

BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM

Business and Finance Committee

Thursday, February 10, 2022
10:30 a.m. – 12:00 p.m.

Union South, Varsity Hall I
1308 W. Dayton Street
Madison, Wisconsin

- A. Calling of the Roll
- B. Declaration of Conflicts
- C. Approval of the Minutes of the December 9, 2021 Meeting of the Business and Finance Committee
- D. UW-Madison Presentation – “Strategic Investments - Opportunities and Challenges for UW-Madison”
- E. UW System Semi-Annual Status Report on Large/High-Risk Information Technology Projects
- F. UW System Report on Strategic Plans for Major Information Technology Projects
- G. UW System Amendment to Service Agreement with Huron Consulting Group, Inc.
- H. UW System Amendment to Service Agreement with EAB Global, Inc.
- I. UW-Madison Sponsored Research Agreement with RxMapper, LLC
- J. UW-Madison Standard Research Agreement with eGenesis, Inc.
- K. UW-Madison Clinical Study Agreement with Fate Therapeutics, Inc.
- L. Semi-Annual Budget-to-Actuals Report
- M. Semi-Annual Report of Gifts, Grants, and Contracts

February 10, 2022

UW SYSTEM STATUS REPORT ON LARGE/HIGH-RISK INFORMATION TECHNOLOGY PROJECTS

REQUESTED ACTION

Adoption of Resolution E., approving submission of the required reports to the legislative Joint Committee on Information Policy and Technology.

Resolution E. That, upon the recommendation the President of the UW System, the UW System Board of Regents approves: (1) the UW System Status Report on Large/High-Risk Information Technology Projects dated February 10, 2022; and (2) UW System Administration's submittal of the report on the Board's behalf to the legislative Joint Committee on Information Policy and Technology, as required by [s. 36.59\(7\), Wis. Stats.](#)

SUMMARY

The Status Report on the Large/High-Risk Information Technology Projects provides the Board of Regents with the information it needs to execute appropriate oversight over the large and high-risk IT projects across the UW System.

Presenter

- Steven Hopper, Associate Vice President for the Office of Learning and Information Technology and Chief Information Officer, UW System Administration

BACKGROUND

[Section 36.59, Wis. Stats.](#), requires that by no later than March 1 and September 1 of each year, the Board of Regents submit to the Joint Committee on Information Policy and Technology a report that documents each information technology project within the system with an actual or projected cost greater than \$1,000,000 or that the board has identified as a large, high-risk information technology project.

[Regent Policy Document 25-4](#) implements the requirements of [s. 36.59, Wis. Stats.](#), which coordinates information technology strategic planning across the UW System, and specifies management and reporting requirements related to large or high-risk information technology projects.

Attached is a dashboard along with individual progress reports on the UW System's major information technology projects. There are fourteen (14) major projects to report.

	Institution	Project Name	Milestone since Aug. BOR Meeting
1	UW-Madison	Campus Access Controls Replacement	Completed Phase 1
2	UW-Madison	DOA Datacenter Migration	None to Report
3	UW-Madison	Endpoint Management	Completed Under Budget
4	UW-Madison	Facilities Planning and Management Work Order System	Completed Module, Schedule Extended
5	UW-Madison	Hybrid Cloud Infrastructure	Completed Under Budget
6	UW-Madison	Interoperability Transformation Initiative	Significant functionality release
7	UW-Madison	One Badger - Salesforce (Early Adopters)	Paused due to COVID-19
8	UW System	Administrative Transformation Program (ATP)	Corrective Actions Completed
9	UW System	Budget Planning and Forecasting System	Completed with Reduced Scope
10	UW System	Hybrid Cloud Adoption for UWL and UWSA	Request for Approval
11	UW System	Procure-to-Pay Automation Project (P2P)	Phase 2 Fully Planned
12	UW System	SIS Consolidation	Pilot Completed
13	UW System	SysNet 2020 Network Upgrade	Completed Wave 2 Campuses
14	UW System	Unified Identity and Collaboration Pre-planning	Discovery Completed

The overall portfolio totals \$269 million, which is an 8.5% decrease from the \$292 million reported at the August 2021 Board of Regents meeting that can be attributed to the closing of five (5) projects at that meeting. There is one (1) new project for which approval by the Board of Regents is requested as part of this report:

- UW System is requesting approval for the Hybrid Cloud Adoption for UW-La Crosse and UW System Administration project, which will consolidate UW-La Crosse (UWL) and UW System Administration (UWSA) servers and storage into a unified service leveraging UW-Madison's Hybrid Cloud infrastructure. This project will establish a scalable IT infrastructure service available to all comprehensive UW institutions that will shrink the information security attack surface, lower the cost of IT infrastructure,

improve disaster recovery, and increase resilience to staff turnover.

The budget for the project is \$2 million that consists primarily of capital investments in electronic equipment. The end date of the project is still unknown due to significant uncertainties in the global supply chain related to COVID-19. Once vendors can provide reliable estimates on delivery of equipment, then the project team can finalize the timeline. However, the project team is exploring creative ways to further progress while awaiting delivery.

The dashboard contains three (3) projects that have been completed since the August 2021 Board of Regents meeting:

- UW-Madison completed the Endpoint Management project, which has enabled central management of over 21,499 university-owned devices, which significantly improves information security and lowers risk. As part of ongoing operations, distributed campus IT units will continue to enroll devices to meet policy compliance. Due to a variety of factors, management extended the timeline by two (2) months beyond the original estimates, and the project completed \$345,000 under budget.
- UW-Madison completed the Hybrid Cloud Infrastructure project, which will improve disaster recovery and lower the cost of IT infrastructure at both UW-Madison and the UW System (see project above). To accommodate a variety of supply chain and staffing challenges, management extended the project one (1) month beyond the original estimates, and the project completed almost \$1.2 million under budget.
- UW System completed the Budget Planning and Forecasting System project, which successfully retired the mainframe in 2019 and significantly streamlined the budget planning process and enhances projection of expenditures and “what if” analysis.

After a business case review, the Administrative Transformation Program (ATP) Steering Committee determined that the UW System will use the native Workday budget functionality to replace the separate budget planning and forecasting system. Estimates indicate additional costs of \$3 million to retrofit the budget system with Workday, which means native functionality was more cost effective and provides a more seamless user experience. Therefore, this project is now complete as the remaining scope (rate setting and strategic planning) will be implemented as part of ATP.

COVID-19 has significantly impacted the large/high-risk IT projects as almost all have experienced some type of hardships or delays. The uncertainty and fluidity of the COVID-19 situation will continue to impact for the projects in the following key areas: 1) existing resources being diverted to handle the emerging threats of new variants, 2) supply-chain disruption impacting the ability to acquire hardware, and 3) increasing challenges in hiring

highly skilled technical talent. In addition to the anticipated supply-chain delays that will affect the project outlined above, the following project has had noteworthy COVID-19 direct impacts:

- UW-Madison's One Badger Salesforce project is mostly complete but has removed the Center for First-Year experience from scope and temporarily paused the School of Education implementation due to lack of staffing resources that are prioritized toward COVID-19 response efforts. The anticipated end date is unknown, but the project team plans to review the timeline by the next reporting quarter (April 2022).

Finally, the following five (5) projects have had noteworthy impacts since the August 2021 Board of Regents meeting:

- UW-Madison's Campus Access Controls Replacement project has extended the timeline by five (5) months due to information learned in phase 1. For example, the Influenza Research Institute has complex needs that will require a custom, unanticipated solution. However, the fixed-price contract keeps the budget flat. The project team is tracking risks related to keeping pace with integrating the new solution to existing software.
- UW-Madison's Facilities Planning and Management Work Order System project successfully implemented the Space Management module on schedule but the timeline for the Lease Management module was extended until February 2022. Go-live of this module will need to be coordinated with a separate system (Assetworks), which has been delayed due to unforeseen issues discovered during testing. Despite the schedule extension, the project is estimated to be \$474,000 under budget.
- UW System's Administrative Transformation Program (ATP) project successfully completed the two critical actions to ensure the overall health of the project by: 1) finalizing the System Implementation (SI) RFP with an award to Huron Consulting Group, and 2) receiving approval from DOA to use the master lease program to finance the Workday subscription and the SI consulting costs.

The planning phase has been delayed by four (4) months due to the complexity of contract negotiations, but the overall timeline of the project (July 2026) is still on track. As part of this planning phase, the project team is evaluating the overall schedule, which may shorten the timeline to either July 2024 or July 2025. Executive leadership is monitoring the schedule closely and will report schedule changes to the Board as soon as they are known.

The project scope increased to include the budget and planning modules after a business case analysis indicated it would be more cost effective to adopt the native functionality than retrofit the existing budget system. Similar business case scope

changes are expected through the end of the planning phase.

The project is working through a high volume of staffing activity to be appropriately resourced to complete the work. Much of this activity is on target but the project is also actively tracking and mitigating risks identifying necessary skills in candidate application pools and delays in filling vacancies.

- UW System's Procure-to-Pay Automation (P2P) project successfully completed the stabilization component of Phase 1 and fully planned the remaining scope for Phase 2. This detailed planning, along with incorporating lessons learned from Phase 1, resulted in a timeline extension of six (6) months, which was approved by the executive sponsors and project sponsors. However, this extension has not affected the budget as the project team is expecting to complete the full project within the original allotment. The project continues to experience staffing risks such as resource contention and turnover, but these risks are being actively monitored by leadership.
- UW System's Unified Identity and Collaboration Pre-planning completed the campus-level data collection in November 2021, which is now guiding the architectural design, business case development, and project planning efforts. Project leadership delayed the project four (4) months to allow more time to share the recommendations and incorporate campus feedback.

The attached project dashboard and individual progress reports provide additional information and details on the status of each of these major projects.

Related Policies

- [Section 36.59, Wis. Stats.](#), "Information Technology"
- [Regent Policy Document 25-4](#), "Strategic Planning and Large or High-Risk Projects"

ATTACHMENTS

- A) Dashboard for the Large/High-Risk Information Technology Projects
- B) Progress Reports for the Large/High-Risk Information Technology Projects

ROW	Milestone Since Last BOR Meeting	Institution	Project Name	Start Date	Scoped End Date	Revised Scoped End Date	Original Scoped Project Budget	Revised Scoped Project Budget	Schedule Status	Scope Status	Budget Status	Other Issues	Notes
1	Completed Phase 1	UW-Madison	Campus Access Controls Replacement	September 2019	May 2022	October 2022	\$ 6,051,423						The timeline has been extended by five (5) months due to new information learned in phase 1. For example, the Influenza Research Institute has complex needs that will require a custom, unanticipated solution. However, the fixed-price contract keeps the budget flat. The project team is tracking risks related to keeping pace with integrating the new solution to existing software.
2	None to Report	UW-Madison	DOA Datacenter Migration	August 2020	December 2022		\$ 1,275,394						Initial wave of migrations complete with ongoing activities still tracking toward scheduled completion. The management team is continuing to monitor staffing shortages and other labor issues that affect timeline. The project is currently \$200k under budget.
3	Completed Under Budget	UW-Madison	Endpoint Management	December 2020	October 2021	December 2021	\$ 976,388	\$ 618,796					After COVID-19 delays, the re-initiated project completed two (2) months after the initial projection but \$345k under budget. As of early December, UW-Madison has 21,499 devices enrolled in the service. Distributed campus units are continuing to enroll devices and determine compliance with UWSA policies 1035.A and 1041.
4	Completed Module, Schedule Extended	UW-Madison	Facilities Planning and Management Work Order System	August 2018	January 2021	February 2022	\$ 5,321,106						The Space Management module was completed, but the timeline for the Lease Management module was extended until February 2022. Go-live of this module will need to be coordinated with a separate system (Assetworks), which has been delayed due to unforeseen issues discovered during testing. Despite the schedule extension, the project is estimated to be \$474k under budget.
5	Completed Under Budget	UW-Madison	Hybrid Cloud Infrastructure	December 2020	November 2021	December 2021	\$ 4,000,000	\$ 2,815,935					The new environment is now in production with existing workloads migrated as of December 2021.
6	Significant functionality release	UW-Madison	Interoperability Transformation Initiative	July 2019	June 2022		\$ 5,107,188						Launched the API management platform to document, share, and protect UW-Madison data. This step enables authorized campus staff to discover data and access it in a secure manner. The project is on schedule and estimated to complete \$2.3M under budget.
7	Paused due to COVID-19	UW-Madison	One Badger - Salesforce (Early Adopters)	September 2019	October 2020	TBD	\$ 1,716,692	\$ 1,235,842					The Center for First-Year experience has been removed from scope due to continuous COVID-19 impacts. The School of Education will remain in scope but has temporarily paused implementation due to prioritizing limited resources to higher needs. The project team plans to revise the timeline by the next reporting quarter (April 2022).
8	Corrective Actions Completed	UW-System	Administrative Transformation Program (ATP)	January 2021	July 2026		\$ 212,000,000	\$ 211,866,117					Two critical actions completed to improve the overall health of the project: 1) finalized the System Implementation (SI) RFP with an award to Huron Consulting group, and 2) received approval from DOA to use the master lease program to finance the Workday subscription and the SI consulting costs. The planning phase is delayed by four (4) months due to the complexity of contract negotiations, but the overall timeline of the project (July 2026) is still on track. As part of this planning phase the project team is evaluating the overall schedule, which may shorten the timeline to either July 2024 or July 2025. Executive leadership is monitoring the schedule closely and will report schedule changes to the Board as soon as they are known. The project scope increased to include the budget and planning modules after a business case analysis indicating it would be more cost effective to adopt the native functionality than retrofit the existing budget system. Similar business case scope changes are expected through the end of the planning phase. The project is working through a high volume of staffing activity to be appropriately resourced to complete the work. Much of this activity is on target but the project is also actively tracking and mitigating staffing risks.
9	Completed with Reduced Scope	UW-System	Budget Planning and Forecasting System	July 2016	December 2021		\$ 8,150,000						After a business case review, the ATP Steering Committee determined that the UW System will use the native Workday budget functionality to replace the separate budget planning and forecasting system. Estimates indicate an additional \$3M to retrofit the budget system with Workday, which means native functionality was more cost effective and provides a more seamless user experience. Therefore, this project is now complete as the remaining scope (rate setting and strategic planning) will be implemented as part of ATP.
10	Request for Approval	UW-System	Hybrid Cloud Adoption for UWL and UWSA	February 2022	TBD		\$ 2,000,000						A project to consolidate UW-La Crosse (UWL) and UW System Administration (UWSA) servers and storage into a unified service leveraging UW-Madison's Hybrid Cloud infrastructure. This project will establish a scalable IT infrastructure service available to all comprehensive UW institutions that will shrink the information security attack surface, lower the cost of IT infrastructure, improve disaster recovery, and increase resilience to staff turnover. The project will also be a forcing-function to clean up technical debt and ensure systems are properly monitored, supported, and patched henceforth. The end date of the project is still unknown due to significant uncertainties in the global supply chain related to COVID-19. Once vendors can provide reliable estimates on delivery of equipment, then the project team can finalize the timeline. However, the project team is exploring creative ways to further progress while awaiting delivery.

