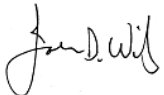




February 28, 2008

TO: Deans and Directors

FROM: John D. Wiley 
Chancellor

RE: Restrictions on GPR-Funded Activities

The state Department of Administration has directed state agencies (Attachment 1), including the university, to take certain measures in order to respond to a directive from the Governor that state agencies position themselves for significant austerity measures in the months ahead. This is due to the current and expected slowdown in the nation's and state's economy. We anticipate these restrictions will not be lifted in the near future. As a result, it is our expectation we will be filling fewer positions and have less out-of-state travel.

The first section of this memo outlines the guidance provided by UW System. The second part of this memo describes how DOA and UWS directives will be implemented at UW-Madison.

President Reilly has provided some additional direction to the chancellors (Attachment 2).

- All new hires funded by GPR* and/or tuition* must be deemed essential to the university's mission and be approved by the Chancellor or his designee.
 - Faculty, instructors, researchers, and student services and academic support positions are considered essential and may be exempted from this restriction.
 - Hires on gifts, grants, contracts, and other program revenue funds are excluded from the restrictions.
- Out-of-state travel funded by GPR and/or tuition must be approved by the Chancellor or his designee. President Reilly provided the following restrictions on February 25. (Further guidelines on allowable out-of-state travel are listed under the "Out-of-State Travel" section below.)

*Funds 101, 104, 105, 108, 114-119, 126, 131, 176-178, and 402

- New space requests and lease renewals funded by GPR and/or tuition will be closely examined by DOA and will need careful justification.
 - Attendance should be limited to a justifiable and minimal number of persons.
 - Alternatives to travel should be explored, such as video conferencing or teleconferencing.
 - Employees should consider canceling travel plans not meeting the guidelines (employees will be reimbursed for their out-of-pocket expenses for cancelled trips).

UW-Madison Implementation

HIRING

UW-Madison implementation guidelines for hiring follow.

Hiring Restrictions Do Not Apply to:

- Any position on non-GPR/tuition funding.
- Essential positions on GPR/tuition funding:
 - Student hourly, student assistant, and employee-in-training positions, regardless of funding source.
 - Faculty positions, regardless of funding source--we assume all faculty positions will be filled.
 - Any position engaged in instruction, research, or student services/academic support regardless of funding source.
 - Any position determined by the dean or director to be essential. For this purpose, an "essential" position is one that is necessary to ensure:
 - the health and safety of students, the public, staff, patients and animals; or
 - the continuation of services or operations that are critical to the university's mission.

Hiring Restrictions Apply to:

- Non-essential GPR/tuition-funded vacancies.

Hiring Decision Procedures for Deans/Directors

I am delegating this responsibility to the deans and division directors, with a periodic reporting requirement. Guidelines are stated below.

Positions Already Being Advertised (posted in PVL or CHRIS, or otherwise in process; e.g., LTEs, Projects, PVL waivers):

Deans/Directors must make an initial determination now about which vacancies are essential and which are non-essential. The Office of Human Resources will provide your HR representatives with a list of current vacancies already in PVL or CHRIS that you will need to review to determine which are essential. Each dean's office then will need to place those vacancies determined to be non-essential on hold or cancel them. You will not need to report your justifications for the essential positions until the first quarter report is due (see Reporting Requirements below).

Positions to be Posted:

Only essential GPR/tuition-funded vacancies may be posted or advertised during this time. Those approved by the dean/director may be given division approval in PVL or CHRIS; non-essential positions must be placed on hold.

Reporting Requirements:

Divisions will need to provide a report to the Office of Human Resources on a quarterly basis (first report due April 11) indicating which GPR/tuition-funded vacancies (other than student hourly, student assistant, employee-in-training, faculty and academic staff with instructional, research or student services titles) are non-essential and which are essential, along with justification for the essential positions. OHR will provide your HR representatives with the reporting template and procedures in the near future.

If you have any questions regarding the period of restricted hiring, please direct them to Mark Walters regarding classified positions and to Steve Lund regarding unclassified positions.

OUT-OF-STATE TRAVEL

Procedures for Deans/Directors to Follow

A dean's office signature in the appropriate box on the Travel Expense Report form will indicate the dean/director has determined that the GPR/tuition-funded travel is essential. Allowable out-of-state travel is listed below.

- Program/host committee members (persons with official duties).
- Conference presenters (presentation subject to review and authorization).
- Fulfillment of grant/contract responsibilities.
- Presentation of academic research.
- Travel reimbursed by an outside professional organization.
- Non-state employees, speakers, contractors.
- Travel to Chicago and Minneapolis.
- Training needed to fulfill job responsibilities not offered within the state (subject to review and authorization).

The following guidance should be considered in determining whether out-of-state travel should be authorized:

- Is the travel essential and necessary for the employee to perform his/her duties?
- Is the travel directly related to the primary missions of teaching, research and public service?
- Can the trip be postponed or canceled?
- What is the fiscal consequence of postponing or canceling the trip?
- Could the business be accomplished through other means (teleconference, videoconference, etc.)?
- Are there alternative sites closer to the institution where the business could be conducted that would result in lower travel costs?
- In the case of travel to a conference/seminar, is it necessary for more than one employee from a division or institution to attend? Could the information, instead, be shared with colleagues by the person who was authorized to attend?

Reporting Requirements

UW System will be retrieving from the Shared Financial System and reporting to DOA the amount spent on GPR/tuition-funded out-of-state travel. It is our expectation that, in this time of required fiscal austerity, data will show reductions in the dollar amount spent on out-of-state travel account codes in GPR/tuition funds. Consistent with DOA guidelines, departments should obtain prior approval from your office for out-of-state travel.

If you have any questions regarding the out-of-state travel restrictions, please direct them to Don Miner.

LEASE RENEWALS

All program revenue or grant-funded leases should be forwarded to Space Management in Facilities Planning and Management, as usual. Leases funded by GPR/tuition must be reviewed with Space Management before renewal requests are completed. This will allow state-funded lease requests to be evaluated before they are forwarded by the campus to UW System Administration and DOA.

If you have any questions regarding lease renewals, please direct them to Alan Fish or Doug Rose.

Attachments