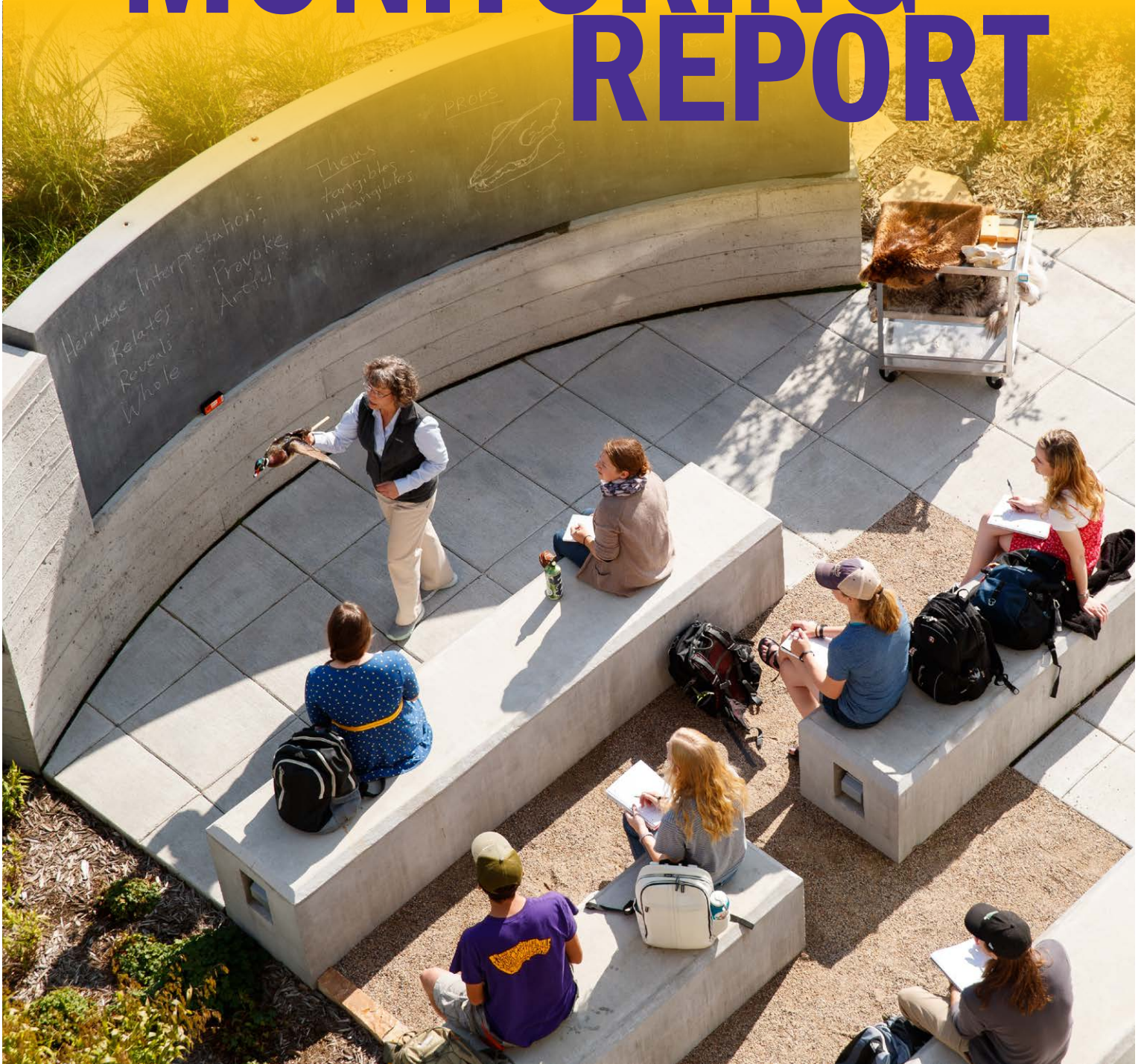


HLC MONITORING REPORT



University of Wisconsin
Stevens Point

STEVENS POINT • MARSHFIELD • WAUSAU

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I. Introduction

During UW-Stevens Point's Year-10 comprehensive reaffirmation review in March of 2019, the peer review team recommended a monitoring report be required relating to (then) Criterion 5.A (now 5.B). Specifically, the review team recommended, and the Institutional Actions Council subsequently concurred, that the institution submit an *"Interim Report due 5/1/2021 on 5A: finances, including implementation of the strategic plan, enrollment data, and operational efficiencies."*

In the text that follows, we communicate this monitoring report and include updates on each of the requested topics. We have organized the report topics with discussions of notable events that have occurred since the visit, finances, enrollment, strategic planning, and operational efficiencies. On a logistical note, resources cited within this report are hyperlinked in the document and are also available in our Monitoring Report Resource Room at: www.uwsp.edu/acadaff/Pages/HLC-2021-Monitoring-Report.aspx.

II. Notable Events Since Reaffirmation Visit

Since the peer review team visit in March of 2019, several significant initiatives, transitions, and events have occurred at UW-Stevens Point. First, in August of 2019, Chancellor Patterson convened a two-day strategic planning workshop that was led by facilitators from the [Society for College and University Planning](#) (SCUP). (The workshop was the SCUP Planning Institute 2: Developing and Implementing a Strategic Plan.) The institutional attendees numbered 32 and included administrators, deans, faculty, students, and shared governance representatives. This workshop kickstarted strategic planning efforts that continue to date and are more fully documented in the report section on strategic planning.

In the last year, our institution has also welcomed new executive leaders in key positions. In April of 2020, Ms. Lana Poole joined the institution, filling a newly-created Chief Marketing and Enrollment Officer position. Lana's hire was the culmination of significant restructuring of our enrollment and marketing operations (also discussed more fully in the report). In June of 2020, the campus also welcomed Ms. Pratima Gandhi as our new Vice Chancellor for Business Affairs and Chief Financial Officer. In January of 2021, the tenure of a new chancellor, Dr. Thomas Gibson, began. Dr. Gibson succeeded our retiring chancellor, Dr. Bernie Patterson, who led UW-Stevens Point for over a decade. These transitions of leadership have brought new ideas and focus to our institution, and the effects of recent leadership decisions are more fully documented throughout the report.

Finally, while abundantly apparent to all – not just those employed in higher education – it is worth acknowledging here that the onset of the COVID-19 pandemic brought several new challenges to our institution and community of learners. To list just a few, the pandemic influenced our enrollment, modalities of instruction, residential living occupancy rates, expenditures on personal protective equipment and other precautions. It also resulted in numerous lost revenue impacts to program revenue operations. Many of these issues are discussed more fully in the sections that follow and many are still being navigated by institutional responses and mitigated through disbursements of the federal CARES Act, American Rescue Plan, and other federal funds. Where COVID-19 notably affected the outlined topics in the report, specific effects and responses are addressed in those report sections.

III. Finances

Three-Year Financial Plan for FY20-22

At the time of the spring 2019 HLC accreditation reaffirmation visit, the institution was in the midst of incorporating two branch campuses and facing sustained, significant enrollment declines and tuition revenue shortfalls at all three locations. It was clear comprehensive strategic financial planning was needed for the institution to survive these major challenges. In fall of 2018, campus leaders developed a three-year, \$8 million operating budget reduction plan for the main campus that would span fiscal years 2020-2022. This plan assumed that main campus enrollment would settle long-term at approximately 7,100 undergraduate students and therefore, these reductions would better align the operating budget with actual anticipated enrollment. Since the 2019 accreditation report, the institution has implemented years one and two of the three-year plan, reducing the operating budget on the main campus by \$5.9 million ([Appendix 1](#)). Plans are currently underway to enact the final year of the \$8 million reduction plan, with those reductions scheduled for fiscal year 2022, beginning July 1, 2021. Additionally, campus leadership decided to reallocate base budget from across the institution over the next two fiscal years to support the annual \$2 million Common Systems charge from UW System, which to-date has not had an established base budget. This decision will also strengthen the institution's financial position by allowing one-time funds to be used in the future on strategic initiatives rather than ongoing expenses.

