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# Strategic Planning and Budget Committee

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SEPTEMBER 20, 2021

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# Update on Mission Statement

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# Status

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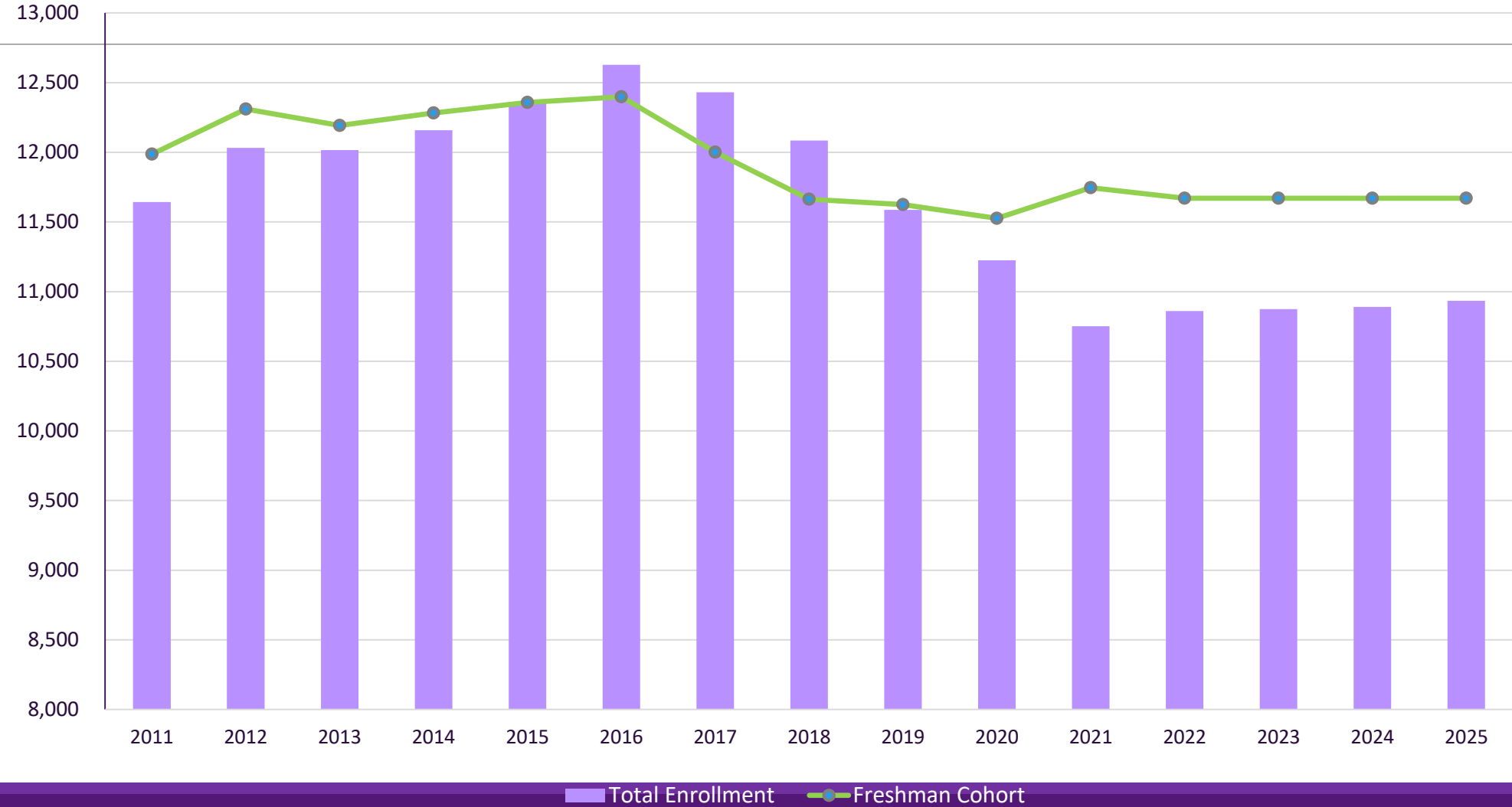
- Mission had first reading at BoR in June
- Minor changes recommended
- Changes approved by governance groups
- Final document submitted to UW System
- Expect 2<sup>nd</sup> and final reading at BoR in October

