I. Introduction

Regent policy, as expressed in the report of the Special Regent Study Committee on Extension adopted on April 9, 1982, reaffirms the UW System's extension function as "utilizing university resources beyond the classroom for the benefit of the state and society at large." The same report recommends that existing UW-Extension faculty be integrated with faculties of the other institutions of the UW System. Integration is expected to benefit the extension function and the university mutually. The extension function will be enhanced through closer links to the instruction and research bases of the university. In turn, the university will benefit from closer linkages to the community and increased relevance of research and instruction.

The above report also recommends that "Any plans for integration of UW-Extension faculty into campus departments or other units must be approved by the appropriate faculty and administrative review bodies of each institution involved, be approved by the President's office, and reported to the Regents." This plan is intended to furnish the opportunity for review and approval in order to fulfill the requirements indicated.

The Regent policy is elaborated in the document Academic Information Series 5 (ACIS-5), Administrative Guidelines for UW System Implementation of Regent Policy on Integration between UW Extension and the UW Institutions.
The introduction to ACIS-5 states, in part, that the guidelines "are based upon the Regent policy of encouraging the integration of the extension function with UW System institutions under the leadership of UW-Extension."

II. Recommendations of the Joint UWM/UWEX Committee on Integration

The Joint Committee, made up of faculty and academic staff from both UWM and UWEX and jointly chaired by a faculty member from each institution, was created on December 9, 1982 by the then Acting Chancellor of UW-Extension and the Vice Chancellor for Academic Affairs of UW-Milwaukee. The Joint Committee was charged to:

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

2. monitor and facilitate the ongoing integration process.

The Joint Committee presented its recommendations in a report dated April 22, 1983, and these recommendations were amended and approved by the UW-Milwaukee Faculty Senate as Document No. 1383 on December 15, 1983. The document was not presented to the UW-Extension Faculty Senate.
The report of the Joint Committee states, in part:

"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 report also recommended the creation of an Extension Policy Committee at UWM:

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."

(Subsequent to integration, the UWM Codification Committee will be charged with developing policies and procedures to implement this recommendation.)

"E. 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 advisory committee on extension
policy. This ad hoc committee would perform the functions of
the Extension Policy Committee on an interim basis."

The Joint Committee report recommended that integration take place to
the maximum extent possible for 1983-1984. Because the necessary review
procedures and administrative changes could not be completed to meet that
timetable, 1983-1985 became a "transitional" period in which appropriate steps
could be taken to achieve full integration. A step toward this objective was
the completion of the UWM/UWEX Joint Committee's report and subsequent UWM
faculty action, as already indicated. Other essential steps toward fulfilling
the Joint Committee's recommendations taken during this period were:

1. identification of UWEX faculty and staff to be integrated
   into UWM;

2. analysis of the budgetary support and procedures needed
   for orderly management of integration; and

3. arrangement for the Joint UWM/UWEX Committee on

This integration plan explicates, builds upon, and is compatible with
UW-Milwaukee Faculty Senate Document No. 1383 and with the documents cited in
the Introduction.
III. Structure of Integration

A. Initially, it is anticipated that most Milwaukee-based Extension faculty and staff will be integrated into the Division of Outreach and Continuing Education where they will exercise faculty governance rights as devised by the membership in accordance with UWM Policies and Procedures. However, some units, faculty and staff will no doubt integrate immediately into colleges and schools and it is expected that over time integration of all the faculty and staff initially housed in DOCE will occur into the colleges/schools and departments of UW-Milwaukee. Such integration is seen as evolutionary and will take place with the involvement and agreement of all affected individuals. This procedure has the almost unanimous support of Milwaukee-based UWEX faculty and staff to be integrated.

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. In accordance with existing UWM policies and procedures 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. 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.

These guidelines for the structure of integration at UWM are consistent with both Regent policy and ACIS-5, as well as with the traditions of university outreach as conducted at UWM.

