads need to make a business decision to determine if the course should be offered. If we are attempting to start up a new program, the Department will usually cover the 11%. Student load is not a factor we use in determining salary paid.No. But if a summer class drops below a certain number of students, then the instructor might get a per student fee and not the lump sum initially promised. This is in their contract.We state a maximum amount the faculty member may earn for a course. The final amount is then based on the expected course revenue generated for that particular class. The expected course revenue is determined by the course enrollment on a certain date of the class. | <ul style="list-style-type: none">NO for all responses | <ul style="list-style-type: none">Yes, if a full-time faculty member on a 36 week appointment would want to teach in the summer, they could receive supplemental (salary up to 33%).No, their compensation would be paid by their annual 48-week base salary.NoYes, but would depend on department/discipline. We do not pay off their base salary, it would be a pre-established rate determined by department.Faculty who teach in the summer are normally on 9 month (36 week) contracts during the academic year. Therefore they receive additional compensation if they do additional teaching in the summer. | <ul style="list-style-type: none">No, they do not overlap.No, our 36-week contracts end before Maymester or summer session begins.The Supp payment is made when the work is performed, since our fiscal year runs 1 July – 30 June, our academic year runs Aug 15 – May 15, and our summer runs May 16-Aug 14. Maymester may cause an overlap, but it hasn’t happened yet to my knowledge.No, we have separate contracts for summer.No | <ul style="list-style-type: none">The Instructor would not be hired or paid if we did not meet the required enrollment threshold. Our contracts for faculty appointments state a date in which we must notify them by if this occurs.No, if we cancel a course, no service has been provided. For our summer supplemental teaching contracts, we do insert a date that we will notify the instructor by if the course is not going to make enrollment.No payment. If they were developing a new course, they are compensated separately for that.We put in the contract that the class could be cancelled due to low enrollment. They do not receive partial compensation.No payment is made if course is cancelled due to low enrollment. | <ul style="list-style-type: none">Faculty can be paid an additional amount to teach during the summer if they are on a 36 week appointment. This is done thru a supplemental payment which can be up to 33% of their regular salary.For tenure, we do not exceed 33% of 36-week base salary for summer work outside the 36-week contract. If additional work is involved during the 36-week contract, a faculty member cannot be paid more than 20% of their 36-week base salary. This is established in policy.Our supplemental pay is limited to 33% of base pay for Supp I and 20% of annual salary for Supp II.Not normally done. Most of our summer instructors are non-tenure track positions.Yes there is a limit/maximum on summer payments to faculty. This is determined by their weeks of service during their contract for the academic year. All factors such as teaching, research, summer service, etc. are taken into account when reaching the maximum summer payments allowable. | | Penn State |

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|---|--|--|--|--|---|--|--|-------------------------------|
| <ul style="list-style-type: none">• We have based our pay rate per course upon the rate paid during each semester per course. It roughly calculates out to 11% of the faculty member’s base pay. So, for each 3 credit course, they will receive 11% pay (up to the maximum allowed – 33% Supp I and 20% Supp II). If the course is a 2 or 4 credit, the payment is adjusted accordingly. This is for tenured/tenure-track faculty. Non-T/TT instructors are paid based upon their individual agreements.• Different pay scale based on appointment or world campus. Most of our summer lecturers are non-tenure track. Departments (discipline) pay different rates depending on class.• Different pay rate. We use a supplemental compensation pay scale based on the type of position they hold during the academic year and the level of course being taught. | | | | | | | | Penn State |
| Salaried supplements provided during the academic year are added to the annual rate and will increase the summer rate. So, the “rates” are different, technically, but the summer is simply a total of the AY. Hope that makes sense. Example: AY- \$100,000 (academic rate) + 50,000 (salaried suppl) = \$150,000 (summer rate) | Possibly. Following are instructions we provide the colleges regarding summer assignments. Individual faculty compensation for summer session teaching is calculated on a per course basis. The stipend for each organized course of three or more credit hours will normally be equal to an established salary cap or 1/6 of a faculty member’s academic rate, whichever is less. Whether a course is of six, nine, or twelve weeks duration does not affect an individual’s stipend. Deans have authority to establish a summer salary cap without special permission from the provost. Deans may also define under what conditions a faculty member should be paid above the salary cap. | No | I’m not sure I completely understand the question. Our faculty are compensated on a 9-month basis. I’m not aware of faculty being compensated in the fall and/or spring simply as encouragement to teach in the summer – when they would actually be compensated for the teaching. | Academic year contracts do not overlap. They end 5/31and any summer contract begins 6/1. | If cancellation was prior to the start of the course, no compensation is provided. If cancellation occurred after the start of the course, the faculty member would be compensated for those days worked. | Faculty may be appointed up to 100% during the summer, same as during the long sessions. | | University of Texas at Austin |

REPORT FROM STUDENT AUDIENCES ADVISORY GROUP

November 2015

The New Student Audiences Advisory group met three times from September 2015 to November 2015 and made progress on the three main areas of our charge: outline a campus vision for Summer Term at UW-Madison, establish strategies for diversifying student audiences, and identify summer curricular opportunities. While other subcommittees had more tangible outcomes associated with their work, our purpose was to brainstorm and generate ideas to provide a framework for the development of new summer experiences for degree-seeking and visiting student audiences.

Values, Vision, and Resources

After reviewing our charge and Summer Term data in the first meeting, the group engaged in brainstorming activities to define the values and vision of the summer experience. The group focused on what would set summer experiences apart from the traditional fall and spring models.

Figure 1 summarizes the group brainstorm.

Figure 1

Brainstorm Outcomes

| VALUES | EXPERIENCES |
|-----------------------------|---|
| Active learning | Internships |
| Applied learning | Leadership opportunities |
| Innovation | Online and blended learning |
| Intensive, short-term study | Research opportunities |
| Leadership development | Student job center |
| Personal assessment | Student organizations |
| Reflective thinking | Study abroad or study away (field work) |
| Skill development | Summer Institutes |
| Immersion | Volunteering and service learning |

We also discussed the availability of resources in the summer and how engaging campus units will be necessary to avoid burdening key groups as summer enrollment grows. Additionally, it is not possible to grow Summer Term without the support and collaboration of units campus-wide. Our advisory group recommends that the future Summer Term Steering Committee connect with campus partners on capacity issues.

The following is a non-exhaustive list of key partners the advisory group identified:

- University Housing
- Academic Advisors and Office of Undergraduate Advising
- Career Services Offices and Internship Program Offices
- Morgridge Center for Public Service
- Center for Leadership and Involvement
- University Health Services
- Writing Center
- Libraries

Audiences and Curricular Opportunities

Our second meeting was also structured around brainstorming; however, we narrowed the scope of this session to focus on student audiences. The group worked to detail what a UW-Madison summer experience would look like for students in different career levels based on assumed student needs and interests given their year in college. **Figure 2** outlines our work on this topic.

Figure 2

Audiences Outcomes

| EARLY COLLEGE | SOPHOMORES | JUNIORS |
|--|---|--|
| <i>Pre-college, Pre-Freshmen, Summer after Freshmen Year</i> | <i>"Sophomore Summer"</i> | <i>"Junior Jumpstart"</i> |
| -Readiness, resiliency, retention -Acclimation and orientation to college -Cohort learning -Key courses -Exploratory courses | -Confirm major and/or backup -Confirm potential careers -Study Abroad -Internships -Career readiness skills -Accelerated courses | -Leadership development -Certificates with applied experiences -Career skills boot camp -Accelerated courses -Stay on track for graduation |

Connections to the Work Plan

The outcomes of our brainstorming sessions were included in the Summer Term Work Plan (Appendix E). Specifically, the Advisory Group contributed to two of the six growth strategies outlined in the plan (Build Curriculum Offerings and Diversify Student Audience). The Summer Term Work Plan was prepared during the implementation phase in 2015 and is the foundation of advancing the Summer Term efforts.

Appendix E: Summer Term Work Plan

Work Plan [Updated 11.9.15]

Executive Summary

1. Background
2. Goals
3. Strategies
 - a. Strategy #1: Adopt a New Summer Budget Model
 - b. Strategy #2: Build Curriculum Offerings
 - c. Strategy #3: Execute Comprehensive Promotions Plans
 - d. Strategy #4: Increase Access to Need-based Scholarships and Financial Aid
 - e. Strategy #5: Diversify Student Audience
 - f. Strategy #6: Advance Policies that Encourage Growth
4. Organizational Structure
5. Timeline

Appendix (a) – Summer Enrollment Data Summary

Appendix (b) – Summer Course Offerings Summary

Appendix (c) – Summer Term Committees Membership

Executive Summary

For the past decade, summer enrollments at the University of Wisconsin-Madison have remained flat. During that same time, two trends have emerged. First, student debt has continued to rise, attracting attention and concern from parents, policymakers, and students alike. Second, peer institutions have embraced innovative strategies to extend the learning cycle, accelerate time to degree, and reduce unnecessary student debt.

Now is the time for UW-Madison to grow and enhance its Summer Term, with the goal of enhancing the UW-Madison learning experience, accelerating time-to-degree, reducing student debt, and increasing operational efficiency. At the same time the campus will begin nurturing a new revenue stream, which may help offset other losses.

To pursue such a plan, the university needs a multifaceted plan that leads to changes in the curriculum, new sources of financial aid, innovative teaching methodologies, and an aggressive promotional plan designed to change behavior.

Research shows that students will enroll in Summer Term classes if they see an opportunity to graduate on time, lighten their courseload, or concentrate on particularly challenging courses. Those same students will avoid Summer Term if the learning mode does not provide enough flexibility, funds are not available, or the classes they need are not offered to support their summer learning experience. In basic marketing parlance, their decisions are shaped by the product, price, and place.

Students who take advantage of Summer Term see a side of UW-Madison that others may never experience. This goes beyond a sunny summer afternoon on the terrace. It speaks to the unique ability to focus on an intensive learning experience, in a more immersive way than is possible during the traditional fall and spring semesters. At the same time, there is a strong correlation between time to graduation and lower student debt. Simply put, students who stay on track and finish their degrees in four years do so with less debt, compared to those who return for a ninth or 10th semester to wrap up degree requirements.

