To: Patrick Boyle, Acting Chancellor, UWEX  
Norma Rees, Vice Chancellor, UWM

From: Joint UWM/UWEX Committee on Integration:

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<th>UWM Personnel</th>
<th>UWEX (Milwaukee) Personnel</th>
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<td>John Bibby</td>
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<td>Robert Corrigan</td>
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<td>Gabor Karadi</td>
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<td>Nancy Wright</td>
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<td>Donald Vogel</td>
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Re: Recommendations Concerning the Integration of Milwaukee-Based UWEX Personnel and Programs into UWM

Introduction

Pursuant to the charge given in your memorandum of Dec. 9, 1982 and during your meeting with the Committee on Feb. 3, 1983, the Committee has assumed the following responsibilities:

1. To make recommendations concerning the nature of the integration process between UWEX and UWM.

2. Monitor and facilitate the ongoing integration process.

To carry out these responsibilities the Committee has met regularly during the spring semester, 1982-83. Throughout its deliberations, the Committee has been guided by a belief that extension programming is an essential component of the University of Wisconsin's mission and that integration of UWEX personnel and programs into UWM should be done in such a way as to enhance the performance of the extension function.
The Extension Function at UWM

The merger of Milwaukee-based University of Wisconsin Extension (UWEX) personnel and programs into UWM means that UWM is assuming a major and expanded obligation for extension programming in the metropolitan area. Assumption of this obligation will have significant implications for all units of the University and all levels of campus decision-making. All faculty bodies and administrators will need to review their decision-making procedures and decisional criteria to make certain that proper recognition is given to the extension function. Because this committee is recommending that integration take place at the departmental or college/school levels, it is imperative that UWM colleges and schools, in particular, review their decisional rules, procedures, and practices to be certain that extension obligations are fulfilled and appropriate recognition is given to effective performance of the extension function.

The extension function includes the following activities:

a. Off-campus credit instruction
b. Noncredit instruction--both on-campus and off-campus
c. Activities for the public (e.g., special lectures, concerts, art exhibits)
d. Programs specially tailored for particular audiences
e. Professional advising services
f. Applied research
g. Pilot/demonstration projects

Recommendations

I. Timetable for Integration

A. Milwaukee-based programs and budgets should be integrated into UWM to the maximum extent possible for 1983-84.

B. Those UWEX programs that are not integrated for 1983-84 should be integrated in the 1984-85 budget year.

C. Because of differences in time that will be required to integrate the various UWEX programs and personnel into UWM, those UWEX units and personnel not integrated by July 1, 1983 should be administered from UWM through the Division of Urban Outreach (DUO) on a temporary basis for one year.
II. Structure of Integration between UWEX and UWM

A. Integration should occur at either the departmental or college/school levels and not through any new or existing division or extension.

B. In integrating UWEX personnel into UWM at the departmental or college/school levels, the following options should be considered:

1. creation of new departments within existing UWM colleges/schools

2. creation of budgetarily separate program units within existing UWM departments. Tenured members of these program units would serve on departmental executive committees.

C. The particular pattern of integration adopted by the various colleges/schools of UWM will vary according to the structure of the school.

D. It is preferable that existing UWEX units not be split up in the integration process so that continuity of programming can be maintained. There should, however, be no prohibition against splitting existing UWEX units since in some instances dividing the personnel among several UWM units may be the most effective way to carry out the extension function.

E. UWEX personnel who work in multi-disciplinary programs should have the opportunity to continue such programs after integration regardless of their departmental or college/school homes.

F. While the statewide planning and coordination of program areas are the responsibility of UW-Extension in cooperation with the other UW Chancellors in performing the general extension function, UWM will have the responsibility for program identification, content, implementation, academic quality and accountability for the programs it administers.

III. Extension Policy Committee

A. There should be a campus-wide faculty standing committee
responsible for advising the campus administration and the schools and colleges on extension policy. This committee would be responsible for advising on the extension mission and programs of UWM, administrative issues, and jurisdictional disputes among UWM schools, colleges, and departments. This committee would therefore make recommendations on such issues as unit retention of excess revenues, mechanisms for program quality assurance, etc. The committee should have a membership representing all UWM schools and colleges. Committee members should be experienced and interested in the University's extension function and contain both faculty and academic staff personnel.

This recommendation for the creation of an Extension Policy Committee is consistent with the report of the Ad Hoc Committee on Outreach in the Milwaukee Area (September 3, 1981). It is envisioned that the Extension Policy Committee would be analogous to the Research Policy Committee.

B. During the time period that is required to implement the recommendation to create an Extension Policy Committee as an official UWM committee, it is recommended that the UWM Chancellor appoint an ad hoc committee advisory committee on extension policy. This ad hoc committee would perform the functions of the Extension Policy Committee on an interim basis.

IV. Campus Administration of Extension

There should be an extension administrator/office at UWM responsible for administration and coordination of extension activities.

