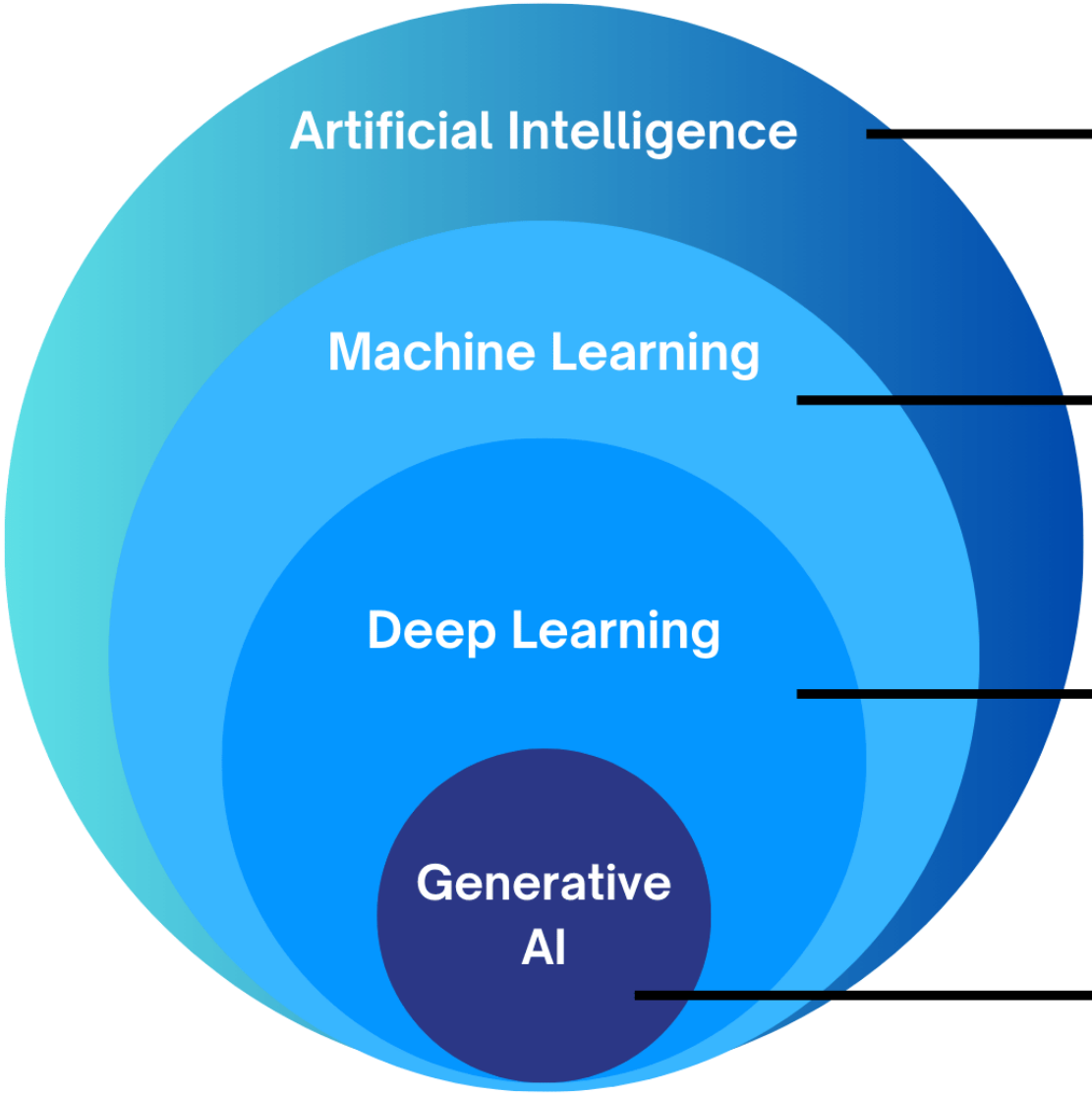
UNIVERSITIES OF WISCONSIN

AI LANDSCAPE REVIEW IN FINANCE & ADMINISTRATION

Board of Regents' Business & Finance Committee
February 5, 2026



AI - machines that mimic human intelligence to perform tasks like problem-solving and decision-making.