The effort to embrace a new Summer Term paradigm at UW-Madison is well underway. A new budget model is being piloted for 2016 that will encourage schools and colleges to be more innovative and entrepreneurial. This represents one near-term strategy. Others include efforts to enhance curricular offerings, increase need-based aid, and launch a strategic promotional campaign. Long-term, the University must also pursue strategies to diversify its Summer Term audience and advance additional policy changes that encourage growth.

Together, these efforts will create both the pull and the push needed to affect significant change. New offerings, new sources of financial aid, and other internal changes will create an attraction for students, parents, and other influencers. A strategic marketing promotional plan, targeting both current UW-Madison students and those other institutions, will help stimulate the kind of behavior change and perceptual change needed to achieve our goals.

This plan provides a high-level overview of efforts to move forward with these aggressive changes. It is designed to provide a starting point for conversations with many stakeholders involved in this significant paradigm shift.

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1. Background

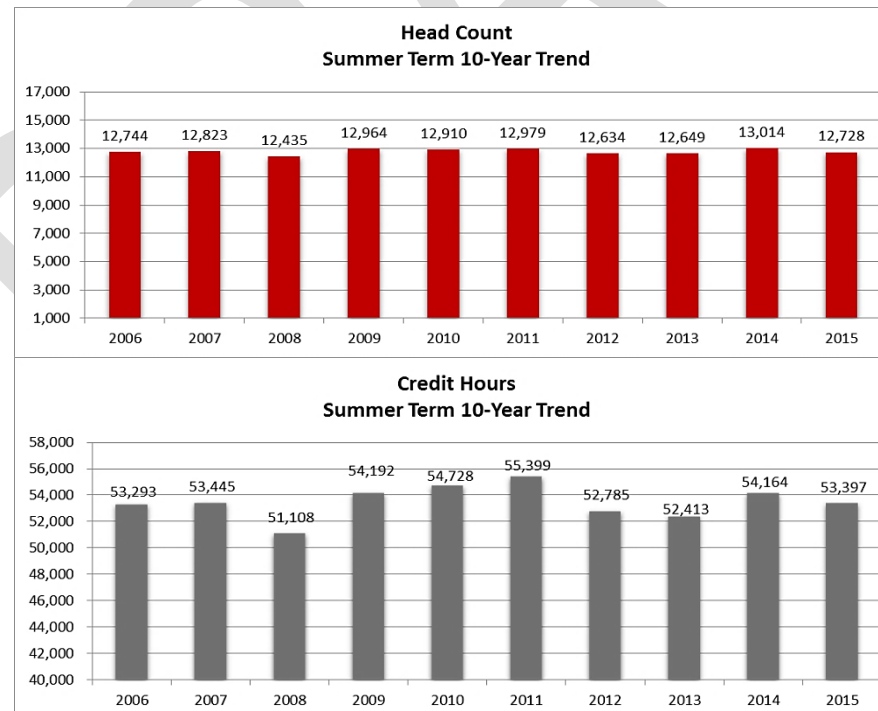
This document outlines a number of strategies and tactics designed to grow and enhance Summer Term at the University of Wisconsin-Madison. It outlines the key roles and responsibilities for many stakeholders who must work together to achieve our vision of generating 18,000 new credits (~3,000 new students) in five years.

The Background section begins with an analysis of summer enrollment trends at UW-Madison, a summary of survey results of existing UW-Madison students, and key benchmarks from other leading peer institutions. It also summarizes work that has been done by the Summer Term Committee and Summer Implementation Committee over that last 10 months to advance our strategic thinking.

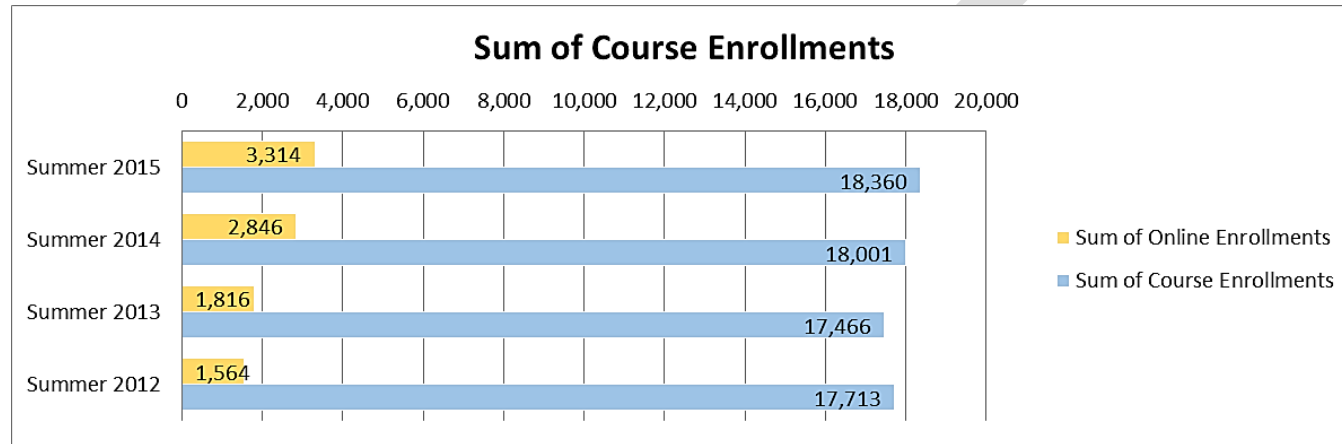
History

a) Enrollment Trends

Summer Term activity – in terms of both head count and credit hours – has remained flat for a number of years. While head count decreased by 286 students (-2%) from 2014 to 2015, it has decreased by only 16 (-0.1%) over ten years. Similarly, total credits for the Summer Term decreased by 767 from 2014 to 2015 (-1%), but the ten-year trend has remained flat with a net increase of 104 (0.2%). See Appendix A for more summer enrollment data.



While overall course enrollments grew modestly in 2015 from the previous years, online course enrollments grew markedly. UW-Madison's total online summer enrollments grew by 82% in three years. In the last four years, online course enrollments have more than doubled. Appendix B provides more information about UW-Madison's summer course offerings.



b) Research

In a 2015 survey of summer online students at UW-Madison conducted by the Division of Continuing Studies, over 80% of students cited schedule flexibility as a reason for enrolling in their online course. The majority (70%) of students liked (moderately or very much) their online experience, and few (15%) disliked their experience.

In a 2015 survey of existing UW-Madison students, students said that the main reasons for taking courses during summer term included their desire to: lighten their course load for fall or spring; graduate on time; and concentrate on a challenging course.

The primary reasons for *not* taking courses during summer term included: not living near UW-Madison in summer; not having funds for summer tuition; and the class they needed was not offered. The feeling that students didn't need to take summer term was also a notable response for primary reasons for not enrolling in summer term. Additionally, students expressed a willingness to take summer term at another university when it is closer to where they are living or it is available online.

The 2015 survey of existing students revealed a general interest for internships, online offerings, research opportunities, and upper-level class offerings to play a larger role in Summer Term. Students also cited scholarships as extremely important. Finally, the survey indicated that a focused communication plan for students, UW-Madison academic advisors, and parents is important as these groups play the greatest role in influencing current students.

A third survey was fielded in 2015 with visiting students who have previously taken Summer Term courses at UW-Madison. This survey revealed the main reasons visiting students took a summer course at UW-Madison were to fulfill an interest; to help with graduate school admissions; and for professional development reasons. When asked who helped them make the decision to attend Summer Term at UW-Madison, most stated they made the decision on their own followed by advisors (graduate school advisors, college advisors, or college professors).

c) Benchmarks

To help provide a framework for thinking about activity-driven alternatives, a range of summer models used by universities similar to UW-Madison in size, complexity, and mission were reviewed.

A key metric used in the analysis of benchmarking peers was a comparison of fall and summer head count, which is a national measure of success. Data from peer institutions suggest UW-Madison could grow Summer Term headcount and average credit load.

| | Summer 2014 Head Count as % of Fall 2013 Head Count | Fall 2013 Undergraduate Head Count | Summer 2014 Undergraduate Head Count | Average Summer Credit Hours/Student |
|---|---|------------------------------------|--------------------------------------|-------------------------------------|
| University of California, Berkeley ¹ | 52% | 25,774 | 13,383 | 6.00 |
| Michigan State University ² | 48% | 37,278 | 17,939 | 6.60 |
| Ohio State University | 28% | 44,201 | 12,377 | 5.51 |
| University of Indiana-Bloomington | 24% | 36,862 | 8,740 | 5.42 |
| University of Wisconsin-Madison | 21% | 29,504 | 6,318 | 4.40 |
| University of Minnesota-Twin Cities | 20% | 30,271 | 6,002 | 7.00 |
| University of Illinois-Urbana Champaign | 19% | 32,294 | 6,230 | -- |
| University of Michigan | 9% | 28,283 | 2,570 | 5.29 |

¹ 4,000 visiting students enrolled, and non-resident students pay resident tuition during summer

² Revenue sharing provided to departments offering online summer courses. Institution grew undergraduate online enrollments from 12,304 in 2010 to 21,839 in 2014. A 77% increase in five years

Process

Over the course of the last ten months, under the charge of the Provost, the Summer Term Committee, followed by the Summer Term Implementation Committee, have been working to make changes to Summer Term that will enhance the student experience and encourage fiscal stewardship. Please see Appendix C for a list of committee members.

| | |
|---------------------------|--|
| Jan 2015 | Provost charged Summer Term Committee with reviewing budget model and summer policies |
| May 2015 | Summer Term Committee submitted report outlining nine recommendations |
| Jun – Aug 2015 | University Committee, Academic Staff Executive Committee, Deans Council, Provost Executive Group, and school and college leadership provided feedback |
| Aug 2015 – Present | Implementation Committee begins meeting to provide oversight on summer 2016 pilot budget model, establish vision and goals, outline growth strategies, and incorporate governance feedback |
| May 2016 | New budget model to be piloted |
| Sep 2016 | Evaluate Summer Term practices and piloted budget model |

a) Summer Term Committee

The initial Summer Term Committee put forth the following set of recommendations in May 2015.