ROW	Milestone Since Last BOR Meeting	Institution	Project Name	Start Date	Scoped End Date	Revised Scoped End Date	Original Scoped Project Budget	Revised Scoped Project Budget	Schedule Status	Scope Status	Budget Status	Other Issues	Notes
11	Phase 2 Fully Planned	UW-System	Procure-to-Pay Automation Project (P2P)	August 2019	April 2022	October 2022	\$ 11,346,497						After a successful go-live and subsequent stabilization of Phase 1, the project team has now fully planned the remaining scope for Phase 2. This detailed planning along with incorporating lessons learned from Phase 1 resulted in a timeline extension of six (6) months, which was approved by the executive sponsors and project sponsors. However, this extension has not affected the budget as the project team is expecting to complete the full project within the original allotment. The project continues to experience staffing risks such as resource contention and turnover, but these risks are being actively monitored by leadership.
12	Pilot Completed	UW-System	SIS Consolidation	January 2021	June 2023		\$ 3,317,768						The pilot implementation with UW-Green Bay went live on schedule in July 2021. UW-La Crosse and UW-Oshkosh go-lives are scheduled for January 2022 and February 2022, respectively. There was a technical correction to increase the budget by \$30k (0.9%) to ensure consistency across project accounting, but it does not materially impact the budget or status.
13	Completed Wave 2 Campuses	UW-System	SysNet 2020 Network Upgrade	May 2020	March 2022		\$ 6,260,357						The project team completed upgrades for fourteen (14) Wave 2 campuses (includes 2-year branch campuses). The project has now recovered from its COVID-19 related delays and remains on track to complete on time and an estimated \$365k under budget.
14	Discovery Completed	UW-System	Unified Identity and Collaboration Pre-planning	January 2021	December 2021	April 2022	\$ 3,570,592						The campus-level data collection was completed in November 2021, which is helping to guide the architectural design along with the business case and project planning efforts. Project leadership delayed the project four (4) months to allow more time to share the recommendations and incorporate campus feedback.

Total Scoped Budget \$ 268,937,015

PROJECT PROGRESS REPORTS FOR THE LARGE/VITAL INFORMATION TECHNOLOGY PROJECTS

Campus Access Controls Replacement



Milestone

Completed
Phase 1,
Schedule
Extended

Description: A project to replace the 15-year-old system that controls the electronic door locks across the UW-Madison campus.

Impact: Over 4,000 doors will be migrated to a more sustainable and extendible solution to improve overall physical security.

Notes: The timeline has been extended by five (5) months due to new information learned in phase 1. For example, the Influenza Research Institute has complex needs that will require a custom, unanticipated solution. However, the fixed-price contract keeps the budget flat. The project team is tracking risks related to keeping pace with integrating the new solution to existing software.

Timeline

Sept. 2019 – Oct. 2022
(extended from May 2022)

Budget

\$6,051,423

Source of Funds

Internally Available
to UW-Madison

Current Status:

Schedule
Scope
Budget
Other

DOA Datacenter Migration



Milestone

None to
Report

Description: The project to move enterprise data center operations at UW-Madison to the Department of Administration's (DOA) commercial quality data center.

Impact: Existing equipment will be physically moved from existing UW-owned datacenters, which will complete the shift from a capital expense (CapEx) model to an operating expense (OpEx) model to increase flexibility and efficiency.

Notes: Initial wave of migrations complete with ongoing activities still tracking toward scheduled completion. The management team is continuing to monitor staffing shortages and other labor issues that affect timeline. The project is currently \$200,000 under budget.

Timeline

Aug. 2020 – Dec. 2022

Budget

\$ 1,275,394

Source of Funds

Internally Available
to UW-Madison

Current Status:

Schedule
Scope
Budget
Other

Endpoint Management



Milestone

Completed
Under
Budget

Description: A project to deploy leading industry technology solutions to manage university-owned computing devices.

Impact: The ability to directly manage university devices will increase protection of UW-Madison data by being able to better monitor and respond to cyberattacks and apply essential security patches, thereby lowering the risk of data breaches and accidental exposure.

Notes: After COVID-19 delays, the re-initiated project completed two (2) months after the initial projection but \$345,000 under budget. As of early December, UW-Madison has 21,499 devices enrolled in the service. Distributed campus units are continuing to enroll devices and determine compliance with UWSA policies 1035.A and 1041.

Timeline

Dec. 2020 – Dec. 2021
(extended from Oct. 2021)

Budget

\$618,796
(reduced from \$976,388)

Source of Funds

Internally Available
to UW-Madison

Final Status:

Schedule

Scope

Budget

Other

Facilities Planning and Management Work Order System



Milestone

Completed
Module,
Schedule
Extended

Description: A project to replace the existing system that automates a variety of functions needed to manage and maintain buildings, which is out of support and no longer meets the needs of the campus.

Impact: The new cloud-based system will be used by thousands of employees who submit and track work orders. It will provide increased visibility for the status of orders, as well as reliable management information to support improved resource allocation.

Notes: The Space Management module was completed, but the timeline for the Lease Management module was extended until February 2022. Go-live of this module will need to be coordinated with a separate system (Assetworks), which has been delayed due to unforeseen issues discovered during testing. Despite the schedule extension, the project is estimated to be \$474,000 under budget.

Timeline

Aug. 2018 – Feb 2022
(extended from June 2021)

Budget

\$5,321,106

Source of Funds

Internally Available
to UW-Madison

Current Status:

Schedule
Scope
Budget
Other

Hybrid Cloud Infrastructure



Milestone

Completed
Under
Budget

Description: This project will refresh the existing end-of-life servers and storage with more cost-effective IT infrastructure with enhanced capabilities that are extendible to other UW institutions. The alternative is to shift all operations to the public cloud, which would nearly triple the total cost of ownership.

Impact: Once completed, this new hybrid cloud will be able to lower the cost of IT infrastructure at both UW-Madison and the UW System with improved disaster recovery through integrations to the public cloud.

Notes: The new environment is now in production with existing workloads migrated as of December 2021 and was almost \$1.2 million under budget.

Timeline

Dec. 2020 – Dec. 2021
(extended from Nov. 2021)

Budget

\$2,815,935
(reduced from \$4,000,000)

Source of Funds

Internally Available
to UW-Madison

Final Status:

Schedule
Scope
Budget
Other

Interoperability Transformation Initiative



Milestone

Significant
functionality
release

Description: A project to modernize the means by which campus data systems are integrated together and how users access data across those systems.

Impact: The applications will be more tightly integrated, which will reduce duplicate entry while providing streamlined access to data for decision-making.

Notes: Launched the API management platform to document, share, and protect UW-Madison data. This step enables authorized campus staff to discover data and access it in a secure manner. The project is on schedule and estimated to complete \$2.3 million under budget.

Timeline

July 2019 – June 2022

Budget

\$ 5,107,188

Source of Funds

Internally Available
to UW-Madison

Current Status:

Schedule
Scope
Budget
Other

One Badger - Salesforce (Early Adopters)



Milestone

Paused
due to
COVID-19

Description: A project to implement the Salesforce Customer Relationship Management (CRM) solution within five (5) early adopters across campus. The solution is expected to expand to over 30 campus units over time.

Impact: Participating departments/units will be able to streamline a wide variety of operational activities such as student recruitment, event management, and fund raising.

Notes: The Center for First-Year experience has been removed from scope due to continuous COVID-19 impacts. The School of Education will remain in scope but has temporarily paused implementation due to prioritizing limited resources to higher needs. The project team plans to revise the timeline by the next reporting quarter (April 2022).

Timeline

Sept. 2020 – TBD
(extended from June 2021)

Budget

\$1,235,842
(reduced from \$1,716,692)

Source of Funds

Internally Available
to UW-Madison

Current Status:

Schedule

Scope

Budget

Other

Administrative Transformation Program (ATP)



Milestone Corrective Actions Completed

Description: A multi-year program that will work across the UW System to address the current complexity and build an administrative infrastructure for the future.

Impact: The program will streamline policies, standardize processes, organize roles, and modernize technology with cloud-based enterprise resource planning (ERP) software.

Notes: The project team successfully completed the two critical actions to ensure the overall health of the project: 1) finalized the System Implementation (SI) RFP with an award to Huron Consulting group, and 2) received approval from DOA to use the master lease program to finance the Workday subscription and the SI consulting costs.

The planning phase is delayed by four (4) months due to the complexity of contract negotiations, but the overall timeline of the project (July 2026) is still on track. As part of this planning phase the project team is evaluating the overall schedule, which may shorten the timeline to either July 2024 or July 2025. Executive leadership is monitoring the schedule closely and will report schedule changes to the Board as soon as they are known.

The project scope increased to include the budget and planning modules after a business case analysis indicating it would be more cost effective to adopt the native functionality than retrofit the existing budget system. Similar business case scope changes are expected through the end of the planning phase.

The project is working through a high volume of staffing activity to be appropriately resourced to complete the work. Much of this activity is on target but the project is also actively tracking and mitigating risks identifying necessary skills in candidate application pools and delays in filling vacancies.

Timeline

Jan. 2021 – July 2026

Budget

\$211,866,117
(decreased from \$212M)

Source of Funds

Internally Available
to UW-Madison and
the UW System
+
DOA's Master
Lease Program

Current Status:

Schedule
Scope
Budget
Other

Budget Planning and Forecasting System



Milestone

Completed
with
Reduced
Scope

Description: A project to modernize how the UW System creates its budgets and manages its forecasts for informed decision making.

Impact: The old mainframe will be retired, the annual budget planning process will be streamlined, institutions will be able to better project expenditure and revenues along with enhanced "what if" analysis.

Notes: After a business case review, the ATP Steering Committee determined that the UW System will use the native Workday budget functionality to replace the separate budget planning and forecasting system.

Estimates indicate an additional \$3 million to retrofit the budget system with Workday, which means native functionality was more cost effective and provides a more seamless user experience. Therefore, this project is now complete as the remaining scope (rate setting and strategic planning) will be implemented as part of ATP.

Timeline

July 2016 – December 2021

Budget

\$ 8,150,000

Source of Funds

Internally Available
to the UW System

Final Status:

Schedule

Scope

Budget

Other

Hybrid Cloud Adoption for UW-La Crosse and UWSA



Milestone

Request
for
Approval

Description: A project to consolidate UW-La Crosse (UWL) and UW System Administration (UWSA) servers and storage into a unified service leveraging UW-Madison's Hybrid Cloud infrastructure.

Impact: This project will establish a scalable IT infrastructure service available to all comprehensive UW institutions that will shrink the information security attack surface, lower the cost of IT infrastructure, improve disaster recovery, and increase resilience to staff turnover.

The project will also be a forcing-function to clean up technical debt and ensure systems are properly monitored, supported, and patched henceforth.

Notes: The end date of the project is still unknown due to significant uncertainties in the global supply chain related to COVID-19. Once vendors can provide reliable estimates on delivery of equipment, then the project team can finalize the timeline. However, the project team is exploring creative ways to further progress while awaiting delivery.