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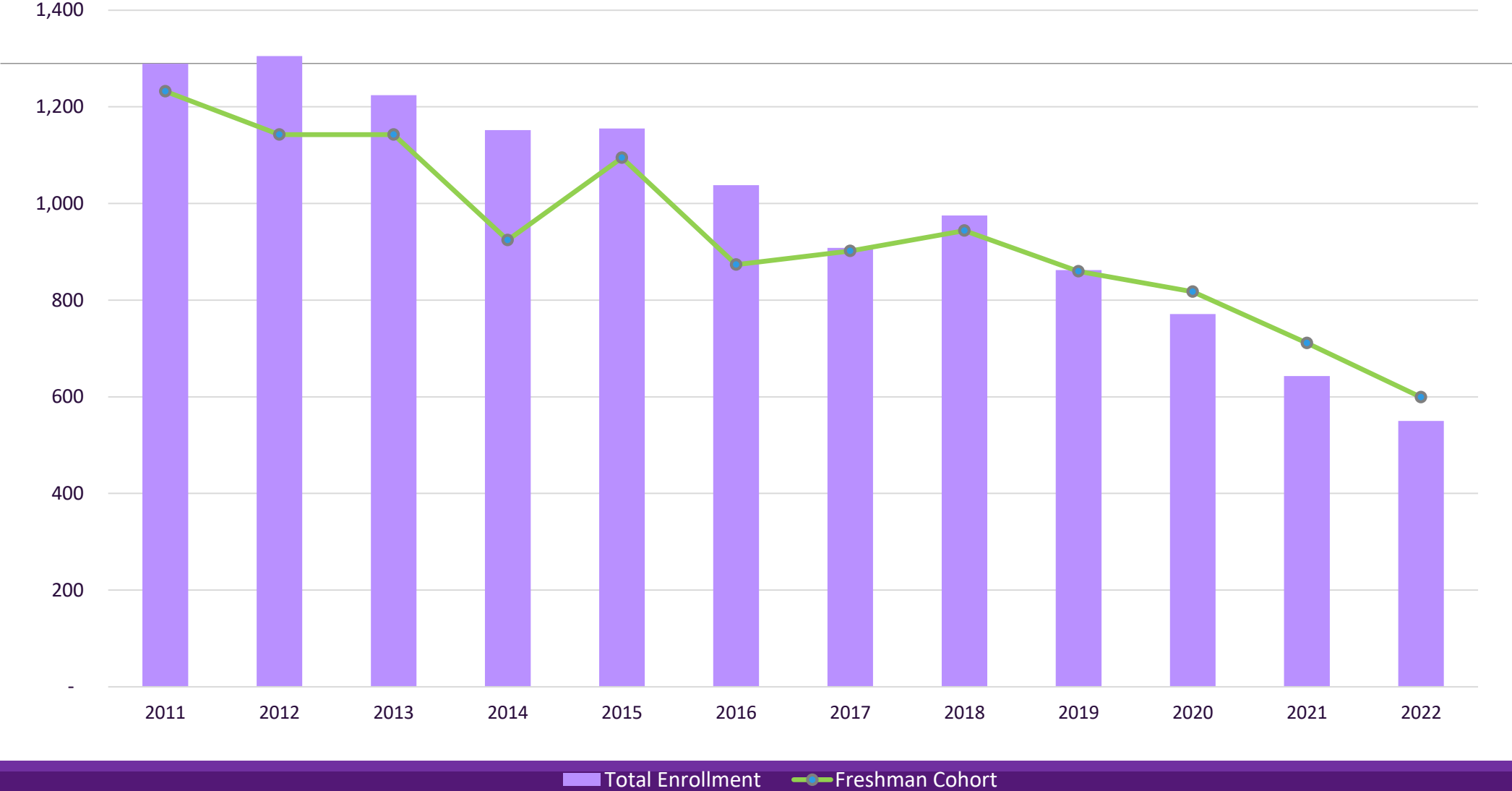
# Enrollment Update

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# UW-Whitewater Enrollment: main campus



# UW-Whitewater Enrollment: Rock campus



# Strategic Enrollment Management Plan

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- Committee is meeting this fall and early spring
- 20 members from across campus and governance groups
- Survey and Open forum are planned for university-wide input
  
- Plan to be wrapped up by February

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# HLC Self-Study

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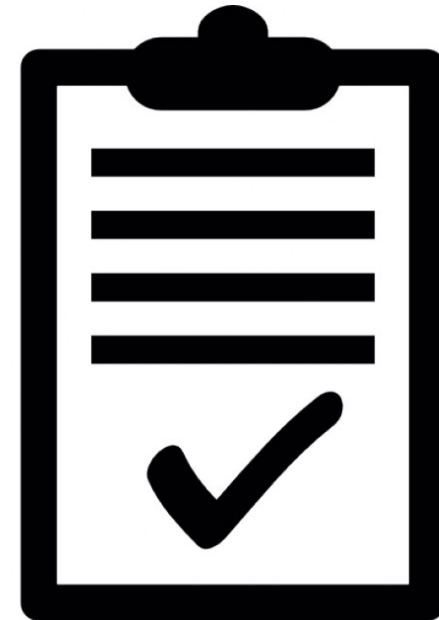
# Budget and Finances

