Substantive Change Application, Part 1: General Questions

Branch Campuses and Additional Locations

Institution: University of Wisconsin-Madison
City, State: Madison, WI

Name of person completing this application: Jocelyn Milner
Date Submitted: MM/DD/YYYY

Title: Director of Academic Planning and Institutional Research
Phone: 608-263-5658
Email: jlmilner@wisc.edu

The questions are designed to elicit brief, succinct, detailed information, rather than a narrative or references to extensive supporting documents. Do not attach other documents unless they are specifically requested in the questions.

The total submission should be no more than 10-12 pages on a single classification of change. The submission should be no more than 20 pages total on an application addressing multiple change requests.

Submit the completed application as a single electronic document (in Adobe PDF format) emailed to changerequests@hlcommission.org.

Requested Change(s). Concisely describe the change for which the institution seeks approval.

Please Note: If submitting a change request for a new program and distance offerings or a new program and location, the institution should submit the New Program Application. Otherwise an institution submitting more than one change request should complete multiple applications, one for each type of change.

UW-Madison seeks permission to offer a version of the MBA: General Management program, referred to as the Corporate Executive MBA, at an additional location at KOHL’S Corporate Office and Headquarters in Menominee Falls, Wisconsin (N56W17000 Ridgewood Dr, Menomonee Falls, WI 53051).

Classification of Change Request. Check all boxes that apply to the change.

Note: not every institutional change requires prior review and approval. Review the “Overview of Commission Policies and Procedures for Institutional Changes Requiring Commission Notification or Approval” to make certain that current HLC policy requires the institution to seek approval.

<table>
<thead>
<tr>
<th>Change in mission or student body:</th>
<th>New academic program(s) requiring HLC approval:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ change in mission</td>
<td>□ certificate</td>
</tr>
<tr>
<td>□ change in student body</td>
<td>□ bachelor’s</td>
</tr>
<tr>
<td></td>
<td>□ diploma</td>
</tr>
<tr>
<td></td>
<td>□ master’s/specialist</td>
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<tr>
<td></td>
<td>□ associate’s</td>
</tr>
<tr>
<td></td>
<td>□ doctorate</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>New additional locations:</th>
<th>Distance Delivery:</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX ☐ in home state</td>
<td>□ Initiation of distance education</td>
</tr>
<tr>
<td>☐ in other state(s) or in other country(ies)</td>
<td>□ Expansion of distance education</td>
</tr>
<tr>
<td>New branch campus:</td>
<td>□ Initiation of correspondence education</td>
</tr>
<tr>
<td>☐ new or additional campus(es)</td>
<td>□ Expansion of correspondence education</td>
</tr>
</tbody>
</table>

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Consortial or contractual arrangement:

- Consortial arrangement
- Contractual arrangement
  - The institution has completed the Screening Form for Contractual Arrangements and has been advised that approval is required. (If not, see the Substantive Change Screening Form for Contractual Arrangements)

Other:

- Substantially changing the clock or credit hours required for a program

Institutional Context for Substantive Change Review. In 1-2 paragraphs, describe the key dynamics — institutional mission and internal or external forces — that stimulated and shaped the change.

The Wisconsin School of Business's core mission is "providing a transformational student experience, producing research at the frontier of knowledge, and advancing the Wisconsin Idea." Within the mission framework, the corporate executive MBA is a customized executive MBA experience created in partnership with a particular organization and offered exclusively to a select group of employees of that organization. The program is designed to address best practices in curriculum and instruction while offering an educational experience to business professionals for the purpose of developing their skills and knowledge to strategically address current trends and challenges in the workplace.

The program provides a general management perspective and emphasizes leadership and teamwork. It also offers flexible options in terms of location, timing, and mode of delivery, and some degree of industry focus. Its design allows organizations to realize immediate benefits in the workplace and an enhanced ability to recruit and retain top talent. Students in this program are able to integrate work and class projects seamlessly with others from their functional area or other areas across the firm.

Kohl's Corporation's is a strong partner for this program. The Corporate Executive MBA Program is an investment in their organization and is an investment by the Wisconsin School of Business in a large and important business and employer in the state.

Special conditions. Underline YES or NO attesting to whether any of the conditions identified below fit the institution. If YES, explain the situation in the box provided.

<table>
<thead>
<tr>
<th>Condition</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the institution, in its relations with other regional, specialized, or</td>
<td>YES</td>
</tr>
<tr>
<td>national accrediting agencies, currently under or recommended for a</td>
<td>NO</td>
</tr>
<tr>
<td>negative status or action (e.g., withdrawal, probation, sanction,</td>
<td></td>
</tr>
<tr>
<td>warning, show-cause, etc.)?</td>
<td></td>
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<tr>
<td>Is the institution now undergoing or facing substantial monitoring,</td>
<td>YES</td>
</tr>
<tr>
<td>special review, or financial restrictions from the U.S. Dept. of</td>
<td>NO</td>
</tr>
<tr>
<td>Education or other federal or state government agencies?</td>
<td></td>
</tr>
</tbody>
</table>
Has the institution’s senior leadership or board membership experienced substantial resignations or removals in the past year?  

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
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<tr>
<td></td>
<td>UW-Madison’s new chancellor, Rebecca Blank, was appointed effective July 2013, succeeding Interim Chancellor David Ward. This was a normal leadership transition.</td>
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</table>

Is the institution experiencing financial difficulty through such conditions as a currently declared state of exigency, a deficit of 10% or more, a default or failure to make payroll during the past year, or consecutive deficits in the two most recent years?  