Timeline

Feb 2022 - TBD

Budget

\$2,000,000

Source of Funds

Internally Available
to the UW System

Current Status:

<u>Current Status:</u>
Schedule
Scope
Budget
Other

Procure-to-Pay Automation Project (P2P)



Milestone

Phase 2
Fully
Planned

Description: A project to transform purchasing and accounts payable systems and business process across the UW System.

Impact: The P2P project will significantly improve the end-user experience by making it easier to place and track orders. It will also improve the quantity and quality of data, process tracking, and strategic sourcing with enhanced one-stop shopping user experiences.

Notes: After a successful go-live and subsequent stabilization of Phase 1, the project team has now fully planned the remaining scope for Phase 2. This detailed planning along with incorporating lessons learned from Phase 1 resulted in a timeline extension of six (6) months, which was approved by the executive sponsors and project sponsors. However, this extension has not affected the budget as the project team is expecting to complete the full project within the original allotment. The project continues to experience staffing risks such as resource contention and turnover, but these risks are being actively monitored by leadership.

Timeline

Aug. 2019 – Oct. 2022
(extended from Apr. 2022)

Budget

\$11,346,497

Source of Funds

Internally Available
to the UW System
and UW-Madison

Current Status:

Schedule
Scope
Budget
Other

Student Information Systems (SIS) Consolidation



Milestone

Pilot
Completed

Description: This project will consolidate the Student Information Systems (SIS) for nine (9) institutions (GB, LAC, MSN, OSH, PKS, RF, SP, STO, SUP) into a single infrastructure and service organization.

Impact: Once consolidated, the UW System will collectively save \$1 million in annual operating cost while significantly improving its security posture and disaster recovery resilience.

Notes: The pilot implementation with UW-Green Bay went live on schedule in July 2021. UW-La Crosse and UW-Oshkosh go-lives are scheduled for January 2022 and February 2022, respectively. There was a technical correction to increase the budget by \$30,000 (0.9%) to ensure consistency across project accounting, but it does not materially impact the budget or status.

Timeline

Jan 2021 – June 2023

Budget

\$3,317,768

Source of Funds

Internally Available
to the UW System

Current Status:

Schedule

Scope

Budget

Other

SysNet 2020 Network Upgrade



Milestone

Completed
Wave 2
Campuses

Description: A project to replace the end-of-life networking infrastructure that connects all of the UW institutions to the Internet. While the existing network has robustly served the UW-System well, we are observing capacity constraints, functionality shortfalls and technology obsolescence.

Impact: The project will significantly increase network capacity (10GB to 100GB), improve reliability and availability, and facilitate the adoption of cloud services.

Notes: The project team completed upgrades for fourteen (14) Wave 2 campuses (includes 2-year branch campuses). The project has now recovered from its COVID-19 related delays and remains on track to complete on time and an estimated \$365,000 under budget.

Timeline

May 2020 – March 2022

Budget

\$6,260,357

Source of Funds

Internally Available
to the UW System and
USAC Federal Funds

Current Status:

Schedule

Scope

Budget

Other

Unified Identity and Collaboration Pre-planning



Milestone

Discovery
Completed

Description: This pre-planning project will execute a deep discovery of the digital identity and collaboration tool infrastructure and processes at all the UW institutions.

Impact: The current environment is extremely fragmented across the UW System and is a major technical barrier to both academic and administrative collaboration.

The goal of the project is to get a full inventory and understanding of the current environment to properly plan and significantly lower the risk of the subsequent consolidation project.

Notes: The campus-level data collection was completed in November 2021, which is now guiding the architectural design, business case development, and project planning efforts. Project leadership delayed the project four (4) months to allow more time to share the recommendations and incorporate campus feedback.

Timeline

Jan. 2021 – Apr. 2022
(extended from Dec. 2021)

Budget

\$3,570,592

Source of Funds

Internally Available
to the UW System

Current Status:

Schedule
Scope
Budget
Other

February 10, 2022

UW SYSTEM REPORT ON STRATEGIC PLANS FOR MAJOR INFORMATION TECHNOLOGY PROJECTS

REQUESTED ACTION

Adoption of Resolution F., approving submission of the required reports to the legislative Joint Committee on Information Policy and Technology.

Resolution F. That, upon the recommendation of the President of the UW System, the UW System Board of Regents approves: (1) the UW System Report on Strategic Plans for Major Information Technology Projects; and (2) UW System Administration's submittal of the report on the Board's behalf to the legislative Joint Committee on Information Policy and Technology, as required by [s. 36.59\(7\), Wis. Stats.](#)

SUMMARY

The Report on the Strategic Plans for Major Information Technology Projects provides the Board of Regents with the information it needs to execute appropriate oversight for the upcoming technology projects for FY 2022-2023 and the projects delegated to the UW System President and Chancellors for FY 2021-22.

Presenter

- Steven Hopper, Associate Vice President for the Office of Learning and Information Technology and Chief Information Officer, UW System Administration

BACKGROUND

[Section 36.59, Wis. Stats.](#), requires all UW institutions to adopt and submit to the Board of Regents annual strategic plans for the utilization of information technology no later than March 1st of each year.

[Regent Policy Document 25-4](#) implements the requirements of [s. 36.59, Wis. Stats.](#), which coordinates information technology strategic planning across the UW System, and specifies

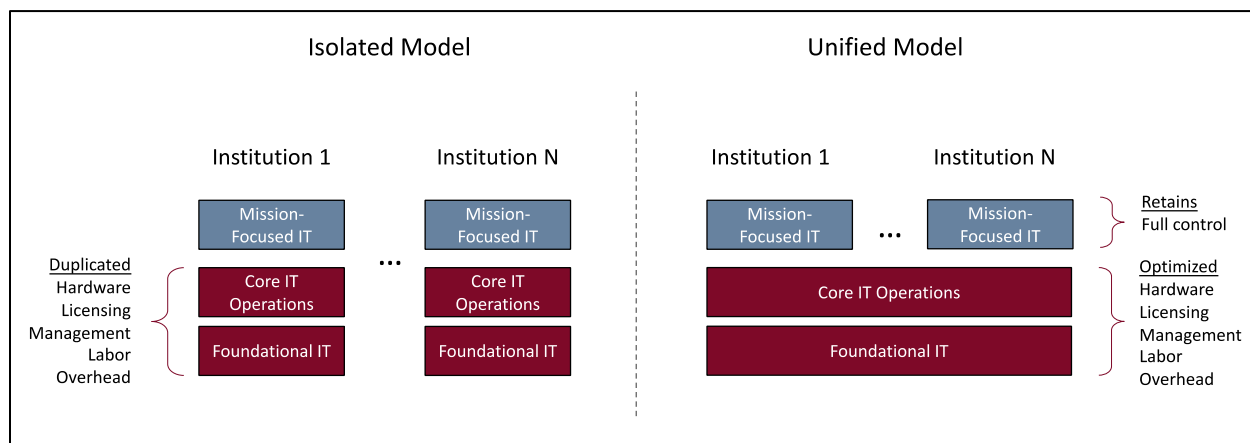
management and reporting requirements related to large or high-risk information technology (IT) projects. Any IT project that exceeds or is projected to exceed \$1,000,000 or is deemed high-risk to the functions of the System or institution requires explicit approval by the Board of Regents before the project can commence or contracts be signed. All other such IT projects have been delegated to the UW System President or Chancellors with a variety of Board reporting thresholds depending on the size and complexity of the institution.

Any IT project that exceeds or is projected to exceed \$1,000,000 or is deemed high-risk to the functions of the System or institution is reported separately in the UW System Status Report on Large/High-Risk Information Technology Projects, which is presented today as agenda item E. For completeness, these large/high-risk IT projects are also included in Attachment A.

IT as a Service Strategy

While there are some key enterprise-wide IT services, most IT resources are controlled by the local institution and are deployed in a non-standard manner across the institutions. This decentralized approach to IT decision-making has created duplication and non-standardization across the UW System, leading to higher costs that are difficult to sustain at present funding levels.

By rethinking how core IT commodities could be more efficiently and effectively delivered at scale, we can reduce duplication and lower the total cost of IT operations, thus allowing local IT personnel to focus on the mission-differentiating activities. The following figure conceptually illustrates moving from multiple isolated services to a unified core IT as a Service (ITaaS) model that will facilitate broader scale, lower costs, and increased quality.



ITaaS has taken significant step forward in FY22 with a formalized partnership between UW System Administration (UWSA) and UW-La Crosse (UWL). In July 2021, the systems engineering, data center operations, and information security responsibilities were formally shifted from UWL to UWSA along with the transfer for five (5) staff who were integrated with existing UWSA staff to form a unified team.

This unified team has a more comprehensive set of skills and enhanced resiliency to staff turnover while continuing to maintain tight integration to the UWL campus and operational needs. Both UWSA and UWL are experiencing service improvements as part of the partnership, and leadership at both institutions are evaluating networking services as the next partnership opportunity as a possibility for FY23.

ITaaS Project Pipeline

Due to the magnitude of the changes, it will take at least five (5) years to fully realize the ITaaS vision. Over that time, technology will continue to evolve, and business needs will constantly change, which will require continuous adaptation as new needs emerge and new threats surface. Therefore, the UW System has adopted a pipeline of key projects to deliver significant milestones while providing the flexibility to adapt as circumstances dictate. The following table outlines the key project pipeline:

Project / Service	Cost	Completion
Completed		
<u>Integration Platform as a Service</u> - Standard platform to simplify and streamline integrating data across multiple systems. Platform is now in production with increasing usage by institutions.	\$732k	June 2021
<u>IT Service Management (ITSM) Platform</u> - Unified platform as a baseline for delivering IT, HR, and business services across the UW System. Usage includes helpdesk and customer support. Platform is now in production at five (5) institutions across the three identified areas. Additional institutions plan to join in 2022 as part of ongoing operations and enhancements.	\$600k	Dec 2021
<u>Hybrid Cloud Infrastructure</u> - UW-Madison's project to refresh the end-of-life servers and storage to lower the cost of IT infrastructure and improve disaster recovery through public cloud integrations. This project was completed and will serve as a foundation for the ITaaS hosting services.	\$2.8M	Dec 2021

Project / Service	Cost	Completion
<u>Security Performance Management / Rating Service</u> - Monitors the entire UW System public facing IP space to instantaneously gain visibility, aggregate data and measure cyber effectiveness.	\$259k	Sept 2021
<u>Security Awareness and Training Service</u> - Provides security and anti-phishing training to improve employee awareness and allows for automatic delivery of training.	\$469k	Jan 2021
In Progress		
<u>SIS Consolidation</u> - Consolidates the Student Information Systems (SIS) for 9 institutions into a single infrastructure and service organization to collectively save \$1M in annual operating costs. UW-Green Bay successfully went live in July 2021; UW-La Crosse and UW-Oshkosh are on track to go-live in January and February 2022, respectively. UW-River Falls and UW-Stevens Point are starting now with a target go-live in Summer 2022.	\$3.3M	June 2023
<u>Unified Identity and Collaboration Pre-Planning</u> - Executes a deep discovery of the digital identity and collaboration tool infrastructure at UW institutions to plan and lower the risk of the subsequent consolidation project. Institution-level data collection was completed in November 2021, which is now guiding the architectural design, business case development, and project planning efforts.	\$3.5M	Apr 2022
<u>Hybrid Cloud Adoption for UWL and UWSA</u> - Consolidation of UW-La Crosse and UWSA data centers to UW-Madison's hybrid cloud infrastructure and establishment of a unified server administration service for the comprehensive UW institutions. Completion date is TBD due to COVID-induced supply chain issues in receiving electronic equipment. Once vendors can confirm delivery windows, the team can finalize the timeline.	\$2.0M	TBD
<u>IT Asset Management</u> - Platform for managing IT assets while detecting and responding to threats against those assets in a proactive manner. We are using the ITSM platform described above to collect these assets, which allows for reduced cost and tight integration to customer service activities.	\$0	Mar 2022
<u>Managed Detection and Response (MDR) Service</u> - Provides remote services to effectively detect and resolve security alerts within all UW institutions' IT environments through 24x7x365 monitoring. Service is being actively piloted with UWSA and UWL using existing technologies with a planned gap analysis to determine future investments and formal operation.	TBD	TBD

Project / Service	Cost	Completion
<u>Incident Response (IR) Service</u> – Provides remotely delivered, modern security operations center (SOC) capabilities to rapidly respond to identified security incidents and perform recovery activities. Service is being actively piloted with UWSA and UWL using existing technologies with a planned gap analysis to determine future investments and formal operation.	TBD	TBD
For Future Planning		
<u>Network Administration as a Service</u> – Consolidate the management and technical architecture of local area networking (LAN) across the comprehensive UW institutions.	TBD	TBD
<u>Penetration Testing Service</u> - Simulates an authorized cyber-attack on networks and applications to identify weaknesses and the potential areas for unauthorized parties to gain access to the system's features and data.	TBD	TBD
<u>Information Security Risk Management (ISRM) Service</u> – Provides services and resources to build and maintain local risk management programs at institutions.	TBD	TBD
<u>Vulnerability Management Service (VMS)</u> - Provides standardized scanning, prioritization and reporting of vulnerability for participating IT environments.	TBD	TBD
<u>End-user Computing Lifecycle and Helpdesk Services</u> – Standardize and streamline how hardware is procured, distributed to users, and supported across the comprehensive UW institutions.	TBD	TBD

UW System and UW Institution Projects

While ITaaS defines the overall IT strategy for the UW System, there are a variety of IT projects that are outside the ITaaS portfolio but are considered part of the annual IT strategic plan. Due to COVID-19, there is significant variety in IT investment across the UW institutions for FY 2022-2023. Some institutions have adopted a more maintenance-oriented posture, whereas others are making new IT investments to enable key capabilities.

