

***matc***

**Milwaukee Area Technical College**

***2004-05***

***Activity Plan and Budget***

*Milwaukee  
Area  
Technical  
College  
District*



*Milwaukee,  
Wisconsin*

## **EQUAL OPPORTUNITY AND AFFIRMATIVE ACTION COMMITMENT**

MATC's commitment to equal opportunity in admissions, educational programs, and employment policies assures that all individuals are included in the diversity that makes the college an exciting institution. MATC does not discriminate against qualified individuals in employment or access to courses, programs, or extracurricular activities on the basis of race, color, national origin, ancestry, religion, creed, sex, sexual orientation, age, disability, pregnancy, marital status, parental status, or other protected class status. The lack of English skills shall not be a barrier to admission or participation in any MATC program or service.

MATC will comply fully with state and federal Equal Opportunity and Affirmative Action laws, executive orders, and regulations. Direct questions concerning application of this policy to the Affirmative Action office, 700 West State Street, Milwaukee, Wisconsin 53233-1443, telephone 297-6528.

MATC also complies with all Americans With Disabilities Act provisions and makes reasonable accommodations upon request. Further information may be obtained by calling 297-6874.

# MILWAUKEE AREA TECHNICAL COLLEGE

## 2004-05 ACTIVITY PLAN AND BUDGET

Fiscal Year 2004-05

### Members of the Board

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Lauren Baker	Vice-Chairperson
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*Assisted by:*

Renee M. Dudley, CPA, Controller  
Kathleen A. Brehmer, Budget Manager  
Teresa R. Sartin, Assistant, Finance

**MILWAUKEE AREA TECHNICAL COLLEGE**

**2004-05 ACTIVITY PLAN AND BUDGET**

**TABLE OF CONTENTS**

**Section I – Introduction and Policy**

Transmittal Letter to District Citizens .....	1
The Planning and Budgeting Process .....	4
2004-05 Assumptions .....	5
Vision, Mission, Purposes and Strategic Goals .....	7
Key Performance Indicators.....	12
Budget Analysis.....	13
Position Summary .....	15
Organizational Chart .....	16
Board Members.....	17
Administration.....	18
WTCS Map.....	19
MATC District Map .....	20
Student and Campus Statistics .....	21
Summary of Financial Policies.....	22
FY 2004-05 Plan and Budget Development Calendar .....	24
Class I Legal Notice - Budget Summary and Notice of Public Hearing.....	25

**Section II – Financial Data**

Combined Budget Summary.....	28
Combining Budget Summary .....	29
Major Categories of Revenues and Expenditures .....	30
Description of Basis of Accounting .....	32
2004-05 Budgetary Statements of Resources, Uses, and Changes in Fund Balance:	
General Fund .....	34
Special Revenue Fund–Operational.....	35
Special Revenue Fund–Non-Aidable .....	36
Capital Projects Fund.....	37
Debt Service Fund .....	38
Enterprise Fund.....	39
Internal Service Fund.....	40
Budget Expenditures by Classification Level.....	41
Debt Retirement Schedule .....	42
Capital Projects for FY 2004-05.....	48
Pro Forma Balance Sheet - June 30, 2004 .....	49
Pro Forma Balance Sheet - June 30, 2005 .....	50
Description of Fund Balance Reserves .....	51

**MILWAUKEE AREA TECHNICAL COLLEGE**

**2004-05 ACTIVITY PLAN AND BUDGET**

**TABLE OF CONTENTS**

**Section III - Supplemental Data**

Property Tax Levies, Equalized Value, and Tax Rates .....	53
FTE Information.....	54
Program Offerings .....	55
Equalized Value by Municipality.....	58
Demographic Statistics for Milwaukee and Ozaukee Counties.....	59
Course Fee History .....	60
Program Graduate Follow-Up Statistics.....	61
Special Revenue Fund Supplemental Schedules:	
Non-Aidable (Non-Financial Aid Activities).....	62
Non-Aidable (Student Financial Aid Activities) .....	63
Enterprise Fund Supplemental Schedules:	
Non-Television Activities .....	64
Public Television Activities .....	65
Operating Budget Summary of Revenues .....	66
Operating Budget Summary of Expenditures .....	67
MATC Tax on \$100,000 House .....	68

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**SECTION I**  
**INTRODUCTION AND POLICY**

June 22, 2004

To the Citizens of the Milwaukee Area  
Technical College District

This document sets forth the activity plans and supporting budget of the Milwaukee Area Technical College District (MATC) for the 2004-05 fiscal year (FY). With teaching and learning as its priority, MATC's Board of Directors, administration, staff, and faculty are committed to meeting the technical and vocational training needs of our citizens and businesses. MATC understands that without a trained, high-skilled workforce, the economic and social strength of the district and surrounding communities will suffer. MATC's activity plans and budget for FY 2004-05 will continue MATC's long history of providing high-quality training that meets the needs of business and industry.