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
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Is the institution experiencing other pressures that might affect its ability to carry out the proposal (e.g., a collective bargaining dispute or a significant lawsuit)?  

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
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**Approvals.** Check the approvals that are required prior to implementing the proposed change and include documentation of the approvals to the request.

- [ ] Internal (faculty, board) approvals
- [ ] System approvals (for an institution that is part of a system)
- [ ] State approval(s) for requests other than for Distance Delivery
- [ ] For Distance Delivery only: process in place to ascertain and secure state approval(s) as required
- [ ] Foreign country(ies) approvals (for an overseas program or site)
- [ ] No approval required

**Specialized Accreditation**

Complete this section only if specialized accreditation is required for licensure or practice in program(s) covered by this change application.

- [x] The institution has already obtained the appropriate specialized accreditation. Attach a copy of the letter from the agency granting accreditation.

- [ ] The institution has begun the process of seeking or plans to seek specialized accreditation. Specify the name of the agency and the timeline for completing the process. (If approval is a multi-stage process, the institution should contact the HLC staff liaison to discuss the timeline before submitting this change application form.)

- [ ] The institution does not plan to seek specialized accreditation. Provide a rationale for not seeking this accreditation.

**Changes Requiring Visits**

Complete this section only if the institution is already aware that the proposed change will need to be reviewed through a visit. (If the institution is unsure whether a visit is required, the Commission will advise the institution based on the information provided in the change application.)

- [ ] Request to schedule a Change Visit.
If a Change Visit has already been planned in consultation with Commission staff, specify the date set for the visit: ________________

☐ Request to add a proposed change to an already scheduled visit. Specify type of visit and date scheduled: _________

Whether the change will be reviewed through a separate Change Visit or embedded in an already scheduled visit, the following schedule will apply.

1. The institution files Part 1 of this change form at least 4 months before the visit. If the visit has not already been scheduled, this filing will initiate the process of scheduling the visit.

2. The institution files Part 2 of this change form at least 2 months before the scheduled visit. If the change will be embedded in an already scheduled visit, the form should be filed as an attachment to the report prepared for that visit.

Please note: The Commission plans to update the change forms annually, on or about September 1 of each year. However, if a Change Application form was accessed more than 90 days prior to filing, it is recommended that the institution visit http://www.ncahlc.org/change to ensure that there have been no changes in the application form in the intervening time.
Substantive Change Application, Part 2: Topic-Specific Questions

Branch Campuses and Additional Locations

Submitting Your Substantive Change Request

Attach the “Substantive Change Application–General Questions” as page one of your application. That completed form and your answers to the questions below will constitute your request for approval of a substantive change. It will be provided to future HLC review processes.

As many as three new additional locations, or one branch campus, may be requested in a single proposal.

Name of Institution: University of Wisconsin-Madison

Type of request: (XX) additional location(s) ( ) branch campus

*Note: The change must be reported the same to the Commission and the U.S. Department of Education as either an additional location(s) or branch campus.

Campus or Branch Campus Definition: (Same as the federal definition)
The term branch campus is “a location of an institution that is geographically apart and independent of the main campus of the institution. The Commission considers a location of an institution to be independent of the main campus if the location:

- Is permanent in nature;
- Offers courses in educational programs leading to a degree, certificate, or other recognized educational credential;
- Has its own faculty and administrative or supervisory organization; and
- Has its own budgetary and hiring authority.

A branch campus must have all four of these attributes.

Additional Location Definition: a place, geographically separate from any main or branch campus, where instruction takes place and students can do one or more of the following:

- Complete 50 percent or more of the courses leading to a degree program;
- Complete a full degree program;
- Complete 50 percent or more of the courses leading to a Title IV eligible certificate.
- Complete a degree program that they began at another institution even if the degree completion program provides less than 50 percent of the courses leading to a degree program.
- There is no base or threshold number of students or distance from the campus necessary for a facility to qualify as an additional location under this definition. An additional location may have five students or 500 students; it might be five miles or 500 miles from the main or other campus.
- An additional location typically does not have a full range of administrative and student services staffed by the facilities personnel; such services may be provided from the main campus or another campus.
- A facility may provide access to instruction requiring students to be present at a physical location that receives interactive TV, video, or online teaching. It is considered an additional location when 50 percent or more of a distance delivery program is available through one or more of these modalities at that facility.

Part 1. Characteristics of the Change Requested

1. Provide the name and street address of each location requested. (No PO Box addresses.)
KOHL’S Corporate Office & Headquarters
N56 W17000 Ridgewood Dr.
Menomonee Falls, WI 53051

2. Identify whether the location will be a branch campus (where degree programs are offered with full support services) or an additional location (where 50% or more of a degree program, diploma program, or certificate program is offered without full support services).

Additional location.

3. In addition, provide for each location the following information:
   a. The date (MM/DD/YYYY) at which the location is projected to begin operation.
      03/04/2014
   b. Whether the location offers Title IV eligible programs.
      Yes the MBA::General Management degree (option Corporate Executive MBA) will be Title IV eligible.
   c. The Classification of Instructional Programs terminology [CIP codes, program name, and additional description (optional)]. CIP codes are established by the U.S. Department of Education’s National Center for Education Statistics. More information is available at http://nces.ed.gov/ipeds/cipcode/.
      52.02.01
   d. Whether the location will be permanent or temporary (for a set number of cohorts).
      Permanent
   e. The primary target audience for the location (e.g., full-time, part-time, traditional college age, working adults, transfer students, military personnel, or particular ethnic group) to the extent, if any, that it differs from simple geographic considerations.
      The primary audience consists of non-traditional age students employed by Kohl’s Corp who are working adult part-time students and who meet the admission standards of the Wisconsin School of Business
   f. Identify the level of degree completion at the new additional location. (Total Degree, Adult Degree completion, or 50 - 99% completion)
      Total degree

4. If you are planning any involvement by external organizations (other than accredited higher education institutions) in key operations as identified below, provide the information requested for each planned involvement. (Note that such involvement by a parent company or by one of its subsidiaries external to the institution in any of these operations should be reported.)

