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## July 10, 2020

Below please find a listing of all approved interim SYS policy actions and SYS policies, procedures, and guidance taken from June 12, 2020 through July 10, 2020.

### I. Interim SYS Policy Action Revisions

[SYS 300-02, Interim: Capital Equipment and Maintenance Repair and Operations Physical Inventory Report Extension](#) (Revision approved June 18, 2020)

- This interim policy provides institutions with an extension for the current cycle biennial physical inventory review of capital inventory and the annual physical inventory requirement of maintenance repair and operations (MRO) inventory, as required [in SYS 334, Accountability for Capital Equipment](#), Section 6.C and [SYS 323, Maintenance and Repair Operations Inventory](#), Section 6.A and 6.C.
  - Changed title to “Interim: Capital Equipment **and Maintenance Repair and Operations** Physical Inventory Review Extension”
  - In Section 1, added “**and the annual physical inventory requirement of maintenance repair and operations (MRO) inventory**” to the end of the first sentence.
  - In Section 1, added “**and staff who conduct the inventory may be working remotely**” to the end of the second sentence.
  - In Section 2, added reference to [SYS 232, Maintenance and Repair Operations Inventory](#), Section 6.A and 6.C.
  - In Section 3, added that the policy also applies to “**a MRO annual physical inventory requirement in 2020 controlled by the facilities management units and auxiliary units.**”
  - In Section 4, added the definition for MRO (Maintenance, Repair, and Operations).
  - In Section 5.A.III, changed “**requirements**” to “**required elements.**”
  - In Section 5, added subsection B, which describes the Maintenance Repair and Operations Physical Inventory Requirement Extension.
    - The deadline for conducting the physical inventory for MRO inventory is extended by up to one year.
    - E.g., if an institution’s review was due to be completed on June 30, 2020, the deadline has been extended to June 30, 2021.
    - This interim policy action does not change the requirements of the physical inventory review listed in [SYS 323, Maintenance Repair and Operations Inventory](#), Section 6.A and 6.C.

### II. New SYS Policies

[SYS 121, Professional Licensure Programs: Determining Student Location](#) (New policy approved June 30, 2020)

- In 2019, the U.S. Department of Education revised the federal regulations initially established in 2016 for institutions that offer distance education in regard to state authorization, notifications and

disclosures The new language under the 2019 rules requires institutions to create a policy under which they will determine a student's location for both Title IV verification purposes as well as state-specific disclosures related to academic program completion requirements to fulfill licensure requirements of states.

- The rules also modify or eliminate many of the required disclosures for distance education programs and shift some of those disclosures to 34 CFR 668.43 to apply to all institutions regardless of modality.
- This policy is needed in response to a new federal requirement.
  - The System policy will serve as the university policy until such time that each university create their own processes and policies.

### III. **SYS Policy Revisions**

*SYS 125, Maintaining Continuity of Extension, Statewide Outreach and Public Service Following the 2017 University of Wisconsin System Restructure* (Revision approved June 16, 2020)

- This is the foundational policy that describes: (1) the purpose of "statewide outreach and public service" (i.e., the new name for the statewide outreach mission of the former UW-Extension, which is now owned individually by each of the former divisions); (2) how statewide outreach and public service works in the UW System; (3) and the domain-specific statewide outreach roles and responsibilities for each of the former Extension divisions.
  - Added in a Preamble section that describes the UW's outreach mission, the role of UW-Extension in fulfilling that mission, and the Board of Regent's intent to preserve that model following the 2017 restructuring.
  - Added in A Note on the Definition of Extension section to clarify the definition of UW-Extension regarding changes that were made as a result of the 2017 restructuring.
  - Described the history of responsibilities of the four former divisions of UW-Extension and their locations under the 2017 restructuring:
    - UW-Madison Extension (historically Cooperative Extension)- transferred to UW-Madison
    - Wisconsin Public Media (historically Broadcast and Media Innovations)- transferred to UW-Madison
    - UW Extended Campus (historically CEOEL)- reports directly to UW System
    - The Institute for Business and Entrepreneurship (historically Business and Entrepreneurship)- reports directly to UW System
  - Clarified that the individuals previously responsible for programming and outreach, including the receipt and allocation of FTEs and 104 Funds, will continue to work in partnership with the UW institutions.
  - Defined the specific partnership responsibilities in the UW Partnership Outreach Model following the 2017 restructuring.
  - Clarified the roles of the three institutions that distribute state funds in service of their respective statewide outreach responsibilities (i.e., "the three state-wide outreach entities" UW-Madison Extension, UW Extended Campus, the Institute for Business and Entrepreneurship) in planning, coordination, oversight, and reporting activities and responsibility for outreach activities.

- Delineated which activities are part of the annual program planning, coordination, oversight, and reporting process initiated and led by the three state-wide outreach entities and which activities are not under the jurisdiction of the three state-wide outreach entities.
- Removed sections regarding personnel classification, the personnel appointment process, and personnel: faculty standing and authority.
- Modified the budgetary policy to reflect changes made by 2017 restructuring.
- Reduced Data Reporting and Monitoring Section to only the basic delineations of responsibility for category 1 and category 2 activities between UW institutions and the state-wide outreach entities.
- Reduced Accountability/Review Section to reference the new administrative homes of the four former divisions of UW-Extension.
- Added a section to address the process for dispute resolution.

