The Madison Initiative for Undergraduates

Business, Finance, and Audit Committee

Board of Regents

May 7, 2009
What are the goals of The Madison Initiative?

- Improve access to courses and majors
- Expand and enhance a potential array of critical student services
- Increase affordability for low and middle income students
The Madison Initiative

Improve access to courses and majors

Restoration of 100 faculty and instructional support positions will:

- Eliminate bottlenecks in key courses
- Improve access to prerequisites and majors
- Avoid increased time to degree
The Madison Initiative

Expand and enhance a potential array of critical student services

- Increase academic and career advising
- Increase peer mentoring programs
- Bolster campus safety
- Expand tutoring support
- Strengthen sexual assault prevention programs
The Madison Initiative

Increase affordability for low and middle income students

- Currently - inadequate need-based financial aid
- Establish pool comprised of differential tuition and private gifts
- Proposed – student will not pay differential increase if they have AGI $80,000 or less and reflect financial need
- 6,100 students estimated to qualify for hold harmless provision
### 4 year funding requirements (millions)

What will the funding support?

<table>
<thead>
<tr>
<th>Enhancements</th>
<th>Year-4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty and instructional support</td>
<td>$15.50</td>
</tr>
<tr>
<td>Curricular innovation &amp; student services</td>
<td>5.10</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>20.40</td>
</tr>
<tr>
<td></td>
<td>$41.00</td>
</tr>
</tbody>
</table>
The Madison Initiative

What will students pay?

- Resident Undergraduate*: $250 annually – 4 years
- Nonresident Undergraduate*: $750 annually – 4 years
- Graduate Resident/Nonresident: no increase

*Will not have to pay increase if they reflect financial need and AGI $80,000 or less
The Madison Initiative

Student/private funding partnership

Sources of funds – 4 years:

Tuition $31.0 million
Private* 10.0 million

$41.0 million

*50% of $20 million need-based financial aid increase
Historically, resident undergraduate tuition is in the lower half of the Big 10 peers.

The proposed increases ($250 annually - $1,000 year 4) will move Madison from 9th to 7th for resident undergraduates by FY 2013.

The proposed increases ($750 annually - $3,000 year 4) will move Madison from 9th to 5th for non-resident undergraduates by FY 2013.
The Madison Initiative

Accountability

- The Madison Initiative Oversight Board will be created – comprised of faculty, staff and students to review annually the Madison Initiative and offer recommendations to the Chancellor as needed.

- As with other differential tuitions, the Board of Regents will review on a 5-year cycle.
Why support The Madison Initiative?

- Emphasis on quality and affordability
- Emphasis on enhancing student services
- Nearly unanimous support from ASM
- Very strong support from campus, alumni, community, and more
- Ensures accountability with annual review by oversight board
Madison Initiative for Undergraduates

A Proposal to Invest in the Quality, Value and Affordability of Undergraduate Education

May 7, 2009
Pre-Proposal Information Gathering

- Concerns rising about faculty losses
- Alumni concerned with potential erosion of quality
- Students facing course bottlenecks, worried about timely graduation
Preserving Quality

• Over the past 160 years, Wisconsin has built a world-class institution

• Ranked 17th in Academic Ranking of World Universities

• Ranked 3rd nationally in external R&D funding

• A top producer of Peace Corps volunteers

• A leader in number of S&P 500 CEOs
### Madison Initiative for Undergraduates

#### Program Budget

<table>
<thead>
<tr>
<th></th>
<th>FY 10</th>
<th>FY 11</th>
<th>FY 12</th>
<th>FY 13</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Faculty &amp; Instructional Support</strong></td>
<td>$3,875,000</td>
<td>$7,750,000</td>
<td>$11,625,000</td>
<td>$15,500,000</td>
</tr>
<tr>
<td><strong>Curricular Innovation &amp; Student Services</strong></td>
<td>$1,275,000</td>
<td>$2,550,000</td>
<td>$3,825,000</td>
<td>$5,100,000</td>
</tr>
<tr>
<td><strong>Financial Aid</strong></td>
<td>$5,100,000</td>
<td>$10,200,000</td>
<td>$15,300,000</td>
<td>$20,400,000</td>
</tr>
<tr>
<td><strong>Total Budget</strong></td>
<td>$10,250,000</td>
<td>$20,500,000</td>
<td>$30,750,000</td>
<td>$41,000,000</td>
</tr>
</tbody>
</table>
Projected Academic Year Tuition & Required Fees
For Full-time Undergraduates at Public Big Ten Universities, By State Residency