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# Topics

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- Fiscal Year 2020-2021 Results
- Fiscal Year 2021-2022 Plan
- Tuition Deficit
- Planned Cash Usage
- Questions and Answers



# Fiscal Year 2020-2021 Results

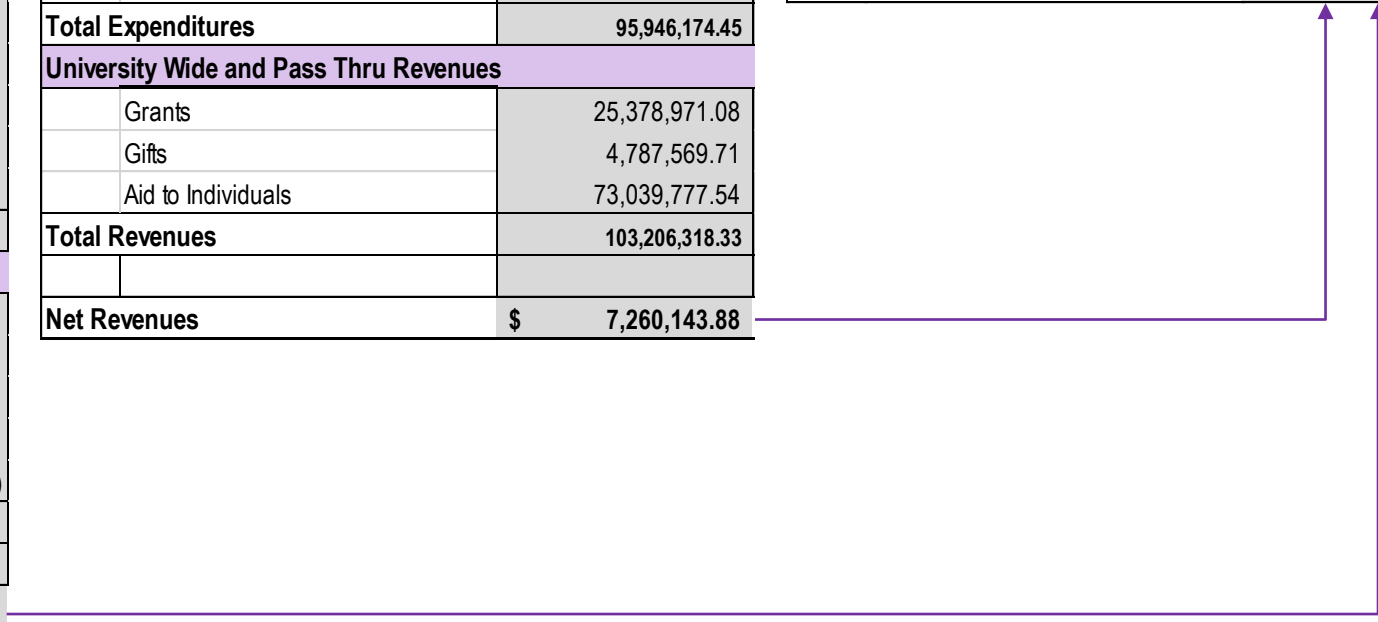
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# Fiscal Year 2020-2021 Net Revenue

	20-21 Actual
<b>Expenditures</b>	
Chancellor's Office	966,333.77
Athletics	4,183,207.51
IRP	387,428.74
EDI	3,189,400.80
Academic Affairs	70,163,402.59
Administrative Affairs	28,436,750.83
Student Affairs	34,064,692.13
University Relations	1,254,295.01
GPR - Fringe	22,481,759.09
<b>Total Expenditures</b>	<b>165,127,270.47</b>
<b>Revenues</b>	
Tuition and Fees	101,178,184.56
Auxiliary Revenue	41,888,672.59
State Appropriations	38,471,390.43
Camps and Clinics Revenue	970,284.01
Other Revenue	(2,058,291.14)
<b>Total Revenues</b>	<b>180,450,240.45</b>
<b>Net Revenues</b>	<b>\$ 15,322,969.98</b>