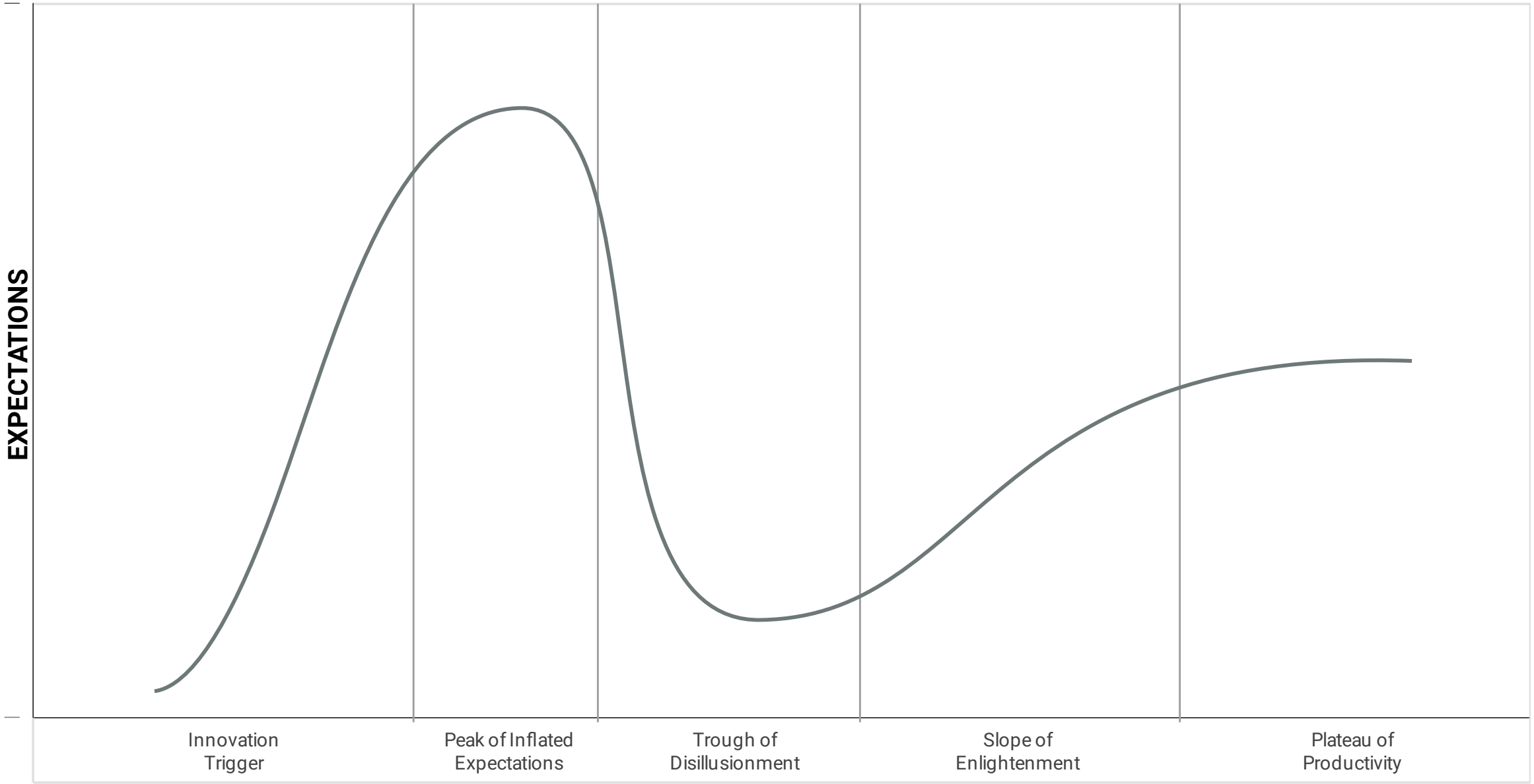
ML - machines learn from data to improve their performance without explicit programming.

Using Neural Networks with multiple layers to analyze data, inspired by the human brain's structure.

AI that creates new content, like text, images, or music, based on learned patterns from data.