Diversifying Student Profile and Cost-Recovery Tuition Adjustments

While budget reductions are a necessary component of the financial plan, campus leaders fully recognized that strategic investments and operational changes would also be necessary. Leadership focused on stabilizing and increasing enrollment as a major factor to improve long-term institutional finances. As mentioned in the section that follows on enrollment strategy, an important investment into a unified marketing and enrollment unit has resulted in both significant increases to the incoming class size on the main campus as well as an increase in the first-to-second-year retention rate. Part of the effort to stabilize was realized through increased enrollment and diversifying the student population.

UW-Stevens Point has traditionally relied heavily on in-state, undergraduate resident enrollments. Over the past few years, as allowed and governed by [UW System policies](#), new cost-recovery programs and tuition increases for existing cost-recovery programs were adopted for several graduate academic programs. For example, tuition increases for the M.B.A. in Applied Leadership and Decision-Making, the M.S. in Athletic Training, and the Ed.D. in Educational Sustainability were secured in the past two years. While the overall financial impact of these programs to the institution's bottom line is not as significant as traditional undergraduate enrollment, these programs have helped lift the academic profile of the institution and have attracted high-quality faculty members and non-resident graduate students, thereby indirectly boosting undergraduate enrollment by creating a pipeline to these high-demand graduate programs. To date, eight self-supporting graduate programs have been implemented, with two additional programs approved; one to begin summer 2021 and another in summer 2022 ([Appendix 2](#)). With those two additional programs, self-supporting graduate programs will have added approximately \$3.5 million revenue to the annual operating budget. At the same time, the institution has continued its efforts to expand participation in collaborative undergraduate and graduate programs developed and managed by UW Extended Campus. These flexible online degree programs provide the same core curriculum at all participating UW institutions, with a specialized track or tracks offered by each partner institution. Because of the online delivery and flexible schedule, these programs attract both traditional and adult students. Our institution currently participates in nine of the UW Extended Campus collaborative programs. This expansion of academic programs supports the strategic initiatives of enrollment growth, enhancing academic excellence, and expanding educational opportunities for student success.

Activity-Based Academic Budgeting

On the academic side of the operating budget, an academic budgeting and planning model that incentivizes student credit hour production, the number of academic majors, and the number of graduates has been developed, reviewed by the Integrated Planning Advisory Council (IPAC) and governance, and subsequently adopted by campus leadership ([Appendix 3](#)). While the model limits the annual percentage change to college base operating budgets, it also clearly shows the long-term trend of where budget support should shift in order to support student enrollment. Because of this, the model has helped the provost determine budget reduction targets for the academic colleges and has helped academic leadership better understand which units are most efficient, and which units need reconfiguring. In combination with the activity-based academic budget model, the Office of Academic Affairs has also recently developed a model which academic departments can utilize to analyze cost efficiency ([Appendix 4](#)). Departments can plan out their curriculum along with personnel and other operating costs over the next five years to examine where efficiencies in the curriculum or personnel may be gained. Together, as these two tools are implemented, academic leaders will be able to accurately analyze data and make better-informed financial and operational decisions.

UW System and Other Investments

Over the period of review, UW System Administration (UWSA) also made strategic investments into UW-Stevens Point. Since fiscal year 2019, UWSA has provided one-time funds to assist with branch campus recruitment, hire an outside firm to develop campus branding and marketing strategies, hire a consultant to develop new student recruitment strategies, increase campus marketing efforts, support the development of a new Doctor of Physical Therapy program, and expand Human Services and Social Work programs on the Wausau branch campus ([Appendix 5](#)). Each of these foregoing investments has been provided as part of an overall strategy by UWSA to help UW-Stevens Point leadership reposition the campus. In addition to investments by UWSA, the UWSP Foundation has also increased its support through increased student scholarships ([Appendix 6](#)) and the purchase and renovation of a property situated within campus boundaries that has been redeveloped into a new Welcome Center. The Welcome Center opened in Fall 2020 and is the focal point of all student and family tours and orientations to the campus.

The branch campuses (UW-Stevens Point at Marshfield and UW-Stevens Point at Wausau) were incorporated financially into the overall institutional budget beginning in fiscal year 2020. UWSA committed to supporting all branch campuses through fiscal year 2021, with receiving institutions becoming financially responsible for branch campuses in fiscal year 2022 (beginning July 1, 2021). As our two branch campuses transitioned into the UW-Stevens Point operating structure and campus leaders began to better understand branch campus operating needs, strategic investments were made in an effort to improve student recruitment, student support, and the overall student experience – areas that had experienced reductions in prior years under the former UW Colleges structure. Investments included student recruiters, student life positions, support for tutoring and other student services, and two baccalaureate programs (the B.S. in Business Administration and the B.S. in Social Work) and a master's (M.B.A.) were extended to the branch campuses in response to regional needs. These investments were supported from state-provided Outcomes-Based Funding. As enrollments have continued to decline at the branch campuses, campus leadership also determined the need for budget reductions on the branch campuses. Plans are currently underway to reduce branch campus operating budgets by a total of \$1.5 million throughout fiscal years 2022 and 2023. There is a delicate balance between making strategic investments into both branch campuses to allow for growth opportunities and the ability to respond to regional needs while at the same time, reducing the overall operating budget.

Federal Support

For the current fiscal year (2021), the institution has received both federal and state support to reimburse expenses and lost revenue in response to the COVID-19 pandemic. While this support has assisted with the costs the institution has incurred, the funds received have not covered all costs associated with the public health emergency ([Appendix 7](#)). Reported through February 2021, the institution incurred \$29.3 million in out-of-pocket expenses and lost revenue. To date, the institution has received \$16.3 million in federal assistance and \$1.7 million in state support, with \$19.1 million additional assistance pending. This pending support will provide additional student aid and assist with continued out-of-pocket expenses and revenue losses into fall. In response to the pandemic, campus leadership initiated summer and academic-year furlough plans, approved continuous furloughs and staff layoffs in select campus units, and increased purchasing and hiring restrictions as cost containment measures. These measures were enacted not only to assist with lost revenues on campus during the pandemic, but also to generate the \$1.9 million state lapse savings returned to the state in the current fiscal year.

Composite Financial Index (CFI) and Financial Outlook

To provide an overall assessment of the institution's financial health, campus leadership monitors the composite financial index (CFI), which is calculated annually. From fiscal year 2019 to fiscal year 2020, the institution's CFI improved to 1.7 per statements and 2.26 excluding GASB 68 & 75. The CFI scores suggest that the approach should be to "re-engineer the institution" ([Appendix 8](#)). We are making good progress toward this suggestion as we implement plans to halt the continued decline in net operating revenues by implementing the final phase of our \$8 million operating budget reduction plan and making deliberate adjustments to our enrollment management strategy. With the enrollment declines experienced in prior years, the implementation of the budget reduction plan better aligns our operating budget to our enrollment-generated operating revenues. Additionally, while the sudden integration of two of the former UW Colleges campuses to become our branch campuses came as a surprise in late 2017, we are working to support the complex and diverse cost structures we are required to maintain by continuing to analyze the operating needs and strategic investments required for overall viability.