Attachment A contains the full list of new projects along with the statutorily required details for each. These new project activities do not encompass all IT activity across the UW System as ongoing operations, end-user support, security monitoring and patching, regularly scheduled hardware replacements, and support of capital renovations are not included. Of note, UW-La Crosse explicitly submitted an empty new project plan because its major projects are related to ITaaS and are already covered by the UW System strategy.

Related Policies

- [Section 36.59, Wis. Stats.](#), "Information Technology"
- [Regent Policy Document 25-4](#), "Strategic Planning and Large or High-Risk Projects"

ATTACHMENT

- A) UW System Annual Strategic Plan Project Inventory

	Full project name	Provide a few sentences to describe the project and anticipated benefits	Explain the business need or problem and describe how the project meets the business need or solves the problem. Explain why current IT systems do not meet the business need.	Indicate priority. Completed = Project has already been completed, High=Must be done or there will be a negative business impact in the next 1-2 years, Medium=Should be done, but not urgent, Low=If delayed, it will not cause major business interruption	List impacts within your institution to the business processes, support processes and/or IT processes with the project. Include information on impact to other institutions and/or UW System Administration	Indicate if you will complete the project with funding available within the UW institution or the UW System or whether you will need additional funding (ex - grant, master lease, etc)	Indicate if you will complete the project with only existing staffing resources or if additional staffing resources will be needed (eg - contractors, etc).	Please provide the range of new, out-the-door cost (not opportunity cost of existing personnel) that this project will require.
Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
UW System	Budget Planning and Forecasting System	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	Complete	See the large/high-risk IT projects report for details	Existing	Additional	\$5M - \$9.9M
UW System	Integration Platform as a Service	This project will establish a standard platform (Informatica IICS) to simplify and streamline integrating data across multiple systems.	institution IT departments are managing a vast spaghetti network of "point-to-point" integrations. Each of these approaches made sense at the time, but year-over-year, integration- after-integration, the lack of a cohesive integration strategy has made the collective environment overly complex, brittle, and difficult to quickly respond to customer's needs.	Complete	The integration platform will simplify system integrations by creating a common intermediary among all the applications within an institution's environment. This platform has been adopted by all UW institutions and UWSA.	Existing	Existing	\$500k - \$999k
UW System	Enterprise Data Visualization Platform (Tableau)	This project will partner with UW-Madison to expand its existing Tableau server environment to an enterprise-scale that can be leveraged by UWSA and other UW institutions.	Tableau is an industry-leading data analytics and visualization platform and this collaborative model will provide the institutions the ability leverage data to improve decision-making.	Complete	All UW institutions will be able to leverage the data visualizations created by UW System programs.	Existing	Additional	\$250k - \$499k
UW System	IT Service Management (ITSM) Platform	This project will leverage the Alemba software to establish a unified platform to serve as baseline for delivering IT, HR, and business services across the UW System. Usage includes helpdesk and customer support. NOTE: This systemwide project entry extends to all participating institution project plans and will therefore omit the local institution projects from this strategic plan.	Institutions currently leverage different tools and homegrown processes for delivering service to customers, which makes it impossible to effectively deliver consolidated services with a high degree of customer satisfaction and efficiency. To eliminate these barriers, the project will establish a common technology platform and service methodology (eg – incidents, requests, assets, configuration, knowledge, etc) for how IT is managed and delivered at the institutions.	Complete	Platform is now in production at five (5) institutions across the three identified areas. Additional institutions plan to join in 2022 as part of ongoing operations and enhancements.	Existing	Additional	\$250k - \$499k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
UW System	Security Performance Management / Security Rating Service	Provides a service to monitor the entire UW System public facing IP space to instantaneously gain visibility, aggregate data and measure cyber effectiveness.	UW System has a broad technology environment that is critical to protect from cyber attack. By engaging outside assistance in assessing each UW institutions' technology environment, critical vulnerabilities and high risk situations can be identified and managed and mitigations prioritized based on organizational risk.	Complete	This service provides a global view into known vulnerabilities, facilitates assessment of relative security performance in context, creates informed improvement plans, allocates limited resources effectively, prioritizes security efforts efficiently and measures/reports on outcomes.	Existing	Existing	\$250k - \$499k
UW System	Student Course Evaluations and Surveys	The project will conduct an RFP and establish a contract with one or more vendors that can conduct online course evaluations and other types of surveys.	Several UW institutions currently conduct student course evaluations with only "bubble sheets", which is not ideal given the drive towards digital transformation. The UW institutions are seeking an enterprise tool that would enable online student course evaluations while also providing capabilities for generalized survey collection.	Complete	The project will established an enterprise standard tool (or tools) that could be leveraged by institutions to streamline their data collection.	Existing	Existing	\$250k - \$499k
UW System	ITaaS Security Awareness and Training Service (annual training and monthly phishing training campaigns)	Provides security and anti-phishing training to improve employee awareness and allows for automatic delivery of training. This project contributes to a defense-in-depth strategy, to improve the UWS overall security posture and to fulfill the requirements set forth in UWSA Policy 1032 as well as the Feb 8, 2021 IS Actions Memo.	Email is critical to daily operations and email is a consistent cyber attack vector. Security awareness and phishing training helps employees understand proper cyber hygiene and behavior when presented with security risks; mitigates impact of cyber attacks; helps to protect organizational IT assets; reduces technology disruption and downtime; enhances compliance efforts.	Complete	Facilitates an organizational culture of cyber safety and security compliance; increases employee awareness of cyber security threats and reduces the risk associated with cyber attacks and breaches.	Existing	Existing	\$100k - \$249k
UW System	Administrative Transformation Program (ATP)	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Additional	Additional	\$10M +
UW System	Procure-to-Pay Automation Project (P2P)	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$10M +
UW System	SysNet 2020 Network Upgrade	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Additional	Existing	\$5M - \$9.9M
UW System	Hybrid Cloud Adoption for UWL and UWSA	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M
UW System	SIS Consolidation	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M
UW System	Unified Identity and Collaboration Pre-planning	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
UW System	Security Information Event Management (SIEM) Pilot	Evaluate and select a SIEM solution to support security operations for UWSA and ITaaS customers.	A SIEM platform is a core foundational element for delivering modern security operations center (SOC) capabilities across UW System.	High	A robust, capable, fully implemented SIEM is vital to the success of security services, such as ITaaS Monitor, Detect & Response (MDR) services. Provides faster, more efficient security operations; enhances accuracy of threat detection and security alerting; reduces impact of security events; improves digital forensics investigations through log management and aggregation.	Existing	Existing	\$500k - \$999k
UW System	Penetration Testing Service	Provides a service that simulates an authorized cyber attack on networks and applications to identify weaknesses and the potential areas for unauthorized parties to gain access to the system's features and data.	Routine penetration testing is not done consistently anywhere in UW System. This service provides visibility into vulnerabilities that may not be known to UW institutions yet could be exploited by an adversary. This service can help to significantly reduce any disruption of operations at any UW institution.	High	Facilitates closing of security gaps (such as basic hygiene practices, patch verification, regulatory compliance requirements, etc.) in the IT environments across all UW institutions.	Existing	Existing	\$100k - \$249k
UW System	ITaaS Information Security Risk Management (ISRM) Platform	Provides services and resources to build and maintain local risk management programs at institutions. This includes security assessment services and upgrading a UW-Madison license for a IS risk management tool to an enterprise license for use systemwide.	Most campuses do point-in-time tracking manually within a spreadsheet, if at all. There is limited automation or ongoing management of the comprehensive risks facing UW institutions.	Medium	Reduces risk exposure by providing the ability to continuously evaluate comprehensive risks (IT Security and others) and make investment decisions based on level of risk across all UW institutions. This is also a foundational solution for ERM across UW System.	Existing	Existing	\$100k - \$249k
UW System	Privileged Access Management	Provides secure, elevated access to critical assets by authorized users. Provides management and monitoring of these accounts and their access.	UW System needs a capability to provide a central repository for secrets; protect against the accidental or deliberate misuse of privileged access by streamlining the authorization and monitoring of privileged users; control and monitor privileged user access to our most critical data; and prevent privileged account escalation and third-party access issues.	Medium	Protects critical data and systems from unauthorized access and insider threats. Additionally, it assists with policy compliance efforts across all UW institutions.	Existing	Additional	\$100k - \$249k
Eau Claire	Server Virtualization Refresh	Replacing the end-of-life hardware and storage in the data center.	Replacement of virtual server environment with Dell VxRais solution.	High	IT Processes, Support Processes, No Impact to Other Institutions, No Impact to Business Processes	Existing	Existing	\$250k - \$499k
Eau Claire	Presence Blugold Connect Replacement	Replacing Presence Blugold Connect system with new software and system.	Contract is up for renewal of replace in mid Spring 2022.	High	Business Processes, IT Processes, Support Processes, No Impact to Other Institutions	Existing	Existing	\$50k - \$99k
Eau Claire	Transact Mobile Credentials	Implementing Transact Mobile Credentials for all faculty, staff, and students at UW-Eau Claire. This will be a service in addition to everyone receiving the UW-Eau Claire Blugold card.	Student Senate ITC funded an initiative to allow faculty, staff, and students to utilize smart phones and watches for credentials through current Transact system.	Medium	Business Processes, IT Processes, Support Processes, No Impact to Other Institutions	Existing	Existing	\$50k - \$99k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
Green Bay	SIS moved to UWSA hosting service	Move SIS to the UWSA managed services offering.	Consolidate commodity like hosting services in one location for efficiency	Complete	Local to UWGB (all campus locations)	Existing	Existing	\$50k - \$99k
Green Bay	Wireless Access Points and Controllers	Replacement of 7 year old wireless access points and controllers	Refresh needed to maintain wireless services and capacity, especially with the addition of more laptops and devices.	High	Local to UWGB	Existing	Additional	\$250k - \$499k
Green Bay	Switch replacements and hardware transfer to branches	Begin replacement of closet switches that are nearing end-of-life (EOL) and rotate them to the branch campuses where equipment is EOL.	Branch switching hardware is EOL.	High	Local to UWGB	Existing	Existing	\$100k - \$249k
Green Bay	Branch Campus Phone Transition to UWGB	Due to changes at UWSS they will no longer be able to support phone services at the branch campuses. This project will move phone traffic through GB and/or relocate all phone services to GB	Required due to UWSS support changes	High	Local to UWGB	Existing	Existing	\$50k - \$99k
Green Bay	Centralized Log server (SIEM system)	Audit finding in multiple audits, most recently 2020 LAB audit.	Information Security	High	Local to UWGB	Existing	Existing	\$50k - \$99k
Green Bay	Student Housing System	Current system is end of life. Implementing StarRez, the UW tool of choice.	Upgrading the current tool will require as much work as moving to a more user friendly platform.	High	Local to UWGB (all campus locations)	Existing	Existing	\$50k - \$99k
Green Bay	Technology for Hyflex Classes	Add additional technology to select classrooms to allow for interaction by students at a distance. Multiple projects.	Allow students choice on attending class in person or online	High	Local to UWGB (all campus locations)	Existing	Additional	\$50k - \$99k
Green Bay	Transact Register Replacement or Migration to Transact Cloud	Existing Transact registers are no longer supported after October 2021. Replacement is required either on the existing POS system or moving to the Transact cloud	Registers are used for a variety of retail transactions throughout the university, including food service.	High	Local to UWGB	Existing	Existing	\$50k - \$99k
Green Bay	Weidner Center Projection Improvements	Replace the end of life projection equipment that was installed when the building was built	The equipment is unreliable and cannot support the many important programs that occur in the space	High	Local to UWGB	Existing	Existing	\$50k - \$99k
Green Bay	E-Sports Lab	Implementation of an E-Sports lab on campus. IT items include networking infrastructure, workstations, and streaming hardware	This is a new implementation requiring additional infrastructure and hardware	Low	Local to UWGB	Existing	Existing	\$50k - \$99k
Madison	Hybrid Cloud Infrastructure	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	Complete	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M
Madison	Endpoint Management	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	Complete	See the large/high-risk IT projects report for details	Existing	Additional	\$500k - \$999k
Madison	Campus Access Controls Replacement	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$5M - \$9.9M
Madison	DOA Datacenter Migration	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M
Madison	Facilities management workorder system	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M
Madison	Facilities Planning and Management Work Order System	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M
Madison	One Badger Salesforce	See the large/high-risk IT projects report for details	See the large/high-risk IT projects report for details	High	See the large/high-risk IT projects report for details	Existing	Additional	\$1M - \$4.9M