| Immediate | Long-Term |
|---------------------------------------|---|
| 1. Adopt new summer budget model | 5. Explore summer compensation practices |
| 2. Establish implementation committee | 6. Adopt per-credit summer tuition rates |
| 3. Create minimum enrollment policies | 7. Create strategies to attract new student audiences |
| 4. Modify academic calendar | 8. Revise faculty policies |
| | 9. Elevate Summer Dean role |

b) Implementation Committee

The Implementation Committee formed in August 2015 and is making significant progress on:

1. Establishing the Summer Term vision and goals
2. Developing strategies to achieve the goals
3. Launching the summer 2016 pilot budget model

Given the number of complex issues that need to be addressed, the committee created four subcommittees to focus on specific objectives:

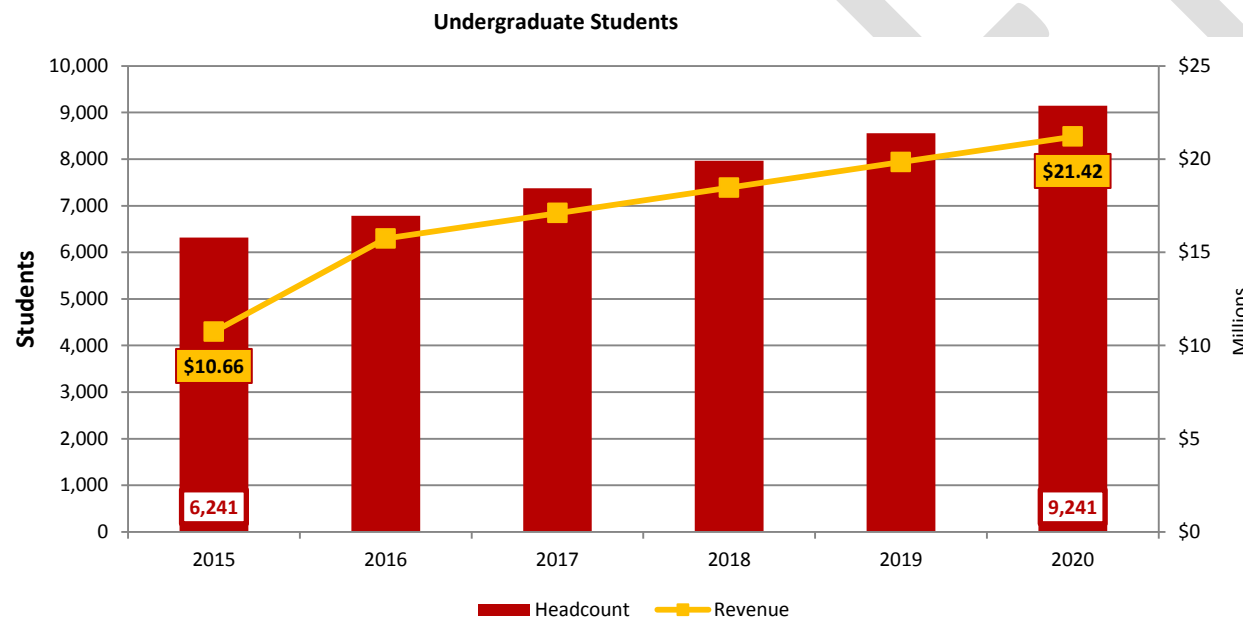
| Subcommittee | Deliverables | Timeframe |
|----------------------------|---|---------------|
| Data | Summer course revenue reports | Completed |
| Fund Infrastructure | Academic year budget payment Summer revenue management & budgeting process | Completed |
| Human Resources | Catalog of summer HR/compensation practices, issues, opportunities | November 2015 |
| Student Audiences | UW-Madison Summer Experience vision | January 2016 |

2. Goals

Summer Term will be used as one vehicle to **enrich the student experience** and **reduce time-to-degree** through immersive learning experiences that can contribute to students' academic and professional goals.

In doing so, it will help students **reduce their debt burden** and **enter the workforce sooner**.

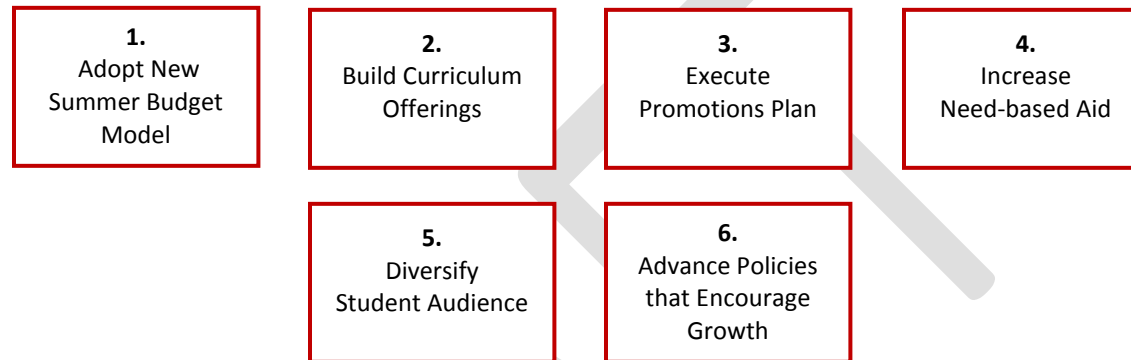
The vision is to generate 18,000 new credits (~3,000 new students) in five years, providing **new revenue** for the institution³.



³ Assumes 3,000 additional undergraduate students, with all undergraduate students taking 6 credits, paying resident undergraduate tuition by summer 2020

3. Strategies

Six strategies must be pursued to achieve the summer goals. No single effort pursued in *isolation* will generate the desired transformative educational experiences for students or the resource stewardship required of a model public institution in the 21st century.



The strategies generally fall into two groups – a set of internal changes designed to create an irresistible “pull” toward Summer Term, and a broad marketing effort designed to “push” students and their influencers.

We must enhance summer offerings in a manner that provides an inherently attractive opportunity for both current UW-Madison students and those enrolled at other institutions. At the same time, we must attempt to influence student behavior, encouraging them to see Summer Term in a new perspective and enroll in larger numbers. Strategies 1, 2, 4, 5 and 6 are “pull” strategies. Strategy 3 is the “push” effort.

The first four strategies listed, Adopt New Summer Budget Model, Build Curriculum Offerings, Execute Promotions Plan, and Increase Need-based Aid, are the primary focus for the next two summers (summer 2016 and summer 2017). The other two strategies will begin to be undertaken, but results will likely not be seen for five years.

In the pages that follow, each strategy is further divided into five parts:

1. Sub-strategies
2. Participants
3. Roles and responsibilities
4. Two-year outcomes
5. Five-year outcomes

This plan was shared with the Summer Implementation Committee in October 2015 and with the Summer Deans in early November 2015. While this document provides a comprehensive framework, it is a very early draft and will require further refinement as it is shared with others across campus.

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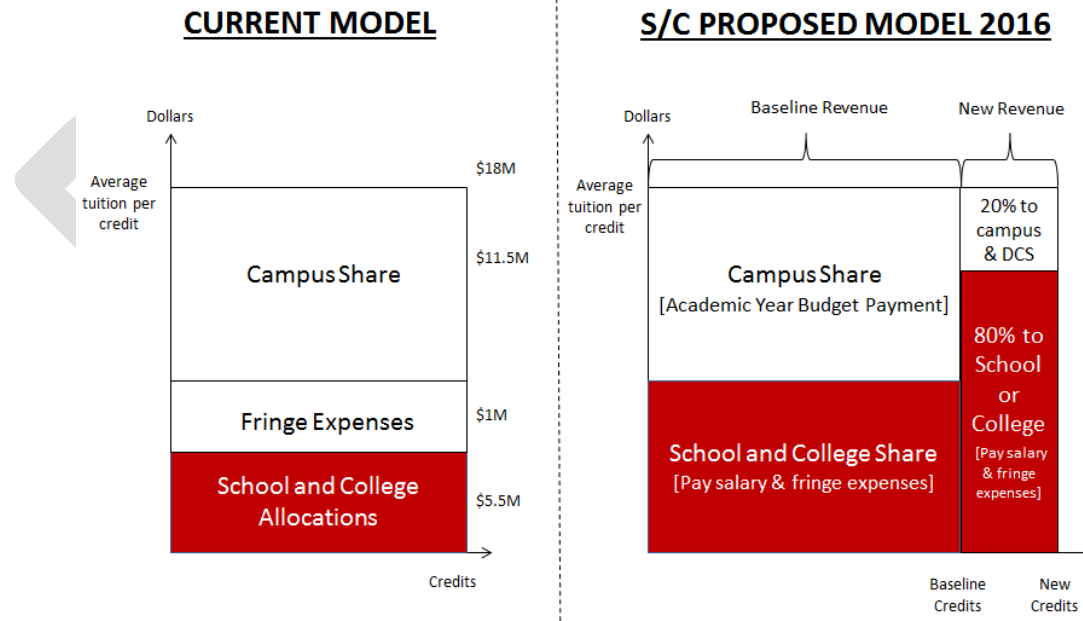
STRATEGY #1: Adopt a New Summer Budget Model

UW-Madison's Summer Term fiscal model is outdated. It does not give schools and colleges the ability to address evolving student needs, and lags behind peer institutions that have embraced fiscal policy designed to spur innovation and generate revenue. The Summer Term committee determined the status quo is unacceptable and recommended an improved budget model that will better meet student needs and contribute to the financial stability of the university.