*[SYS 127, Identification of the Extension Function in the University of Wisconsin System](#)* (Revision approved June 16, 2020)

- This document describes how to co-brand statewide outreach activities in the context of the UW System partnership model of statewide outreach.
  - Replaced language about the formation of Extension and its mission with a description of the transfer of historical responsibilities and divisions following the 2017 restructuring (further detailed in *[SYS 125, Maintaining Continuity of Extension, Statewide Outreach and Public Service Following the 2017 University of Wisconsin System Restructure](#)*).
  - Added definitions, replicated from SYS 125, to clarify the two basic forms of outreach activities and public service, and delineate reporting responsibilities:
    - **Category 1:** The three statewide outreach entities have responsibility to direct the planning, coordination, and oversight of their respective outreach and public service programs and activities for which resources are allocated to them by UW System (the currently called “Fund 104” resources). Each of the three statewide outreach entities exercise budgetary control over their resources through IIAs, which codify agreements reached between individual UW campuses and the three statewide outreach entities, and which should include mutually agreed programming, annual allocations, market and other research to support said programming. Each of the three statewide outreach entities retain final authority and control over their respective FTE and 104 dollars. Each campus must use the allocated 104 funds and FTE for their intended purpose, as specified in the IIA; these FTE and dollars are specifically not a “pass through” from the state through the three statewide outreach entities and to each UW campus.
    - **Category 2:** For non-104-supported programs and activities out in the state but supported by UW campuses and under that campus’s purview, each of the three statewide outreach entities is assigned by the UW System reporting responsibility only to promote coordination and mission compatibility. The UW campuses retain final authority and responsibility over the FTE and dollars associated with these non-104-funded programs and activities.
  - Defined “Extension” after the 2017 restructure to be shorthand for the UW-Madison Division of Extension (i.e., formally the Division of Cooperative Extension) and its activities.

- Replaced references to UW-Extension with Statewide Outreach Entity or the specific division name.
- Removed section regarding Identification of UW Institutional Response Units Responsible for the Extension Function.
- Removed section regarding Identification of Faculty/Staff With Collaborative Appointments.

*SYS 130, Programming for the Non-Traditional Market in the UW System* (Revision approved June 16, 2020)

- This document describes the purpose of the IIAs, CEEC, and how Fund 189 (formally Fund 104-2) should be used. This policy also contains three important appendices including processes for service-based pricing.
  - Emphasized the importance of the non-traditional student in the UW mission and described how services are managed within missions, resources, and academic policy framework of the UW System and Institutions.
  - Removed references to fund 104-2, the history of non-traditional student enrollment, and Enrollment Management 21.
  - Added explanation of the Board of Regents' intent to preserve and affirm the partnership model of statewide outreach through the new administrative structures created via the 2017 restructure, and added reference to *SYS 125, Maintaining Continuity of Extension, Statewide Outreach and Public Service Following the 2017 University of Wisconsin System Restructure*.
  - Explained the role of the institutional Continuing Education Executive Council (CEEC, formerly the Continuing Education Extension Committees) in the systemwide coordination of credit and noncredit programming.
  - Removed distinction between adult and high school programming in the Types of Programming and Funding Sources to be Used Section.
  - Removed language about increasing enrollment of adult students from the Pricing Policies Related to Non-Traditional Markets Section.
  - Removed references to Fund 104-2 from the Responsibility for Credit Courses Section.
- SYS 130 Appendix A-
  - Replaced references to Fund 104-2 with Fund 189.
  - Removed and replace references to UW-Extension with the appropriate division under the 2017 restructuring.
  - Removed reference to the Extension Statewide Plan.
- SYS 130 Appendix B-
  - Replaced definition of nontraditional students with reference to Appendix A.
  - Removed distinction for adult non-traditional programs.
  - Added information about the market and competitive pricing may be submitted by UW Extended Campus or the UW institution.
  - Removed requirement that institutions describe incentives systems that reward the sponsoring academic units.
  - Removed requirement that proposals be sent simultaneously to various offices, that the president report on written action to the Board of Regents, and that existing tuition rates initiated through Fund 104 are exempt from review.
- SYS 130 Appendix C-
  - Replaced reference to UW-Extension with UW-Extended Campus.
  - Added that UW Extended Campus, along with UW institutions, will be held accountable for their distance education pricing and cost analyses.

#### **IV. SYS Policy Rescissions**

RESCISSION- [SYS 126, Statewide Planning, Communication and Coordination of Extension Programs in the UW System](#) (Rescission approved June 16, 2020)

- This document described the history of UW-Extension and it will now be considered a “guidance document” vs. a policy. That is, this document will no longer provide policy directives. A new paragraph was written that will precede this policy, converting it to a guidance document.
- Rationale for Rescission:
  - In 2017, pursuant to Regent Resolutions 10956 and 10961, the UW Colleges and UW-Extension were restructured. Hence, the [UW System Policy, SYS 126, Statewide Planning, Communication and Coordination of Extension Programs in the UW System](#), became a guidance document, rather than an active policy. As a guidance document, SYS 126 describes many of the foundational aspects of the statewide extension function, for ready access by current and future UW System faculty, staff, and students, as well as members of the public. The UW System policies that remain in effect as active policies include: SYS 125, SYS 127, and SYS 130.

#### **V. Fiscal Year 2021 UW System Administrative Policy Plan**

The [FY 2021 SYS Policy Priority Plan](#) is distributed annually at the beginning of the fiscal year to provide guidance to UW institutions about SYS policy development work that will occur between now and the following June (i.e. June 30, 2021.) This memorandum does not include Regent Policy Document actions that may occur.

A quarterly update will be provided to campuses on progress against the FY21 SYS policy priorities plan and to note any emerging policy priorities for the following quarter.