<table>
<thead>
<tr>
<th>Type of involvement</th>
<th>Name(s) of external organization(s)</th>
<th>% of Involvement</th>
</tr>
</thead>
</table>

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Page 6
Version 2.0 . September 2011
A. Recruitment and admission of students
Kohl’s will host program information sessions at their headquarters, although they are led by the admission director for the part-time programs at the Wisconsin School of Business.

B. Course placement and advising of students
None

C. Design and oversight of curriculum
None

D. Direct instruction and oversight
None

E. Other support for delivery of instruction
Not relevant

5. If you are planning any involvement with other accredited higher education institutions in key operations identified above, provide the name(s) of the other institutions and the nature of the involvement.

The Wisconsin School of Business at UW-Madison and the Lubar School of Business at UW-Milwaukee have developed a collaborative partnership on the delivery of the corporate executive MBA, which includes the Lubar School doing a specified fraction of the teaching of selected courses and receiving appropriate compensation. However, it is important to mention both that the curriculum is under the governance of the UW-Madison faculty and that the corporate executive MBA degree will be awarded only by UW-Madison.

Part 2. Institution’s History with Branch Campuses and Additional Locations

6. Does the institution currently operate three or more locations with the same or greater scope/level of instruction as the proposed location(s) and with the same or greater level of sophistication in facilities and services? If yes, please identify the three such locations with the largest enrollments during the past year, along with those enrollments.

No.

7. If the Higher Learning Commission approves you to open the additional location or branch campus, what future growth do you anticipate (e.g., in the next six months, three years, 10-20 years) for additional locations or branch campuses?

At this time, we do not anticipate any additional sites; however, if an organization requested an on-site program, the Wisconsin School of Business faculty and leadership would consider it.

8. How do you plan to manage this growth?
Our program office staff has recently been expanded, in part to manage the administrative aspects of the corporate executive program at Kohl’s. The curriculum will be taught with a combination of overloads for UW-Madison faculty, one to two classes taught per year by UW-Milwaukee faculty, and a few expert full-time and part-time instructors. The program also generates sufficient net revenues that we could consider one or two additional faculty hires as an alternative way to support the delivery of the program.

Part 3. Institutional Planning for Branch Campuses and Additional Locations
9. What impact might the proposed branch campuses or additional locations have on challenges identified as part of or subsequent to the last comprehensive visit or reaffirmation panel and how has the institution addressed the challenge(s)?

Not applicable. There were no challenges identified in the last comprehensive visit and reaffirmation of accreditation for UW-Madison that was conducted in 2009.

10. For each proposed location, provide a description of physical facilities and equipment to support the programs that will be offered at each requested location.

Classes would be held within Kohl’s Corporate Headquarters in Menomonee Falls, WI. The facility is 900,000 square feet, it houses 5,000 corporate employees, and it is used by Kohl’s to deliver considerable corporate training and development. Technology will be supported by Kohl’s and the University of Wisconsin-Madison School of Business. The class will meet in a room that easily accommodates 40 students, the expected class size. The room is spacious and has a dedicated computer, projector, screen, large whiteboard, Internet access, and moveable tables.

11. What is the evidence that the facilities at the location will meet the needs of the students and the curriculum?

Students enrolled in the corporate executive MBA program at Kohl’s will have access to instructional technology and academic resources. The Kohl’s Corporation has space available for faculty office hours, prior to the start of class. Additionally, the Wisconsin School of Business commits fully to this program by offering the following resources:

**Orientation**
Upon entrance to the program, students will be required to attend an orientation program that includes: 1) program overview, 2) team development, 3) course schedules, 4) math review, and 5) faculty/staff introductions.

**Academic Resource**
Information related to academic resources and updates will come from the assistant dean in the Evening and Executive MBA program office. On routine visits, students may schedule meetings with the assistant dean to discuss academic progress, on-campus events and/or concerns/issues related to the program.

**Library Services**
Students enrolled in the corporate executive program will have access to the Wisconsin School of Business Library’s books, journals, and research databases via Internet. The staff is committed to assisting students to successfully complete their research assignments and, if additional assistance is needed, online training is available.

**Technical Equipment for Instruction**
Instructional equipment is available at Kohl’s. The classroom is equipped with a computer, projector, screen, large whiteboard, and Internet access. Technical support for course websites will be available to faculty. If faculty require additional technology, the School of Business will accommodate their specific needs.

12. How do you determine the need for an additional location or campus?

The decision about an additional location or campus is a two-step process that begins with a request from an external constituent. In this case, Kohl’s expressed interest in the Wisconsin School of Business at UW-Madison running an on-site program for their employees, as part of their overall talent management and economic development strategy.

In the second stage, the Wisconsin School Business would evaluate the program based on factors that include an analysis of the organization, the needs of the potential students at the organization, the needs of the UW System schools that are in the region, and the academic and administrative resources at the Wisconsin School of Business, to determine if an on-site program at the proposed location would be of benefit to the residents of Wisconsin, the...
economic growth of Wisconsin, the UW System and the economic growth of the employer and potential student body.