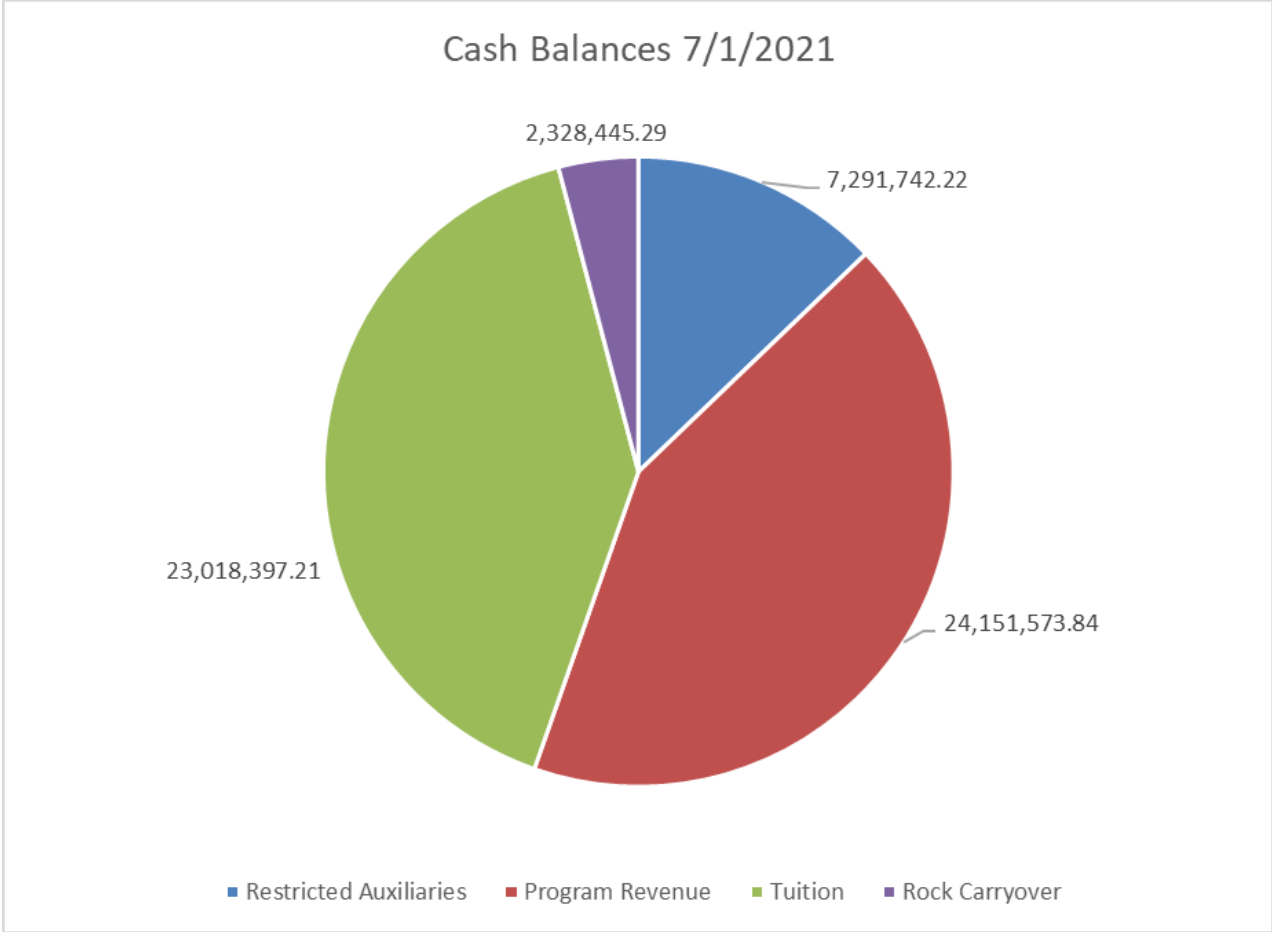
	20-21 Actual
<b>University Wide and Pass Thru Expenses</b>	
Grants	15,834,368.10
Gifts	3,507,556.19
Aid to Individuals	76,604,250.16
<b>Total Expenditures</b>	<b>95,946,174.45</b>
<b>University Wide and Pass Thru Revenues</b>	
Grants	25,378,971.08
Gifts	4,787,569.71
Aid to Individuals	73,039,777.54
<b>Total Revenues</b>	<b>103,206,318.33</b>
<b>Net Revenues</b>	<b>\$ 7,260,143.88</b>

	20-21 Actual
<b>Total All Expenses</b>	<b>\$ 261,073,444.92</b>
<b>Total All Revenues</b>	<b>\$ 283,656,558.78</b>
<b>Total All Net Revenues</b>	<b>\$ 22,583,113.86</b>



# Fiscal Year 2020-2021 Ending Cash

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# Fiscal Year 2020-2021 Positive Result