By implementing the budget reduction plans outlined above, the financial outlook for all three UW-Stevens Point locations continues to improve. Using enrollment projection figures generated by the provost and marketing and enrollment units, which are based on improved recruitment and retention strategies as described in the enrollment section that follows, and continuing to implement the planned budget reductions, all three UW-Stevens Point campuses will achieve financial stability within two to three years ([Appendix 9](#)). Campus leadership fully recognizes that these financial projections are continually evolving estimates and that as the next state biennial budget is finalized, and as enrollment projections become realized and revised, these financial projections will be adjusted accordingly. Additionally, an effort in the current fiscal year to build one-time reserves via the cost containment measures mentioned previously will provide the institution added financial flexibility heading into the next state biennial budget. It is anticipated that the UW System could face another state budget lapse or base budget reduction due to the financial effects of COVID-19. Campus leadership has proactively planned for this possibility; however, if there are no state-mandated reductions in the next biennium, these one-time funds can serve to help 'bridge the gap' in the operating budget until undergraduate enrollment rebounds as currently projected or be used for one-time strategic investments.

As the institution begins to implement the newly developed strategic plan, there are many valuable action items planned within the strategic theme of 'Align the Financial Model with the Institutional Vision' that support both Chancellor Gibson's strategic imperatives and the other themes within the overall strategic plan ([Appendix 10](#)). Among these is work to identify funding sources with which to increase the institutional strategic reserve and to implement a clearly defined, transparent process for the strategic distribution of one-time funds. Additionally, work will continue in an effort to develop integrated, flexible financial models that will allow the institution to respond to changing demands over time, as well as create processes and metrics to support the financial models and inform strategic decisions. An additional focus will be on encouraging financial growth: both examining existing operations to gain efficiencies across campus and exploring new revenue sources. While various new investments and changes to campus operations are currently being considered, ongoing challenges with COVID-19 will persist and will need to be continually monitored. Additional federal funding is expected and will help in covering a significant portion, but not all, expenses and lost revenues that have been incurred. The long-term financial impact of the pandemic is uncertain and as financial models are developed, this flexibility will also be considered.

IV. Enrollment

Significant Increases in First-Year and Graduate Student Enrollments Recently

As described in the sections that follow, we comprehensively overhauled our recruitment operations and have recently achieved enrollment increases in targeted student segments. The reorganization of the affected units, a comprehensive enrollment plan, and significant market research and recruitment efforts led to increased enrollment of first-year and graduate student segments in fall of 2020. Table 1 below provides the historic fall term enrollments for years 2016-2020. While main campus total enrollment declined in Fall 2019, it increased by about 1% in Fall 2020. Fall 2020 recruitment efforts achieved a 25% increase in first-year students, 4% increase in total adult student enrollment, 5% increase in new adult undergraduate students, 4% increase in first-year students of diverse backgrounds, 22% increase in graduate students – all during a global pandemic that caused declines in enrollment at most institutions. In addition, new tools and policies (discussed below) helped increase the retention rate to a seven-year high.

Table 1. Fall Enrollments by Year, Campus, and Student Type

Main Campus Enrollment

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|------------------------------|------|------|------|------|------|
| Graduate | 330 | 328 | 341 | 484 | 591 |
| New Freshmen | 1565 | 1535 | 1405 | 1218 | 1569 |
| Other New | 846 | 749 | 643 | 557 | 422 |
| Undergrad Continuing | 5759 | 5457 | 5236 | 4906 | 4684 |
| Undergrad Specials | 127 | 139 | 88 | 86 | 50 |
| Total Enrollment | 8627 | 8208 | 7713 | 7251 | 7316 |
| Total Graduate Students | 330 | 328 | 341 | 484 | 591 |
| Total Undergraduate Students | 8297 | 7880 | 7372 | 6767 | 6725 |

Marshfield Campus Enrollment

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|------------|------|------|------|------|------|
| New Total | 289 | 332 | 353 | 321 | 279 |
| Continuing | 212 | 187 | 166 | 93 | 97 |
| Re-Entry | 11 | 13 | 17 | 2 | 1 |
| Transfer | 23 | 9 | 9 | 15 | 6 |
| Total | 535 | 541 | 545 | 431 | 383 |

Wausau Campus Enrollment

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|------------|------|------|------|------|------|
| New Total | 432 | 419 | 416 | 324 | 272 |
| Continuing | 350 | 312 | 325 | 222 | 232 |
| Re-Entry | 21 | 14 | 24 | 6 | 4 |
| Transfer | 38 | 34 | 37 | 35 | 23 |
| Total | 841 | 779 | 802 | 587 | 531 |

Total UWSP Enrollment

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|-------|------|------|------|------|
| | 10003 | 9528 | 9060 | 8539 | 8230 |

Comparisons of Main Campus Enrollment with Other UW Institutions

The increases in enrollment of first-year students at our institution for Fall 2020 stands in marked contrast to the experience of other UW System institutions. Along with UW-Madison and UW-Parkside, UW-Stevens Point was one of only three UW institutions to increase total student enrollment in Fall of 2020 (Figure 1), and the only one to do so with first-year students (Figure 2).

Figure 1. Fall 2020 UW System Main Campus Total Enrollment (% Change From 2019)

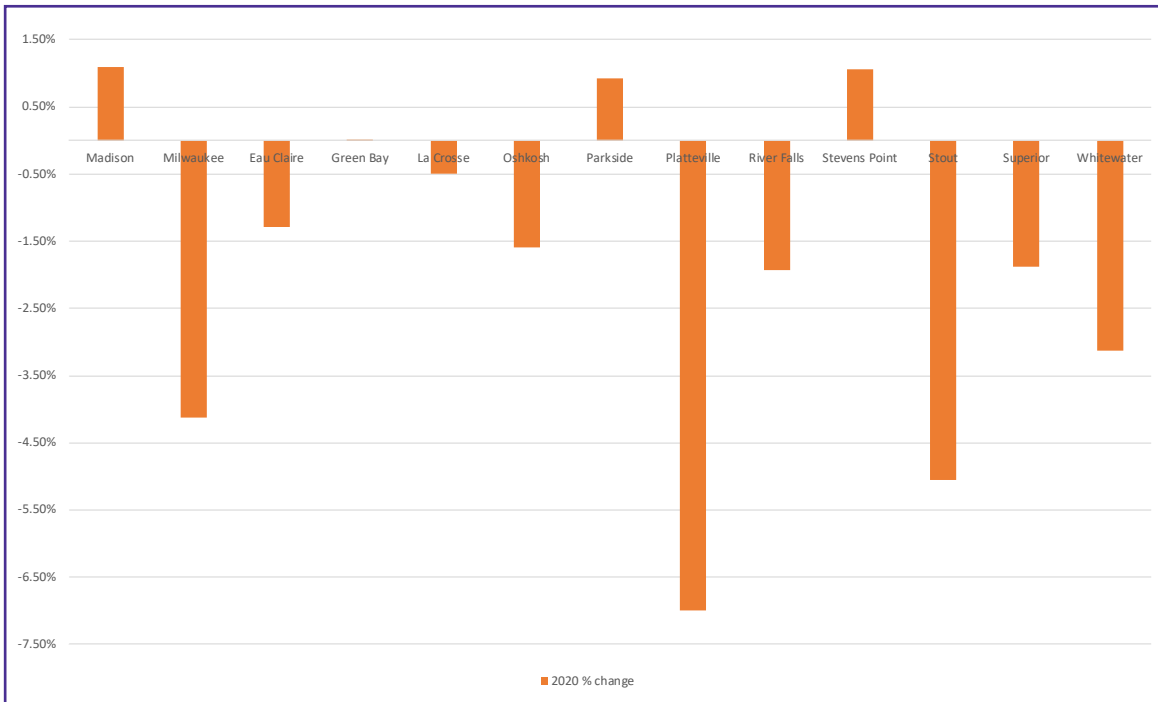
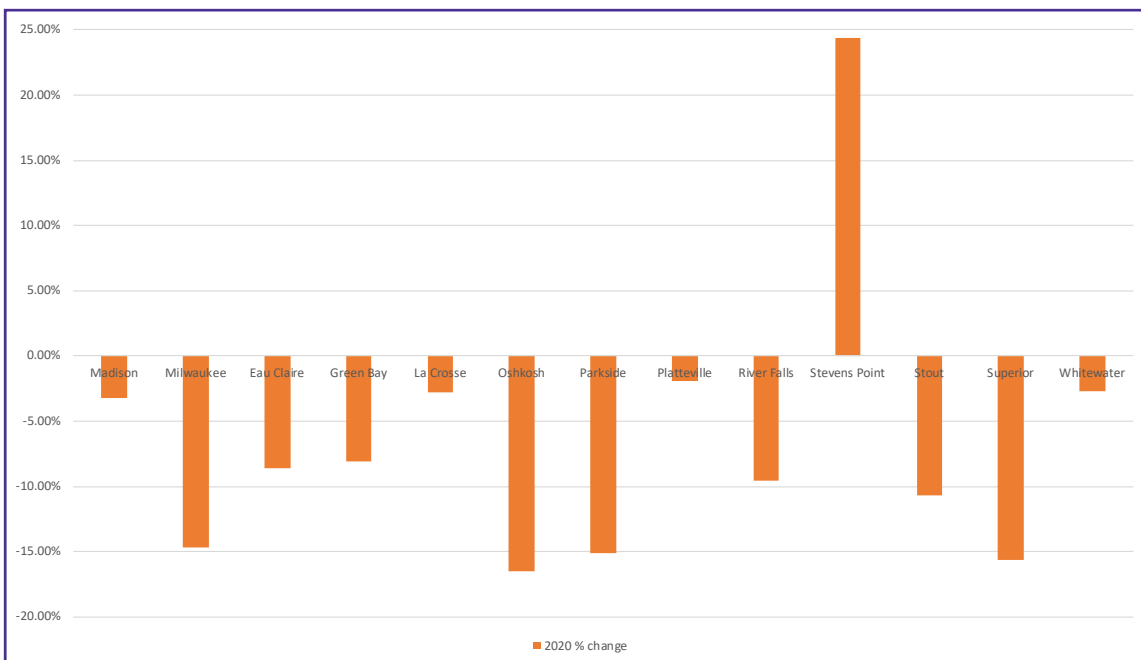