Faculty Doc. No. 1383 also specifies the existence of an extension administrator/office at UWM responsible for administration and coordination of extension activities. In the organizational structure of UWM that function is presently assigned to the Division of Urban Outreach. The Division of Urban Outreach was created in 1973 as a joint unit of the University of Wisconsin-Milwaukee and the University of Wisconsin-Extension. DUO's mission statement, adopted at the same time, reads as follows:

"The mission of the Division of Urban Outreach of the University of Wisconsin-Milwaukee and the University of Wisconsin-Extension is:

(1) to bring into a coordinated relationship the UWM outreach activities and Milwaukee-based Extension and other UW System activities in order to improve public service of the University System in the metropolitan Milwaukee area;
(2) to plan with and support statewide Extension and other UW System units in the delivery of public service to other areas of Wisconsin;

(3) to assist in the development and maintenance of a faculty, expert and active in public service;

(4) to facilitate and/or administer present University outreach efforts and to organize and/or administer services as needs are identified."

Although written over ten years ago, this mission statement is fully appropriate to the university division under the conditions of integration as outlined in the Regents policy, ACIS-5, and UWM Fac. Doc. No. 1383. To clarify the future role of this division, the name will be changed to UWM's Division of Outreach and Continuing Education (DOCE), with the following scope of responsibilities:

1. coordinate the university's non-credit continuing and adult education activities;

2. coordinate off-campus credit instruction;
3. manage conferences and workshops on and off campus that support the university's continuing education and outreach objectives;

4. facilitate and coordinate the use of cable and other forms of television for the purposes of credit and non-credit university programs;

5. provide administrative support for and deliver special or pilot programs, especially those involving more than one school or college;

6. provide liaison between UWM's academic units and local agencies, governmental units, and community groups;

7. supervise the affairs of the university's extension function, including budget management;

8. facilitate annual and long-range planning in UWM schools and colleges regarding their outreach and continuing education activities;
9. coordinate UWM's non-credit and off-campus credit
offerings with UW-Extension, other UW System units, the VTAE
System, and other postsecondary institutions;

10. facilitate school/college compliance with UWM and UW
System policies related to outreach activities (e.g.,
overload, continuing education fee policy); and

11. consult regularly with UWM's Extension Policy Committee.

IV. Personnel: 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, and therefore an area
of responsibility and performance in faculty review policies
and procedures. Each department assuming responsibility for
extension education functions will also clearly define its
expectations for persons performing those functions, including
a clear statement of percentage of time to be committed to
extension activities. Divisional executive committees will review and, as 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. These documents will incorporate 1) criteria statements delineating performance expectations for extension work, and 2) requests for the documentation necessary for review of an individual's performance, including evidence of a) recognition by one's peers of outstanding performance; b) quality program design and implementation; c) positive program impact; d) innovative and creative approaches to extension activities; and e) a program of research with related publications. The Extension Policy Committee will review proposed revisions in the 'criteria for promotion' documents of divisional executive committees to assure compatibility with Regent policy governing integration, soliciting comment from integrated faculty and other concerned groups and individuals. These reviews and revisions will be completed during the initial year of integration, and will be effective upon their completion.
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. At the appropriate time, integrated faculty should also review UWM Policies and Procedures 3.18(2) and, in accordance with that section, indicate in writing the standards and guidelines under which they wish to be reviewed for tenure.

E. Divisional committee review will 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 integration shall not be restricted to existing UWM faculty or academic staff. Teaching staff may be employed subject to the approval of the appropriate departmental or college/school faculty.
V. 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 the recommendation will require either a waiver of some existing UWM academic staff rules or a revision of those rules. Such waiver will not be a precedent for any other purpose.

B. Any UWEX position currently occupied by probationary/- indefinite academic staff which becomes 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 will 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 only the requirements under which they were appointed in UWEX before advancing to indefinite status. The review for indefinite appointment will be conducted by the appropriate UWM academic staff committee. Provision will be made to insure that these committees have representative members with Extension programming responsibilities. Copies of the statement of criteria for indefinite appointment that were provided the academic staff person up for review will be provided to that committee for each UWEX department from which an academic staff member has been integrated.