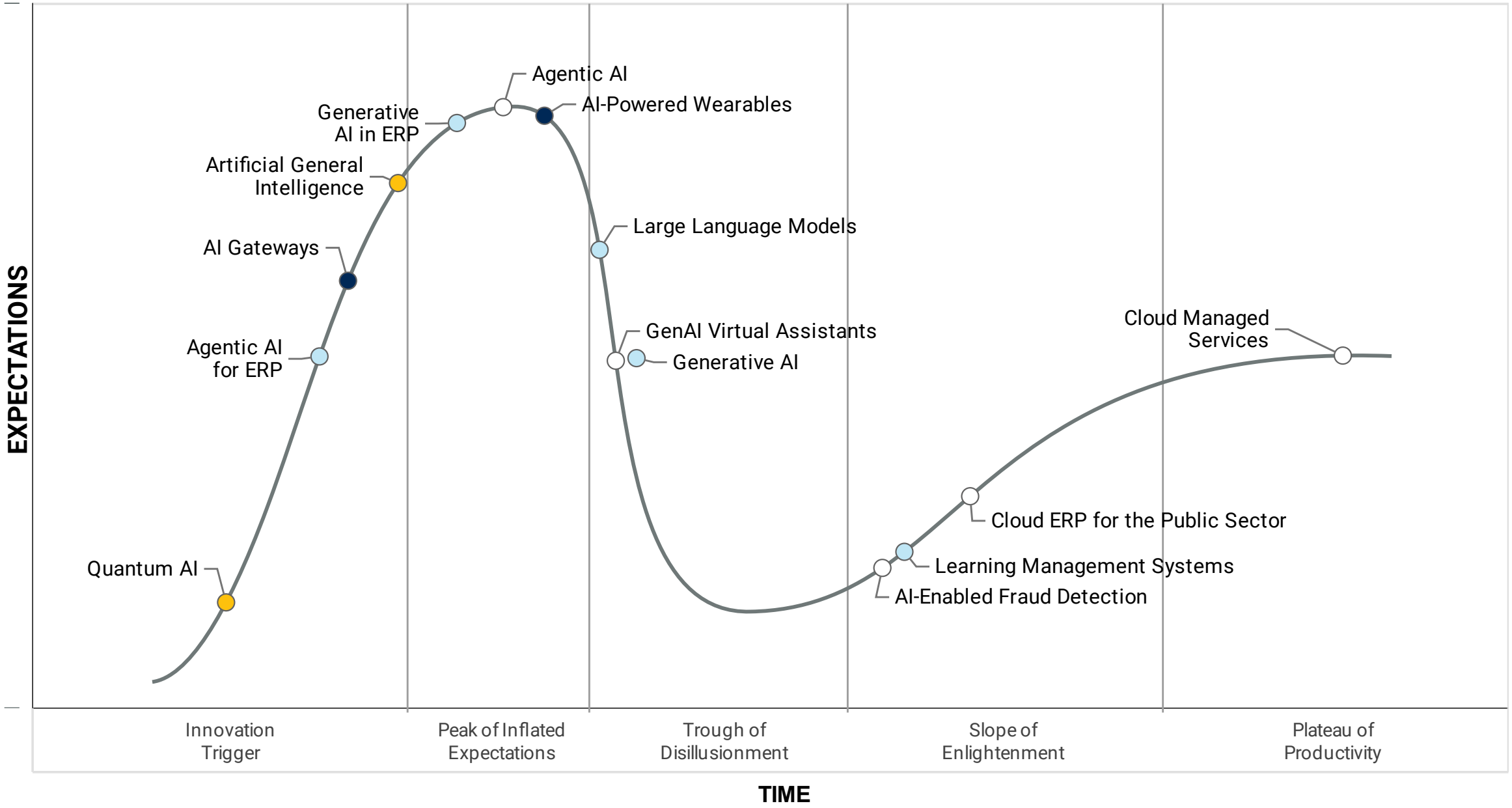
Source: zequance.ai

Gartner Hype Cycle - Technological Maturity Model



Plateau will be reached: ○ <2 yrs. ○ 2–5 yrs. ● 5–10 yrs. ● >10 yrs. ⊗ Obsolete before plateau