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
Madison	Research computing	Add computational capacity to support emerging big data and high capacity research workloads. This includes both acquisition and deployment of GPUs and needed physical plant work to support the necessary power and cooling.	This supports Madison's research enterprise broadly, allowing more extensive workloads for cutting edge research.	High	Impacts research workflows and IT work to manage the infrastructure.	Existing	Additional	\$1M - \$4.9M
Madison	Cybersecurity to the Edge	Extend cybersecurity tooling to all devices across the university, and potentially personally owned devices in some situations. Actual costs are unclear until licensing decisions are made and procurement processes completed, so it is not yet clear if this work will meet the reporting threshold. It is listed here for transparency.	Ensure full protection against cyberthreat.	High	This impacts all faculty, staff and students at the university who use university resources and data. There are significant impacts on IT staff to deliver and support these tools.	Existing	Additional	\$500k - \$999k
Milwaukee	UWM College of General Studies WiFi Refresh	Replacement of obsolescent, non-standard, network equipment at the UW-Waukesha and UW-Washington County campuses (UWM's new College of General Studies or "CGS"). Replacement will ensure reliable connectivity that is critical to sustained and effective CGS operations. Replacement will promote student success. It will also significantly reduce the administrative burden for UWM's UITS Network Operations and the other IT support units for these remote sites, bolstering network visibility and traffic control.	As the UW-Waukesha and UW-Washington County campuses were transitioned to UWM, the following business risks and functional/technical deficiencies became apparent: (1) The switches in both locations were obsolescent, past their industry-standard "replacement cycle" dates; (2) The interfaces on nearly all CGS switches were congested, limiting user access to vital resources and in some cases preventing key functionality like video conferencing and calls; (3) The campuses' switching equipment was non-standard to UWM had no familiarity, therefore imposing a high cost to operate; (4) The switches at each campus varied in model and operating system, and lacked operational standards.	High	The Network Replacement Project will effectively address the following practical issues for UWM's Waukesha and Washington County campuses (CGS): (1) The existing WiFi network on the campuses consisted of Aruba access points that UW Shared Services (UWSS) still administered; (2) the existing network lacked necessary documentation increasing operational burdens; (3) Large sections of the networks in each campus site still required IP addresses that were owned and operated by UWSS; (4) The campuses had used a VoIP system that was managed by UWSS and UW-Whitewater by contract; the replacement project will enable the extension of UWM-standard services such as Teams telephony to CGS.	Existing	Existing	\$250k - \$499k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
Milwaukee	UWM Office of Undergraduate Admissions, Financial Aid, Bursars, Enrollment Management Call Center	Over the past calendar year, UWM's UITS has been working with UWM's "Business and Financial Services" unit to define phone system operational needs to enhance significantly the student experience in these functional areas.	Improve campus operations to help make operations invisible and information accessible and easy-to-find: (1) Centralize/consolidate information; (2) Highlight all resources available to students as early and as often as possible; (3) Create consistency for students regarding the technology used for engaging with support units.	High	The "Call Center" Project will: (1) Strengthen UWM faculty engagement with students and faculty investment in student success; (2) Create clear coordination of messaging among UWM's admissions office, University Relations, Academic Affairs, Student Affairs, and systems related to enrollment management (student success); (3) Develop a complete data picture that seeks to drive change and improvements of student experiences and outcomes.	Existing	Additional	\$100k - \$249k
Oshkosh	Asset Management Implementation (local with UWSA input)	Develop a framework to better manage IT infrastructure.	Security compliance and risk reduction.	Medium	Loss prevention and reduction of data loss and access.	Existing	Existing	\$50k - \$99k
Parkside	Classroom Updates to include lecture streaming and lecture capturing (FY 21)	UW-Parkside did upgrade classrooms to include lecture streaming and lecture capturing in 50% of classrooms as response to COVID teaching challenges.	UWP needed to upgrade classrooms to allow social distancing to happen in classrooms. Student will self select if they are attending face to face classes in person or online, and allow classes to have room for social distance.	Complete	UW-Parkside can provide better teaching and learning environments to our faculty and students by allowing remote connection to face to face classes, social distancing in small classrooms, and availability of recorded lectures.	Existing	Additional	\$100k - \$249k
Parkside	Endpoint Privilege Management Tool	This tool will allow IT to manage downloads of different solutions in campus owned devices.	IT needs to manage software and solutions that are being downloaded across campus in different end points to improve information security.	High	This project will get us closer to be compliant with UWSA information security policies and to improve our information security posture.	Existing	Additional	\$50k - \$99k
Parkside	Monitor, Detect and Response Management Services	UW-Parkside is planning to increase our Information Security posture by outsourcing or MDR needs.	UWP needs to be able to prevent, detect, and respond to threats and vulnerabilities so that we can optimize existing IT investments and secure our data and information.	High	This project will get us closer to be compliant with UWSA information security policies and to improve our information security posture.	Existing	Additional	\$50k - \$99k
Parkside	Classroom Updates to include lecture streaming and lecture capturing (FY 22)	UW-Parkside plans to upgrade classrooms to include lecture streaming and lecture capturing in the remaining classrooms	UWP needed to upgrade classrooms to allow social distancing to happen in classrooms. Student will self select if they are attending face to face classes in person or online, and allow classes to have room for social distance. It also allows classes to be recorded so students will be able to "attend" classes in their own time. Finally, it allows students that are not feeling well to attend classes remotely.	Medium	UW-Parkside can provide better teaching and learning environments to our faculty and students by allowing remote connection to face to face classes, social distancing in small classrooms, and availability of recorded lectures.	Existing	Additional	\$50k - \$99k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
Platteville	Data Warehouse/ETL Tool Upgrade	A new Data Warehouse and ETL solution, which are supported, reliable, scalable, flexible and requires minimal maintenance from ITS staff allowing staff to focus on innovative/strategic goals.	The existing Data Warehouse and IBM DataStage 8.5 (ETL toolset) are no longer supported. Legacy settings hinder Security as it relates to database version 12.1. This also hinders a PASS and Data Warehouse upgrade to 12.2 or 18c. Support for the current Production DataStage server's operating system ended in 2019. The impact of an operating system upgrade is unknown. The Dev/Test DataStage operating system cannot be upgraded, patched, nor changed without major implications. Data integrity in the Data Warehouse is amiss due to the nature of DataStage's inability to reload select data. Through research, legacy Data Warehouses and tools can hinder analytic performance, make self-service and ad-hoc reporting more difficult, are incapable of taking advantage of new data modeling techniques and are inflexible.	High	The solution would help campus become self-sufficient in ad-hoc reporting and provide data for predictive analytics.	Existing	Additional	\$100k - \$249k
Platteville	Class scheduling & Planning Tools	Research project (at this point, implementation after selection process). We need to replace expiring (and expensive) tool with a new one that offers enhanced features at a lower cost. Scheduling tool is definite, planning tool is optional.	Enhance student experience.	Medium	Improve student experience with registration and academic career planning. Also allows for "what if" scenarios to help with major changes. Expect it will improve retention.	Existing	Existing	\$50k - \$99k
River Falls	Campus Website Project	Though not necessarily an IT project this project will be updating the campus website with a move from CommonSpot CMS to Drupal CMS platform. IT is in partnership with University Communications and Marketing as they will be working with campus to refresh the content and make the site more appealing to our target audiences. One aspect of this project is splitting our website in to audience facing sites focused on incoming students, current students, and Faculty/staff/alumni.	Need to improve the website experience to recruit more students while still supporting the needs of our campus community. The website is the first place prospective students and families look and it needs to be modern and appealing.	High	The work will be done while maintaining the current website. This project began in FY22 with top level pages moving to Drupal and a refresh and rework of the content and homepage. This is continuing work to address the remainder of the website. Budget note: the estimate is likely high as we have already invested FY21 funding in this project. Listing this mostly due to the "High Risk" nature that if the project is not completed that we could see potential enrollment impacts.	Existing	Existing	\$50k - \$99k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
River Falls	Migrate UWRF PeopleSoft SIS to UW PeopleSoft as a Service	This is a multi-year project for UWRF to join the UW PeopleSoft as a Service offering by moving our Student Information System (SIS) PeopleSoft Server and Database to the UWSA managed central hosting service of DoIT in Madison. The justification is a more efficient and cost friendly model of operation of a Student Information System leveraging a multi-campus managed hosting service. This will free up local campus staff to address strategic needs at the campus level.	Stable and centralized hosting environment freeing up resources at campus level to focus on local strategic and operational needs. We will also see a \$40,000-\$60,000 per year savings due to 1 FTE reduction and after payment of approximately \$70,000 per year for this service in our EDC billing from UWSA.	Medium	Plan is to complete transition by end of July 2022 with a six month buffer until December 2022 before the campus releases the 1 FTE. Potential disruption with go live in July but are mitigating with testing. Summer was chosen for minimal disruption, likely to be none.	Existing	Existing	\$50k - \$99k
Stevens Point	Instructor Laptops	Replace Instructor desktop PCs with laptops.	This effort is to purchase laptops for instructors who currently possess only desktops. This will be a total of 188 windows laptops, and 60 mac laptops. A small variety of devices will be purchased to match discipline needs. This will help the campus in 4 major ways: -- During COVID, many instructors used personal equipment to do their classes, which is not ideal from an information security perspective -- This will create a new standard for instructors (exceptions may apply) where laptops are mandatory. -- This also creates a new standard for Classroom AV technology where computers will no longer be supplied (exceptions may apply). -- It will be new equipment in the hands of many instructors, and repurpose their existing desktops to areas around campus that need it.	High	This impacts Instructors, and Information Security. Due to budget reductions for 5 years, 50% of our classroom AV setups are out-of-warranty and starting to fail. We need to trim costs to by utilizing a simple USB C dock for connections instead of having a dedicated computer and AV switch in each classroom. This will also improve our ability to shift to online-only teaching due to COVID concerns, and to do it more securely by using institutional devices rather than personal ones (which we have little control over). The biggest risk is a potential breach of student information due to having highly sensitive data on a personal device.	Existing	Existing	\$250k - \$499k
Stevens Point	Civitas Academic Planner	Purchase 3 year contract to provide a strong academic planner for students and advisors to plan out degree paths. This will also allow for better planning of class offerings for academic departments as they will be able to see upcoming class enrollments more than 1 year in advance, and can prepare, modify, or request resources appropriately.	The institution currently does not provide an easy to use way for student and advisors to visually plan out a degree over several years. Students need the ability to understand degree requirements and plan their years accordingly. This will help graduation and retention rates as required class bottlenecks can be identified early and avoided. It will also help academic departments know demand for certain classes well in advance, and can pivot or realign resources as needed.	High	This will impact Students, Registrar's Office, and Advising in the immediate term. Longer-term, it should impact the institution's graduation and retention rates.	Existing	Existing	\$100k - \$249k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
Stevens Point	Modern Campus Curriculog	Purchase a 3 year contract for hosted solution to better manage workflow and consistency between course catalogs and our Student Information System (and our new Academic Planner).	To provide a workflow engine for academic areas to propose curricular changes, route the requests through an approval process, and publish the changes to both our course catalog and Student Information System (and new Academic Planner). This package integrates well with our already purchased Acalog software.	High	This will impact Advising, Registrar's Office, Students, Faculty, Dept. Chairs, Deans, and Course Catalog Editor.	Existing	Existing	\$50k - \$99k
Stevens Point	UWSP - Marshfield Distance Learning Classroom (Lite)	Install a Distance Education classroom based on web-conferencing technologies instead of dedicated hardware codec. Room 126.	There is increased demand on scheduling distance learning classrooms at Marshfield. This is needed to provide additional capacity for scheduling and planning.	High	This will impact Instructors and Students at the Marshfield campus.	Existing	Additional	\$50k - \$99k
Stevens Point	UWSP - Wausau Distance Learning Classroom (Lite)	Install a Distance Education classroom based on web-conferencing technologies instead of dedicated hardware codec. Room 191.	There is increased demand on scheduling distance learning classrooms at Wausau. This is needed to provide additional capacity for scheduling and planning.	High	This will impact Instructors and Students at the Wausau campus.	Existing	Additional	\$50k - \$99k
Stevens Point	Accruent EMS Scheduler	Upgrade our existing campus event scheduling software to include offerings that make it more complete, and mandate its usage as the only standard for events across institution. This is a 3-year contract.	Currently there are several class and event based calendars across the institution. This creates information and organizational challenges when it comes to knowing what is happening, when it is happening, where it is happening, and who is responsible. Facilities, IT, University Police, Emergency Operations Center, and other areas need all this information in one system in order to provide better crisis management and organizational efficiency. An added benefit is better classroom utilization across campus as departments will be able to utilize the entire campus when looking for resources for class, events.	Medium	This will impact the entire campus: Faculty, Staff, and Students. Having an easier to use scheduling platform will ease the upcoming institutional mandate of its usage, deprecating all other event calendar systems.	Existing	Existing	\$100k - \$249k
Stevens Point	Add additional emergency Power to Residence Halls	Purchase small generator to keep network switches and other emergency lighting function in the event of a power outage (snow-storm, etc.).	Roach Hall, Smith Hall, and Pray/Sims Hall are the only dorms without emergency power to wireless APs, network switches, and misc. lights.	Medium	This will impact the students living in these 4 dorms. If a temporary power outage occurs, they will continue to have access to the university network / wifi for laptops, phones, etc.	Existing	Additional	\$50k - \$99k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
Stout	Palo Alto Firewall	Implement a multi-context next generation firewall between campus resources and the public internet and between campus resources and key infrastructure	Provides increased transparency into inbound and outbound internet traffic and traffic flowing in and out of the data center providing malware detection, traffic filtering, advanced logging, and other services which significantly increase the security of our campus IT assets. Completed summer of 2021	Complete	Security	Existing	Existing	\$100k - \$249k
Stout	EAB Enroll360	Enrollment integration service. Focused on increasing the contact with prospective student to increase applicant pool and cultivate the recruitment campaign.	Enrollment enhancement to compliment existing enrollment tools. Need in increase enrollment.	High	Recruitment	Existing	Additional	\$100k - \$249k
Stout	Ocelot Chatbot tool	Chatbot tool - purchase new tool to engage students and answer some of the more commonly asked questions. Will enable increased customer service to the campus and prospective students.	Need increased engagement with prospective and current students. Do not have a Chatbot for student enrollment/retention needs	High	Recruitment & retention	Existing	Additional	\$50k - \$99k
Stout	VPN Upgrade	Replace existing VPN solutions to increase remote access security, reduce complexity and aid with UW System Security Policy compliance.	Move general and privileged access VPN services to a single vendor supported platform that supports multi-factor authentication, provides a better user experience while maintaining the highest level of security	High	Security	Existing	Existing	\$50k - \$99k
Superior	Website & Intranet redevelopment	Develop new campus website, this includes splitting out and the Internet and Intranet functions for campus as part of this project. This project will also move UW-Systems current site onto a support hardware/software platform.	Redesign website to improve marketability and usability while cleaning up old history of over +30k pages. Split internal and external websites for better access, usability and maintainability.	High	External website will provide a improved marketing tool for campus while splitting out information into a Internet and Intranet sites will the enhance accessibility and usability.	Existing	Additional	\$500k - \$999k
Superior	Offsite disaster recovery site and plan	Create a disaster recovery site that meets UW-System requirements	This will provide the ability for UW-Superior to recover from a loss of our current data center while also meeting UW-System policy requirements.	Medium	Ability to restore current data center from physical loss.	Existing	Additional	\$500k - \$999k
Superior	Campus Security Camera Project	Install security cameras around campus where there is no visibility - residence halls, parking lots and exterior cameras are the priority.	Campus Safety & Security	Medium	Ability for UW-Superior Public Safety Department to provide better on site campus safety and incident response.	Existing	Additional	\$50k - \$99k
Superior	PeopleSoft as a Service (PSaaS)	Move PeopleSoft (E-Hive) to UW-Madison hosted solution with conversion from MySQL to Oracle DBMS	Cost savings and risk mitigation	Medium	Move to a centralized PSaaS platform.	Existing	Additional	\$50k - \$99k