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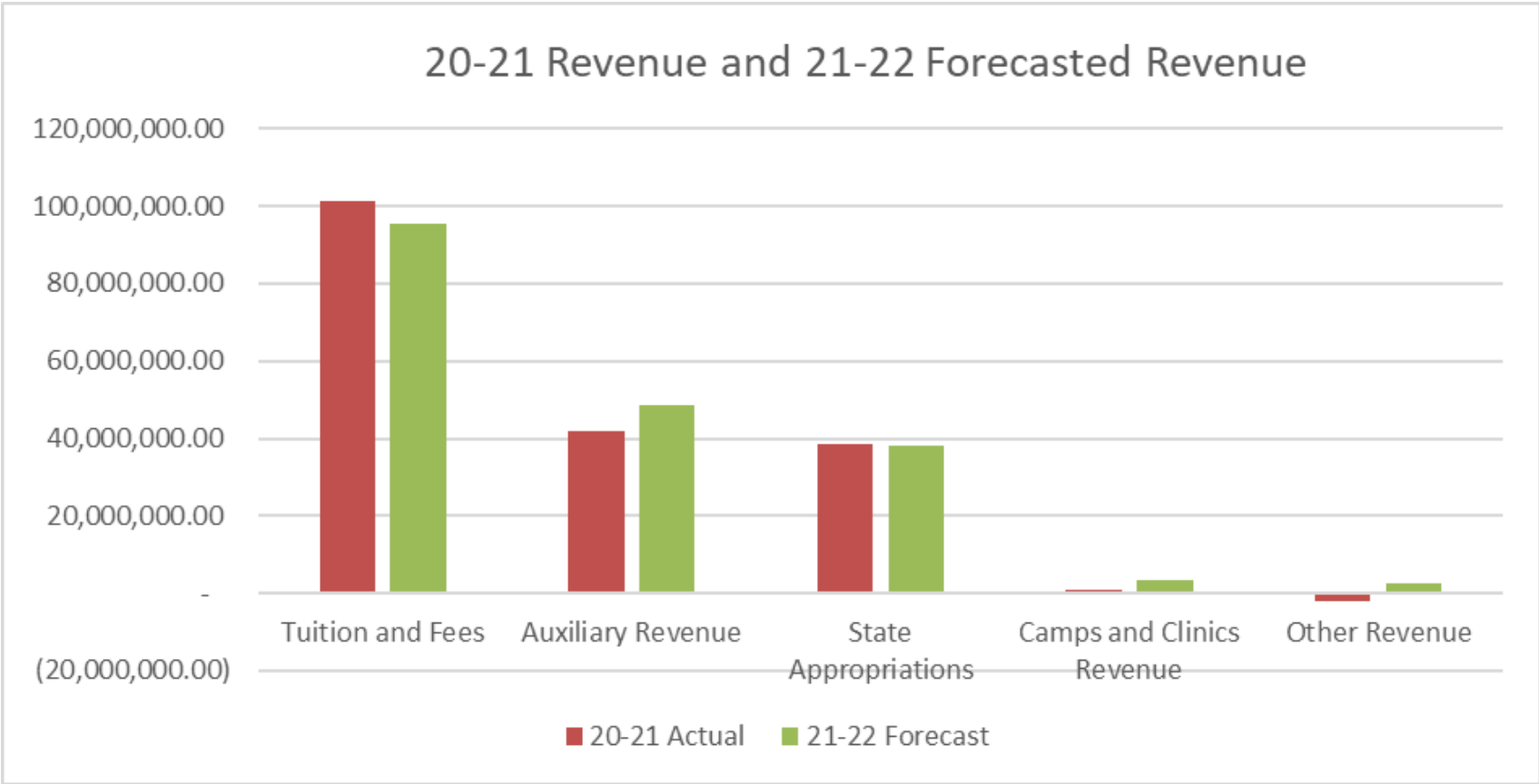
## **Several take-aways from the FY20-21 results**

- Cash is available for strategic investments to build enrollment
- Cash is available for strategic investments in people
- Reductions in spending has reduced the overall tuition-related deficit

# Fiscal Year 2021-2022 Plan

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# Fiscal Year 2021-2022 Planned Revenue





