UNIVERSITY OF WISCONSIN SYSTEM

Budget & Planning

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March 22, 2023 Via E-Mail Only

To: Chief Business Officers
Budget Officers

From: Chrissy Klappa
UW System Administration Office of Budget and Planning

Re: 2023-24 Additional Annual Budget Allocations

The Initial Allocation memo was sent to institutions on February 21, 2023. Since that time, there have been several additional allocations entered. Information on those allocations can be found below.

2023-24 Debt Service Reallocation

The 2023-25 Biennial Budget provides $193,786,000 in GPR Debt Service for fiscal year 2023-24. This funding has been allocated based on each institution's proportion of actual debt service expenditures (principal plus interest) in fiscal year 2021-22.
This allocation has been entered as:
Debt Service Alloc 801 – FY24 DEBT SERVICE

Financial Aid Allocations

The Financial Aid memo was sent on March 20, 2023. This included information on the institutional allocations for the Lawton Undergraduate (406) and the Advanced Opportunity Programs (403). The allocation is based on each institution's proportion of a three-year rolling average of Wisconsin resident undergraduates from eligible populations who are registered full-time.
This allocation has been entered as:
Lawton & AOP Alloc 811 – FY23 LAWTON AND AOP ADJUSTMENTS

The Financial Aid memo also included information related to Tuition Assistance Grant (TAG). This funding is being allocated to institutions as part of the annual budget process starting with fiscal year 2023-24. These funds have previously been transferred to campuses from UW System Administration each year. A redistribution will be completed annually like AOP and Lawton funding. As with prior years, the allocation amount is based on the proportion of Pell Grants (dollars) for Wisconsin resident undergraduate students with EFCs below $5,502 (the Wisconsin Grant maximum) at each UW institution. Fiscal year 2021-22 is used to calculate the 2023-24 allocation. These funds are allocated on funds 101-103 and should be tracked discretely and used for financial aid only.
This allocation has been entered as:
Tuition Assistance Grant Alloc 812 – FY24 TUITION ASSISTANCE GRANT (TAG)

Beginning with fiscal year 2023-24, UW System Administration will allocate Veterans Remission funding as part of the annual budget development process. This year, UWSA will be distributing $23,900,000 based on a 3-year average of Veterans Remissions for years 2020-2022. The allocation will be adjusted annually based on a new 3-year average. In order to ensure that campuses are made whole, a true up will occur at year end.
This allocation has been entered as:
Veterans Remission Alloc 813 – FY24 VETERANS REMISSION

27th Pay Period Allocations
A 27th pay period, which happens every eleven years, will occur during fiscal year 2023-24. Campuses will receive salary allocations and also an associated deallocation for the unfunded tuition share. This will be a one-time allocation and the System Budget Office will reverse these allocations in fiscal year 2024-25. The unfunded tuition share is being allocated as undistributed and campuses should submit a distribution of undistributed template.
These allocations have been entered as:
27th Pay Period Alloc 871 – FY24 27TH PAY PERIOD – FAASLI
27th Pay Period Alloc 872 – FY24 27TH PAY PERIOD – UNIV STAFF
27th Pay Period Alloc 876 – FY24 27TH PAY PERIOD – UNFUNDED TUITION SHARE

Allocations for 2023-24 Interinstitutional Agreements with Extended Campus (EC), Institute for Business and Entrepreneurship (IBE), and UW-Madison Division of Extension (MSN-EXT)
As part of our agreement with the former UW Extension units, the UW System Budget Office has removed the 104, 132, and 189 funding at each campus associated with the 2022-23 IIAs.

EC, IBE, and MSN-EXT are currently working on finalizing the IIA amounts for each institution. Each of the three units will be entering their own allocations for FY24 and Budget Directors will be notified when completed.

ADDITIONAL FORMS
Distribution of Undistributed: The form for reporting undistributed allocations back to System Administration can be found on the UWSA website at: https://www.wisconsin.edu/budget-planning/annual-operating-budget/#forms-and-templates and is called "2023-24 Distribution of Undistributed Template". Please submit a separate form for each allocation. The fringe benefit rates that can be used for these distributions are included in the form.

Questions regarding the 27th pay period should be directed to Jen Goytowski (jgoytowski@uwsa.edu). Other allocation and general budget related questions should be directed to me (cklappa@uswa.edu).

CC: President Rothman
Chancellors
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