Figure 2. Fall 2020 UW System Main Campus First-year Student (FYS) Undergraduate Enrollment (% Change From 2019)



Fall 2020 Branch Campus Enrollment Comparisons

On the branch campuses for Fall 2020, our enrollments were mixed (Table 1). For the Wausau campus, enrollment increased 10% for the first-year class but was down 8% in total enrollment. For the Marshfield campus, enrollment was down 23% in the first-year class and down 8% in total enrollment.

By comparison, enrollments for Fall 2020 at all former UW Colleges campuses (now branch campuses) predominantly decreased (Figures 3 and 4). The UW-Stevens Point branch campuses overall decrease of 6% was smaller than some: at UW-Platteville's branch campuses enrollment declined 32% and UW-Milwaukee campuses declined 22%. COVID-19 significantly affected [community colleges nationwide](#) so it is not surprising that our branch campuses witnessed a similar decline.

Figure 3. Fall 2020 UW System Branch Campus First-year Student (FYS) Enrollment (% Change From 2019)

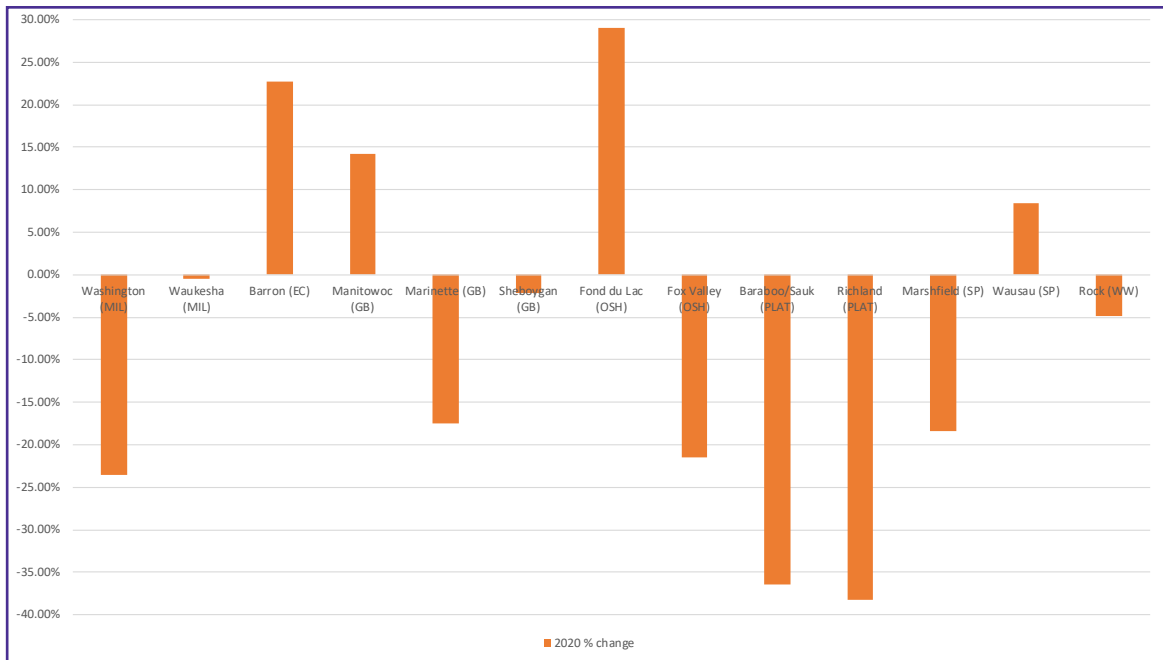
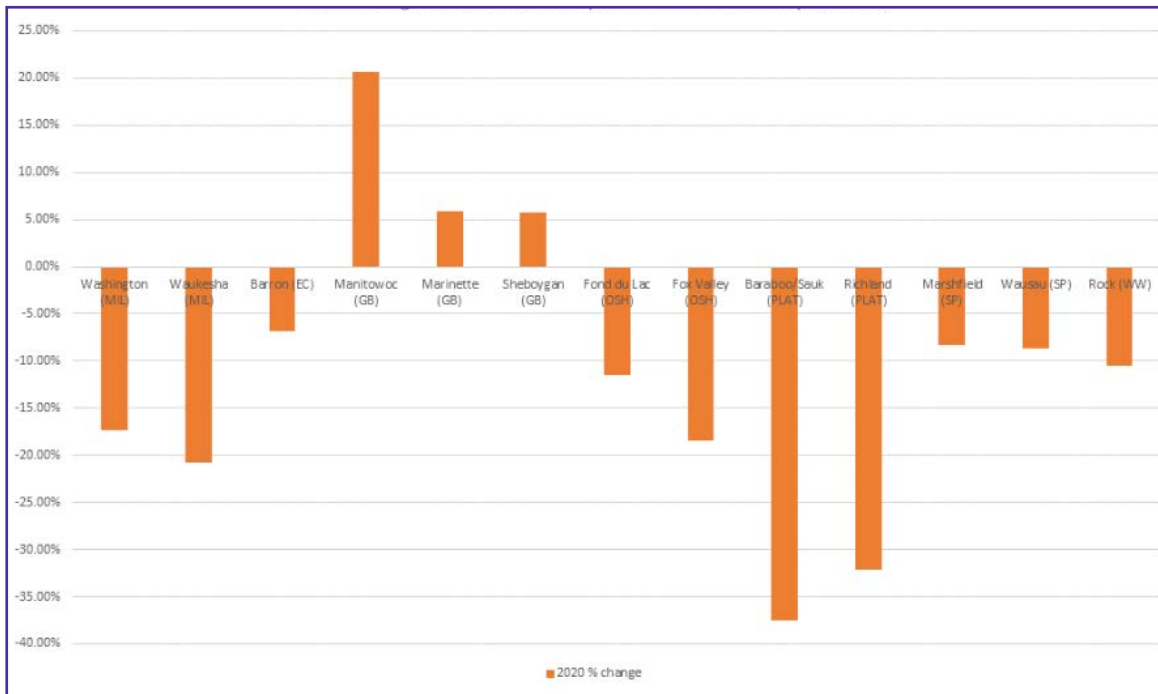