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 academic 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 fixed term appointments should be allowed to negotiate the amount of their service which will be credited toward probationary service at UWM. This provision shall not establish a precedent for any other purpose.
VI. Faculty Governance

Immediately upon agreement on integration and choice of divisional affiliation, Milwaukee-based UWEX faculty will be included in the districting for election of Senators to the UW-Milwaukee Senate. Academic Staff with faculty status will acquire the rights and privileges of that status granted by UWM Policies and Procedures.

In the course of the election process in 1985-86, the newly integrated faculty will also be eligible to run for and vote in elections for the UWM University Committee, the Divisional Executive Committees, and other faculty elected committees.

In the past, UW-Extension faculty holding integrated and/or joint appointments with other UW institutions have had representation on both their resident campus' and UW-Extension's Senates. The practice was reaffirmed by the UWEX Senate in June 1983 and at subsequent meetings. Therefore, it is proposed that 1985-86 will be a transitional year in which those faculty integrating into other UW System institutions will retain their governance rights vis-a-vis the Extension Faculty Senate.
In this transitional year, because a faculty senate deals primarily with
the internal operation of personnel and units within an institution, the role
of the UWEX Faculty Senate, for those faculty who remain in UWEX after
integration, will be clearly defined and its policies and procedures revised
and approved. This will ensure that faculty, deans, and the chancellor are
able to exercise the shared governance rights as dictated by Wis. Stats.
Ch. 36.09(3) and (4).

Further, it is proposed that an Extension Statewide Assembly elected on
a proportionate representative basis from faculty with designated extension
responsibilities at all UW institutions be established, effective July 1,
1986. Its role, too, will be clearly defined in the transitional year, but
its specific purpose will be to ensure essential faculty advice on matters
pertaining to long-range and statewide priority setting and planning and/or
other academic matters involving the extension function.

VII. Classified Staff

Fulfillment of UWM's extension mission will require a continuing comple-
ment of support staff. An appropriate number of support personnel will be
integrated into UWM in a manner consistent with state statutes, administrative
rules, and collective bargaining agreements.
VIII. Program

As provided in ACIS-5, UW-Extension has leadership responsibility for program coordination and statewide planning. Accordingly, UW-Extension will review annual program plans for UWM's non-credit programs to ensure the required degree of coordination and compatibility of program offerings with UWM's institutional mission, to assure compliance with the Continuing Education Fee Policy, and to avoid undue duplication of program offerings among the UW System institutions. Within this framework, UWM will have the responsibility for program identification, content, implementation, academic quality, and accountability for the programs it administers.

The statewide coordinating function is supported also by the UW System Advisory Committee to General Extension, formed in October, 1983 with System-wide representation, and the System Advisory Committee on Outreach, a System-wide body made up of outreach coordinators at all UW System institutions that has long been in place; SACO is given a specific role in planning and coordination in ACIS-5.

Program planning for extension activities at UWM will begin at the departmental or school/college level as consistent with the missions of each of those units and the overall mission of the university. Program planning will be facilitated and coordinated by the Dean of the Division of Outreach and Continuing Education (DOCE), subject to the approval of the Chancellor at
UWM. Together with the Chancellor of UWEX, UWM's Chancellor will review annually the university's performance of its extension programs, relation to statewide programming priorities and responsibilities, and plans for program growth, reduction, and change. UWM's representatives on the UW System Advisory Committee on General Extension, mentioned above, will insure that Committee decisions take note of UWM's long-range program priorities and that, in turn, UWM's plans reflect statewide long-range planning priorities.

The timetable for program planning will follow that of the existing academic planning and budget process at UWM. Academic planning documents due in the Vice Chancellor's office each year will include relevant sections on planning for continuing education and other outreach activities for the period covered in the planning process. The Dean of DOCE will also review these program plans in connection with the coordination and facilitation responsibilities assigned to that Division.