V. Budget Policy

A. Because substantial fiscal risks exist for balancing the UWM extension budget after merger, it is strongly recommended that all UWM extension budget decisions be made using conservative estimates of program and grant revenues.

B. Extension programming and budget decisions (including the program revenue requirements) should be handled through the regular UWM budgetary decision-making process. That is, after appropriate consultation with their respective faculties, Deans should and would submit an extension program budget to the UWM Campus Administration.
C. The UWM advisory committee on extension policy should advise the Campus Administration on extension programs and budgets.

D. Since extension programming will be initiated at the department, college, or school level, there is no assumption that all currently existing UWEX programs will be continued in their present form after merger.

E. The Committee recognizes that some extension programs will be more successful than others in raising program revenue and that it is essential that incentives exist for raising this revenue. When extension programs earn revenues in excess of costs, the departments, schools or colleges in which those programs are located should be permitted to retain an appropriate proportion of these excess revenues. These excess revenues should be reinvested to strengthen extension programming.

F. When deficits occur within extension budgets of the departments, schools and colleges, the decisions on how these deficits will be handled will be through the regular budget processes of the departments, schools and colleges and the UWM Central Administration. Such deficits will be made up out of extension funds (see item G.).

G. Extension funds should be identified within the UWM budget and the budgets of the colleges and schools so that the extent of extension activity can be readily determined and the UWEX can carry out its oversight function.

VI. Personnel Issues: Faculty Rights and Responsibilities

A. All UWM Policies and Procedures will apply to integrated UWEX faculty. All UWEX faculty should be provided with a copy of Chapter 5, UWM Policies and Procedures, before the integrating step takes place.

B. In view of the extension functions being assumed by UWM, it is necessary that extension activities be recognized as an essential component of the UWM mission. Divisional executive committees should review and, if necessary, revise their "criteria for promotion" documents to insure that the criteria of teaching, research, and service are so delineated as to provide appropriate consideration to extension activities.
Each department assuming responsibility for extension education functions should also clearly define its expectations for persons performing those functions.

C. All integrated UWEX faculty should be provided with a copy of the current UWM divisional criteria for promotion.

D. Integrated UWEX faculty should select and join whichever UWM division they find preferable, consistent with the divisional membership(s) of the department or college/school with which they are affiliating.

E. Divisional committee review should not be required of tenured UWEX faculty that are being integrated into UWM.

F. Seniority must be honored in accordance with both the UWM and UWEX policies and procedures. That is, seniority within a department is based upon the date of appointment or promotion to the current rank. Integration of UWEX means meshing the two seniority lists.

G. Teaching staff for UWM extension programs after merger shall not be restricted to UWM faculty or academic staff. Teaching staff may be employed subject to the approval of the appropriate departmental or college/school faculty.

VII. Personnel: Academic Staff Rights and Responsibilities

A. Individual members of the UWEX academic staff who are integrated into UWM will hold the same type of appointment (i.e., indefinite, probationary, fixed term) at UWM that they currently hold in Extension, regardless of funding source. Implementation of this recommendation will require either a waiver of some existing UWM academic staff rules or a revision of those rules.

B. Any UWEX positions currently occupied by probationary/indefinite academic staff which become vacant and any positions which currently are vacant should be reviewed by the UWM Compensation and Classification Committee (and other appropriate administrative bodies) to determine the appropriate classification of the position according to current UWM policies.

C. UWEX academic staff being integrated into UWM should retain those faculty voting rights that they held in UWEX.
D. Individual members of Extension academic staff who are integrated into UWM should retain all seniority earned in Extension, and that seniority will apply within the operational area into which they are integrated.

E. UWEX academic staff being integrated into UWM who are on probationary appointments should be expected to meet the requirements under which they were appointed in UWEX before advancing to indefinite status.

F. Because of the extension functions being assumed by UWM, it is necessary that committees and administrators evaluating academic staff include in their evaluation criteria appropriate measures of extension activity.

G. Members of UWEX academic staff being integrated into UWM should be allowed full participation in all governance opportunities open to members of the academic staff at UWM.

H. After integration takes place, the faculty and deans/division heads, and other appropriate administrative bodies at UWM, should have the authority to make program decisions which may affect the continuation or termination of former Extension individuals/programs. These decisions should be made with full regard for due process, in the same way that programmatic decisions affecting current UWM faculty and staff are made.

I. All UWEX academic staff being integrated into UWM should receive copies of all UWM policies and rules pertaining to academic staff.

J. UWEX academic staff who are on probationary appointments should be allowed to negotiate the amount of their probationary service in UWEX which will be counted toward their probationary service at UWM.

VIII. Classified Staff

The committee recognizes the contributions that the UWEX classified staff have made to carrying out the extension mission of the University of Wisconsin. Fulfillment of UWM's extension mission will require a continuing complement of support staff. The committee, therefore, recommends that an appropriate number of support personnel be transferred to UWM and that these personnel be integrated into UWM in a manner consistent with state statutes, administrative rules, and collective bargaining agreements.