Figure 4. Fall 2020 UW System Branch Campus Total Undergraduate Enrollment (% Change From 2019)



COVID-19 and Fall 2020 Melt

In early 2020, our enrollment projections for Fall 2020 remained steady and positive – predicting that our first-year classes would be 1,734 for Main campus, 242 for Wausau, and 117 for Marshfield. If these projections had held, we would have achieved significant enrollment increases at all three campuses. However, once COVID-19 became a pervasive issue, we witnessed declines in predicted first-year students at all three campuses. Thus, our actual enrollments for Fall 2020 fell short of our goals.

Moreover, on the branch campuses, student registration tends to occur later in the recruitment cycle; the branch campuses have historically experienced a boost in enrollment during the late spring and summer prior to the start of fall terms. We saw the branch campuses tracking well for fall 2020 during that time. For first-year students, the Marshfield campus was up 23% in total applications and up 20% in total admits. We did not have historical confirm data by which to compare. For first-year students at the Wausau branch, there was an increase of 42% in total applications and 48% in total admits. It was at this moment that the pandemic impacted the normal influx of applications; furthermore, we saw melt impact our first-year classes at all three campuses. Table 2 below displays the significant increase in melt, particularly on the branch campuses.

In recent years, the Marshfield branch has relied heavily on high school special students to maintain overall enrollment. Fall 2020 high-school-special enrollment decreased 27% for Marshfield. If the high school enrollment for Fall 2020 would have matched Fall 2019, Marshfield would have experienced an increase of 7% in total enrollment.

Table 2. Melt by Campus for Fall 2019 and Fall 2020

| Campus | Matriculated | Enrolled at Census | 2020% Melt Total | 2019 % Melt |
|----------------|--------------|--------------------|------------------|-------------|
| Main FYS | 1805 | 1569 | 13% | 9% |
| Marshfield FYS | 84 | 66 | 21% | 4% |
| Wausau FYS | 230 | 179 | 22% | 10% |

Enrollment Goals

Tables 3 and 4 below outline our market share of Wisconsin high school graduating seniors from 2020, our 2021 and 2022 goals, and our historic enrollment by geographic region with 2021 goals. Our enrollment plan established these aggressive and achievable targets.

Table 3. Market Share of Wisconsin Students in 2020 and 2021-2022 Goals by County

| | 2020 Seniors | 2020 Enrolled | 2020 Market Share | 2021 Projected Seniors | 2021 Goal Enrolled | 2022 Projected Seniors | 2022 Goal Enrolled* |
|--------------|--------------|---------------|-------------------|------------------------|---------------------|------------------------|---------------------|
| Portage | 710 | 109 | 15.4% | 727 | 114 (+0.3%) | 742 | 117 |
| Marathon | 1458 | 111 | 7.6% | 1461 | 116 (+0.3%) | 1400 | 111 |
| Wood | 999 | 97 | 9.7% | 1027 | 102 (+0.2%) | 978 | 97 |
| Brown | 3415 | 73 | 2.1% | 3521 | 86 (+0.3%) | 3387 | 81 |
| Outagamie | 2869 | 81 | 2.8% | 2974 | 89 (+0.2%) | 2928 | 88 |
| Milwaukee | 9528 | 121 | 1.3% | 9654 | 130 (+0.1%) | 9647 | 135 |
| Dane | 5787 | 62 | 1.1% | 5986 | 75 (+0.2%) | 6174 | 80 |
| Waukesha | 5346 | 57 | 1.1% | 5333 | 62 (+0.1%) | 5276 | 63 |
| Winnebago | 1654 | 46 | 2.8% | 1700 | 50 (+0.1%) | 1668 | 48 |
| Waupaca | 646 | 30 | 4.6% | 659 | 32 (+0.2%) | 620 | 30 |
| All other | 33754 | 614 | 1.8% | 34274 | 645 (+0.1%) | 34517 | 656 |
| Total | 66166 | 1401 | 2.1% | 67316 | 1501 (+0.1%) | 67337 | 1506 |

*Fall 2022 goals are based on matching market share of Fall 2021.

Table 4. Fall 2019, 2020 Historical and Fall 2021 Goal FYS Yield Rate by Geographic Location

| Geographic location | 2020 Applied | 2019 Yield from Apply | 2020 Yield from Apply | 2020 Admitted | 2019 Yield from Admit | 2020 Yield from Admit | 2019 Enrolled | 2020 Enrolled | 2021 Goal |
|---------------------|--------------|-----------------------|-----------------------|---------------|-----------------------|-----------------------|---------------|---------------|-----------|
| In-State | 4558 | 35% | 31% | 3897 | 41% | 36% | 1096 | 1401 | 1501 |
| MN | 207 | 34% | 27% | 183 | 39% | 31% | 57 | 56 | 62 |
| MSEP | 584 | 22% | 16% | 498 | 29% | 19% | 89 | 94 | 182 |
| Out-of-state | 255 | 9% | 7% | 175 | 13% | 10% | 13 | 18 | 51 |
| Total | 5604 | 32% | 28% | 4753 | 38% | 33% | 1255 | 1569 | 1796 |

Fall 2021 Enrollment Projections

Looking ahead to Fall 2021, the following data was reported April 16, 2021:

- For first-year students, main campus enrollment is up 41% in total applications (+2,196), up 53% in total admits (+2,317), and up 46% in confirms (+763). Orientation registration is up 1% (+12). Housing is up 7% (+69).
- For transfer students, main campus enrollment is up 4% in total applications (+16), up 4% in total admits (+11), and up 8% in confirms (+8).
- For first-year students, our Marshfield campus is up 6% in total applications (+8), up 15% in total admits (+16), and up 19% in confirms (+11). Orientation registration is up 17% (+7).
- For first-year students, our Wausau campus is down 27% in total applications (-71), down 21% in total admits (-49), and down 19% in confirms (-24). Orientation registration is down 15% (-14).

As of this document publication, we are predicting an enrollment of approximately 1,700 first-year students in fall of 2021, another significant year-over-year increase. We also expect a modest increase in graduate enrollment and a further increase of graduate enrollment when the Doctor of Physical Therapy (DPT) program matriculates its first cohort of 36 students in the 2022-23 academic year. Overall, we anticipate continued growth in graduate enrollment as graduate programs expand to meet the needs of adult learners and emerging markets.

Structural Changes Improved Recruitment and Enrollment

As illustrated in the foregoing section, UW-Stevens Point reversed previous annual enrollment declines. We improved our recruitment activities by making several changes in operational structure and recruitment approach. We integrated University Communications and Marketing, Enrollment Operations, Admissions and Recruitment, and Financial Aid and Scholarships units into a single division led by the Chief Marketing and Enrollment Officer. The new structure operates within existing budget parameters to align marketing and enrollment functions with staffing and financial resources. The division office oversees planning and research to guide, integrate and measure our work. The departments directly reflect the sequential elements of the prospective student journey: strategic communication, marketing and creative services, prospective student engagement, admissions, and financial aid. Reorganizing the division helped focus and streamline all efforts. Integrating these functions paved the way for a more cohesive marketing and enrollment strategy to grow the university.