The university's annual plan for extension programming will be incorporated in the interinstitutional agreement developed for approval by the Chancellors of UW-Extension and UW-Milwaukee. Following the approval of the interinstitutional agreement, UWM's Chancellor will have full authority and responsibility for implementing the extension programs and making such short-term changes as may be necessary for meeting program objectives. The responsibility of the UWEX Chancellor for statewide coordination of program planning will be met through the approval of the interinstitutional agreement and the annual review. Plans and priorities for extension programming will
also be a regular part of UWM's annual budget and program meeting with the President.

Finally, UW-Milwaukee's extension programming will be evaluated as part of the academic review process in place at UWM. The requirement for review will be met by including the extension function wherever applicable in all scheduled reviews of UWM's academic programs. UW-Extension, in turn, will assess the consistency of UWM's programs with the interinstitutional agreements.

IX. Budget

As specified in the memorandum from President Robert M. O'Neil to Chancellors Boyle and Shain, dated April 6, 1984 and quoted below, State General Purpose Revenue (GPR) funds to support UW-Extension personnel and programs integrated into UW-Milwaukee will continue to reside in the UW-Extension budget but will be transferred to UWM at the beginning of each fiscal year. The authorization to generate the fee income (Program Revenue, or PR) funds to support these programs will also be transferred annually.

For the 1985-1986 fiscal year, and indefinitely thereafter, UW-Extension will guarantee UW-Milwaukee an amount at least equal to the total salary obligation for all integrated tenured faculty and indefinite academic staff. UW-Extension will also make a base transfer of GPR to UW-Milwaukee for the
1985-1986 fiscal year to cover the cost of administrative support services provided by UW-Extension's Central Office prior to integration. In accordance with ACIS-5, section IV.A., interinstitutional agreements for the years after 1985-1986 will include two basic types of commitments: (1) annual commitments to faculty and staff for short-term projects and activities and their program support to implement agreed-upon programs, and (2) continuing fiscal support for tenured and probationary faculty (and their program support) with specific long-term assignments to extension activities. In addition, longer term commitments to support continuing education activities not permanently identified with specific individuals may be included.

The fiscal obligation beyond the amount of GPR transferred annually (the total dollar commitment for salaries of other academic staff and classified employees, program supplies and expense, equipment, and other administrative costs) will be covered by fee income from the extension programs offered by UW-Milwaukee as part of the statewide extension plan.

Although UW-Extension will allocate a total cost budget to UW-Milwaukee, managing the PR funds generated by fees for non-credit extension programs will be UWM's responsibility. If fees fall short of estimates, UWM will be expected to curtail expenditures and/or make up the difference from other funds. If fees exceed estimates, the surplus will be available for UWM's extension programs within the year or to be carried over into subsequent years.
While Regent policy mandates that the Chancellor of UW-Extension will have ultimate fiscal responsibility for all UW-System resources dedicated to the extension function (i.e., those funds coded IBAC 104-5 and 143), UWM will continue to have fiscal responsibility for all other resources that, as part of UWM's operating budget, are devoted to extension and outreach.

In accordance with UWM Faculty Doc. No. 1383, because substantial fiscal risks exist for balancing the UWM extension budget after integration, it is strongly recommended that all UWM budget decisions be made using conservative estimates of program and grant revenues.

Extension programming and budget decisions (including the program revenue requirements) will be handled through the regular UWM budgetary decision-making process. That is, after appropriate consultation with their respective faculties, Deans will submit an extension program budget to the UWM Campus Administration.

The UWM extension policy committee will advise the Campus Administration on extension programs and budgets.

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 integration.
Because some extension programs will be more successful than others in raising program revenue, 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 these programs are located should be permitted to retain an appropriate portion of these excess revenues. These excess revenues should be reinvested to strengthen extension programming.

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 UWM Administration. Such deficits will be made up out of extension funds (see item G.) to the degree made possible by availability of excess program revenues from other units.

Extension funds will 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.