- Big Ten In-State (Median)
- Big Ten Out-State (Median)
- Wisconsin In-State
- Wisconsin Out-State

Tuition & Required Fees

Academic Year

Projected Actual

- 1994-95
- 1995-96
- 1996-97
- 1997-98
- 1998-99
- 1999-00
- 2000-01
- 2001-02
- 2002-03
- 2003-04
- 2004-05
- 2005-06
- 2006-07
- 2007-08
- 2008-09
- 2009-10
- 2010-11
- 2011-12
- 2012-13

Projected vs. Actual tuition and fees for Full-time Undergraduates at Public Big Ten Universities, by State Residency, showing trends from 1994-95 to 2012-13.
Need-Based Financial Aid

- We currently have $20 million in unmet need
- Initiative will create pool of financial aid resources to help our neediest students and will increase applications for aid
- The hold-harmless provision represents a fraction of the total financial aid pool that will be available
- Goal is to exceed tuition dollars raised with private giving
- Adjusted gross income (AGI) of $80,000 was selected because median family income in Wisconsin is $62,000
- AGI is fairest in providing aid to neediest families
Faculty and Instructional Support

- Increase the number of faculty teaching in undergraduate courses
- Improve access to high-demand majors
- Increase access to high-demand courses
- Decrease bottlenecks
Student Services, Curricular Innovation and Pedagogical Improvement

- Freshmen Interest Groups
- Undergraduate Research Scholars
- Residential Learning Communities
- Capstones, Internships and Service Learning
- Academic Technologies
- Peer Mentoring Programs
- Career Advising
- Transfer Student Office
- Tutoring Support
Pursuing Private Support

• Need-based aid identified as campus-wide fundraising priority

• Intensify *Great People Scholarship Campaign*

• Strategic multi-tiered approach
  – High-capacity individuals
  – Mid-level donors
  – Corporations and foundations
  – Leverage new technology for smaller annual giving
Listening and capturing input:

- Forums
- Presentations
- ASM, student groups, meetings
- Department and college meetings
- Informal discussions
- Online feedback, surveys
  - more/improved academic advising
  - more/improved career advising
  - technological innovations in classroom
  - tutoring
  - support for underrepresented populations
  - student organizational support
Plan Improved with Engagement

• Advisory Oversight Committee
• Assessment and evaluation
• Ideas about improved pedagogy
• Peer mentoring proposals
• Priority for areas that serve students from more than one college
• Greater details for spending proposals
• Improved focus on technology and learning needs
• Greater clarity about financial aid and hold-harmless provisions
• Peer mentoring from WISCAPE to increase the number of students applying for financial aid
How will students, faculty and staff continue to be involved?

• Shared governance oversight committee of faculty, staff and students

• Specific student subcommittee to address student services component

• Role in accountability, ongoing evaluation
Faculty and Instructional Support Requirements

- Departmental commitment to improving undergraduate education
- Demonstrate need in terms of high-demand courses and majors
- Regular budget decision-making methods will be used
- Accountability to initiative oversight committee
Gary Sandefur
Dean, Letters and Science
University of Wisconsin-Madison
Letters & Science

Since 1993

- 12% decline in faculty
- 20% increase in student enrollment

Since 2004 through Spring 2009

- Lost 66.55 faculty positions
Improving Undergraduate Education

• Bottlenecks and High-Demand Courses
  – Economics
  – Spanish
  – Chemistry

• Freshman Interest Groups
• Academic Advising
Letters of support convey examples of need

• Economics
• Journalism
• School of Human Ecology
• International Studies
• Political Science
• Social Work
Economics

• Over 10 years ... majors have doubled and faculty have dropped from 29 to 25

• Waitlists for all advanced core courses

• Even senior majors are on waitlists

• Career advisors

• Madison Initiative could add 10 faculty, 20 TAs
Journalism

- Only 40% of students accepted into major
- Reliance on part-time lecturers
- Many seniors denied access to capstone courses
- Signed by more than 20 alumni respected nationally
- Madison Initiative could add 5 faculty, 5 TAs
Political Science

• Since 2000, the number of faculty has decreased by 20% while number of majors has increased by 85%

• Attempts to maintain small class size to maintain quality
Undergraduate Student Success at UW–Madison

- First-year Experience & First-year Interest Groups
- Access to Courses
- Access to Majors
- Access to Tenure-Track Faculty
- Innovative Classroom Experience
- Need-Based Financial Aid
- Academic / Career Advising