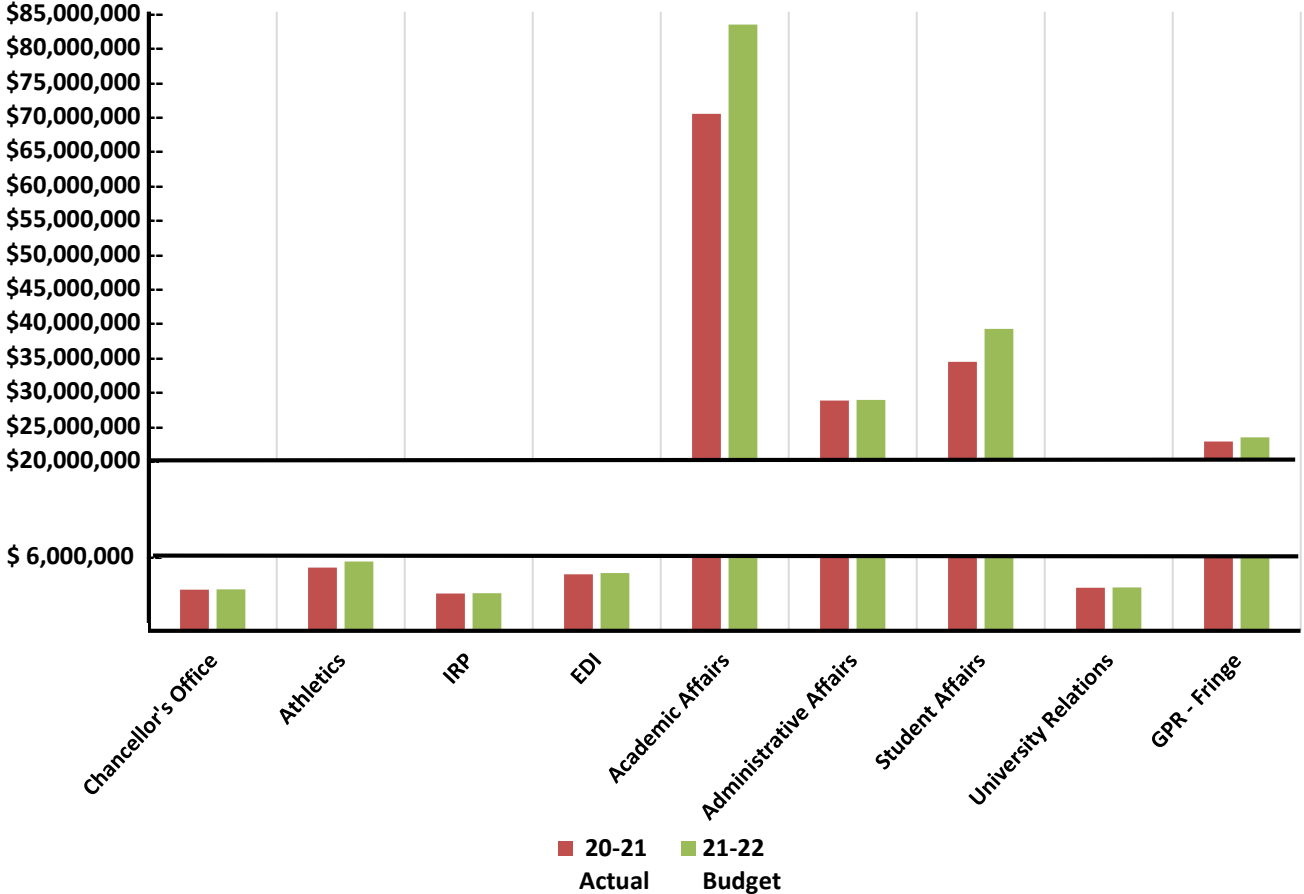
# Fiscal Year 2021-2022 Enrollment

	2021 Fall Term			2020 Fall Term				
	Headcount	SCH	FTE	Headcount	SCH	FTE	Headcount	
	<b>UGRD</b>	<b>9,596</b>	<b>131,910.0</b>	<b>8,791.6</b>	<b>10,179</b>	<b>140,423.2</b>	<b>9,359.0</b>	<b>(583)</b>
a. Freshmen	2,425	35,245.5	2,348.8	2,329	33,463.7	2,230.1	96	4.1%
b. Sophomores	2,325	32,831.5	2,188.1	2,606	37,093.5	2,472.2	(281)	(10.8%)
c. Juniors	1,916	27,586.0	1,838.7	2,151	30,950.0	2,062.9	(235)	(10.9%)
d. Seniors	2,555	34,046.0	2,269.3	2,711	36,719.5	2,447.5	(156)	(5.8%)
e. Post-baccs	99	936.0	62.4	119	1,146.0	76.4	(20)	(16.8%)
f. Special no credentials	95	552.0	36.8	61	286.5	19.1	34	55.7%
g. Special high school	181	713.0	47.5	202	764.0	50.9	(21)	(10.4%)
<b>GRAD</b>	<b>1,646</b>	<b>11,049.5</b>	<b>920.5</b>	<b>1,486</b>	<b>9,915.5</b>	<b>826.0</b>	<b>160</b>	<b>10.8%</b>
a. Graduate	1,582	10,670.5	888.9	1,409	9,553.5	795.8	173	12.3%
b. Ed Specialist	23	193.0	16.1	25	193.0	16.1	(2)	(8.0%)
c. Grad NCFD	41	186.0	15.5	52	169.0	14.1	(11)	(21.2%)
<b>Grand Total</b>	<b>11,242</b>	<b>142,959.5</b>	<b>9,712.1</b>	<b>11,665</b>	<b>150,338.7</b>	<b>10,185.0</b>	<b>(423)</b>	<b>(3.6%)</b>