13. How do you plan for changes and future expansion of additional locations? Who is involved? How are possible new locations examined and evaluated?

Planning for changes/expansion of additional locations begins in the Dean’s office at the Wisconsin School of Business and in the executive branch of the partner organization. Similar to the process above for considering an additional location or campus, the consideration of possible changes/expansion of an additional location would involve the Dean’s office evaluating the program’s needs based on factors that include an analysis of the organization, the needs of the students at the organization, the needs of the UW System schools that are in the region of the business, and the resources at the Wisconsin School of Business, to determine if the changes/expansion would be of benefit to the residents of Wisconsin, the economic growth of Wisconsin, the UW system and the economic growth of the employer and potential student body.

14. How do you assure that promotion, marketing, and enrollment for your branch campus or additional location stay in balance with your actual resources and technical capabilities?

The Wisconsin School of Business has an Integrated Marketing Communications (IMC) group that manages all promotional, marketing and branding activity for the school. It is overseen by the IMC director, the Chief Communications Officer for the school, and, ultimately, the Dean. These three high level administrators oversee all promotion and marketing for all programs at the school and ensure that all promotional efforts follow branding and promotion guidelines developed by the Dean and the CCO. Additionally, a web site has been developed exclusively for the students enrolled in the corporate executive MBA program. This is an informational site that informs students about program requirements, and contacts.

The Dean, Senior Associate Dean and Associate Dean set enrollment limits for this program, based on a thorough evaluation of the school’s ability to deliver premium learning experiences.

Responsibility for the program resides with the Evening & Executive MBA Program Office. Curriculum and other academic matters are reviewed by the Masters Curriculum Committee for the school, after which they are considered by the faculty of the Wisconsin School of Business. The business school’s governance requires an added review by the school’s Academic Planning Council when proposed changes have resource implications.

15. What controls are in place to ensure that the information presented to students in advertising, brochures, and other communications will be accurate?

Advertising, brochures and communications are developed within the Evening & Executive MBA Program Office, and reviewed by the assistant and associate deans in the program office. All materials follow the guidelines developed by the Dean, Chief Communications Officer and Director of the Integrated Marketing Communications group. A final approval is needed from the Chief Communications Officer and the IMC group for all advertising, brochures, websites, and other communications.

16. For additional locations only: How do you ensure that financial planning and budgeting for your additional location are realistic? What are your projected revenues and expenses? What are your projected enrollment and staffing needs?

The Director of Financial Management in the Wisconsin School of Business oversees the Financial Management Office (FMO) and reports directly to the Dean. The Evening & Executive MBA program office
develops yearly budgets and profit and loss statements. These are submitted to the Dean, Senior Associate Dean and Financial Management Director for review and approval.

Projections for annual revenues and expenses (including fringes) are below for the two years of a cohort’s program:

<table>
<thead>
<tr>
<th>Budget (based on 40 students)</th>
<th>First Year</th>
<th>Second Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition per year</td>
<td>900,000</td>
<td>900,000</td>
</tr>
<tr>
<td>Administrative staff</td>
<td>120,000</td>
<td>120,000</td>
</tr>
<tr>
<td>Faculty compensation</td>
<td>250,000</td>
<td>250,000</td>
</tr>
<tr>
<td>Academic liaison</td>
<td>25,000</td>
<td>25,000</td>
</tr>
<tr>
<td>Instructional material</td>
<td>15,000</td>
<td>15,000</td>
</tr>
<tr>
<td>UW Milwaukee Tuition Transfer</td>
<td>100,000</td>
<td>100,000</td>
</tr>
<tr>
<td><strong>Annual Contribution Margin</strong></td>
<td><strong>390,000</strong></td>
<td><strong>390,000</strong></td>
</tr>
</tbody>
</table>

All financial processes will be integrated into the UW-Madison financial systems, the bursar for tuition, and the infrastructure for student financial aid for students who may seek financial aid.

17. **For branch campuses only:** Provide a business plan for the branch campus, including a budget projection for the first two years of operation. Please also:
   a. Show both gross income (including projected enrollments, gross tuition and fees, and any increase in state or federal subsidies generated by the new enrollment) and gross projected expenses.
   b. Describe clearly the contingency plans in case anticipated enrollments, income, or resources do not materialize.

Not Relevant

**Part 4. Curriculum and Instructional Design**

18. How will the institution effectively oversee instruction at the location or branch campus?

The curriculum falls under the Masters Curriculum Committee of the Wisconsin School of Business. That group has approved the curriculum and forwarded it to the faculty of the business school, who voted in favor of the program. The curriculum is detailed in Appendix A.

Course evaluations for each course and annual program evaluations will be given to the students and evaluated by Associate Dean. Program administration will communicate with Kohl’s representatives on an ongoing basis to evaluate instruction. Students can submit feedback to the program office at any time.

The off-site delivery of the program offers great convenience to students, but challenges efforts to effectively support and administer the program. An important part of our solution to this issue is to have a Corporate Executive academic liaison who connects the School to both the students and the representatives at the Kohl’s Corporation who support our program. This is a part-time role for a person ideally with both corporate and educational administrative experience. Their activities include managing the information sessions on the program at Kohl’s, assisting in the admissions process data collection, leading the class orientation at the beginning of the program, annually working on the development of
new student teams, being a point of contact for student concerns and any issues of Kohl’s, leading meetings between the School and Kohl’s representatives, and working with Kohl’s on gaining access to managers and experts to participate in class.