For 2016, UW-Madison will pilot a new summer budget model that requires each individual school or college to maintain its historic level of summer revenue – its baseline summer revenue. Any additional revenue a school or college generates above its baseline is part of a revenue share program with the school or college retaining 80 percent of the new revenue. The remaining 20 percent is distributed equally between central campus and the Division of Continuing Studies (DCS).

DCS provides administrative oversight for Summer Term and will use the revenue it receives to support summer marketing, provide new summer scholarships, offer development funds to schools to create innovative summer offerings, and support the Summer Term staff.

The pilot will provide schools and colleges more flexibility to expand summer course offerings, and the potential to develop a new revenue stream. However, the new model also requires careful planning, with much closer attention to revenues and expenses than under the old model. Each school and college is rolling out the pilot differently within their unit.



The launch of the pilot for summer 2016 is well underway. A review of the pilot next fall at the conclusion of summer 2016 will be crucial. Here is a breakdown of the work plan for the Adopt a New Summer Budget Model strategy.

| Strategy | Sub-strategies | Participants & Roles/Responsibilities | 2-Year Outcomes | 5-Year Outcomes |
|--|--|--|---|---|
| ADOPT A NEW SUMMER BUDGET MODEL | <ul style="list-style-type: none"> Pilot new model for 2016 Review pilot | <ul style="list-style-type: none"> School and College Financial Officers – Pilot implementation School and College Summer Deans – Pilot implementation Division of Continuing Studies – Pilot project management and fund distribution Academic Planning and Institutional Research – Course revenue reports Madison Budget Office – Academic year payment Summer Term Implementation Committee – Pilot implementation | <ul style="list-style-type: none"> \$1M new revenue Consistent, incentive-based budget model College-level fiscal summer strategic plans | <ul style="list-style-type: none"> \$10M new revenue |

STRATEGY #2: Build Curriculum Offerings

The curriculum array must evolve to address student needs and provide meaningful academic and professional experiences to learners in the summer. Schools and colleges, and academic departments and curriculum committees within schools and colleges, must be the drivers of this change.

Academic departments are the owners of all courses taught across campus during all academic terms including summer. The curriculum they select to teach each summer, the mode of those offerings, and the timing of their courses will have a great impact on students. Departments will need to think creatively about new courses or packages of offerings that will provide transformational learning experiences that appeal to students. College curriculum committees and academic deans can also play a valuable role in providing guidance on a college's suite of summer offerings. See Appendix B for a summary of summer course offerings.

We are requesting that schools and colleges update their summer strategic plans. In light of changes to the summer fiscal model and the renewed institutional support of summer expansion, revised college-level strategic plans will result in an established set of summer priorities for each school and college and an articulation of their desired credit-hour goals.

While DCS is not the primary driver of curriculum offerings, DCS has a responsibility to support colleges in building the appropriate curriculum array. DCS will distribute special initiative funding to departments, provide enrollment data, conduct market research on the demand for new offerings, and offer project management services to help develop new curriculum.

DCS must also lead in identifying general education requirements that can have the greatest impact on students if offered in the summer and promoting those courses to students. As an example, the University General Education Committee recommends that a greater share of undergraduates enroll in ethnic studies courses in their first 60 credits. DCS can help campus achieve this goal by ensuring an appropriate number of ethnic studies courses are offered each summer, promoting these courses to students approaching or exceeding 60 credits, and directing summer scholarship funds to students who take those summer courses.

Based on research and benchmarking insights, five key types of offerings have been identified to diversify the Summer Term curriculum portfolio, which will better serve our students or reach new audiences.

1. Online courses
2. Certificate and institute programs
3. High demand courses

4. Courses with transformational immersion, research, field, service learning, or professional development experiences
5. Distinctive curriculum for visiting audiences

A partnership between schools and colleges and DCS, with schools and colleges as active participants in the change, will advance this effort.

| Strategy | Sub-strategies | Participants | Roles/Responsibilities | 2-Year Outcomes | 5-Year Outcomes |
|-----------------------------------|--|--|--|--|--|
| BUILD CURRICULUM OFFERINGS | <ul style="list-style-type: none"> Develop online courses Create certificate and institute programs Offer high demand courses Develop syllabi with transformational, immersion, research, field, service learning, or professional development experiences Tap distinctive curriculum for visiting students | Summer Deans | <ul style="list-style-type: none"> Research summer curriculum needs and opportunities within individual college Establish a college-level summer curricular strategic plan Provide leadership and oversight on development and delivery of new curriculum offerings Engage student services staff in strategic planning | <ul style="list-style-type: none"> College-level curricular summer strategic plans Increase online credit hours by 800 Three new college-led program offerings in summer \$500,000 distributed in special initiative funding | <ul style="list-style-type: none"> X increase in online course credit hours X increase in certificate program credit hours Development of a hands-on summer research experiences that includes an academic component generating X credit hours Development of service learning, career readiness, and internship opportunities that result in X credit hours |
| | | Department Chairs | <ul style="list-style-type: none"> Actively participate in new curriculum ideation Build departmental support and long-term commitment for new initiatives within department Engage academic advisors in development of new initiatives | | |
| | | Instructors [Faculty & Academic Staff] | <ul style="list-style-type: none"> Ideate new offerings with attention to distinctive UW facilities, academic expertise, and opportunity for unique summer study Develop and deliver curriculum | | |
| | | Curriculum Committees | <ul style="list-style-type: none"> Help establish a college-level summer curricular strategic plan Ideate new offerings | | |
| | | Academic Deans | <ul style="list-style-type: none"> Ideate new offerings with attention to distinctive UW facilities, academic expertise, and opportunity for unique summer study | | |
| | | DCS | <ul style="list-style-type: none"> Provide special initiative funding to schools and colleges for new curriculum development Provide project management services to help develop new curriculum Lead promotion of general education offerings across campus in summer (e.g., students fulfill Ethnic Studies requirements before Junior year) Conduct market-based research on feasibility of new curriculum ideas Identify model courses/programs from past five years Provide department-level enrollment data and garner input from focus groups and advising staff | | |

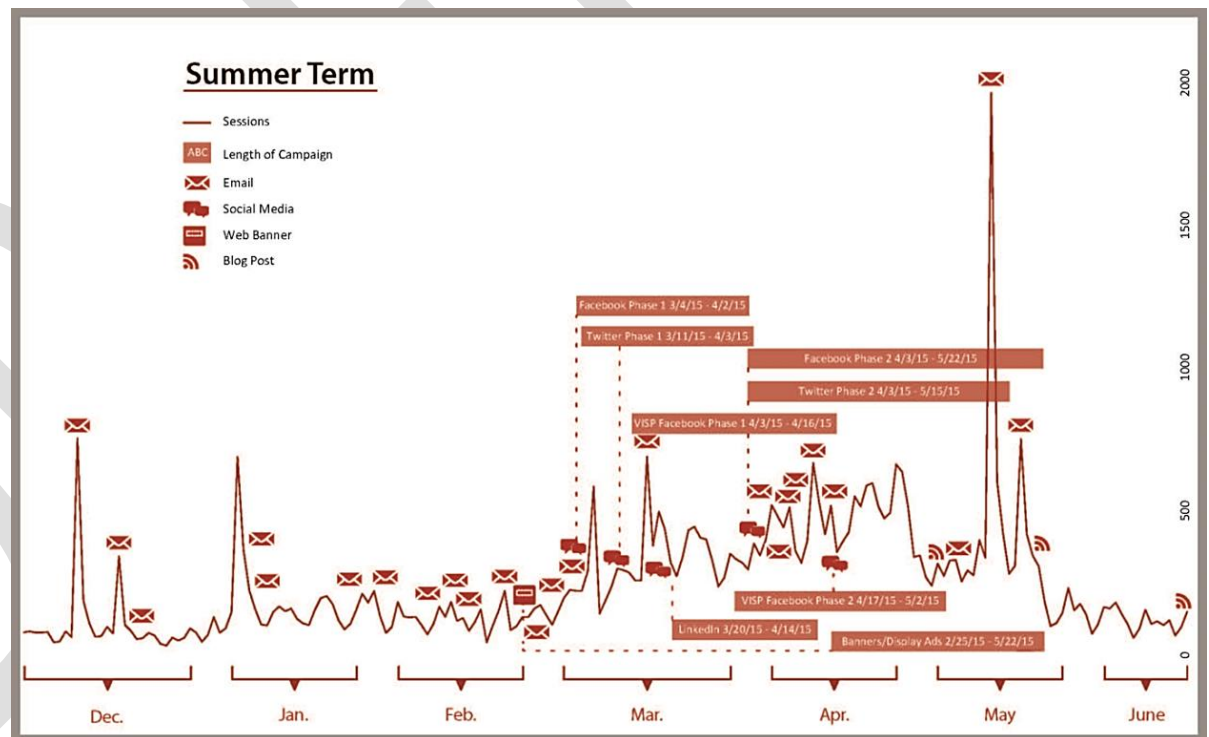
STRATEGY #3: Execute Comprehensive Promotions Plans

History

The groundwork for expanding summer marketing support was established in 2014 and 2015. Existing UW-Madison students, visiting students and their influencers (e.g., parents, advisors) are now able to locate information regarding Summer Term in a centralized website summer.wisc.edu. In 2015, a mix of paid (online banner ads, Facebook ads, Twitter ads, LinkedIn ads) and owned media (email, blog posts, social media posts) achieved more than 9 million impressions. With the exception of email, our marketing campaigns have primarily targeted visiting student audiences. The campaign drove 28,626 users to summer.wisc.edu. While website traffic dipped from 2014 to 2015, improvements in other metrics such as “time on-page” and “bounce rate” suggest a more engaged audience visited the site in 2015.

Of the tactics executed in 2015, email and Facebook had the strongest click rate and on-site response of all tactics in the campaign. Campaign response suggested that existing UW-Madison students are the best short-term 2016 growth prospects. For example, click response on emails targeted to prospects already in the UW-Madison community (e.g., undergraduates, instructors, alumni, transfer students) performed significantly better than emails to visiting students. Additionally, the largest percentage of traffic that visited the site was from the Madison Designated Market Area.

