

# Economic Development Incentive Grant 2013-14 Annual Report

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<b>Institution Name(s): UW-La Crosse</b>	<b>Project Title: Expansion of Statistical Consulting Center to Serve Business Needs</b>
<b>Principal Investigator: Barbara Bennie</b>	<b>Person submitting Report: Sherwin Toribio</b>
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<b>Grant Award Amount: 126,248.00</b>	<b>Report Date: July 18, 2014</b>
<b>Grant Funding Spent (to date): 39,232.81</b>	<b>Date project began: December 2013</b>
	<b>Date project ends (projected): July 2015</b>

## I. Status Report

The Statistical Consulting Center (SCC) at the University of Wisconsin-La Crosse (UW-L) has accomplished most of its goals for FY14 for this incentive grant project:

- Created a marketing plan,
- Created fee schedule for consulting services,
- Created a standard consulting contract/agreement,
- Created promotion materials (postcards, brochure, and poster),
- Developed the SCC website for off-campus clients, and
- Setup the structure for accounting and billing clients.

We have also sent out promotion materials to several local businesses and institutions. So far, five clients have made initial contact. Four of the 5 have setup an initial meeting to discuss their data and potential project. One has already availed the services of the statistical center.

## II. Updated Goals/Performance Metrics and Assessment Plans

*See spreadsheet.*

### III. Project/Program Budget and Expenditures

Please provide a report of project/program expenditures detailed by category and source of funds.

#### Budget for Incentive Grant funding

Description	Amount	Fringe
SCC Director		
2013-14 (6 credit release for Spring 2014)	12,000.00	6,174.00
2014-2015 (Summer 2014 support, 6 credit release for Fall 2014 and Spring 2015)	32,000.00	16,464.00
Statistics summer internship support (2 for Summer 2014)	10,000.00	271.00
Statistics semester intership support (2 per semester, Fall 2014/Spring 2015)	6,000.00	162.60
Marketing intern, Summer 2014	5,000.00	135.50
Website development intern, Spring 2014	1,500.00	40.65
Computer hardware (3 computers to stay in consulting center for director + 2 interns, secu	10,000.00	
Software licensing	10,000.00	
Accounting fees (approximately 20 hours @ \$200 per hour)	4,000.00	
Legal consulting fees (approximately 10 hours @ \$250 per hour)	2,500.00	
Marketing costs	10,000.00	
Total		126,247.75

#### Budget for funds received from consulting clients during the 2013-2015 biennium

Instead of providing an initial five hours of statistical support free of charge to new clients, we have decided to offer a 60% fee discount to the first project of new clients through December 2014. This is to attract new clients and to not give the impression that our services are free of charge. All revenue received from SCC clients during the 2013-2015 biennium will be used to support the operation of the SCC in the following year (faculty director, student internships, marketing, etc).

### IV. Changes

A portion of the marketing budget for Spring 2014 was used to hire a marketing intern student to help develop a marketing plan for SCC. A total of \$1500 out of the \$10,000 was used for this purpose.

**UW System Incentive Grant  
General Outcomes/Goals Reporting Matrix  
2013-14**

Incentive Grant Program Name: Expansion of Statistical Consulting Center to Serve Business Needs  
Funding Allocation: \$126,248