Institution	Project Name	Description and justification	Business need	Priority	Project Impact	Financial Resources	Staffing Resources	Estimated Budget
UWSA	High Risk Data Storage	Provides a standard solution for storage of high risk data for all UW institution employees who access and use high risk data.	The enterprise needs a capability to store and access high risk data from on-campus as well as remote locations.	Medium	Improves standardization in handling, transfer, and storage of high risk data across all UW institutions and limits the risk of data exposure. Solution can work for both UW System functional areas (Internal Audit, Athletics, Legal, CHROs) as well as prospective students (i.e. financial aid forms).	Existing	Existing	\$100k - \$249k
UWSA	Password Manager	Provides centralized, secure and integrated access (from cloud to mobile and legacy to on-prem). Simplifies access to all applications, with the ability to generate and automatically capture, store and fill credentials for any login. Can be an integrated single sign-on and password manager solution.	UW System needs a robust, encrypted method to store user passwords and to provide users with a simple way to increase password complexity. This is not consistently employed by all UW institutions.	Medium	Provides a better user experience, reducing the friction of IT security requirements and enabling employee access to business applications by reducing sign-on functions. Improves security posture of UW System by reducing the attack surface brought about by weak user passwords.	Existing	Existing	\$50k - \$99k
Whitewater	Renew University Housing management system (StarRez) contract	StarRez is the University's residence hall management system. The current contract has ended, but we University Housing is planning to renew. So technically not a new purchase, but may be a new contract?	StarRez is the primary system for assigning university residence rooms to students, tracking their deposits, etc.	High	Critical system for University Housing. Will impact all students residing on campus.	Existing	Existing	\$50k - \$99k
Whitewater	Upgrade University ID Card system	Upgrade existing software to a new version, deploy new card printers and cash registers	Existing software needs to be upgraded to continue to be supported.	High	Critical University system for student identification, E-Access, student debit card and other functions.	Existing	Existing	\$50k - \$99k
Whitewater	Event Ticketing Software	Replace existing event ticketing software. To be selected by RFP during FY22.	Reduce cost of using existing software	Medium	The project will impact those who attend events in person or online through UW-W. This includes students, staff and non-campus-related community members.	Existing	Existing	\$50k - \$99k
Whitewater	Surveillance Cameras management software	Replace existing software that manages Surveillance Cameras. To be selected by RFP during FY22.	Existing software will no longer be supported and needs to be replaced.	Medium	Critical system for Public Safety, primarily used by campus Police	Existing	Existing	\$50k - \$99k

**UW SYSTEM AMENDMENT TO SERVICE AGREEMENT WITH HURON
CONSULTING GROUP, INC.**

REQUESTED ACTION

Adoption of Resolution G., approving the amendment to the contractual service agreement between the Board of Regents and Huron Consulting Group, Inc.

Resolution G. That, upon recommendation of the President of the University of Wisconsin System, the Board of Regents approves the amendment to the contractual agreement between the Board of Regents of the University of Wisconsin System, doing business as UWSA, and Huron Consulting Group, Inc.

SUMMARY

The University of Wisconsin System has purchased Workday, a Finance and Human Capital Management Software package. This software as a service (SaaS) is designed to provide a unified finance, human resources, and student/faculty lifecycle management solution in a single package. The purchase of this software was approved by the Board of Regents (BOR) during the July 2021 BOR meeting (Resolution #11663). A separate resolution was passed during the December 2021 BOR meeting (Resolution #11743) to hire Huron Consulting Group, Inc to help UWSA with the implementation of the software.

Since Resolution #11743 was passed, the scope of the Administrative Transformation Program was expanded to include implementation of budget and planning modules already included in the UW System subscription of Workday. The additional implementation scope followed a business case analysis that determined it is more cost effective to UW System to implement native Workday functionality than to retrofit the existing budget system following implementation of Workday Finance and Human Capital Management.

This contract amendment is for a consultant to lead the implementation (planning, architect, configure, test, and deploy) of budget and planning modules (Adaptive Planning) of Workday at all UW System institutions. The cost of this amendment is \$5,476,750 and is in addition to the original contract cost of \$26,839,950 for a total cost of \$32,316,700. The schedule for the work proposed will correspond to the original contract and run through

December 2023. There are also two (2) optional one-year renewals if UWSA elects to use them.

Presenter

- Brent Tilton, Director of Procurement, UW System Administration

BACKGROUND

Regent Policy Document 13-1 requires any grant or contract with private, profit-making organizations in excess of \$1,000,000 be presented to the Board of Regents for formal approval prior to execution.

Previous Action or Discussion

The University of Wisconsin System has purchased Workday, a Human Capital Management Software package. This software as a Service (SaS), is designed to provide a unified finance, human resources, and student/faculty lifecycle management solution in a single package. The purchase of this software was approved by the Board of Regents (BOR) during the July BOR meeting (Resolution #11663). A separate resolution was passed during the December BOR meeting (Resolution #11743) to hire Huron Consulting Group, Inc to help UWSA with the implementation of the software.

Related Policies

- Regent Policy Document 13-1, "General Contract Approval, Signature Authority, and Reporting"

**UW SYSTEM AMENDMENT TO SERVICE AGREEMENT WITH
EAB GLOBAL, INC.**

REQUESTED ACTION

Adoption of Resolution H., approving the amendment to the contractual service agreement between the Board of Regents and EAB Global, Inc.

Resolution H. That, upon recommendation of the President of the University of Wisconsin System, the Board of Regents approves the amendment to the contractual service agreement between the Board of Regents of the University of Wisconsin System, doing business as UWSA, and EAB Global, Inc.

SUMMARY

In 2018, the Board of Regents approved a software-as-a-service contract with EAB to provide their Navigate System to twelve (12) UW System institutions. Navigate provides participating institutions with an important communications platform allowing greater engagement among administrators, advisors, faculty, academic support staff, and students. Navigate has proven an unexpectedly important tool for increasing student engagement during the COVID-19 pandemic, with a strong correlation between engagement and retention.

EAB has a new fully-integrated product offering, Academic Planner, which creates the clear course-to-graduation pathway students seek. Academic Planner better empowers institutions to fully map the degree journey with the certainty students require to meet their academic goals on-time and on-budget. Notably, UW-Milwaukee and UW-Parkside have been successfully utilizing Academic Planner as a component of the 'Moonshot for Equity' multi-institutional southeastern Wisconsin-focused program approved for participation by the Board of Regent's Finance Committee in August of 2020. 'Moonshot for Equity' is a highly-coordinated effort with positive early results seeking to boost enrollment and retention rates, which hopes to serve as a national model.

UWSA has proposed funding a pilot program which would span the remaining two years of the Navigate contract (through 2023), seeking to garner a better understanding of implementation and efficacy of Academic Planner. Three campuses will participate in the

pilot program: UW-Oshkosh, UW-Platteville, and UW-River Falls. The pilot program will provide both participating campuses and UWSA with key insights for consideration in advance of the 2023 expiration of the current EAB contract. In addition, with a nearly two-year head start, both UW-Parkside and UW-Milwaukee's engagement with Academic Partner can provide additional context for future considerations.

The costs associated with the EAB contract amendment to provide Academic Planner to the three pilot-program participants through the remaining term of the existing contract, absent an early termination, is \$384,942.

Presenters

- Ben Passmore, Associate Vice President, Office of Policy Analysis and Research, UW System Administration
- Brent Tilton, Director of Procurement, UW System Administration

BACKGROUND

Regent Policy Document 13-1 requires any grant or contract with private, profit-making organizations in excess of \$1,000,000 be presented to the Board of Regents for formal approval prior to execution.

Related Policies

- Regent Policy Document 13-1, "General Contract Approval, Signature Authority, and Reporting"

**UW-MADISON SPONSORED RESEARCH AGREEMENT
WITH RXMAPPER, LLC**

REQUESTED ACTION

Adoption of Resolution I., approving the contractual sponsored research agreement between the Board of Regents and RxMapper, LLC.

Resolution I. That, upon recommendation of the Chancellor of the University of Wisconsin-Madison and the President of the University of Wisconsin System, the Board of Regents approves the contractual sponsored research agreement between the Board of Regents of the University of Wisconsin System, doing business as UW-Madison, and RxMapper, LLC.

SUMMARY

RxMapper is a spinoff from the Mayo Clinic. RxMapper is working with clinicians at the Mayo Clinic and other health care organizations, integrating patient data with DNA sequence data, to develop models that will provide better predictions of patient outcomes.

Under this agreement, the UW Biotechnology Center at UW-Madison will receive human cheek swab samples from RxMapper, generate DNA sequence data for those samples, and return that data to RxMapper along with a report of the status of mutations of interest to RxMapper. The data is enriched for those regions which contain genes, the human exome. The work to be performed by UW Biotechnology Center is considered a service activity being provided to RxMapper, similar to other activities offered to external clients. Total funding under this agreement is expected to reach \$10,000,000 over its three-year term.

For UW-Madison, this is a new relationship. RxMapper has been looking for an academic partner to connect with, choosing the UW Biotechnology Center. With a successful relationship, RxMapper intends to share developed data in an anonymized format with UW researchers, giving UW researchers a data rich resource to mine. Going forward, RxMapper also intends to collaborate with UW researchers, including them on NIH grant applications. As a result, this initial agreement represents an opportunity for a larger, cross campus collaboration between UW-Madison and RxMapper.

Presenter:

- Rob Cramer, Interim Vice Chancellor for Finance and Administration, UW-Madison

BACKGROUND

Regent Policy Document 13-1 requires any grant or contract with private, profit-making organizations in excess of \$1,000,000 be presented to the Board of Regents for formal approval prior to execution.

Related Policies

- Regent Policy Document 13-1, "General Contract Approval, Signature Authority, and Reporting"

**UW-MADISON STANDARD RESEARCH AGREEMENT
WITH EGENESIS, INC.**

REQUESTED ACTION

Adoption of Resolution J., approving the contractual standard research agreement between the Board of Regents and eGenesis, Inc.