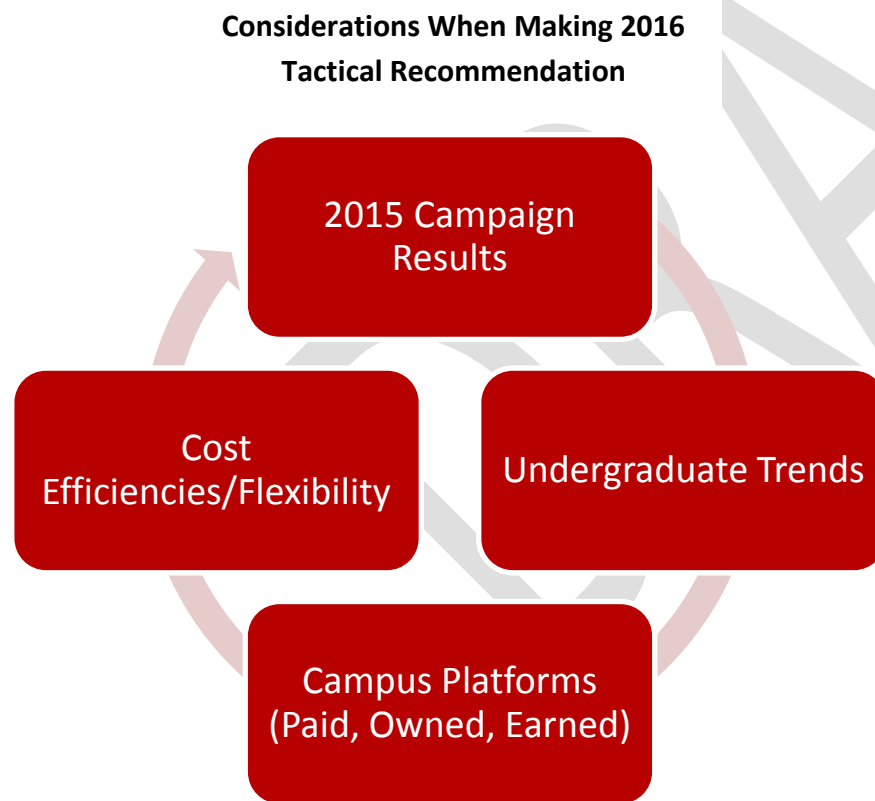
This chart illustrates increases in website traffic in comparison to dates advertising was in-market (12/1/14 – 6/15/15).



2016 Approach

Over the course of the next five years, promotions will target various audiences, including existing UW-Madison undergraduates and their influencers (parents, family, advisors), as well as visiting students (domestic, international, precollege). However, we recommend focusing on existing UW-Madison undergraduates and their influencers for 2016 because performance from the existing UW-Madison community was significantly stronger in 2015 than visiting audience performance. Additionally, approximately 1,600 UW-Madison students take summer term courses elsewhere and transfer the credits back, indicating more UW-Madison students have summer term needs not currently being fulfilled by UW-Madison (Appendix B).

After identifying best prospects for 2016, several considerations were taken into account when determining the tactics and messages to reach undergraduates and their influencers. We sought to balance all of the considerations when developing the recommendation.



Resources that Informed 2016 Tactical Recommendation



Continuing Studies
UNIVERSITY OF WISCONSIN-MADISON



PewResearchCenter

Details about this promotions strategy are outlined here. DCS is the lead participant within this strategy with summer deans and school and college staff providing critical support.

| Strategy | Sub-strategies | Participants | Roles/Responsibilities | 2-Year Outcomes | 5-Year Outcomes |
|---|--|--|---|--|---|
| EXECUTE COMPREHENSIVE PROMOTIONS PLANS | <ul style="list-style-type: none"> Expand communication to existing UW-Madison undergraduates Engage undergraduate influencers (parents/family, advisors) Revise ad messages based on prior performance Research visiting audiences for future promotional campaigns (e.g., precollege; international) | DCS | <ul style="list-style-type: none"> Execute overarching marketing plan Develop materials, buy media, lead events promoting the benefits of Summer Term to existing UW-Madison undergraduates, parents and advisors via online radio, online video, Facebook, Twitter, desktop and mobile online ads, email, events and e-newsletters Provide guidance to colleges on ways to promote Summer Term (marketing toolkit) Research competitive summer offerings at peer universities Facilitate research for colleges as needed Lead promotion of general education offerings across campus in summer (e.g., students fulfill Ethnic Studies requirements before Junior year) | <ul style="list-style-type: none"> Increase student awareness of range of experiences available at UW-Madison during Summer Term Increase marketing response (measured by website traffic) 20% versus 2015 | <ul style="list-style-type: none"> Increase of 3% in marketing attribution to new credit hours generated Increase student awareness of range of experiences available at UW-Madison during Summer Term Increase awareness among visiting audiences of UW-Madison Summer Term programming |
| | | Summer Deans | <ul style="list-style-type: none"> Build connections between college communication teams and DCS Work with advisors to integrate Summer Term into more conversations with students Provide ideas and support to DCS for engaging advisors | | |
| | | School/College Staff [Department Chairs, Instructors, Advisors, etc.] | <ul style="list-style-type: none"> Execute grassroots specific course marketing support via e-newsletters, social media posts, student org outreach, posters, department announcements, student brownbags | | |

STRATEGY #4: Increase Access to Need-Based Scholarships & Financial Aid

Growing a sustainable summer scholarship program will support students with financial need enabling their participation in transformative summer experiences as they make progress towards degree completion. A third of the UW-Madison student population faces financial barriers, yet federal financial aid is limited in the summer as are summer scholarship opportunities. Consequently, students rely predominantly on loans. In summer 2015, the Office of Financial Aid distributed aid, primarily in the form of loans, to approximately 1,000 undergraduate students. In 2015, DCS piloted a summer scholarship program with \$25,000 in funds. The scholarship program was executed within a short timeframe, yet resulted in 168 students applying. The program was able to award 12 students (7% of applicants) with scholarships that funded the resident portion of their summer tuition expenses. Securing more sources of financial aid and promoting policies that provide students opportunities for aid will be crucial moving forward⁴.

| Strategy | Sub-strategies | Participants | Roles/Responsibilities | 2-Year Outcomes | 5-Year Outcomes |
|--|---|-------------------------|--|---|---|
| INCREASE ACCESS TO NEED-BASED SCHOLARSHIPS AND FINANCIAL AID | <ul style="list-style-type: none">• Provide more summer scholarships• Provide more opportunities for students to receive financial aid | DCS | <ul style="list-style-type: none">• Secure scholarship funds• Manage scholarship application and select process• Promote scholarship opportunity• Support creation of a 4-week Maymester• Explore simplification of summer sessions schedule | <ul style="list-style-type: none">• 100 students receive scholarship award annually | <ul style="list-style-type: none">• Secure \$5 M summer scholarship endowment |
| | | Advisors | <ul style="list-style-type: none">• Promote scholarship opportunity | | |
| | | Campus Review Committee | <ul style="list-style-type: none">• Select scholarship recipients | | |
| | | Office of Financial Aid | <ul style="list-style-type: none">• Evaluate summer financial aid policies and practices• Assist in generating more student financial aid | | |

⁴ Under current UW-Madison practices, students must enroll in a summer session of at least 4 weeks in length to receive federal financial aid. Students enrolled in summer sessions of 3 weeks in length or fewer are not eligible for federal financial aid.

STRATEGY #5: Diversify Student Audience

This is a highly involved and important strategy to attract several new audiences to UW-Madison in the summer. Each sub-strategy will require campus-level collaboration among an array of participants unique to the sub-strategy.

| Strategy | Sub-strategies | Participants | Roles/Responsibilities | 2-Year Outcomes | 5-Year Outcomes |
|-----------------------------------|---|---|---|---|--|
| DIVERSIFY STUDENT AUDIENCE | Expand visiting international student enrollment | Collaborative effort including: International Division; Undergraduate Admissions; Graduate Admissions; Schools and Colleges; DCS | <ul style="list-style-type: none"> Form a campus-level committee to create an institutional international recruitment strategy and work plan | <ul style="list-style-type: none"> Provide schools and colleges with annual student audience research information Grow international visiting credit hours to 1,000 Pilot "Summer Start" program generating 400 new credit hours | <ul style="list-style-type: none"> Balanced portfolio of enrollment by different student types Increase in X credit hours Increase in X revenue |
| | Reduce UW-Madison undergraduate summer course transfer activity | Collaborative effort including: Advisors; Academic Deans; Undergraduate Admissions; Academic Departments; Registrar's Office; DCS | <ul style="list-style-type: none"> Identify frequently transferred courses that have summer capacity and are prerequisites to higher level courses. Communicate with students about value of UW-Madison summer course offerings | | |
| | Develop "Sophomore Summer" experience | Collaborative effort including: Academic Deans; Student Life; Housing; Summer Deans; DCS | <ul style="list-style-type: none"> Develop infrastructure, curriculum and programming for Sophomore summer experience | | |
| | Develop precollege credit programs | Collaborative effort including: Summer Deans; Department Chairs; Curriculum Committees; Faculty; Student Life; Housing; DCS | <ul style="list-style-type: none"> Develop infrastructure, curriculum and programming for precollege credit program | | |

| | | | | | |
|--|--|---|---|--|--|
| | Develop “Summer Start” program for new undergraduates | Collaborative effort including: Academic Deans, Student Life, Center for First Year Experience, Undergrad Admissions, Undergrad Advising, Summer Deans, Instructional Designers, Housing; DCS | <ul style="list-style-type: none"> Develop infrastructure, curriculum and programming for early admit program | | |
| | <ul style="list-style-type: none"> Research competitive summer session offerings at peer universities Conduct research with visiting student prospects to gain additional insights on programs of interest | DCS | <ul style="list-style-type: none"> Determine program offerings from peer universities to identify curriculum development areas to attract new audiences Network with peer universities to understand their growth strategies Execute survey with visiting student audience to learn information on how they decide what programs to attend and what programs they are attracted to Develop and execute communications to students about value of UW-Madison summer course offerings Execute promotions recruiting visiting students including creating informational print and web content for visitors; creating relationships with recruiters; attending recruitment events; building a database on UW international connections | | |
| | | School/College Staff [Department Chairs, Instructors, Advisors, etc.] | <ul style="list-style-type: none"> Execute promotions recruiting visiting students including creating informational print and web content for visitors; creating relationships with recruiters; attending recruitment events; building a database on UW international connections | | |