September 14, 2021

# Fiscal Year 2021-2022 Planned Expense

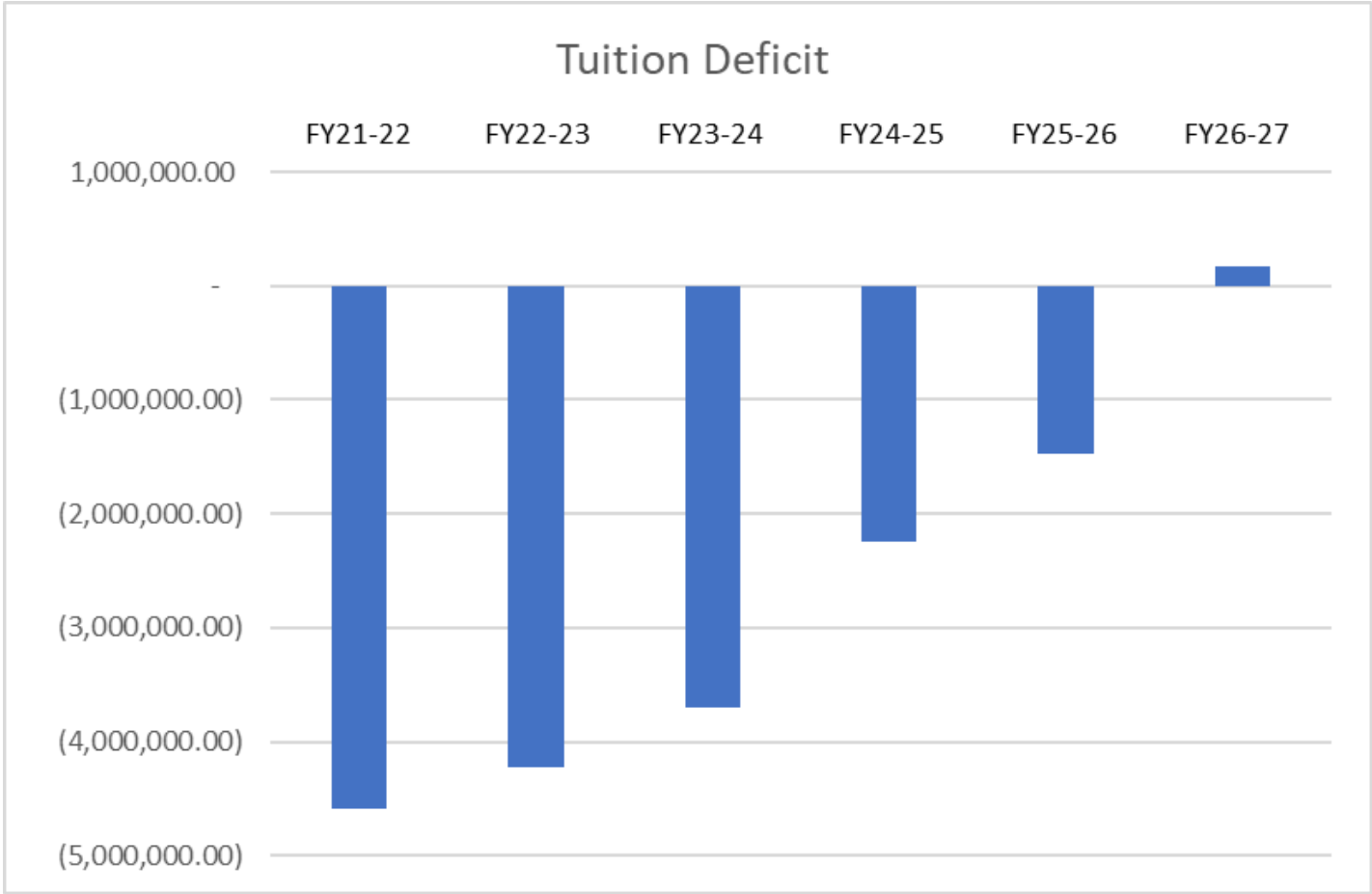
20-21 Expenses and 21-22 Budget by Division