We continue to align strategies, develop key performance indicators, collaborate on campaigns that drive enrollment, and create new initiatives to target our diverse segments of students, families, and stakeholders. Most notably, we are rebuilding our website, developing a data dashboard, focusing on the financial needs of our constituents, and creating a **Discover Your Purpose** interactive tool for our website that will assist with recruitment of traditional, non-traditional, and graduate students alike.

Strategic Enrollment Plan

To understand how we planned for an enrollment recovery, it is necessary to be candid about deficiencies in previous recruitment cycles. Under the former enrollment management leadership, the lack of a strategic enrollment plan cost the university. The elimination of pipeline and open-access programs (e.g., conditional admissions, diversity leadership camps, bus trips), separation of units without clear guidelines of ownership, detrimental changes to the scholarship awarding models, significant staff turnover, lack of strategy for recruitment efforts, and the overall breakdown of enrollment operations contributed to years of declining enrollments.

A central tenet of our recruitment philosophy today, shaped in part through the rebranding campaign described later, is promoting the value of **Relentless Purpose** and the idea that UW-Stevens Point helps students discover their purpose and focus on achieving it. A recurring theme that our rebranding consultants identified at our institution, more than any other campus they have worked with, is that we care *deeply* and invest *passionately* in students' purpose. This theme is now carried through all that our recruitment staff does, and we aim to work with diverse students to build relationships, inspire purpose, and emphasize the return on the educational investment.

Using market share analyses and historical enrollment data, we developed a strategic enrollment plan (available upon request) based on both best-practices and innovative ideas. In June 2019 we began:

- Implementing the Four Disciplines on Execution (4DX) framework to address any strategy or execution gaps
- Purchasing 80,000 targeted prospect names for adult, transfer, and first-year students for all three campuses based on our signature academic programs
- Developing compelling content for our award-winning signature programs
- Building an Adult Student Services operation to recruit, retain, and serve the adult learner
- Utilizing our marketing partnerships and developing strategies to enhance our brand, visibility, and recruitment operations
- Working in close collaboration with college deans, department chairs, faculty, and department recruitment liaisons to bolster and streamline recruitment efforts, communication, and event management
- Establishing data-driven goals for first-year, transfer, adult, re-entry, branch campus, and under-represented minority (URM) students
- Transforming our scholarship model to leverage dollars on a two-year renewable basis to improve first to second-year retention with first-year students, and transforming our non-resident fee waiver (Destination Wisconsin Scholarship) to be used as a recruitment tool
- Revitalizing our reporting and analytics structure to better assist with making data-informed decisions
- Managing territories in alignment with Wisconsin by-county goals and out-of-state goals
- Increasing yield rates and re-establishing our market share from all Wisconsin counties and leveraging scholarship dollars, establishing top-of-the-funnel activities (name-buying in targeted geo-markets), improving outreach, and focusing on yield for out-of-state students
- Implementing a branch campus strategy that includes name-buying and outreach to local business partners for the new Associate of Arts and Sciences (AAS), Bachelor of Science (B.S.), and Master of Business Administration (M.B.A.) programs at the Marshfield and Wausau campuses
- Pioneering new initiatives aimed at adult and transfer students, including the establishment of an adult student recruiter, name-buys, and targeted communication plans
- Collaborating with our dean of the University College to improve retention and decrease attrition to the Wisconsin Technical College System (WTCS) – our leading transfer-out destination
- Mobilizing staff for a newly established re-entry student plan to re-enroll stop-out students each semester and outreach to those stop-out students close to graduation who have not transferred out
- Establishing a basic outline for international recruitment
- Developing the strategy and outline of impactful communication plans to targeted segments of students
- Enhancing and emphasizing the value of a four-year degree

In our recruitment recovery plan, we established a strong foundation on which to build, and we identified areas that need further attention. With a constant eye on our weekly progress, activities, tactics, and strategies, our goals include returning to a more stable enrollment, particularly through increases in first-year cohorts and graduate student enrollments. Equally important, we continue to motivate staff by equipping them with the right tools and creating a culture of strong recruitment based on serving students uniquely and comprehensively.

Improved Retention Efforts

Recent retention efforts on our campus also yielded strong results. Utilizing EAB's Navigate system, we have streamlined our early alert system during the 5th week of the semester. These efforts catch students at risk of failing academically and have allowed us to outreach in a personalized manner that helps guide students back on the path toward success. We are also exploring analytics that can provide insights into identifying at-risk students earlier and hope to collect more data that can contribute to the accuracy of an algorithm output.

We also modified our [academic standing policy](#) so students are afforded a more extended opportunity to correct a semester or two of poor performance. We no longer suspend first-year students after a poor first semester. Instead we work with them during a warning phase through our tutoring services, study skills, and time management practices. Moreover, our centralized and intentional advising model ensures that first-year students have five touchpoints throughout the year; this focused attention helps new students maintain good academic standing. These efforts have produced a seven-year high retention rate of 78.5% this past year, as depicted in Table 5 below.

Table 5. First-to-Second Year Retention Rates for Main Campus: 2010-2019

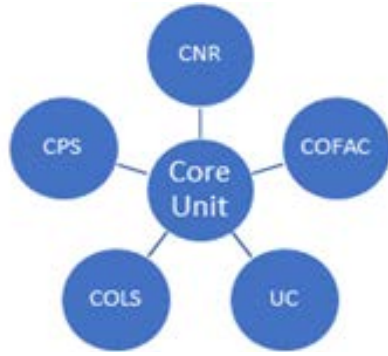
| Entering Fall | Retention Rate |
|---------------|----------------|
| 2010 | 80.0% |
| 2011 | 82.3% |
| 2012 | 78.9% |
| 2013 | 77.6% |
| 2014 | 76.0% |
| 2015 | 72.6% |
| 2016 | 74.5% |
| 2017 | 72.9% |
| 2018 | 75.2% |
| 2019 | 78.5% |

New Marketing and Recruitment Engagements

Beginning in spring 2019, our campus engaged in two marketing and recruitment partnerships designed to develop a communication structure, build brand awareness, create consistent messaging, and provide compelling information about what distinguishes UW-Stevens Point from our competitors, both by academic program and overall academic experience. In addition to an overall marketing strategy, our engagements have assisted in our goal to market individual academic program outcomes while recruiting new students.

The Ruffalo Noel Levitz (RNL) recruitment and marketing engagement provided guidance on our recruitment operational structure that consists of a core unit (admissions/recruitment/events) with clear lines to collaborative teams embedded within the academic units - College of Natural Resources (CNR), College of Professional Studies (CPS), College of Fine Arts and Communication (COFAC), University College (UC) and College of Letters and Science (COLS)(Figure 5). In each academic group, a recruitment liaison assists the core unit with marketing initiatives, event planning, and outreach to prospective and admitted students and parents.

Figure 5. Recruitment Operational Structure



The BVK Image Branding and Marketing engagement assisted with a re-branding campaign that allowed our campus to provide consistent and compelling talking points that engage prospective families/students, external stakeholders, university alumni, and other constituents in a meaningful way – all distilling to our authentic brand of **Discover Your Purpose**. Through a multi-phased approach, BVK helped determine our positioning in the marketplace, establish creative campaign concepts that highlight the core of who we are as an institution, develop a creative product to launch a new brand, and align our new marketing materials with each academic program. This final phase of the engagement permitted us to differentiate ourselves from competitors not only as an institution but also by the strengths of our academic majors.

New Adult Student Services

In addition to optimizing our recruitment efforts for the traditional college student, we began focusing on our adult, transfer, and re-entry populations as well. We developed a new Adult Student Services operation that dedicates work to recruit, retain, serve, and market the nontraditional, transfer, and re-entry student. We launched numerous re-recruitment and re-enrollment campaigns for admitted-not-enrolled and stop-out students, respectively, and we have developed a strategic **FinishUp** plan (available upon request) for adults looking to complete their degree. This includes UW-Stevens Point students who have earned more than 100 credits but fall just shy of degree completion.