#	Performance Outcomes Descriptions	Assessment Plan Description	Projected Goals 2013-14	Actual 2013-14 Outcomes	Projected Goals 2014-15
1	Establish legal infrastructure for external consulting	Standard consulting contract/agreement	A standard consulting contract/agreement exists and is approved by a legal advisor	A standard consulting contract/agreement exists and is approved by the university legal advisor	
2	Establish accounting infrastructure for external consulting	Communications with UW-L Business Services	Clear procedures exist for receiving and making payments	Clear procedures exist for receiving and making payments	
3	Develop and implement a strategic marketing plan	Marketing plan that is developed by Spring 2014 class MKT 365: Promotions	Marketing plan is clearly laid out and tied to the needs of area businesses	A marketing plan was created by the marketing intern student and the director of the statistical consulting center. None of the students from the Spring 2014 MKT 365 class wanted to do the project.	Marketing plan is fully implemented within the biennium and operates within the budget constraints of the SCC
4	Steadily grow a base of external clients	Number of clients and number of projects completed	At least 2 clients established and at least 2 projects initiated	Five clients have made initial contact. Four of the 5 have setup an initial meeting to discuss their data and potential project. One has availed the services of the statistical center.	At least 10 clients established and at least 12 projects completed
5	Provide quality statistical consulting service	Client feedback survey		The one client who availed the services of SCC was very satisfied with the quality of the analysis, timeliness, and professionalism of the SCC	At least 95% of clients report satisfaction with overall experience, timeliness, and professionalism of the SCC
6	Create a fee schedule for consulting services	A report that forecasts the financial sustainability of the SCC and associated fee schedule	Approval of fee schedule by UW-L institutional competition review committee	A fee schedule for consulting services has been created.	Forecasting report strongly suggests long-term sustainability of the SCC
7	Provide high quality internship experiences for six statistics students	Products of the students' work including both written and verbal consulting reports and exit survey about the student experience		Two statistics students have accepted the summer 2014 internship position.	Clients report satisfaction or better regarding the students' work and students report that experience was valuable or better
8	Provide a high quality internship experience for one marketing student	Products of the students' work and exit survey about the student experience		One marketing student accepted the spring 2014 internship position and the summer 2014 internship position.	Marketing strategy is successfully implemented by the student and student reports that experience was valuable or better
9	Provide a high quality internship experience for one computer science student	SCC website that the student created and exit survey about the student experience	SCC website is complete, informative, and easy to navigate and student reports that experience was valuable or better	The SCC website is complete, informative, and easy to navigate.	

# UW System Incentive Grant Program

## Required Program Goals/Outcomes Reporting Matrix

### 2013-14

#### Economic Development Goals and Results

Economic development program" means a program or activity having the primary purpose of encouraging the establishment and growth of business in this state, including the creation and retention of jobs, and that satisfies all of the following:

1. The program receives funding from the state or federal government that is allocated through an appropriation under ch. 20
2. The program provides financial assistance, tax benefits, or direct services to specific industries, businesses, local governments, or organizations.

Performance Categories	Goals		Actual Outcomes 2013-14	Accomplished Goal? Yes or No	Notes
	Projected 2013-14	2014-15			
# of Jobs Created	0	0			
# of Jobs Retained	0	0			
# of Businesses Assisted	at least 2	at least 12	1	No	Other clients who setup an initial meeting with SCC are still waiting for approval for funds to pay for consulting services for their projects. Also, we started promoting the SCC later because we had to make sure that we have the legal, accounting, and billing structures setup and all the promotion materials and website developed.

Additional Goals/Outcomes	Goals		Actual Outcomes 2013-14	Accomplished Goal? Yes or No	Notes
	Projected 2013-14	2014-15			

## 2013-14

c. Increasing or enhancing research and development.

Goals		Actual Outcomes 2013-14	Accomplished Goal? Yes or No	Notes
Projected 2013-14	2014-15			
1	7	1	Yes	

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# UW System Incentive Grant Program

## Required Program Goals/Outcomes Reporting Matrix

### 2013-14

#### Improve the Affordability of Higher Education

Programs that Improve the Affordability of Higher Education for Resident Undergraduates, including:

- a. Reducing the time required to obtain a degree
- b. Increasing the opportunities available for high school pupils to earn credit toward a postsecondary degree; and
- c. Improving the transfer of credit between institutions of higher education.

#### Reducing the Time required to obtain a Degree

Goals	Anticipated Completion Dates	Actual Completion Dates	Accomplished Goal? Yes or No	Notes

#### Increasing the Opportunities available for High School Pupils to earn Credit toward a Postsecondary Degree

Goals	Anticipated Completion Dates	Actual Completion Dates	Accomplished Goal? Yes or No	Notes

#### Improving the transfer of Credit between Institutions of Higher Education

Goals	Anticipated Completion Dates	Actual Completion Dates	Accomplished Goal? Yes or No	Notes
			NA	