The "budgetary procedures" are outlined in detail in the following memorandum from President Robert M. O'Neil to Chancellors Boyle and Shain, dated April 6, 1984:
The starting point for agreement on budgeting must be the relevant portion (paragraph 8) of the 1982 Regent policies. The full text of the paragraph is as follows:

'Require that allocations from UW-Extension to institutions be based on interinstitutional agreements reached between the Chancellor of UW-Extension and the Chancellor of the institution involved; that such allocations permanently retain their budgetary identity as funds in support of extension programs; and that they be accompanied by substantial and adequate assurance of continued performance of the extension function and fiscal commitment to existing personnel. Modifications in interinstitutional agreements occasioned by required budget cuts or by vacancies due to retirement, death, or resignation of personnel must not be handled unilaterally, must be consistent with good personnel management, and must be compatible with the statewide plan for extension. The budget allocations identified in the interinstitutional agreements must assure sufficient stability and duration to permit institutions to make long-range commitments for carrying out that portion of the statewide extension plan for which they have accepted responsibility. Interinstitutional agreements may include three types of commitments: (a) continuing fiscal support for tenured and probationary faculty (and their program support) with specific long-term assignments to extension activities, (b) annual commitments to faculty and staff for short-term projects and activities and their program support to implement agreed-upon programs, and (c) longer term commitments which might support continuing education activities not permanently identified with specific individuals. Allocations based on these long- and short-term commitments will be administered through the UW institutions' faculty and administrative structures. Ultimate responsibility for the budget associated with these allocations and based on the interinstitutional agreements will remain with the UW-Extension Chancellor.'
"A brief review of the uniqueness of the UW-Extension budget and program may be helpful in applying this language. The major units scheduled to be integrated with UW System campuses are Cooperative Extension and General Extension. Each obtains approximately one-third of its direct budget from state funds (GPR). The balance comes from outside sources, although the basis for these revenues is very different. Cooperative Extension obtains the remainder of its funds from federal and county government sources. General Extension, on the other hand, earns nearly all its non-GPR budget through fees (program revenue, or PR) charged for its programs.

"In contrast, the direct instructional budget of the UW System universities is roughly three-fourths supported by state funds and one-fourth supported by student fees. The programs, students, locations, and sources of fiscal support for the extension function all differ from those of resident instruction and research functions. The differences were recognized by the 1982 Regent policy on Extension.

"Two complementary goals must be served within the budgetary framework of integration. On one hand it is essential that UW-Extension retain the flexibility and the ability to develop a coordinated statewide extension programming effort, to insure that a uniform fee policy be implemented on a statewide basis, and the capacity for the entire University System to fulfill the legislative and Regent mandate to effect substantial reprogramming
throughout the state. On the other hand, the campuses of the UW System need sufficient assurance of stability and continuity of resources to support their assumption of additional programmatic and personnel commitments through the integration process.

"Not all options would achieve both these goals. A short-term commitment of resources, for example, would provide flexibility but would insufficiently assure the stability which the universities properly seek. A permanent base budget transfer, on the other hand, would provide stability, but only by jeopardizing Extension's needed flexibility to carry out statewide its mandate and mission. Moreover, the concept of base budget transfer would not be consistent with the April 1982 Regent policies. A preferable alternative, which would equally well serve the goals of flexibility and stability, is outlined in the following paragraphs. These specific provisions and arrangements will be recognized through interinstitutional agreements as part of the integration process:

"First, all former UW-Extension faculty and academic staff who hold appointments at another UW institution will henceforth receive (from that campus) a single paycheck. This change will simplify bookkeeping and clearly identify the recipients of the checks as faculty and staff of that institution.
"Second, the campuses of the UW System will retain any savings realized during the fiscal year from resignations or other forms of termination of faculty and staff appointments, and will thus have the capacity within the year to make temporary arrangements as may be necessary to meet instructional and service commitments.

"Third, UW-Extension will commit to the campus...an agreed-upon amount of funds to support the classified staff and other services required by the faculty and academic staff who are performing the extension function. The arrangements for the academic and administrative support services will be worked out within twelve months of the initial 'integration' of the extension function and personnel. Such an accommodation will ensure the campus' responsibility for delivery of extension programs.