Surveys of Prospective Students, Enrolled Students, and Alumni

Our operations seek to leverage all aspects of our marketing and recruitment work. To inform our recruitment functions, we began to collect more qualitative and quantitative information by surveying prospective students, enrolled students, students who were admitted but elected not to attend, and alumni.

The survey of enrolled first-year students indicated that 70% of the main campus students made their final decision to enroll within two months of applying. The majority of students at the branch campuses also made their decision within this timeframe. The enrolled students at main campus identified that academic program was the top reason for attending UWSP, followed by campus feel and location. For our branch campus students, location and cost were identified as the top reasons for attending. Utilizing this survey data, we enhanced our communication plan to be more robust within the 60 days of application and have included more prominent academic program information for our main campus and more cost and location-based messaging for our branch students.

The survey of enrolled students also indicated that the No. 1 reason students selected UW-Stevens Point was the university's academic programs. That information, coupled with the fact that 70% of our incoming students made their decision to enroll within 60 days of submitting their application, provided us two focal points for marketing: we need rich content and branding materials to draw students to the university, and we need a comprehensive approach to personalized recruiting after a student submits their application.

To learn more about the students who did not enroll, we utilized a few methodologies. The National Student Clearinghouse (NSC) central database that stores student enrollments nationwide provided insights into which campuses are our top competitors; this includes an investigation into competitor sets for each academic program. We also identified our transfer-out institutions to assist with retention efforts. Finally, we surveyed admitted, but not enrolled students to learn more about their behavior. This information has important implications for recruitment, marketing, and content, among other things. Most importantly, we have learned that our institution needs to promote the value of a four-year degree to both incoming and current students.

To evaluate alumni attitudes, we partnered with the Career Leadership Collective to administer the National Alumni Career Mobility (NACM) survey. This engagement allowed us to capture alumni successes, engagements, experiences, and career outcomes data for graduates at the five- and ten-year post-graduation mark. We understand that consumers need to see the return on their investment, and this engagement will allow us to highlight those examples. We are working to align our academic offerings with high-impact practices to meet and exceed industry demands, and we predict this robust inquiry will yield valuable insights.

Aligning Marketing and Recruitment Strategy

Our academic program array and organizational structure has directly impacted our marketing and recruitment strategy and allowed us to educate our audience about a broader array of academics and display the benefits of interdisciplinary work. This has also allowed us to talk about programs in terms of career clusters that align with how Wisconsin high schools are preparing students for a post-K-12 experience. UW-Stevens Point representatives are working with staff from the Wisconsin Department of Public Instruction (DPI) and the Cooperative Education Service Agency (CESA) to coordinate our marketing and recruitment language with the [Career Clusters and Pathways](#) framework.

The culmination of all of this academic reorganizational work will be displayed in an interactive **Discover Your Purpose** majors exploration tool on our new website (beginning in summer 2021). This tool will walk students through a variety of questions targeted at how their values, interests, and skills align with our academic program array. The result of this interactive quiz will provide students a clear path to career options, related majors, and graduate programs that align with corresponding areas of interest.

New Customer Relations Management (CRM Tool)

Beginning in the spring 2021, UW-Stevens Point will have a new Customer Relations Management (CRM) tool, Slate, that will maximize our ability to communicate with prospective students. In addition to having a strong tool to recruit undergraduate students, we are poised to include our graduate student recruiters in this process. For the first time on our campus, graduate programs will be able to effectively market to a significantly broader audience using this new CRM product. All undergraduate and graduate academic programs will benefit by having a sophisticated tool to reach more students.

Repackaging Scholarships

As a public institution, our ability to adjust pricing is extremely limited; thus, it is critical that we optimize our financial aid packaging. We have taken a data-driven approach to examine our existing scholarship dollars to maximize net tuition revenue goals. To that end, we made two significant changes to our previous **Pointer Payback** scholarship. The feedback we received indicated that the award name 1) did not convey academic excellence and, 2) communicated the possibility that the scholarship dollars needed to be repaid. Furthermore, the award was distributed in a one-time, lump-sum amount during the first term of the recipient's enrollment. This created an imbalance of tuition

and fees from one semester to another, and it was clear that needed to be rectified so that students could navigate their educational journey in a fiscally responsible manner.

Using our historical yield rates by award category, we developed a two-year renewable model that will be equally distributed over four semesters. We also re-branded the award as the **Presidential Scholarship** to emphasize academic achievement.

We also have funds allocated for students designated in the tuition categories of out-of-state and Midwest Student Exchange Program (MSEP). In the past, we have used the name Non-Resident Fee Waiver (NRFW) and awarded these dollars late in the recruitment cycle. The criteria set for this award were far too complicated for most to understand.

Our aim was to develop a simple, marketable scholarship that was easy to explain. This award would be used as a recruitment tool early in the recruiting process and would be guaranteed to students who met the requirements. We also awarded at the point of admission to ensure students could account for this scholarship as they continued to explore financial obligations associated with their post-secondary planning.

The following criteria have been approved under the new name of **Destination Wisconsin Scholar** program: any Midwest Student Exchange Program (MSEP) or out-of-state first-year or transfer student (except for Minnesota and Return to WI students) with a 2.75+ GPA or 19+ ACT/980+ SAT will receive the award upon admission. Table 6 below indicates, based on 2020 numbers and yield rate, what the projected actual cost for Year 1 would be with the following award amounts:

- **MSEP - \$1,000/year, renewable for 4 years**
- **Out-of-State - \$4,000/year, renewable for 4 years**

Table 6. Transfer and First-year Student Destination Wisconsin Projections

| Tuition Category/ Location | Yield | Number of 2020 eligible at 2.5 GPA or 19 ACT/980 SAT | Number of 2020 would be awarded | Projected actual cost for year 1 |
|-----------------------------------|--------------|---|--|---|
| Illinois | 34%* | 464 | 158 | \$158,000 |
| Other MSEP | 29%* | 138 | 40 | \$40,000 |
| Out-of-State | 13%** | 291 | 38 | \$152,000 |
| | | | | \$350,000 |

**based on Presidential Scholarship yield*

***based on yield for students with GPA above 3.0, excluded all MSEP and MN students*

We are exceedingly pleased with the structural and tactical changes to our marketing and recruitment operations and the improved enrollment they achieved. The turnaround in enrollment of first-year and graduate students represents a significant institutional achievement and a continuing diversification of our enrollment and, by extension, our operating revenue.

V. Strategic Planning and Implementation

As noted in the introduction to this report, in August of 2019 institutional representatives participated in the [Society for College and University Planning](#) (SCUP) Planning Institute 2 (Developing and Implementing a Strategic Plan). The following month, Chancellor Patterson charged the Integrated Planning and Advisory Council (IPAC) to engage in creating a new strategic plan. During the fall of 2019 and continuing into early 2020, led by IPAC, the UW-Stevens Point community of students, faculty, and staff at all three campuses (i.e., Stevens Point, Wausau, and Marshfield) engaged in appreciative inquiry surveys, visioning sessions, and consensus workshops ([Appendix 11](#)). Informed by the SCUP framework, in February of 2020 a draft vision statement was authored, and during March of 2020, high-level strategic plan goals were developed and approved. The draft vision and goals, named **Purpose Made Possible** ([Appendix 12](#)), was approved by the Common Council on April 15, 2020, and by Chancellor Patterson shortly thereafter.

Purpose Made Possible identified five strategic themes and articulated high-level goals under each theme. The five themes were: align financial model with institutional vision, offer programs to serve the lifelong learner, enhance the student experience, serve our communities by expanding partnerships and connections, and enhance collaboration. The work of developing the strategies, tactics, and metrics for goals outlined within the themes continued during fall 2020 and were monitored by IPAC.