Before sharing the details of our plans for FY 2004-05, it is important to acknowledge the accomplishments and results from a successful year. A year where successes reflect MATC's competent and highly-motivated employees; exemplary planning processes; continuous improvement; shared decision making; and commitment to teaching and learning. A year of successes that include, but are not limited to:

- ◆ Increased admission applications for the 2003-2004 academic year by 24.7%.
- ◆ Continued donations from business industry with equipment contributions increasing 339% over the same period last fiscal year.
- ◆ Remodeled and equipped two new Nursing labs at the Mequon and West Allis campuses to offer both Associate Degree Nursing and Nursing Assistant courses.
- ◆ Offered Bilingual Medical Terminology in Spanish and Hmong. Added Bilingual Phlebotomy and Bilingual Management Development programs in cooperation with the Hispanic Chamber of Commerce. Will expand Bilingual Nursing Assistant Program and offer sections as a precursor to summer Bilingual Academy.
- ◆ Meeting the demand of apprentice program with Spanish instruction by hiring a part-time Spanish instructor. The college is currently searching for a full-time bilingual instructor.
- ◆ Developed a plan for offering community programs and MATC courses for the citizens of the Germantown area. Three MATC classes were offered during spring 2004.

- ◆ Expanded partnerships with Community and Faith-based organization by providing the Office Technology Certificate (Community Justice Center and Interfaith). The first cohort of students completed the Certificate in Spring 2003.
- ◆ Increased online and blended courses with student use of online courses up 25%.
- ◆ Improved curriculum alignment with MATC and UWM entry level college courses to facilitate student transitioning and articulation. One hundred pre-college students per year will transition into degree/diploma programs at MATC and/or UWM.
- ◆ MPTV close captioned all distributed programs. Developed two new production partnerships – MPS wrestling special and MPTV/ECB presidential candidate interviews in 2004.
- ◆ Enhanced business partnerships by moving the State Apprenticeship field agent's office to the South Campus.
- ◆ Increased federal grant funding for health occupations.

As successful as the year was, 2003-04 presented continuing financial challenges. Modest property tax growth, coupled with the operational mill rate limitations and reduced general state aid, resulted in support services reductions. As a result of these funding limitations, student and business service demands continued to exceed capacity. Our commitment to teaching and learning through the provision of quality programs and services will continue to be our primary focus while ensuring our resources are used efficiently and effectively.

In 2004-05, we will continue to face financial challenges due to funding constraints and double-digit increases in health care. We will continue to seek innovative ways to reduce expenses and find alternative funding sources while growing our core efforts in teaching and learning. The funding constraints are primarily the result of decreasing state and federal support and limited taxing authority. State aid for MATC and the Wisconsin Technical College System (WTCS) has steadily declined from 35 percent (in 1980) to less than 20 percent (in 2003-04).

The proposed 2004-05 budget includes total expenditures of \$285 million, a 8.6 percent increase over the current year budget of \$266 million. The proposed property tax levy of \$117 million represents an increase of \$5.481 million or 4.9 percent over last year. The proposed tax rate of 1.94 is a decrease of 1.5 percent when compared to last year's rate.

Despite limited resource growth potential, the MATC Board of Directors, administration, staff, and faculty remain committed to MATC's focus on teaching and learning. In 2004-05, resource reallocations will be used to focus on the following strategic goals:

- ◆ Reduce student financial burden with a 30% increase in educational scholarships.
- ◆ Continue to develop, update, and implement the college's new website. Phase I of this initiative is complete and live.

- ◆ Improve MATC Foundation involvement in the community with increased participation with outside businesses and organizations.
- ◆ Develop a Biotechnology Program at MATC by offering Introduction to Biotechnology in Fall 2005. Initiatives will include conducting market surveys of biotech needs in southeastern Wisconsin along with preparing and submitting program paperwork to WTCS.
- ◆ Develop a Nanotechnology Program in FY05 to include dedicating a full-time instructor to initiate program development, create courses, and conduct market surveys of nanotech needs in MATC programs and southeastern Wisconsin.
- ◆ Present new and high-quality programming by producing and marketing local student programs in HDTV.
- ◆ New Customer Information Specialist Program and Advanced Mobile Commerce Certificate to be offered at the Oak Creek Campus.
- ◆ Develop short-term Multicultural program for Carpentry and Cabinetmaking.
- ◆ Create online courses for all Fire and Police Science Associate degree offerings.
- ◆ Work with International Education representatives to provide opportunities for students, faculty, and administrators to participate in foreign exchange activities.
- ◆ Exploration of a Renewable Energy Technology Center at the Mequon Campus.