Hype Cycle for AI and Other Technologies



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AI-GENERATED REVIEW OF LEADING UNIVERSITY SYSTEMS IN UNITED STATES

- Microsoft Co-Pilot/GPT 5.1 & Google Gemini 3
- Series of Research Prompts & AI Analysis
  - ✓Identification of 9 Pillars
  - ✓Leading Higher Education Systems within Pillars
  - ✓WI Maturity Ranking & Overview
- Select activities at UWsA & UW universities were identified by staff

AI-Generated Review of Leading University Systems in United States

- Degree Programs
- Financial Management
- Integrated Data
- Industry Partnerships
- Optimizing Performance
- AI Ready Campus
- Advancing Research
- Automating Workflows
- AI Governance

AUTOMATING ADMINISTRATIVE WORKFLOWS

Universities are using AI to streamline high-volume, repetitive tasks:

- Document processing (invoices, contracts, HR forms)
- Chatbots for financial (payroll, travel) and student services (financial aid, bursar, registrar)
- Scheduling tasks
- Predictive maintenance for facilities management

AUTOMATING ADMINISTRATIVE WORKFLOWS

- Introduced proactive AI chatbots that provide direct resource routing
- UH integrates AI tools to automate routine tasks such as invoice processing, approval workflows, and flagging inconsistencies in financial aid applications

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- Monitoring of approximately 44,000 components across buildings and infrastructure systems
  - ✓ Useful Life Tracking
  - ✓ Automated Investment Planning
  - ✓ Critical System Monitoring
  - ✓ Predictive Analytics for Operations & Scheduling

- Campuses have automated administrative inquiries and document workflows
- UC Berkeley and UC Riverside offer internal where departments can pilot automated workflows in a secure environment

AUTOMATING ADMINISTRATIVE WORKFLOWS

"The Universities of Wisconsin (UW) System ranks as a leading innovator in administrative automation, distinguished more by its institutional process redesign and high IT service satisfaction than by traditional third-party administrative rankings"
Gemini

- Workday is providing the foundation for AI-enabled workflows and innovation
- Drafting position descriptions and reviewing them for alignment with common industry standards
- Launched a chatbot to address tier 0 and tier 1 level questions from employees regarding payroll, leave reporting, purchasing, and more
- Developed repository of justification narratives for UW capital projects to ease the development of narratives for new projects

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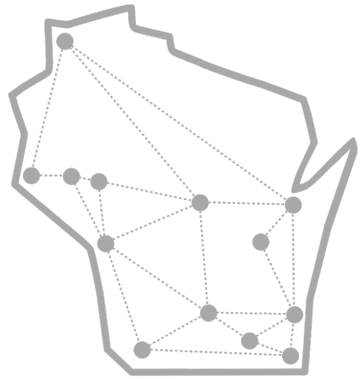
Maturity Rank:



OPERATIONAL & FINANCIAL PERFORMANCE OPTIMIZATION

Universities are using AI to improve efficiency and reduce costs in key areas:

- Procurement optimization
- Energy and facilities management
- Enrollment and retention analytics
- Staffing and workload modeling

OPERATIONAL & FINANCIAL PERFORMANCE OPTIMIZATION

University of Missouri System

STATE UNIVERSITY SYSTEM OF FLORIDA

UNIVERSITY OF CALIFORNIA

- AI models identify patterns in energy demand, equipment performance, and system efficiency
  - ✓ Using machine learning to optimize campus-wide energy use
  - ✓ Analyzing six years of operational data to improve efficiency
  - ✓ Reducing operational costs and carbon emissions

- AI-powered early intervention systems to identify students at risk of departing before they fall into academic or financial crisis
  - ✓ Natural language processing is used to detect signs of stress and well-being issues in student communications
  - ✓ AI-driven academic support, reducing the administrative burden on faculty while improving student persistence

- AI-powered spend visibility dashboards
- AI analytics used to identify waste, improve purchasing decisions, and strengthen accountability

OPERATIONAL & FINANCIAL PERFORMANCE OPTIMIZATION

"By standardizing more than 700 disparate systems into a unified, AI-enabled cloud infrastructure, the system has positioned itself as an "AI-powered organization" designed to drive productivity and institutional vibrancy" Gemini