STRATEGY #6: Advance Policies that Encourage Growth

Several policies that can enhance summer growth or remove barriers must be considered. Within the short-term horizon, the key focus will be on implementing a new academic year calendar, providing colleges with documentation of summer human resources and compensation flexibilities and regulations, and revising the Faculty Policies and Procedures (FPP) Chapter 11 document.

| Strategy | Sub-strategies | Participants | Roles/Responsibilities | 2-Year Outcomes | 5-Year Outcomes |
|---|---|---------------------------|--|---|---|
| ADVANCE POLICIES THAT ENCOURAGE GROWTH | <ul style="list-style-type: none">Identify summer term HR and compensation options that could better address the campus goal of increasing summer term enrollmentsAdopt new academic calendarSimplify summer sessions scheduleExamine summer plateau practiceRevise FPP Chapter 11Review graduate student summer tuition remission practicesSupport new campus course management system | Office of Human Resources | <ul style="list-style-type: none">Identify summer term HR and compensation options that could better address the campus goal of increasing summer term enrollments | <ul style="list-style-type: none">Implement new academic year calendarProvide colleges documentation of summer HR and compensation flexibilities and regulationsRevise FPP Chapter 11 | <ul style="list-style-type: none">Revised summer HR and compensation that support summer enrollment growth while aligning with academic year policies |
| | | DCS | <ul style="list-style-type: none">Facilitate campus-level conversationsDocument practices at peer institutions | | |
| | | Faculty Senate | <ul style="list-style-type: none">Implement new academic calendarReview HR compensation optionsLead FPP Chapter 11 discussions | | |
| | | UW System | <ul style="list-style-type: none">Form system-level committee to review per-credit tuition | | |
| | | Graduate School | <ul style="list-style-type: none">Help assess summer tuition remission policies | | |
| | | Registrar's Office | <ul style="list-style-type: none">Include Summer Term in process when implementing new course management system | | |
| | | Summer Deans | <ul style="list-style-type: none">Provide college perspective on summer-related policies | | |
| | | | | | |

4. Organizational Structure

The current summer structure is a hybrid model, combining centralized and decentralized elements. Led by Dean Jeffrey Russell, the Division of Continuing Studies (DCS) provides central coordination for Summer Term at UW-Madison. Each school and college appoints a Summer Dean who collaborates with DCS and their academic departments to determine which courses will be taught. Finally, several key administrative units across campus provide support to Summer Term efforts as well.

Within DCS, a core team of four staff members (Director, Project Manager, Marketing Account Manager, and Student Services Coordinator) leads and executes the central coordination of Summer Term. Summer Term team relies on the DCS Integrated Marketing Communications team for executing much of its marketing plan. The DCS responsibilities are outlined below.

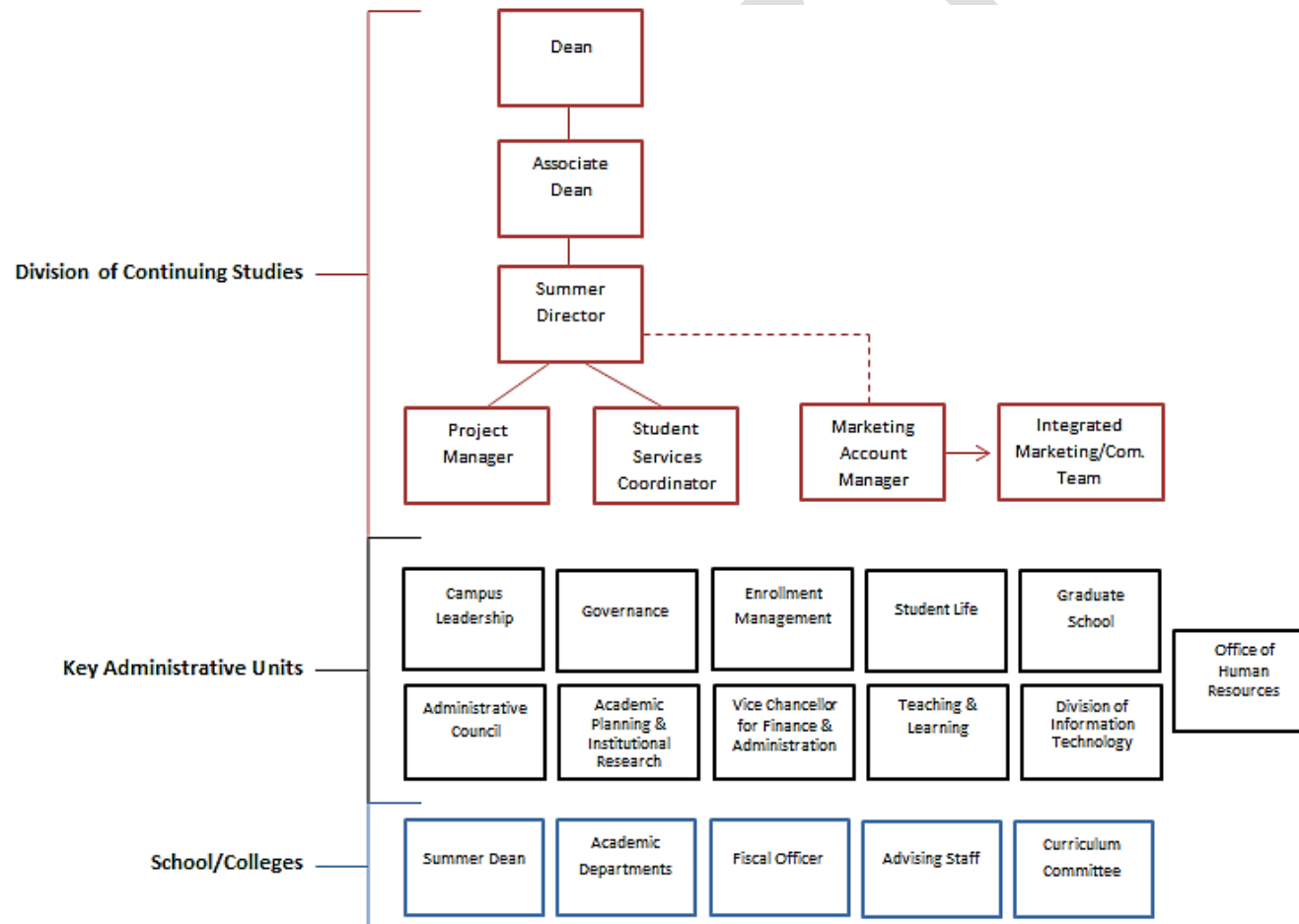
DCS administrative responsibilities:

- Manage implementation of pilot budget model
- Provide advising and admissions for visiting and non-degree credit students
- Invest in and implement new strategic initiatives (online summer courses, summer institutes, etc.)
- Lead cross-campus summer online course development process
- Track and communicate enrollment patterns and other relevant summer data in collaboration with Academic Planning and Institutional Research and the Office of the Registrar
- Administer need-based summer scholarship program
- Provide oversight on summer policies
- Monitor national summer trends

DCS marketing responsibilities:

- Communicate and market Summer Term to UW-Madison students and new audiences
- Support schools and colleges with their summer communication efforts
- Identify untapped prospective Summer Term students
- Conduct market research on student needs and preferences

With the growth of Summer Term, responsibilities related to Summer Term will continue to grow both within DCS and across campus. Schools and colleges and key administrative units will become increasingly involved in the development and implementation of the growth strategies. For example, curriculum committees will ideate new offerings and help establish a college-level summer curricular strategic plan. Another example of cross campus collaboration will be the development of precollege credit programs that will include representation from Summer Deans, Department Chairs, Curriculum Committees, Instructors, Student Life, Housing, and DCS. Specific representatives for each strategy and subsequent related tasks will be identified as tasks begin.



5. Timeline

Detailed work schedules will be developed for each strategy and associated tasks as they roll out. However, we will take an agile project management approach that provides flexibility to change over time as campus partners become more engaged in growing Summer Term. For reference, below is a sample timeline for Summer 2016 of key curriculum planning and promotions milestones.

| Milestone | Nov 15 | Dec 15 | Jan 16 | Feb 16 | March 16 | April 16 | May 16 | June 16 |
|--|----------------|--------|--|--------|--|----------|------------------------------------|------------------------------------|
| Student Dates & Deadlines | | | 1/5: Website updates live 1/8: Courses available online | | 3/15: Make the Most of Your Summer Fair 3/28: Enrollment Begins | | 5/24: Three week session begins | 6/14: Eight week session begins |
| School/College Curriculum Planning | Nov – Dec 2015 | | | | | | | |
| Promotions Plan Production (Writing, Design) | Nov – Dec 2015 | | | | | | | |
| Advisor Luncheon with Chancellor Blank | | 12/14 | | | | | | |
| First Mass Email | | | 1/9 | | | | | |
| Promotions (Email, social media, online ads, online video, online radio, e-newsletters, paid search) | | | Early January – mid May | | | | | |

Appendix E(a) – Summer Enrollment Data

1. Summer 2015 Total Head Count & Credit Hours by Type

| | UNDERGRADUATE | GRADUATE | SPECIAL STUDENTS | CLINICAL/ PROFESSIONAL | TOTAL |
|--------------|---------------|----------|------------------|---------------------------|---------------|
| Students | 6,241 | 4,547 | 1,209 | 731 | 12,728 |
| Credit Hours | 27,428 | 14,308 | 5,073 | 6,588 | 53,397 |