At the institutional level, the UW-Madison Provost’s Office will require periodic reports on the status of the location, will provide support for an HLC visit or any HLC reports if required, and will require a full program review at the five-year mark.

19. What impact (if any) will the new location have on instructional capacity at existing approved locations?

The new location for the corporate executive MBA program will have no impact on the existing approved locations. UW-Madison offers the Master of Social Work in a part-time format on the UW-Eau Claire campus in Eau Claire, Wisconsin. UW-Madison has been offering a BS-Nursing in LaCrosse, Wisconsin but that location is closing effective Fall 2013. To date, any additional location has been designed to offer only a single program to serve a well-defined and important student audience, as is case with the program at the proposed additional location.

The proposed MBA location will not negatively impact the School of Business programs located on site at UW-Madison. On the contrary, Kohl’s is an important business force in Wisconsin and the delivery of the corporate MBA will help to strengthen an already strong relationship and may enhance employment opportunities for graduates from other UW-Madison School of Business programs.

20. Do any of the proposed locations involve either dual credit or accelerated delivery (earning of semester credit hours or equivalent routinely exceeds 20 in 4 months or 60 in 12 months)? If so, please explain the extent the options are involved.

No.

Part 5. Institutional Staffing and Faculty Support

21. How do you plan to staff the additional location or branch campus, including faculty qualifications and full-time vs. part-time faculty? How does this differ from your processes for staffing at the main campus?

Many of the Wisconsin School of Business faculty who teach in the Corporate Executive MBA program also teach in our full-time, Evening and Executive MBA programs. Staffing details appear in Appendix B. Determining the instructional staff will be largely the same as the process for the main campus’s staffing of its on-site Evening and Executive MBA programs. For those programs, tenure-track faculty and proven full-time instructors, through a combination of overloads and building the teaching into their regular teaching assignment, will be involved in foundation classes. More advanced topics and classes emphasizing cutting edge practice will also employ these two groups, but we will also involve practitioners who are engaged in that cutting edge practice and for whom there is demonstrated evidence of their ability to develop and deliver a course with academic integrity and relevance. An important difference between Kohl’s staffing and the staffing of our on-campus programs will be the use of some instructional staff from the University of Wisconsin-Milwaukee as part of our collaborative arrangement with the Lubar School of Business.

22. What is your process for selecting, training, and orienting faculty for the additional location or branch campus? What special professional development, support, or released time do you provide for these faculty?

The Evening and Executive MBA Program Office curriculum committee will recommend the curriculum and content for any corporate executive MBA offering, in a way that matches the needs of the program and our strengths and teaching capacity among of faculty.
Faculty selected for the program must have expertise in the course topic area, have demonstrated excellence in the classroom, and have demonstrated an ability to teach and engage with executives. These criteria are the same as for our on-campus evening and executive MBA programs.

Generally, our instructors have a terminal degree in their area. On occasion, we do enlist individuals with only a master’s degree. That is most likely to happen when exposure to the course topics benefits from a state-of-practice perspective. Referring again to Appendix B, the staffing for the 2012-2014 cohort is fairly typical: 16 out of 19 courses have instructors with a PhD or JD, ten are taught by tenured professors, eight are taught by lecturers at UW-Madison or UW-Milwaukee, and one by an individual who has a master’s degree and is a fellow of the society within his profession (actuarial science).

The associate dean will work one-on-one with faculty to prepare them for their corporate executive appointment. Two central issues that will be discussed and which are critical to success are detailed information about the students and their role in the two-year lockstep curriculum. Faculty will deliver a course for a general audience — rather than one tailored just for students in the retail industry (e.g., Kohl’s employees) — but discussions will include judicious use of retail content to motivate and create an especially rich discussion that draws on the cohort’s common and deep knowledge of the retail industry. The associate dean will also discuss this dimension to the course with faculty. The Program Office will provide instructors additional support as identified by the instructors.

Finally, the associate dean will hold an annual meeting of the faculty in the Kohl’s program to prepare the faculty, share compare experiences, understand the goals and details of the entire curriculum, and learn best practices.

**Part 6. Student Support**

23. What is the evidence that the institution will effectively deliver, support, and manage necessary academic and student services at the location?

Kohl’s Human Resource department will designate a liaison at the site. This liaison will work with instructional and student support staff at UW-Madison, to ensure that necessary academic and student support are delivered at the site. UW-Madison will have also a part-time academic liaison who will deliver, support and manage academic and student services.

The Wisconsin School of Business will provide mathematics review materials and a review session to students prior to the start of the program. There will also be an orientation for the students to communicate academic standards and program expectations, and to help the newly-formed teams start working together effectively.

Students will not need advising on course selection because this is a cohort model. Students needing academic assistance with a particular course in the program can start with the faculty during their office hours, typically ahead of the start of the program’s evening classes. Additional office hours are available, although the faculty mostly live and work in the Madison area, so communication is usually by phone or email.

As degree-seeking students, the students will have access to and be supported by all of the student service systems that support the 42,000 students enrolled at UW-Madison. All course enrollment functions are automated. Essentially all financial aid services are also provided on-line or through other kinds of distance support. Students will be provided a UW-Madison email address and will have full access to information technology and library resources.

24. If the population targeted for the proposed location represents a marked change within the mix of students now enrolled in the institution (e.g., dual credit students at an institution with relatively few such students), briefly explain the institution’s experience with the targeted population.
This will be the third additional location operated by UW-Madison. All serve high-value strategic partners. The Corporate Executive MBA adds an enrollment of approximately 40 working adults to UW-Madison’s enrollment of approximately 42,000 predominately residential students. The Wisconsin School of Business already has extensive experience with working adults in our Evening MBA (offered on campus with evening classes to 150 students annually) and through the on-campus Executive MBA (offered in a weekend format to 70 students). Thus, UW-Madison has successfully served student populations at additional locations and the Wisconsin School of Business has successfully served working adults and the executive market.