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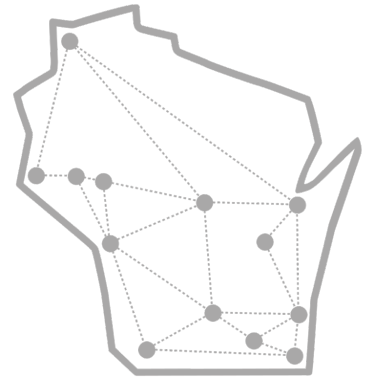
- UW-Green Bay has adopted AI tools to improve the procurement process for end users and improve administrative efficiencies
- UW-Whitewater is utilizing AI-based camera tools to solve issues related to facilities, physical space maintenance, and planning
- UWsA loads Request for Proposals and vendor questions into AI to assist in drafting answers and responding efficiently to interested vendors

Maturity Rank:



AI-DRIVEN FINANCIAL MANAGEMENT

Finance offices are adopting AI to improve visibility, forecasting, and cost control:

- Real-time financial dashboards integrating data across systems
- Predictive analytics for enrollment, tuition revenue, and budget modeling
- AI-enhanced expense management to detect anomalies and automate approvals
- Scenario planning to navigate enrollment declines and budget constraints

AI-DRIVEN FINANCIAL MANAGEMENT

- Recognized as a national leader in AI-driven financial management:
  - ✓ Accelerate budget creation
  - ✓ Identify budget variances
  - ✓ Perform market analysis for new academic programs to ensure positive ROI on investments

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- ASU leverages AI-powered accounts payable assistants to handle over 90% of vendor and payment inquiries automatically
- Budget frameworks utilizes AI-enhanced insights to prioritize administrative savings

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- USG uses unified data from all campuses for macro-level forecasting:
  - ✓ Predictive Analytics Dashboards: Custom statistical models to track admissions and enrollment likelihood
  - ✓ Yield & Revenue Protection: AI models analyze "summer melt" risk

AI-DRIVEN FINANCIAL MANAGEMENT

"The University of Wisconsin System is a strong regional performer in AI-driven financial management—anchored by a systemwide Workday rollout and campus shared-services pilots—but it is still maturing compared with the largest U.S. systems" MS Co-Pilot

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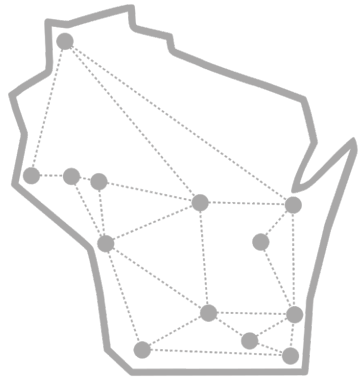
Maturity Rank:

- Workday is providing the foundation for AI-enabled workflows, analytics, and innovation
- EAB Navigate Analytics more effectively identifies and provides necessary student support
- UWsA has developed modeling analytics for long-term enrollment outlook



INTEGRATED DATA ECOSYSTEMS

Leading universities are investing in unified data platforms:

- Connecting siloed systems (ERP, CRM, LMS, HRIS, finance) to enable AI-driven insights
- Data quality and governance initiatives to ensure reliable inputs for AI models
- Cloud-based architectures to support scalable analytics and automation

INTEGRATED DATA ECOSYSTEMS

UNIVERSITY OF CALIFORNIA

- UCLA has implemented a comprehensive data lakehouse as a campus-wide data repository.
- UC San Diego is developing an AI assistant to allow employees to use natural language to query their data warehouse
- System is actively sharing its data architecture to rapidly deliver data for AI, analytics, and reporting

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ARIZONA BOARD OF REGENTS
ASU ◆ NAU ◆ UA

- Using Amazon Web Services to create cloud-based AI environments allows the ASU community to prototype and launch AI-driven solutions without deep technical expertise

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UNIVERSITY OF MICHIGAN

- U-M utilizes a long-standing data governance structure (established in 1994):
  - ✓ Streamlined Data Stewardship: consistent quality guidelines and alignment with university policy
  - ✓ Data Quality Assessments: The university fosters a culture of "data citizenship," where faculty and staff perform quality assessments and identify appropriate, ethical data sources.