Resolution J. That, upon recommendation of the Chancellor of the University of Wisconsin-Madison and the President of the University of Wisconsin System, the Board of Regents approves the contractual standard research agreement between the Board of Regents of the University of Wisconsin System, doing business as UW-Madison, and eGenesis, Inc.

SUMMARY

eGenesis is a biotechnology company based in Cambridge, Massachusetts with a mission of ending the global transplant shortage and transforming the treatment of organ failure. The company is attempting to bring that vision closer to reality with their multiplex gene editing and genome engineering platform to transform solid organ and therapeutic cell transplantation for the treatment of serious diseases.

This agreement allows for an animal research study as part of a collaboration between eGenesis and UW-Madison, involving the Center for Biomedical Swine Research and Innovation (CBSRI) and partnering units at UW-Madison, including Wisconsin National Primate Research Center, Biomedical Research Model Services, Research Animal Resources Center, and Animal Facilities. The project may include transplantation of organs and tissues between different species (xenotransplantation), specifically genetically engineered pigs and non-human primates. The dollar value of the agreement over the two-year term will exceed \$1,000,000.

This agreement will grow UW-Madison's reputation in the field of xenotransplantation and increase the potential of UW Health to participate in the first xenotransplantation human clinical trials. Further, this collaboration will help build expertise and resources to strengthen UW's own internal research program related to genetically engineered pigs.

Presenter:

- Rob Cramer, Interim Vice Chancellor for Finance and Administration, UW-Madison

BACKGROUND

Regent Policy Document 13-1 requires any grant or contract with private, profit-making organizations in excess of \$1,000,000 be presented to the Board of Regents for formal approval prior to execution.

Related Policies

- Regent Policy Document 13-1, "General Contract Approval, Signature Authority, and Reporting"

**UW-MADISON CLINICAL STUDY AGREEMENT
WITH FATE THERAPEUTICS, INC.**

REQUESTED ACTION

Adoption of Resolution K., approving the contractual clinical study agreement between the Board of Regents and Fate Therapeutics, Inc.

Resolution K. That, upon recommendation of the Chancellor of the University of Wisconsin-Madison and the President of the University of Wisconsin System, the Board of Regents approves the contractual clinical study agreement between the Board of Regents of the University of Wisconsin System, doing business as UW-Madison, and Fate Therapeutics, Inc.

SUMMARY

Fate Therapeutics is a biopharmaceutical company developing cellular immunotherapies for patients with cancer. By creating genetically engineered cell lines with preferred biological properties, the company aims to develop a renewable source for repeatable and cost-effective cell therapy products that can be delivered off-the-shelf to treat many patients.

Under this agreement, the UW-Madison Carbone Cancer Center will explore the safety and effectiveness of novel treatments for B-Cell lymphoma, Chronic Lymphocytic Leukemia or B-cell Acute Lymphocytic Leukemia for whom other FDA-approved therapies have not worked. Treatment will be via Fate Therapeutics CAR-T drug. Total funding under this agreement is expected to be \$3,602,263, depending on enrollment of patients. The agreement will extend for the duration of the study, projected at approximately five years.

This is a new partnership for the University, providing access to a cutting-edge partner and treatment. As UW-Madison does not have a past relationship with Fate Therapeutics, participation in this trial will offer the opportunity to develop a longer-term relationship with the company.

Presenter:

- Rob Cramer, Interim Vice Chancellor for Finance and Administration, UW-Madison

BACKGROUND

Regent Policy Document 13-1 requires any grant or contract with private, profit-making organizations in excess of \$1,000,000 be presented to the Board of Regents for formal approval prior to execution.

Related Policies

- Regent Policy Document 13-1, "General Contract Approval, Signature Authority, and Reporting"

**BUDGET-TO-ACTUALS REPORT
PERFORMANCE REPORT
FY2021-22 (Midyear)**

REQUESTED ACTION

No action is required; this item is for information only.

SUMMARY

Attached is the FY2021-22 Budget-to-Actuals Report which is based on financial data for fiscal year FY21-FY22 and reflects the status of the UW System budget by major areas of activity in comparison to actuals for the period of July 1, 2021 through December 31, 2021.

Presenter:

- Sean Nelson, Vice President for Finance, UW System Administration

BACKGROUND

The Business and Finance Committee receives periodic reports regarding the status of the UW System budget. These reports are prepared twice each year based on financial information as of December 31st and June 30th reflecting budget data at the midpoint and close of the fiscal year, respectively. The report provides budget-to-actual revenue and expense information along with variances of that activity from the initial Board of Regents' approved budget. The report is intended to provide a high-level summary to help aid the Committee in meeting its fiduciary responsibilities with respect to UW System budget management and oversight.

The budget-to-actuals report presented here details revenues for the following unrestricted and restricted funding source categories:

- Tuition & Fees
- State General Purpose Revenue (GPR)
- Auxiliary Enterprises
- General Operations

- Gifts
- Nonfederal Grants, and Contracts
- Federal Grants and Contracts
- Other Restricted Program Revenue
- Other Unrestricted Program Revenue
- Federal Indirect Cost Reimbursement
- Trust Funds
- Other Appropriated Funds

On the expense side, the following categories are highlighted:

- Salaries and Fringe Benefits
- Supplies and Expenses
- Capital
- Financial Aid
- Other (Debt Service/Transfer Out to DOA)

This cash basis report is not intended to replace the UW System's Annual Financial Report and related accrual-based, audited Financial Statements. The UW System Annual Financial Report presents a comprehensive look at the University's financial activities for a given fiscal year. The (draft) FY2021 Annual Financial Report was presented to the Business and Finance Committee at the December 2021 meeting.

Previous Action or Discussion

The last report was presented to the Business and Finance Committee in the October 2021 meeting.

ATTACHMENT

- A) FY2021-22 Budget-to-Actuals Report (Midyear)

UW System

Fiscal Year 2022 - thru December 2021

	Board Approved		Revised Budget	Actual	Variance / Board		Revised Budget to Actual	
	Budget	Budget Adjustments			Approved to Actual		Variance	% of Revised Budget
Revenue								
GPR/Tuition and Fees	\$ 2,553,266,392	\$ (2,749,931)	\$ 2,550,516,460	\$ 1,268,617,792	\$ (1,284,648,600)		(1,281,898,669)	49.7%
GPR: Miscellaneous	23,883,196	-	23,883,196	10,256,272	(13,626,924)		(13,626,924)	42.9%
Auxiliary Enterprises	709,633,510	(919,332)	708,714,178	425,104,287	(284,529,223)		(283,609,891)	60.0%
General Operations	444,853,102	511,264	445,364,366	150,209,481	(294,643,621)		(295,154,885)	33.7%
Other Unrestricted Program Revenue	266,675,026	30,070	266,705,096	129,321,332	(137,353,694)		(137,383,764)	48.5%
Federal Indirect Cost Reimbursement	175,701,586	194,068	175,895,654	87,039,708	(88,661,878)		(88,855,946)	49.5%
Total Unrestricted	4,174,012,812	(2,933,861)	4,171,078,951	2,070,548,872	(2,103,463,940)		(2,100,530,079)	49.6%
Gifts and Nonfederal Grants and Contracts	715,398,179	3,798,204	719,196,383	301,207,639	(414,190,540)		(417,988,744)	41.9%
Federal Grants and Contracts	614,229,115	40,337,667	654,566,781	538,052,074	(76,177,041)		(116,514,708)	82.2%
Other Restricted Program Revenue	804,230,645	12,000	804,242,645	352,590,798	(451,639,847)		(451,651,847)	43.8%
Trust Funds	28,555,352	-	28,555,352	10,733,883	(17,821,469)		(17,821,469)	37.6%
Other Appropriated Funds	2,980,800	1,000	2,981,800	(67,805,345)	(70,786,145)		(70,787,145)	-2274.0%
GPR: Debt Service	205,856,900	-	205,856,900	98,471,297	(107,385,603)		(107,385,603)	47.8%
Total Restricted	2,371,250,991	44,148,870	2,415,399,861	1,233,250,345	(1,138,000,645)		(1,182,149,516)	51.1%
Total Revenue	\$ 6,545,263,803	\$ 41,215,009	\$ 6,586,478,812	\$ 3,303,799,217	\$ (3,241,464,585)		\$ (3,282,679,595)	50.2%
Expenses								
Salaries and Fringe Benefits								
Salaries	\$ 2,664,123,618	\$ 414,382	\$ 2,664,538,000	\$ 1,256,886,923	\$ (1,407,236,695)		\$ (1,407,651,077)	47.2%
Fringe Benefits	918,797,887	(683,655)	918,114,232	487,375,514	(431,422,373)		(430,738,718)	53.1%
Total Salaries and Fringe Benefits	3,582,921,505	(269,274)	3,582,652,231	1,744,262,437	(1,838,659,068)		(1,838,389,795)	48.7%
Supplies and Expenses	1,285,952,919	14,365,229	1,300,318,149	608,205,004	(677,747,915)		(692,113,145)	46.8%
Capital	187,070,533	118,803	187,189,336	78,165,136	(108,905,397)		(109,024,200)	41.8%
Financial Aid	1,067,007,837	24,563,278	1,091,571,115	602,757,813	(464,250,024)		(488,813,302)	55.2%
Other (Debt Service/Transfer Out to DOA)	449,450,641	46,517	449,497,158	225,080,166	(224,370,475)		(224,416,992)	50.1%
Total Expenses	\$ 6,572,403,436	\$ 38,824,554	\$ 6,611,227,989	\$ 3,258,470,556	\$ (3,313,932,880)		\$ (3,352,757,433)	49.3%
Revenue less Expense	\$ (27,139,633)	\$ 2,390,455	\$ (24,749,177)	\$ 45,328,661	\$ 72,468,294		\$ 70,077,839	

**SEMIANNUAL REPORT ON GIFTS, GRANTS AND CONTRACTS
JULY 1, 2020 THROUGH JUNE 30, 2021**

REQUESTED ACTION

No action is required; this item is for information only.

SUMMARY

Attachment A provides a summary report of gifts, grants, and contracts awarded to University of Wisconsin System institutions from July 1, 2021 through December 31, 2021. Total gifts, grants, and contracts for the six-month period were approximately \$1.1 billion; this is a 14.3% increase (\$138.5 million) from the same period in the prior year.

Federal awards increased \$31.6 million (4.9%). This increase is largely attributed to research grants from various federal agencies.

Non-federal awards increased \$106.9 million (33.0%) between the first half of fiscal years 2019-21 and 2020-22. This increase is primarily at UW-Madison and relates to funds received from the Wisconsin Alumni Research Foundation (WARF) to support new research buildings, pandemic support, grants to the Morgridge Institute for Research, and other operational and functional research support.

Presenter

- Sean Nelson, Vice President for Finance, UW System Administration

BACKGROUND

Regent Policy Document 13-1, "General Contract Approval, Signature Authority, and Reporting", requires that a summary of extramural gifts, grants, and contracts be reported semiannually to UW System Administration for presentation to the Business and Finance Committee of the Board of Regents. The report, included as Attachment A, is intended to meet that requirement and reflects gifts, grants, and contracts awarded for the given reporting period. It does not include what has been expended or total amounts beyond the given reporting period.

The policy further directs that grants from and contracts with private, profit-making organizations with a value of more than \$1,000,000, as well as athletics employment contracts where the total annual compensation is greater than \$500,000, require formal approval by the Board of Regents prior to execution. In addition, any contract with a value of less than \$1,000,000 that, in the judgment of the President of the UW System, warrants direct Board approval shall also be approved by the Board prior to execution. Grants and contracts covered by these requirements are included in the semiannual reports and are also presented individually to the Business and Finance Committee of the Board of Regents.

The policy also requires that grants from and contracts with private, profit-making organizations with a value between \$500,000 and \$1,000,000 be reviewed by an institution's legal affairs office or the UW System Office of General Counsel prior to execution.

The categories defined in this report are based on UWSA program activity code queries and are further defined in Attachment B.

Previous Action or Discussion

The semi-annual gifts, grants and contracts reports for fiscal year 2020-21 were presented to the Business and Finance Committee in February and October 2021, respectively.