Part 7. Evaluation and Assessment

25. How will you measure, document, and analyze student academic performance sufficiently to maintain academic quality at the location? Consider, in particular, setting of measurable learning objectives, actual measurement of performance, and analysis and use of assessment data to maintain/improve quality.

The business school is engaged in the development and analysis of learning outcomes throughout all of its programs. The exercise is named “KDBIN,” based on the learning outcome dimensions of Knowing, Doing, Being, Inspiring, and Networking. (See Appendix C for definitions of these dimensions.) The analysis of the Corporate Executive program has started but is incomplete. The work to date has focused on KDBIN learning outcomes for individual courses. The development of KDBIN program learning outcomes (as opposed to KDBIN course learning outcomes) will begin soon for the Corporate Executive program, as well as for the Executive and Evening programs. Nevertheless, it is possible to report on several of the learning outcomes and assessments developed so far, starting with a substantial first goal.

Goal 1: Students have a working knowledge of the foundational and functional areas of business, as developed in the core MBA curriculum.

Desired learning outcomes have been established for many of the courses in the core curriculum and details of those outcomes for three classes appear in Appendix D.

Assessment measures: Assessments of learning outcomes for these foundational and functional area core courses are largely related to cases reports, exams, homework assignments, and written and oral reports that are evaluated by the instructors.

Goal 2: Students are able to propose and justify innovative approaches to solving complex business problems.

Assessment Measures: Assignments and projects in many classes, including data analysis, operations management, marketing, accounting, and finance. Projects in the capstone strategy class and the applied projects course are subsequent opportunities to assess, and offer the potential for experts within the partner organization to participate in the evaluation of the applied projects.

Goal 3: Students can perform critical and analytical reasoning.

Assessment Measures: Assignments and projects in many classes, including data analysis, operations management, marketing, accounting, and finance. Projects in the capstone strategy class and the applied projects course are subsequent opportunities to assess, and offer the potential for experts within the partner organization to participate in the evaluation of the applied projects.

Goal 4: Students can communicate effectively

Assessment measures: Written and oral communication grades in course work. Evaluations of written and oral presentations in several classes, and especially the capstone strategy and applied projects courses where substantial reports are developed and presented. There is an opportunity to compare the assessments in these two later courses to related assessments in earlier courses, as a way to assess our approaches to enhance communication skills.
Goal 5: Student can effectively lead, participate, collaborate and contribute on a team.
Assessment measures: Assignments and projects in many classes, including managing people, managing the organization, and negotiations. Projects in the capstone strategy class and the applied projects course are subsequent opportunities to assess.

Goal 6: Student can analyze an industry to identify the natures of the various competitive advantages (and disadvantages) of firms within that industry.
Assessment measures: Assignments, projects and exams in business strategy and the capstone strategy course.

Goal 7: Student can integrate theory and practice across multiple functional areas of business
Assessment measures: The projects in the applied projects course and the capstone strategy course.

Goal 8: Student can advance their careers during and after the Corporate Executive program
Assessment measures: Yearly data on career advancement (e.g., promotions, raises, annual reviews)

26. How are the measures and techniques you use for the location equivalent to those for assessment and evaluation at the main campus or other locations? If there are differences, why are these differences appropriate?

Measures and techniques are the same as the Wisconsin School of Business uses in the Evening and Executive MBA programs that are offered on campus at UW-Madison. As mentioned in Q25 above, the Wisconsin School of Business is reviewing all of its programs and identifying their learning outcomes and assessments based on our KDBIN approach. This comprehensive review can be expected to lead to some differences in the appropriate measures for the corporate executive program, but we expect that the differences will be very few, given the strong similarities among the corporate executive, executive and evening programs.

27. How do you assess the learning of the students you educate at your location to ensure that they achieve the levels of performance that you expect and that your stakeholders require? What types of comparisons will be made with the main campus and other locations?

Assessments of learning will largely be the same as we use for our Evening and Executive MBA programs on the UW-Madison campus, which include exams, oral and written reports, case studies, peer analyses, and classroom discussion.

The corporate executive program includes two applied project courses near the end of the program that offer a means to re-assess a variety of the major learning objectives of the course. A special feature of these projects is the potential of the partner organization’s senior leadership to provide their assessment of the work and the delivery.

Finally, a long-term relationship with the partner organization would allow us to understand the employment experience of students in and after the program, a factor that will be tracked by and important to the partner. It also potentially allows us to gather focus groups of alumni.

28. How do you encourage and ensure continuous improvement at the location?

Multiple performance measures are applied throughout the program for continuous improvement. Feedback from students includes comments obtained in course evaluations and annual correspondence from the representatives from Kohl’s. Students complete the following assessments aligned with program requirements:

- Review of course evaluations
- Continuous evaluation of program between administration and corporate partner
• End-of-Program evaluation with corporate partner when students finish the program
• Assessment of achieving KDBIN outcomes
• Exit survey of students when they complete the program

Formal feedback for the program is provided by the faculty curriculum committee. Based on the data collected, their responsibility is to determine program improvement, curriculum changes, and new course offerings.
## KOHL's Corporate Executive Named Option Curriculum