"Fourth, UW-Extension will at the time of any transfer or expansion of personnel responsibilities guarantee indefinite fiscal support for tenured faculty with specific long-term assignments to extension activities, appropriate continuing support for academic staff with multi-year appointment status of two or more years (fixed term or indefinite) and support for classified staff, academic staff on annual appointments, and other costs such as supplies and expense and equipment. Annually, UW-Extension will provide the appropriate amount of GPR funds to cover the salaries of such personnel in General and Cooperative Extension who are integrated with a UW System campus.
"Language in the formal red book budget which is approved by UW System Administration and by the Board of Regents, as well as similar language in the interinstitutional agreement between UW-Extension and the campus...will state explicitly that UW-Extension is committing an amount of dollars for the salaries of tenured faculty and for indefinite (and long-term fixed term) academic staff who are transferred to that institution and who have extension responsibilities. Such language will clearly indicate the continuing fiscal commitment for tenured faculty and indefinite and long-term fixed term academic staff who are to be integrated and perform extension functions.

"The implementation of interinstitutional agreements shall be as follows: Prior to the start of each fiscal year, the two Chancellors (Extension and the campus) will agree on the basic objectives of the joint extension program plan. After approval of the UW System budget by the Board of Regents, the annual allocation of the extension function to each campus will be made shortly after the beginning of the new fiscal year. This allocation will include both GFR and PR. During the fiscal year, the participating university shall have full responsibility for managing its extension budget. The university shall retain any program revenue surplus realized, and shall have responsibility to meet within its annual operating budget any shortfall which might result. The program revenue expectations under this arrangement also presuppose a substantial role for the university chancellor, deans and faculties in program planning, initiative and development, and through supervision of individual personnel assignments in the extension area. Within the basic agreed-upon program, the university may make such operational changes as may be necessary to meet these objectives."
"The concept described here - that of annual allocations for the support of extension activities through integrated appointments - provides to the Chancellor of UW-Extension the authority to meet the responsibilities described in the Regent policies: leadership, coordination, statewide planning, relationship with other agencies, and accountability for UW System resources dedicated to the extension function (i.e., those funds coded IBAC 104-5 and 143, but not those which have historically been part of the campus budget and dedicated to extension/outreach functions). The chancellor of the university (together with the deans, faculties, and other administrators) would meanwhile gain the commitment and stability necessary to assume additional and long-term personnel commitments and to carry out substantial responsibilities for program initiation, design, development, and implementation in the extension/outreach area. Permanent base budget transfers thus appear to be unnecessary, as well as inconsistent with the intent of the Regent policies of 1982. The goals of flexibility on the one hand and stability on the other should be reconcilable within a framework of the type outlined here.

"Above all, it is clear that UW-Extension bears a strong commitment to the goals and the implementation of the Regent policies. Extension also has a clear responsibility for the involvement of other UW System institutions as major partners in the statewide planning process. It should be clear that the extension function includes many persons and units other than those to whom these arrangements pertain; extension and outreach activity represent a
pervasive mission of faculty and staff throughout the University System.
Finally, the UW System administration will closely monitor the performance of
UW-Extension in carrying out the functions of statewide planning, coordination
and budget accountability for extension programming within the Regent policies
and the interinstitutional agreements."

Finally, the continuing education uniform fee policy will be followed in
the development of program fees and projections for program revenues. The
total program revenue requirement for UWM's extension activities supported by
UWEX funds will be developed annually as a projection based on planned program
activities approved through the interinstitutional agreement and in conformity
with the continuing education fee policy. While fee-based continuing education
activities in UWM's academic units that are not supported by UWEX funds will
be subject to UW System guidelines for implementing the continuing education
uniform fee policy, these programs will not be included in the annual inter-
institutional agreement nor included in the program revenue projection covered
by that agreement.

X. Conclusion

This plan for integration of UWEX Milwaukee-based personnel and programs
into UWM represents a basis for proceeding with the integration process as
outlined in Regents policy and ACIS-5. While additional details of
implementation are expected to arise as the process continues, adoption of this plan will permit UW-Milwaukee and UW-Extension to engage in an orderly and effective integration process.

Patrick G. Boyle
Chancellor
UW-Extension

Frank E. Horton
Chancellor
UW-Milwaukee