Office of the Registrar, University of Wisconsin-Madison

2. Summer 2015 Course Enrollments and Credit Hours by School/College Undergraduate & Special Students Only

| COLLEGE | COURSE ENROLLMENTS | CREDIT HOURS |
|--------------|--------------------|---------------|
| L&S | 5,394 | 16,684 |
| EDU | 1,006 | 2,695 |
| EGR | 870 | 2,318 |
| CALS | 699 | 1,932 |
| BUS | 729 | 2,121 |
| SOHE | 348 | 1,006 |
| MED | 246 | 853 |
| NELSON | 75 | 225 |
| NURS | 47 | 130 |
| LAW | 19 | 48 |
| VET MED | 4 | 6 |
| PHARM | 4 | 18 |
| Total | 9,441 | 28,036 |

Academic Planning and Institutional Research, University of Wisconsin-Madison

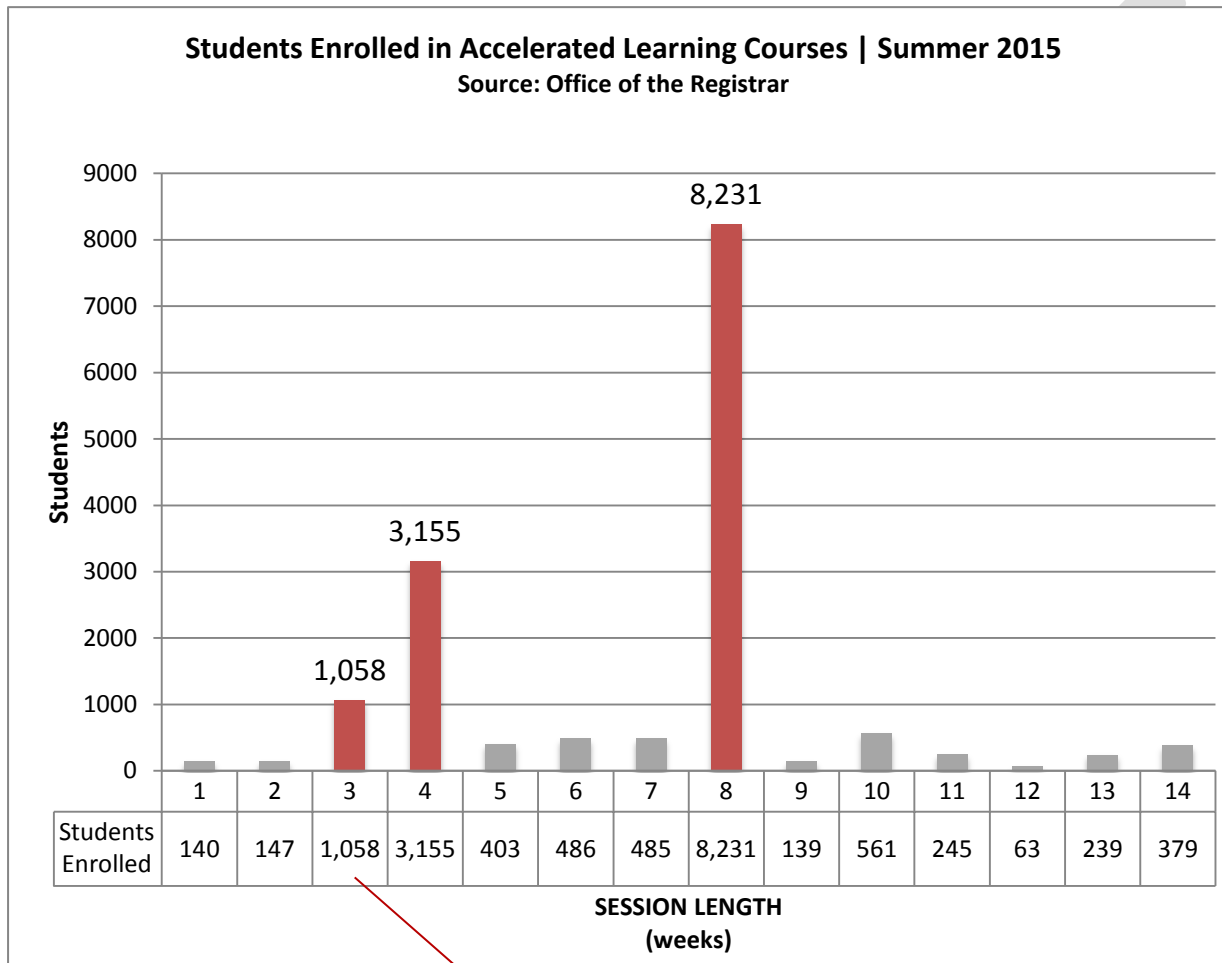
3. Summer 2015 Student Degree Home Head Count

| STUDENT DEGREE HOME | UNDERGRADUATE STUDENTS* | | | | | | |
|---------------------|-------------------------|--------------|----------------|----------------|---------------|----------------|----------------|
| | Freshmen | Sophomores | Juniors | Seniors | Total | WI Residents | Non-Residents |
| CALS | 13 | 67 | 277 | 529 | 886 | 564 | 322 |
| BUS | 0 | 6 | 144 | 247 | 397 | 179 | 200 |
| EDU | 21 | 41 | 110 | 243 | 415 | 304 | 111 |
| EGR | 17 | 131 | 305 | 667 | 1,120 | 542 | 578 |
| SOHE | 3 | 40 | 97 | 172 | 312 | 203 | 109 |
| L&S | 146 | 369 | 881 | 1,577 | 2,973 | 1,740 | 1,233 |
| NURS | 6 | 25 | 23 | 73 | 127 | 102 | 25 |
| PHARM | - | - | - | 11 | 11 | 8 | 3 |
| MED | - | - | - | - | - | - | - |
| NELSON | - | - | - | - | - | - | - |
| LAW | - | - | - | - | - | - | - |
| VET MED | - | - | - | - | - | - | - |
| | 206 3.3% | 679 10.9% | 1,837 29.4% | 3,519 56.4% | 6,241 100% | 3,642 58.4% | 2,599 41.6% |

*Does not include 1,209 Special Students

Office of the Registrar | Academic Planning and Institutional Research, University of Wisconsin-Madison

4. Summer 2015 Enrollments by Session Length



Sample Student Time Commitment

| 3 Credit Course | Standard Course | Accelerated Course |
|------------------------------------|---------------------|-----------------------------|
| Session Length | 15 weeks | 3 weeks |
| Classroom Instruction per week | 3 hours | 15 hours |
| Sample Classroom Schedule | M, W, F 8-8:50AM | M, T, W, TH, F 8-11:00AM |
| Outside of Classroom work per week | 6 hours | 30 hours |
| Total time per week | 9 hours | 45 hours |
| TOTAL TIME COMMITMENT: | 135 hours | 135 hours |

Appendix E(b) – Summary of Summer Course Offerings

1. Ten Largest Courses at UW-Madison in Fall 2014 and Spring 2015

| SUBJECT NAME | | COURSE | FALL 2014 & SPRING 2015 ENROLLMENT (enrollment combined) | SUMMER 2015 ENROLLMENT | SUMMER 2015 ENROLLMENT CAPACITY | PERCENT FULL IN SUMMER 2015 |
|----------------------|-----|--------------------------------|--|------------------------------|--|--------------------------------|
| Chemistry | 103 | General Chemistry | 2,901 | 32 | 44 | 73% |
| Psychology | 202 | Introduction to Psychology | 2,510 | 86 | 150 | 57% |
| Economics | 101 | Principles-Microeconomics | 2,485 | 30 | 45 | 67% |
| Chemistry | 104 | General Chemistry II | 2,472 | 57 | 66 | 86% |
| Mathematics | 234 | Calc—Functns of Variables | 1,984 | 38 | 72 | 53% |
| Chemistry | 343 | Intro Organic Chemistry | 1,962 | 94 | 112 | 84% |
| Mathematics | 222 | Calculus & Analytic Geometry 2 | 1,934 | 55 | 72 | 76% |
| Mathematics | 221 | Calculus & Analytic Geometry 1 | 1,881 | 42 | 52 | 81% |
| Music | 113 | Music in Performance | 1,796 | 78 | 150 | 52% |
| Nutritional Sciences | 132 | Nutrition Today | 1,673 | — | — | — |

Academic Planning and Institutional Research, University of Wisconsin-Madison

2. Ten Largest Courses at UW-Madison in Summer 2015

| SUBJECT NAME | | COURSE | SUMMER 2015 ENROLLMENT | FALL 2014 & SPRING 2015 ENROLLMENT (enrollment combined) |
|----------------------------|-----|---------------------------------|---------------------------|--|
| Curriculum & Instruction | 630 | Prof Dev School & Community | 256 | * |
| Gender and Women's Studies | 103 | Womens Bodies-Hlth&Disease | 229 | 641 |
| Chemistry | 344 | Intro Organic Chemistry Lab | 190 | 980 |
| Pharmacy Practice | 760 | Phmceut Care Specialty Clerkshp | 184 | * |
| L&S Interdis Course | 121 | Critical Thinking & Writing ^ | 132 | * |
| Physics | 990 | Research | 132 | * |
| Mathematics | 118 | SCE Math Course ^ | 127 | * |
| Computer Science | 302 | Introduction to Programming | 126 | 1,447 |
| Law | 854 | Clinical Program | 111 | * |
| Chemistry | 345 | Intmed Organic Chemistry | 111 | 1,548 |