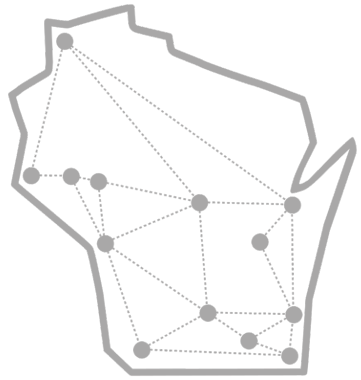
INTEGRATED DATA ECOSYSTEMS

"The Universities of Wisconsin System ranks as a strong, well-governed regional leader in building an integrated data ecosystem for AI—anchored by a systemwide Enterprise Analytics Platform and formal data governance—but it is still maturing compared with the largest U.S. systems that have multi-campus, long-standing, productionized data lakes and analytics platforms" MS Co-Pilot

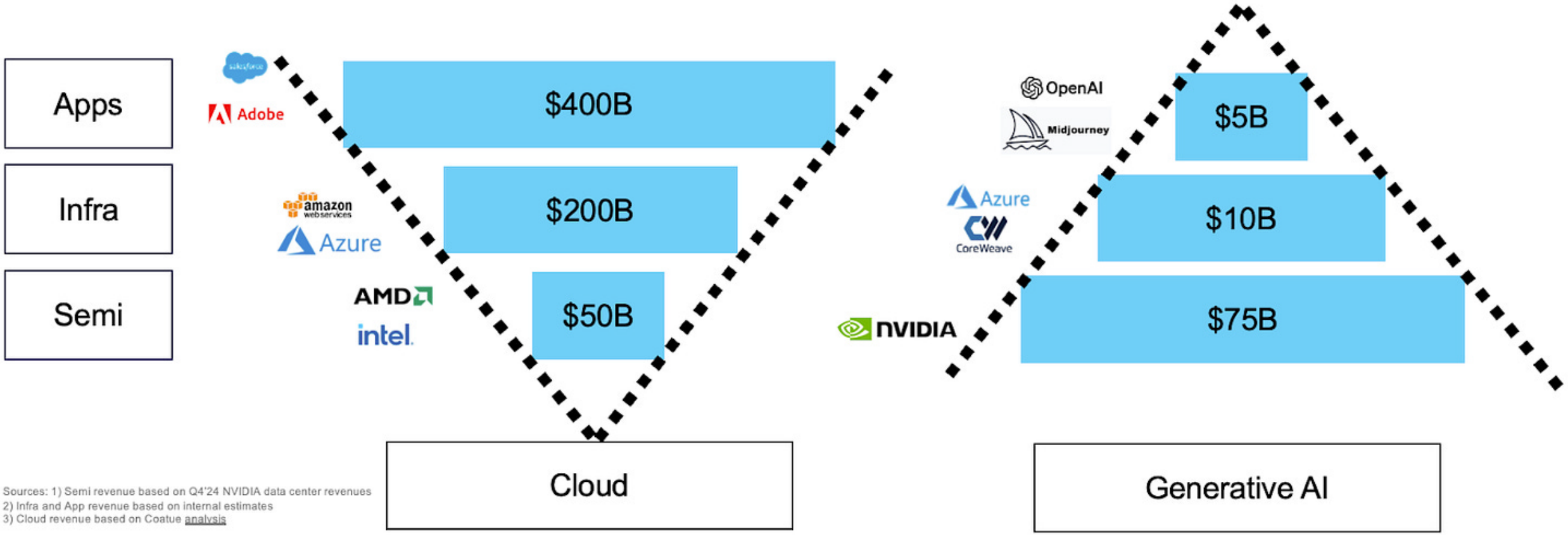
- Created the Enterprise Analytics Platform (initially with HR and finance data) to integrate data across multiple silos, thus creating a data pipeline to facilitate AI-enabled analytics
- Implementing a student data modernization project to co-locate student and curricular data with HR/finance data to unlock additional insight
- Faculty & research staff at UW Madison have access to collaborative high performance computing resources at the Center for High-Throughput Computing