<table>
<thead>
<tr>
<th>Course</th>
<th># of Sessions</th>
<th>Credits</th>
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<tbody>
<tr>
<td><strong>Spring I (16 weeks, Mar-June)</strong></td>
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<tr>
<td>OIM 765: Managerial Economics</td>
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<td>MHR 765: Managing People</td>
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<td>MKT 765: Marketing Management</td>
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<td>2</td>
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<td>AIS 765: Financial Accounting</td>
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<tr>
<td><strong>Fall I (16 weeks, August-December)</strong></td>
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<td>FIN 765: Financial Management</td>
<td>8</td>
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<td>MHR 765: Negotiations</td>
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<td>2</td>
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<tr>
<td>GB 765: Data Analysis &amp; Decision Making</td>
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<td>2</td>
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<tr>
<td>GB 765: Business Law</td>
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<td>2</td>
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<tr>
<td><strong>Spring II (20 weeks, January-May)</strong></td>
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<tr>
<td>MHR 700: Managing the Organization</td>
<td>10</td>
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<tr>
<td>OIM 700: Operations Management</td>
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<td>3</td>
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<tr>
<td>MHR 723: Business Strategy</td>
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<td>3</td>
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<tr>
<td>Advanced Offering</td>
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<tr>
<td><strong>Fall II (16 weeks, August-December)</strong></td>
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<td>Advanced Offering</td>
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<td>Advanced Offering</td>
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<tr>
<td>Applied Projects Course</td>
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<tr>
<td><strong>Spring III (9 weeks, January-February)</strong></td>
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<td>MHR 765: Leadership</td>
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<tr>
<td>MHR 765: Applied Strategy Capstone</td>
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APPENDIX B: INSTRUCTIONAL STAFF FOR THE 2012-2014 COHORT

**Spring 2012**
- Managerial Economics: Donald Hausch, Professor of Operations & Information Management
- Managing People: James Woodrum, Faculty Associate and Vice President of Custom Executive Education
- Marketing Management: Joann Peck, Associate Professor of Marketing
- Financial Accounting: Holly Skiøfe, Professor of Accounting, David Lesar Professor in Business

**Fall 2012**
- Financial Management: Phil Greenwood, PhD, CPA, Senior Lecturer in Management & Human Resources
- Negotiations: Charlie Trevor, Associate Professor in Management & Human Resources
- Data Analysis & Dec. Making: Richard Crabb, Senior Director of Predictive Analytics at Sentry Insurance, Fellow of the Casualty Actuarial Society, Member of American Academy of Actuaries
- Business Law: Raymond Rausch, JD, Lecturer in Law, UW-Milwaukee

**Spring 2013**
- Managing the Organization: Mark Mone, Professor of Organizations & Strategic Management, UW-Milwaukee
- Operations Management: Tim McClurg, PhD and senior lecturer in Operations & Information Management
- Business Communications: Roger Ervin, Sector Vice President of LMI, Senior Lecturer in Wisconsin School of Business
- Managerial Accounting: Mark Covaleski, Robert Beyer Professor of Management Accounting
- Advanced Finance: Michael McBain, PhD, Senior Lecturer in Finance, UW-Milwaukee

**Fall 2013**
- Financial Statement Analysis: R. D. Nair, Professor of Accounting & Information Systems
- Business Strategy: Hart Posen, Associate Professor of Management & Human Resources
- Business Sustainability: Tom Eggert, JD, Senior Lecturer in Business
- Advanced Marketing: Purushottam Papatla, Associate Professor in Marketing, UW-Milwaukee

**Spring 2014**
- Leadership: Alex Stajkovic, Associate Professor of Management & Human Resources
- Applied Strategy Capstone: Phil Greenwood, PhD, CPA, Senior Lecturer in Management & Human Resources
APPENDIX C: KDBIN LEARNING OUTCOME DIMENSIONS

Knowing = My conceptual expertise and awareness of facts, frameworks, and theories

Doing = My ability to execute in addition to what I have experienced

Being = My understanding of who I am and how I match with the values of the university and my profession

Inspiring = My understanding of who I could be and how I could inspire others

Networking = Who I interact with and how I relate to others
### APPENDIX D: KDBIN LEARNING OUTCOMES FOR SELECT MBA CORE CLASSES

#### KDBIN LEARNING OUTCOME FOR MBA CORE CLASSES

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### Financial Accounting: Learning Outcomes

**AIS 700 K**
- Students will understand that the infrastructure of financial reporting includes components such as financial reporting standards, auditing standards and profession, and regulatory oversight.

**AIS 700 K**
- Students will explain both the interrelationship and details of the structural components of financial reporting.

**AIS 700 K**
- Students will understand that there are recognition and measurement concepts that underlie the preparation of a basic set of financial statements.

**AIS 700 D**
- Students will articulate the recognition and measurement concepts to the preparation of a basic set of financial statements.

**AIS 700 D**
- Students will apply the recognition and measurement concepts to the preparation of a basic set of financial statements.

**AIS 700 D**
- Students will evaluate the impact of business and macro-economic events on a company’s financial statement.

**AIS 700 D**
- Students will apply accounting data to the creation of a basic set of financial statements.

**AIS 700 D**
- Students will demonstrate how companies’ financing, investing, and operating decisions affect their financial statements and, consequently, measures used to assess risk.

### Marketing Management: Learning Outcomes

**MKT 700 K**
- Students will learn specific frameworks for making marketing decisions, including decisions regarding 1) new products and services, 2) pricing, 3) distribution channels, and 4) marketing communications.

**MKT 700 K**
- Students will understand that an analysis of customers and competitors is a general prerequisite for marketing decision-making, and an integral part of the different decision-making frameworks.