Academic Planning and Institutional Research, University of Wisconsin-Madison

* Not one of 100 largest courses in fall 2014 and spring 2014 combined

^ Summer Collegiate Experience course

3. Top Enrolled Online Courses at UW-Madison – Summer 2015

| SUBJECT | CAT. NUMBER | COURSE | SUMMER 2015 ENROLLMENT |
|--------------------------------------|----------------|--------------------------------|------------------------|
| GENDER & WOMEN'S STUDIES | 103 | Womens Bodies-Hlth&Disease | 228 |
| LIBRARY AND INFORMATION STUDIES | 202 | Divides&Differences-Multicultr | 103 |
| GEOGRAPHY | 340 | World Regions in Global Contxt | 98 |
| GEOGRAPHY | 342 | Geography of Wisconsin | 95 |
| CONSUMER SCIENCE | 275 | Consumer Finance | 93 |
| GENERAL BUSINESS | 310 | Acctg&Finance - Non-Bus Majors | 90 |
| LIFE SCIENCES COMMUNICATON | 251 | Science, Media and Society | 85 |
| GEOGRAPHY | 170 | Digital Globe:GIScience & Tech | 80 |
| STATISTICS | 371 | Intro Applied Stats-Life Sci | 71 |
| MANAGEMENT AND HUMAN RESOURCES | 300 | Organizational Behavior | 65 |
| POLITICAL SCIENCE | 209 | Intro to Political Theory | 61 |
| POLITICAL SCIENCE | 337 | Intl Institutns&World Order | 60 |
| ANTHROPOLOGY | 105 | Principles - Biological Anthro | 58 |
| ENGINEERING PROFESSIONAL DEVELOPMENT | 690 | Special Topics in E P D | 58 |
| LIBRARY AND INFORMATION STUDIES | 640 | Topics-Library&Informatn St | 58 |
| POLITICAL SCIENCE | 104 | Intro-Amer Politcs&Governmt | 54 |
| COMMUNICATION SCIENCES AND DISORDERS | 210 | Neural Base Comm | 52 |
| KINESOLOGY | 100 | Exercise,Nutrition,&Health | 52 |
| KINESOLOGY | 119 | Introduction to Kinesiology | 51 |

4. Most Frequent Summer Courses Transferred to UW-Madison by UW-Madison Degree-Seeking Undergraduates – Summers 2013 and 2014

| SUBJECT | CAT. NUMBER | COURSE | AVG. ANNUAL STUDENTS |
|--------------------------|-------------|------------------------------------|----------------------|
| Chemistry | 344 | Intro Organic Chemistry Lab | 136 |
| Management/HR | 300 | Organizational Behavior | 85 |
| English | X26 | (literature, Comm B elective) | 76 |
| Finance, Inv. & Bank, | 300 | Introduction to Finance | 68 |
| Psychology | 202 | Intro. to Psychology | 64 |
| Accounting & Info. Syst. | 100 | Intro. Financial Accounting | 62 |
| Economics | 101 | Principles of Microeconomics | 53 |
| Math | 221 | Calculus and Analytic Geometry I | 50 |
| Economics | 102 | Principles of Macroeconomics | 49 |
| Statistics | 301 | Intro-Statistical Methods | 49 |
| Accounting & Info. Syst. | 211 | Intro. Managerial Accounting | 42 |
| Marketing | 300 | Marketing Management | 38 |
| Psychology | 509 | Abnormal Psychology | 34 |
| Chemistry | 104 | General Chemistry II | 32 |
| Philosophy | 241 | Introductory Ethics | 29 |
| Math | 222 | Calculus and Analytic Geometry II | 22 |
| Political Science | 104 | Intro to Amer. Politics/Government | 21 |

| SUBJECT | CAT. NUMBER | COURSE | AVG. ANNUAL STUDENTS |
|-------------------------|----------------|--|-------------------------|
| Genetics | 160 | Heredity | 21 |
| Math | 234 | Calculus: Functions of Several Variables | 19 |
| General Business | 301 | Business Law | 18 |
| Anthropology | 104 | Cult. Anthropology/Diversity | 18 |
| Chemistry | 343 | Intro Organic Chemistry | 18 |
| English | 203 | Creative Writing | 17 |
| Operations & Tech. Man. | 300 | Operations Management | 17 |
| Philosophy | X26 | (ethnic studies, soc sci/hum elective) | 17 |
| Math | 112 | Algebra | 17 |
| Music | X24 | (humanities, ethnic studies elective) | 16 |
| Biological Science | X12 | (elem. bio science elective) | 15 |
| Chemistry | 345 | Intermediate Organic Chemistry | 15 |
| Chemistry | 103 | General Chemistry I | 14 |
| Physics | 103 | General Physics | 14 |
| Geography | 120 | Global Physical Environments | 12 |
| Computer Science | 302 | Introduction to Programming | 12 |
| Math | 211 | Calculus | 12 |
| Geoscience | 105 | Survey of Oceanography | 11 |

Note: A total of 587 unique courses (including electives) were transferred in the two summers represented in this table.
Academic Planning and Institutional Research, University of Wisconsin-Madison

5. Most Frequent Institutions from Which Summer Courses were Transferred – Summers 2013 and 2014

| INSTITUTION | AVG. ANNUAL STUDENTS | AVG. ANNUAL CREDITS |
|--------------------------------------|----------------------|---------------------|
| UW Colleges Online | 212 | 822 |
| UW-Whitewater | 83 | 302 |
| UW-Milwaukee | 76 | 318 |
| Madison College (formerly MATC-Mad.) | 65 | 274 |
| UW-Green Bay | 48 | 211 |
| College of DuPage (IL) | 30 | 138 |
| Oakton Community College (IL) | 28 | 118 |
| College of Lake County (IL) | 26 | 111 |
| UW Colleges – Waukesha | 25 | 92 |
| Korea University | 20 | 125 |
| UW-Eau Claire | 16 | 59 |
| Milwaukee Area Technical College | 14 | 58 |
| Harper College (IL) | 10 | 50 |
| Inver Hills Community College (MN) | 10 | 40 |
| Total | 1,588 | 6,324 |

Academic Planning and Institutional Research, University of Wisconsin-Madison

Appendix E(c) – Summer Term Committees Membership

Summer Term Committee Members (January - May 2015)

Jeffrey Russell, Vice Provost for Lifelong Learning, Dean, Division of Continuing Studies, Committee Chair

James “Jake” Blanchard, Senior Associate Dean, College of Engineering

Larry “Chip” Hunter, Associate Dean, Wisconsin School of Business

Jocelyn Milner, Director, Academic Planning and Institutional Research

James Montgomery, Associate Dean, College of Letters & Science

Timothy Norris, Associate Vice Chancellor, Madison Budget Office

David Rosenthal, Associate Dean, School of Education

Karl Scholz, Dean, College of Letters & Science

Staff to Committee

Sarah Barber, Summer Term Director, Division of Continuing Studies

Laura Ingram, Associate Dean, Division of Continuing Studies

Scott Owczarek, Registrar, Office of the Registrar

Keri Johnson, Special Projects Coordinator, Division of Continuing Studies

Implementation Committee and Subcommittee Members (August 2015 - Present)

**indicates Implementation Committee member*

Jeffrey Russell, Vice Provost for Lifelong Learning, Dean, Division of Continuing Studies, Committee Chair*

Lori Berquam, Vice Provost for Student Life and Dean of Students, Division of Student Life*

James “Jake” Blanchard, Senior Associate Dean, College of Engineering*

Michelle Holland, Academic Service Coordinator, Graduate School*

Jocelyn Milner, Director, Academic Planning and Institutional Research*

Karen Mittelstadt, Assistant Dean, School of Nursing*

James Montgomery, Associate Dean, College of Letters and Science*

Timothy Norris, Associate Vice Chancellor, Madison Budget Office*

Elizabeth Odders-White, Senior Associate Dean, School of Business*

David Rosenthal, Associate Dean, School of Education*

Steven Smith, Secretary of the Faculty*

Judith Strand, Associate Dean, Division of Continuing Studies*

Richard Straub, Senior Associate Dean, College of Agricultural and Life Sciences*

Cheryl Adams Kadera, Assistant Dean, College of Letters and Science

Timothy Gattenby, Distinguished Faculty Associate, School of Education

Anne Gunther, Associate Dean, College of Letters and Science

Carol Hillmer, Assistant Dean, College of Agricultural and Life Sciences

Kris Olds, Professor, College of Letters and Science

Mark Walters, Director, Office of Human Resources

Brian Ward, Assistant Director, University Housing

Associated Students of Madison (ASM) student representative

Staff to Committees and Subcommittees

Sarah Barber, Summer Term Director, Division of Continuing Studies

Ann Bourque, Budget and Policy Analyst Advanced, Madison Budget Office

Catherine DeRubeis, HR Specialist Advanced, Office of Human Resources

Stephen Elmer, Accountant, Division of Continuing Studies

Clare Huhn, Senior Policy Analyst, Academic Planning and Institutional Research

Laura Ingram, Associate Dean, Division of Continuing Studies

Keri Johnson, Special Projects Coordinator, Division of Continuing Studies

Appendix F: Summer Term Steering Committee DRAFT

Summer Term Steering Committee

The Summer Term Steering Committee (STSC) assists with setting the vision and implementing improvements for the Summer Term Office. The STSC advises the Provost, Dean of the Division of Continuing Studies, and the Summer Term Office by evaluating and making recommendations about expansion efforts and campus-wide policy that are in the best interest of students and the institution. The STSC coordinates when appropriate with the Summer Deans Council.

Possible Summer Term Steering Committee Members

Jeffrey Russell, Dean, Division of Continuing Studies

Lori Berquam, Associate Vice Chancellor, Division of Student Life (DSL) (or DSL representative)

Steve Hahn, Associate Vice Chancellor, Enrollment Management

Jocelyn Milner, Associate Provost, Office of Academic Planning and Institutional Research

James Montgomery, Associate Dean, College of Letters and Science

Sarah Pfatteicher, Associate Dean, College of Agricultural and Life Sciences

Wren Singer, Director, Undergraduate Advising Office

Mark Walters, Director, Office of Human Resources (or OHR representative)

Dorothy Farrer-Edwards, Professor and Chair, Kinesiology

John Zumbrunnen, Professor, Political Science (or other faculty representative)

University Committee Representative

Academic Staff Executive Committee Representative

University Staff representative

Student representative

Staff

Sarah Barber, Director, Summer Term

DCS Budget Officer