# Tuition Deficit

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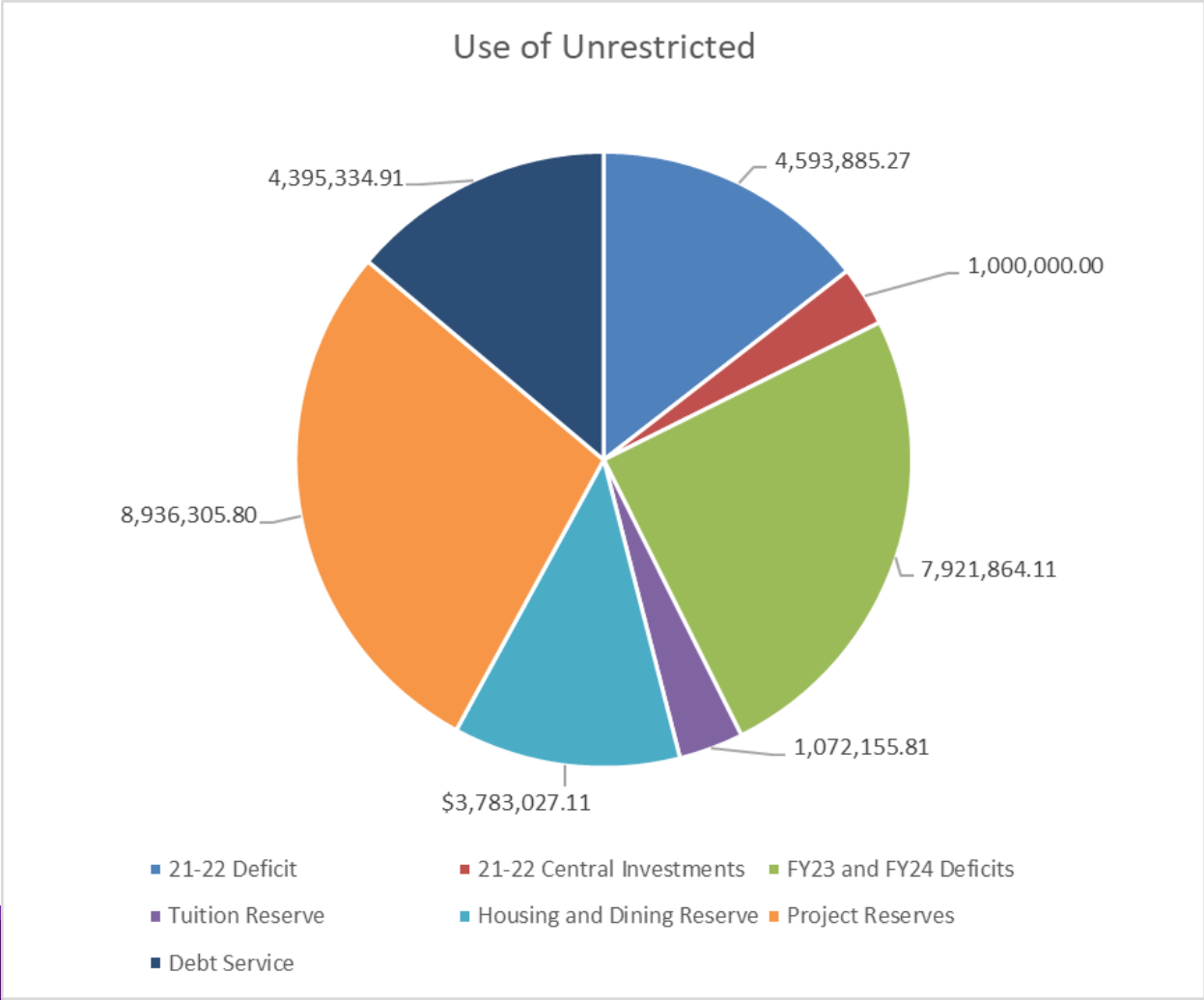
# FY21-22 to FY26-27 Deficit



# Planned Cash Usage

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# Planned Cash Usage



# Questions and Answers

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2017-2022  
Strategic Plan  
Wrap-up

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# Introduction

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Provide the specific goal and objectives along with the importance of the goal and objectives at the time of creating the strategic plan.

# Analysis

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Provide a description of what has been achieved both in quantitative and qualitative ways.

- a. List specific accomplishments
- b. Provide Data and Metrics with charts, trends, etc.
- c. Impact that has been experienced on campus because of what has been achieved

# Next Steps

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Discuss the permanent nature of the achievements as well as additional operational steps to continue improving the legacy of the goal.

# Appendices

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Provide other supporting documents like forms, brochures, papers, etc.

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# Preparing for the next Strategic Plan

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# The next Strategic Plan – rough outline

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Fall 2021 –

- Identify leadership committee
- Plan spring events
- Focus on 2017-2022 Strategic Plan Wrap-up and HLC work to inform the direction of the new plan

Spring 2022 –

- Information gathering via open forums, surveys, etc..
- Begin drafting

2022-2023 –

- Finalize plan