Related Policies

- Regent Policy Document 13-1 "General Contract Approval, Signature Authority, and Reporting"

ATTACHMENTS

- A) University of Wisconsin Gifts, Grants and Contracts Awarded Fiscal Year 2021-22 (through December 2021)
- B) Report Category Descriptions and Examples

UNIVERSITY OF WISCONSIN SYSTEM
GIFTS, GRANTS AND CONTRACTS AWARDED
FISCAL YEAR 2021-2022 (through December)

TOTAL AWARDS - ALL CATEGORIES									
Institution	Total Fiscal Year to Date			Federal Fiscal Year to Date			Non Federal Fiscal Year to Date		
	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)
Total	1,110,472,665	971,954,435	138,518,230	679,428,511	647,827,409	31,601,103	431,044,154	324,127,027	106,917,127
Madison	943,875,139	826,719,359	117,155,780	543,194,615	534,655,416	8,539,200	400,680,524	292,063,944	108,616,580
Milwaukee	55,095,006	45,859,164	9,235,842	43,246,603	31,841,277	11,405,326	11,848,403	14,017,888	(2,169,484)
Eau Claire	7,554,519	8,122,197	(567,678)	7,533,177	7,998,821	(465,644)	21,342	123,376	(102,034)
Green Bay	12,466,153	10,180,135	2,286,019	10,064,032	8,071,063	1,992,969	2,402,121	2,109,072	293,050
La Crosse	7,349,496	7,305,575	43,921	4,878,994	5,402,716	(523,722)	2,470,502	1,902,859	567,643
Oshkosh	15,133,408	14,887,613	245,794	14,621,038	14,408,992	212,046	512,370	478,621	33,748
Parkside	3,857,142	4,050,466	(193,324)	3,364,615	3,670,797	(306,183)	492,528	379,669	112,859
Platteville	5,312,138	7,193,439	(1,881,301)	3,772,352	6,351,255	(2,578,903)	1,539,786	842,184	697,602
River Falls	6,373,752	5,219,514	1,154,238	5,255,974	4,336,579	919,395	1,117,778	882,935	234,843
Stevens Point	10,715,298	13,306,950	(2,591,652)	7,520,288	9,033,587	(1,513,299)	3,195,010	4,273,362	(1,078,352)
Stout	6,608,839	8,208,344	(1,599,504)	5,569,607	6,111,712	(542,105)	1,039,232	2,096,632	(1,057,399)
Superior	4,425,215	8,617,632	(4,192,417)	3,507,383	7,740,391	(4,233,008)	917,832	877,241	40,591
Whitewater	12,960,529	9,900,199	3,060,331	9,429,284	6,965,187	2,464,097	3,531,245	2,935,011	596,234
System Administration	18,746,030	2,383,849	16,362,181	17,470,549	1,239,616	16,230,933	1,275,481	1,144,233	131,248

RESEARCH & PUBLIC SERVICE									
Institution	Total Fiscal Year to Date			Federal Fiscal Year to Date			Non Federal Fiscal Year to Date		
	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)
Total	906,050,593	744,212,878	161,837,715	560,586,439	525,873,731	34,712,708	345,464,154	218,339,147	127,125,007
Madison	845,379,747	697,004,833	148,374,915	508,612,880	493,068,986	15,543,894	336,766,867	203,935,847	132,831,020
Milwaukee	27,571,544	21,871,765	5,699,778	23,587,412	14,157,890	9,429,522	3,984,132	7,713,875	(3,729,744)
Eau Claire	1,143,271	2,035,236	(891,965)	1,124,129	1,911,860	(787,731)	19,142	123,376	(104,234)
Green Bay	3,307,933	3,794,302	(486,369)	2,729,628	2,727,368	2,260	578,305	1,066,934	(488,629)
La Crosse	765,289	1,662,372	(897,083)	362,533	1,327,333	(964,800)	402,756	335,039	67,717
Oshkosh	1,315,492	1,715,672	(400,180)	1,080,072	1,267,347	(187,275)	235,420	448,325	(212,905)
Parkside	100,824	132,695	(31,871)	4,500	134,190	(129,690)	96,324	(1,495)	97,819
Platteville	623,908	1,740,809	(1,116,901)	508,829	1,707,034	(1,198,205)	115,079	33,775	81,304
River Falls	1,213,548	111,831	1,101,717	920,612	0	920,612	292,936	111,831	181,105
Stevens Point	861,989	3,040,899	(2,178,910)	303,682	1,486,730	(1,183,048)	558,307	1,554,168	(995,861)
Stout	448,683	1,418,750	(970,066)	204,862	764,242	(559,380)	243,822	654,508	(410,687)
Superior	761,633	5,904,564	(5,142,932)	645,164	5,818,002	(5,172,838)	116,468	86,562	29,906
Whitewater	4,137,802	1,532,466	2,605,336	3,031,586	263,133	2,768,453	1,106,216	1,269,333	(163,117)
System Administration	18,418,929	2,246,684	16,172,246	17,470,549	1,239,616	16,230,933	948,380	1,007,068	(58,688)

INSTRUCTION									
Institution	Total Fiscal Year to Date			Federal Fiscal Year to Date			Non Federal Fiscal Year to Date		
	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)
Total	46,028,460	41,464,041	4,564,418	28,755,569	25,533,390	3,222,178	17,272,891	15,930,651	1,342,240
Madison	24,702,843	24,801,230	(98,387)	16,825,676	16,176,758	648,918	7,877,167	8,624,472	(747,305)
Milwaukee	10,073,387	7,438,825	2,634,562	2,331,723	1,226,181	1,105,542	7,741,664	6,212,643	1,529,020
Eau Claire	2,018,013	1,107,330	910,683	2,015,813	1,107,330	908,483	2,200	0	2,200
Green Bay	1,421,125	472,100	949,026	710,105	0	710,105	711,020	472,100	238,921
La Crosse	673,941	754,691	(80,750)	261,284	606,406	(345,122)	412,657	148,285	264,372
Oshkosh	6,551,386	5,967,494	583,892	6,551,386	5,967,494	583,892	0	0	0
Parkside	8,475	408,417	(399,943)	0	346,094	(346,094)	8,475	62,323	(53,849)
Platteville	9,533	43,231	(33,697)	0	0	0	9,533	43,231	(33,697)
River Falls	0	4,740	(4,740)	0	0	0	0	4,740	(4,740)
Stevens Point	340,850	284,240	56,610	0	3,942	(3,942)	340,850	280,298	60,552
Stout	204,451	155,812	48,639	59,581	99,185	(39,604)	144,870	56,627	88,243
Superior	0	6,263	(6,263)	0	0	0	0	6,263	(6,263)
Whitewater	24,455	19,669	4,786	0	0	0	24,455	19,669	4,786
System Administration	0	0	0	0	0	0	0	0	0

				STUDENT AID					
Total				Federal			Non Federal		
Fiscal Year to Date				Fiscal Year to Date			Fiscal Year to Date		
Institution	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)
Total	94,916,332	101,398,558	(6,482,226)	79,381,941	84,364,698	(4,982,757)	15,534,391	17,033,860	(1,499,469)
Madison	23,443,303	29,316,436	(5,873,133)	15,344,783	18,584,863	(3,240,080)	8,098,519	10,731,573	(2,633,053)
Milwaukee	14,610,715	14,574,447	36,268	14,609,615	14,570,687	38,928	1,100	3,760	(2,660)
Eau Claire	4,393,235	4,979,631	(586,396)	4,393,235	4,979,631	(586,396)	0	0	0
Green Bay	6,346,567	5,642,782	703,786	5,807,755	5,236,432	571,323	538,812	406,350	132,463
La Crosse	4,543,999	4,504,739	39,260	3,299,030	3,423,828	(124,798)	1,244,969	1,080,911	164,058
Oshkosh	6,853,174	7,035,852	(182,678)	6,650,626	7,035,852	(385,226)	202,548	0	202,548
Parkside	2,959,194	3,471,064	(511,871)	2,881,308	3,190,513	(309,206)	77,886	280,551	(202,665)
Platteville	3,236,423	3,948,929	(712,506)	3,149,048	3,946,521	(797,473)	87,375	2,408	84,967
River Falls	3,818,290	4,136,034	(317,744)	3,284,408	3,625,262	(340,854)	533,882	510,772	23,110
Stevens Point	9,324,188	9,251,649	72,539	7,216,606	7,528,015	(311,409)	2,107,582	1,723,634	383,948
Stout	3,847,760	4,602,201	(754,441)	3,839,260	4,139,907	(300,647)	8,500	462,294	(453,794)
Superior	3,421,446	2,600,272	821,174	2,662,388	1,922,389	739,999	759,058	677,883	81,175
Whitewater	8,118,038	7,334,522	783,515	6,243,879	6,180,797	63,082	1,874,159	1,153,725	720,434
System Administration	0	0	0	0	0	0	0	0	0

				ALL OTHERS*					
Total				Federal			Non Federal		
Fiscal Year to Date				Fiscal Year to Date			Fiscal Year to Date		
Institution	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)	2021-22	2020-21	Increase (Decrease)
Total	63,477,280	84,878,958	(21,401,678)	10,704,563	12,055,590	(1,351,027)	52,772,718	72,823,369	(20,050,651)
Madison	50,349,246	75,596,861	(25,247,615)	2,411,276	6,824,809	(4,413,533)	47,937,970	68,772,052	(20,834,082)
Milwaukee	2,839,360	1,974,127	865,233	2,717,852	1,886,518	831,334	121,508	87,609	33,899
Eau Claire	0	0	0	0	0	0	0	0	0
Green Bay	1,390,529	270,952	1,119,576	816,544	107,263	709,281	573,984	163,689	410,295
La Crosse	1,366,266	383,773	982,493	956,147	45,149	910,998	410,119	338,624	71,495
Oshkosh	413,355	168,595	244,760	338,954	138,299	200,655	74,401	30,296	44,105
Parkside	788,650	38,289	750,361	478,807	0	478,807	309,843	38,289	271,554
Platteville	1,442,273	1,460,470	(18,197)	114,475	697,700	(583,225)	1,327,798	762,770	565,028
River Falls	1,341,914	966,909	375,005	1,050,954	711,317	339,637	290,960	255,592	35,368
Stevens Point	188,271	730,162	(541,891)	0	14,900	(14,900)	188,271	715,262	(526,991)
Stout	2,107,945	2,031,581	76,364	1,465,904	1,108,378	357,526	642,041	923,203	(281,162)
Superior	242,137	106,532	135,604	199,831	0	199,831	42,306	106,532	(64,227)
Whitewater	680,234	1,013,541	(333,307)	153,819	521,257	(367,438)	526,415	492,284	34,131
System Administration	327,101	137,166	189,935	0	0	0	327,101	137,166	189,935

*Includes Libraries, Physical Plant and Miscellaneous categories

Report Category Descriptions and Examples

Report Category	Program Name	Description	Examples
Research and Public Service	Sponsored Research	Activities specifically organized and separately budgeted to produce research outcomes, whether commissioned by an agency external to the institution or separately by an organizational unit within the institution.	Institutes and research centers Individual and project research
Research and Public Service	Public Service	Activities that are established primarily to provide noninstructional services beneficial to individuals and groups external to the institution. Examples include Community Services; Cooperative Extension Services; and Public Broadcasting Services.	Community services Cooperative extension Public broadcasting
Instruction	Instruction	Activities that are part of an institution's instructional program. Included are credit and noncredit courses for academic, vocational, and technical instruction; remedial and tutorial instruction; regular, special, and extension sessions; and community education. Includes departmental research and sponsored instruction.	General academic instruction Vocational/technical instruction Special session instruction Community education Preparatory/remedial instruction
Student Aid	Student Aid	All forms of financial aid assistance to students including scholarships, fellowships, and loans.	Scholarships Fellowships Loans Federal grants (i.e. Pell)
All Others: Split Libraries and Miscellaneous	Academic Support	Support services for the institution's primary missions: instruction, research, and public service. Examples include Libraries; Museums and Galleries; Educational Media Services; Academic Computing Services; Ancillary Support; Academic Administration; Academic Personnel Development; and Course and Curriculum Development.	Libraries Museums and galleries Educational media services Academic computing services Ancillary support Academic administration Academic personnel development Course and curriculum development
All Others: Miscellaneous	Student Services	Admissions and registrar offices and those activities whose primary purpose is to contribute to the student's emotional and physical well-being and to his or her intellectual, cultural, and social development outside the context of the formal instructional program. Examples include Student Services Administration; Social and Cultural Development; Counseling and Career Guidance; Financial Aid Administration; Student Admissions; Student Records; and Student Health Services.	Student services administration Social and cultural development Counseling and career guidance Financial aid administration Student admissions Student records Student health services
All Others: Miscellaneous	Institutional Support	1) Central executive-level activities concerned with management and long-range planning of the entire institution, such as the governing board, planning and programming, and legal services; 2) fiscal operations, including the investment office; 3) administrative data processing; 4) employee personnel and records; 5) logistical activities that provide procurement, storerooms, printing, and transportation services to the institution; 6) support services to faculty and staff that are not operated as auxiliary enterprises; and 7) activities concerned with community and alumni relations, including development and fundraising.	Executive management Fiscal operations General administrative and logistical services Administrative computing services Public relations/development
All Others: Physical Plant	Operation and Maintenance of Plant	Operation and maintenance of physical plants for all institutional activities, including auxiliary enterprises and independent operations	Physical plant administration Building maintenance Custodial services Utilities Landscaper and grounds Major repairs and renovations
All Others: Miscellaneous	Auxiliary Enterprises	An entity that exists to furnish goods or services to students, faculty, or staff, and that charges a fee directly related to, although not necessarily equal to, the cost of the goods or services. This also includes Division I Intercollegiate Athletics.	Provides goods and services for a fee to students, faculty, and staff Intercollegiate athletics