**MKT 700 D**
- Students will utilize the decision-making frameworks to evaluate actual decisions in the context of company case studies.

**MKT 700 K**
- Students will understand that appropriate implementation — including overcoming the potential barriers that exist within a firm itself and vis-à-vis its external partners — is critical to the success of marketing decisions.

### Data Analysis & Decision Making: Learning Outcomes

**GB 704 K D**
- Students will articulate appropriate business responses to analytical results and make a strong evidentiary case for the response.

**GB 704 K D**
- Students understand that there is a broader framework for the incorporation of statistical analyses into business decisions and why each step of the framework is important.

**GB 704 K D**
- Students will propose the proper analytical approach to support a particular business need and explain why that is the proper approach.

**GB 704 K D**
- Students will evaluate the quality of a proposed analytical plan, application of an analytical technique or presentation of results.

**GB 704 K D**
- Students will demonstrate and interpret basic statistical calculations and tests.
SUPPORTING DOCUMENTS FOR THE CORPORATE EXECUTIVE PROGRAM AT THE KOHL’S CORPORATION

Attached are two documents:

1) A Memorandum of Agreement on the collaborative delivery of the Corporate Executive program between the Wisconsin School of Business at the University of Wisconsin and the Lubas School of Business at the University of Wisconsin – Milwaukee.

2) Email support from the Kohl’s Corporation for a new cohort of the corporate executive program. The Organization Development (OD) Department at the Kohl’s Corporation is the unit that supports our delivery of the Corporate Executive program at Kohl’s headquarters. In response to our request for a statement of Kohl’s interest in a new cohort for the program in 2014, our OD contact emailed us that Kohl’s does “not write or sign letters of intent.” She also indicated that, to show Kohl’s interest, “exchanging notes electronically about the program is the best we can do.” The email that follows from our OD contact at Kohl’s includes the quoted statements above and refers to another cohort.
MEMORANDUM OF AGREEMENT

The purpose of this Agreement is to set forth the conceptual and operational framework for UWM's Lubar School’s involvement in the collaborative delivery of the Corporate Executive MBA degree program for Kohl’s employees. The details are as follows:

1. The Corporate Executive MBA (CEMBA) degree will be awarded under the banner of the Wisconsin School of Business at the University of Wisconsin-Madison.
2. UW-Milwaukee Lubar School of Business faculty will teach at least four of the courses in the program and will be compensated according to the pay framework and fringe benefits established for Wisconsin Business School faculty. Full-time Lubar School faculty will earn one-ninth of their academic year faculty salary plus fringe benefits for teaching in the program. Any adjunct faculty teaching a UWM-delivered course will be compensated in salary and fringe benefits as the Lubar School determines to be appropriate. The salary compensation and fringe benefits for UWM faculty and adjunct faculty will be handled through an inter-institutional transfer of funds from UW-Madison to UW-Milwaukee.
3. The course topics, their scheduling and content, and other joint program logistics will be determined by the two business schools’ Associate Deans for Executive MBA Programs. In the event of a disagreement, the final decision will be determined collaboratively.
4. Courses are generally eight to ten sessions, 5:30 – 8:30 p.m., with a break at about 7 p.m. Specific courses will be determined by Associate Deans as noted above and will depend on instructor availability and program fit.
5. Net surplus from the program, after administrative expenses, will be shared by the Wisconsin School of Business and the UWM Lubar School of Business proportionately, based on the number of classroom contact hours delivered by each school. Accounting information used in computing the program surplus will be shared with the Lubar School. The program surplus due to the Lubar School will be transferred to the Lubar School via a standard invoice.
6. The same policies and practices concerning the distribution of proceeds established in the first CEMBA cohorts will be continued, going forward, for future cohorts.
7. Future similar Milwaukee region educational offerings by the Wisconsin School of Business will entail a prior framework of collaboration that will be decided by mutual agreement.

The Wisconsin School of Business at UW-Madison
By: Paul M. DeLuca, Jr.
Provost & Vice Chancellor
By: François Ortalo-Magné
Dean

The Sheldon B. Lubar School of Business at UWM
By: Johannes Brutz
Provost & Vice Chancellor
By: Timothy L. Smunt
Dean
Hello to both,

I discussed with our Legal department and we do not write or sign letters of intent. Legal stated by us exchanging notes electronically about the program is the best we can do.

I am sorry for the inconvenience.

If you need more I am going to have to put you through to our Legal department.

Let me know how I can help

thank you!

Suzanne Bonlender
OD Coordinator | Kohl’s Department Stores | 262.703.6958
N56 W17000 Ridgewood Drive Menomonee Falls, WI 53051
suzanne.bonlender@kohls.com

On Wed, Sep 25, 2013 at 3:13 PM, Suzanne Bonlender <suzanne.bonlender@kohls.com> wrote:
Good Afternoon,

Thank you for taking the time to discuss the 2014-2016 EMBA cohort. We are excited to partner to kick another cohort off.

The info sessions I have set for this cohort is below.
10/28 11:30am-12:30pm
11/8 12:30pm-1:30pm
Will these times work? I have checked with Sherry at the UWCU and the dates work for them.

Ideally, I would like to connect on the PowerPoint slides early to mid October. This is to ensure Sherry and her team are ready to present as well. Her team presents on the partnership with UWCU, usually, unless you have other ideas.

Any questions please let me know!
Suzanne Bonlender
OD Coordinator | Kohl's Department Stores | 262.703.6958
N56 W17000 Ridgewood Drive Menomonee Falls,
WI 53051 suzanne.bonlender@kohls.com

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