UNIVERSITIES OF WISCONSIN

Maturity Rank:



Where does value accrue in the Gen AI stack? *(Est. Annual Revenue)*



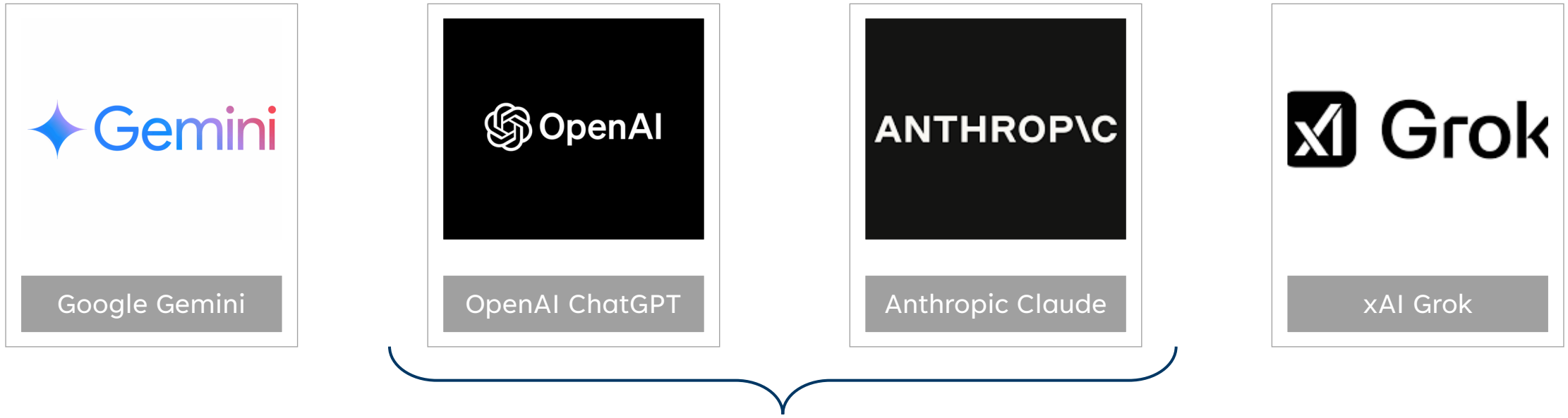
Sources: 1) Semi revenue based on Q4'24 NVIDIA data center revenues
2) Infra and App revenue based on internal estimates
3) Cloud revenue based on Coatue analysis

@apoorv03

ALTIMETER

Source: Apoorv Agrawal

Foundational Large Language Models (LLMs)



- 4 foundational proprietary LLM models
- Other AI tools generally leverage one of these foundational models to deliver service
- Microsoft CoPilot is a combination of ChatGPT (mostly) and Claude (growing)

Copilot

UW licensed for CoPilot Chat for all faculty, staff, and students

- Models are **NOT** inter-changeable as each has strengths and weaknesses
- Cost prohibitive to provide universal access to a single model, much less multiple models
- But significant cybersecurity and privacy concerns when students/staff use the “free” versions

AI-TECH FOR EVERYDAY: TOOL LANDSCAPE & COSTS

	All Universities of Wisconsin	UW-Madison Specific (Will be unique to each university as they contract for these services separately)		
Enterprise Tools	Microsoft	Google	OpenAI	ANTHROP\C
Available to All	**CoPilot Chat** (part of system-level contract)	**Gemini for Education** (part of UW-Madison license & include NotebookLM)	N/A	N/A
Cost per user/year (before volume discount)	**M365 Copilot** (integrate with user data) ~$192/user/year	**Google AI Pro for EDU** (Advanced Features & Models) ~$180/user/year	**ChatGPT EDU** cost dependent on # users licenses ~$78 to $180 /user/year	**Claude for EDU** cost dependent on # users licenses ~$180/user/year
Consumption based costs	Copilot Studio Azure AI Foundry	AI Studio Workspace Studio	Advanced Model Credits API Access	Claude API for research and tools

Source: UW-Madison Division of Information Technology (DoIT)

As of January 2026

QUESTIONS?