In January of 2021, Chancellor Gibson began his tenure at UW-Stevens Point. Chancellor Gibson engaged the campus community and IPAC and requested modest refinements of the vision and background as well as the themes and high-level goals of **Purpose Made Possible** to emphasize three strategic imperatives: enrollment growth, enhancing academic excellence, and promoting equity, diversity, and inclusivity in all we do. Additionally, the chancellor requested that IPAC examine possible integration of the service to communities by expanding partnerships and outreach with enhanced collaboration themes. These requested refinements were recently incorporated in an updated **Purpose Made Possible** document ([Appendix 13](#)).

Underlying each thematic area in the strategic plan are goals, strategies, and tactics as well as metrics associated with goal monitoring and achievement. In February of 2021, Chancellor Gibson operationally assigned executive sponsorship to each of the thematic areas. To wit, the chancellor assigned the Align Financial Model with Institutional Vision to Vice Chancellors Pratima Gandhi (Business Affairs) and Chris Richards (Advancement). Similarly, the refined Expand Educational Opportunities for Student Success was assigned to Lana Poole (Chief Marketing and Enrollment Officer) and Greg Summers (Provost and Vice Chancellor for Academic Affairs). The Enhance Student Experience theme was assigned to Provost Summers and Al Thompson (Vice Chancellor for Student Affairs). Finally, the work for the revised final theme of Serving our Internal and External Communities for Impact was assigned to Rob Manzke (Chief of Staff to the Chancellor). Development of the associated strategies, tactics, and metrics is currently underway for each strategic theme. The work being planned on these themes is being organized by IPAC using customized Gantt-type Excel templates ([Appendix 14.](#))

As of the writing of this document, the work is planned over the next five-year timeframe. Additionally, both the financial and student success themes directly address the role of recruitment and activity-based budget models as essential components of the institutional financial stability and plan.

VI. Operational Efficiencies

In addition to previously discussed budget modifications and development of activity-based budget mechanisms and substantial changes to recruitment operations, our institution has planned and implemented several operational efficiencies. These include restructuring of our academic colleges and future plans for replacement of our library and student services building (Albertson Hall) and consolidation of student support services (advising, registrar, financial aid, and student financials) in a single building. Additionally, outsourcing bookstore operations and centralizing facilities services operations were also accomplished during the period of this report. These are discussed in turn below.

Reorganization of Curricular Colleges

To improve the student experience and promote curricular and scheduling efficiencies, the academic colleges also undertook a massive restructuring effective fiscal year 2021. In June of 2020 the Board of Regents of the University of Wisconsin approved the reorganization of three of our four curricular colleges: College of Fine Arts and Communication (COFAC), College of Letters and Science (COLS), and College of Professional Studies (CPS) ([Appendix 15](#)). The restructuring modified the existing departments within COFAC, COLS and CPS to combine existing units into new schools. Within COFAC, the change included the creation of the School of Design and Communication and the School of Performing Arts. Replacing the existing 13-department structure within COLS, the following schools were created: the School of Behavioral and Social Sciences; the School of Biology, Chemistry and Biochemistry; the School of Humanities and Global Studies; and the School of Mathematics, Computing, Physics and Astronomy. Finally, within CPS, a School of Health Sciences and Wellness was created. This restructuring resulted from a two-year-long campus dialogue, with objectives related to better aligning institutional spending with revenue, especially in curricular areas; enhancing interdisciplinary curricular offerings, and providing clearer professional foci to our academic programs. Additionally, it facilitated the implementation of the university's new marketing and branding campaign. The restructuring was achieved through a reallocation of existing resources as part of a revenue-neutral plan (see figures 6, 7, and 8 on the three final pages in [Appendix 15](#)).

Prior to restructuring, each of the four academic colleges maintained numerous individual academic departments, each with their own chair, support personnel, and departmental procedures. The restructuring grouped similar and interdependent academic departments into larger schools. While the restructuring did not result in significant financial savings, the restructuring of the academic colleges and adjustments to the academic budget model will allow the challenges presented in balancing academic offerings with student needs/demands to be addressed both operationally and financially. Long-term curricular planning at a school level rather than a department level allows for improved operational and financial decision-making.

Albertson Hall Replacement and Consolidation of Student Services Functions

Early in 2021, institutional plans for the renovation of Albertson Hall changed significantly. Albertson Hall currently houses our library and student support services, such as Academic Career Advising Center (ACAC). The building has been on the UW System and state renovation list for several years. The original plan was to renovate the existing structure to upgrade the fire suppression system as well as update the heating and ventilation system for the building. When pre-design consultants evaluated the building late last fall, it was concluded that razing the building and replacing with a new structure was economically preferable to an extensive remodel. The determination sparked an immediate discussion and plan that now includes the movement of our other student support services (including registration and records, financial aid, and student billing) into the newly designed building. The project will also include razing the existing Student Services Center

and moving student support personnel into a single building for centralized access for students to all services. This plan will result in significant increased efficiencies of student access and reduced maintenance as the Student Services Center is taken out of service. The Board of Regents approval and summary plan elements (to date) are provided in the linked material ([Appendix 16](#)).

Contracting Services for University Store

Historically, the institution maintained a self-operating University Store and a Text Rental program. While these are two distinct operations sharing the same space and staff, the University Store was retail-funded and the Text Rental operation was, and still is, funded by student segregated fees. Upon review of this operation in 2018, it was noted that the University Store operations had not generated adequate revenues to be sustainable and provide funding to support operations outside of the unit, such as the Division of Student Affairs and other operations of the university community. In June 2019, the institution entered into a contract with Barnes & Noble College Booksellers LLC to provide retail store operations and text rental management services beginning the following month (July 2019). The structure of this agreement allows for one of the largest operators of college bookstores to be a campus partner and deliver retail expertise in the higher education market. Additionally, the management services of the text rental program allow the institution to retain ownership of the rental program but affords the space and staff to be managed and maintained under the oversight of the contract with Barnes & Noble, joint with the retail store operations. The financial benefits of this contracted service have yet to be fully realized as the public health emergency was declared nine months into the contract. Finally, in a recent renegotiation of the contract, Barnes and Noble will begin managing the text rental program for the Wausau and Marshfield branch campuses in fall 2021. Also, the current main campus on-line store will be enhanced to accommodate branch campus spiritwear and gifts at the same time.

Consolidation of Custodial and Maintenance Operations

Prior to 2019, the institution maintained three distinct custodial and maintenance functions – a large operation within the main institutional Facility Services unit, and two smaller operations within Residential Living and University Centers. To reduce redundancy across campus units, become more efficient, and maintain consistent standards across campus, the two smaller operations merged into the larger custodial and maintenance operation within Facility Services during 2019. This merger has since allowed for more consistent and streamlined service to campus units and for internal and external events. An additional benefit of this merger could also be financial. While related expenses have been reduced since the merger, those annual savings have been variable, especially due to COVID-19. As the institution begins to return to more regular operations, true consistent savings will be known and financial support for the service arrangements may be reduced.

VII. Conclusions and the Steps Ahead

As articulated in the sections above, we submit that the changes we have made in our enrollment management and financial operations have resulted in improved enrollments and associated financial support from tuition. Additionally, the themes and goals articulated in our strategic plan will continue to position UW-Stevens Point as an excellent regional comprehensive educational institution. We will continue to identify and execute operational efficiencies and while the continuing effects of COVID-19 remain uncertain, the path forward we have charted for ourselves is not. While additional financial information will be forthcoming as part of the ongoing federal relief package disbursement as well as the Wisconsin biennial budget process, we are confident in our financial plan and available resources to continue to fulfill our mission. We look forward to updating the HLC and reviewers on this progress in our Year-4 review and assurance argument.