We firmly believe the goals, strategies, and financial plan summarized on the following pages fulfill the needs, priorities, and commitment to providing high-quality technical education and services. Your participation in our planning processes and suggestions for improving MATC's programs and services is critical to our success.

Respectfully submitted,

Mark S. Maierle  
Chairperson

Darnell E. Cole, Ph.D.  
President

## MILWAUKEE AREA TECHNICAL COLLEGE

### The Planning and Budgeting Process

The annual budget is a key element of MATC's planning and control system. The Three-Year Plan document that each division completes is the cornerstone of this process. While the planning document is updated each year, the basic focus of the plan is to ensure each division's goals are in alignment with the strategic goals of the college.

In this plan, the budget managers were asked to form a planning team, which included a broad representation of members with an emphasis on those impacted by the plan. In addition, the teams were asked to identify what other divisions or departments would be impacted by their plan and to include them in the planning process. The operational three-year planning documents demonstrate how the department's/division's planning and budget processes are linked. These forms were completed by all division/department leaders.

As part of this planning process, each area was required to complete a self-assessment of past performance, as well as to identify annual plans with measurable objectives. The monitoring of these measurable objectives and reporting will help the division/department move in tandem with the strategic goals and provide valuable input for next year's planning process.

The President's Budget Council, comprised of the president of the college, the presidents of Local 212, 587, and 715, vice presidents of the campuses, and the champions for the strategic planning goals, reviewed the budget assumptions for FY 2004-05. The council held FY 2004-05 budget hearings with division/department leaders and also reviewed budget balancing strategies and progress on the strategic planning goals, objectives, and strategies.

Another program planning and evaluation system for MATC exists in the citizen advisory committees that support each vocational and technical education program. The advisory committees are composed of business, industry, and labor representatives, as well as past and present students. Each committee provides the district with a review of its curriculum, instructional methods, facilities and staff, and feedback as to how well the program meets the needs and expectations of business and industry.

At the present time, the district has 93 separate advisory committees with 927 citizen representatives in membership. MATC is unique as a public institution in the large number of citizens who are involved on a regular and systematic basis in the planning, development, and review of its educational programs. The input and advice from these committees are an integral part of the strategic planning and budgeting process.

## MILWAUKEE AREA TECHNICAL COLLEGE

### 2004-05 Assumptions

In preparing the FY 2004-05 budget, a number of planning assumptions and guidelines were developed so that all managers were operating from a common base of understanding. These assumptions and guidelines included:

#### ◆ *Enrollment Assumptions*

- Full-time equivalent enrollment (FTE) of 13,300 for FY 2004-05; this is an increase of 100 FTEs from the FY 2003-04 level.
- Programs and services will be offered at the four primary campuses, at eleven satellite locations, online and via MATC's two public television stations—WMVS/MMVT.

#### ◆ *Fiscal Assumptions*

- Revenue:
  - 1) The total equalized value of District property will increase 6.5 percent.
  - 2) Total state revenue will decrease about 0.5 percent due to no increase in the state aid appropriation and the characteristics of the state aid distribution formula.
  - 3) Tuition and fee rates will increase about 8.24 percent based on tuition and fee rates established by the WTCS Board and other student fee rates established by MATC.
  - 4) Federal revenues (exclusive of financial aid) are anticipated to remain flat with no significant changes.
- Expenditure levels will emphasize resource reallocation to fund the following:
  - 1) Compensation and benefit increases for employees.
  - 2) Marketing, parking, and insurances.
  - 3) Capital acquisitions are budgeted at \$30.8 million, as the MATC continues to finance needed new technologies for education and support services as well as a new Applied Technology Center.

## MILWAUKEE AREA TECHNICAL COLLEGE

### 2004-05 Assumptions (Cont.)

#### ◆ *Programming Assumptions*

- Priority consideration will be given to the maintenance and/or expansion of programs and services supporting the highest priority mission objectives of MATC. These include:
  - 1) Programs/services with high student demand and job placement potential;
  - 2) Programs/services related to emerging growth occupations in the Milwaukee labor market;
  - 3) Programs/services which support economic development efforts of the Milwaukee area;
  - 4) Programs/services which serve the needs of minorities, handicapped, and others with special educational needs;
  - 5) Programs/services which provide developmental instruction through basic skills and crossover.
- Priority consideration will be given to the reduction or elimination of programs and services not in line with the highest priority mission objectives of MATC. These include:
  - 1) Programs/services with marginal or declining job placement;
  - 2) Programs/services with marginal or declining student interest or enrollments;
  - 3) Programs/services where it is becoming increasingly difficult to maintain high quality standards;
  - 4) Programs/services where the costs appear to outweigh the benefits;
  - 5) Services with a non-educational objective; that is, those of a "social service" nature not related to the educational priorities of the district.
- Priority consideration should be given to achieving more efficiency or productivity through the redefinition, reorganization, and restructuring of administrative and instructional functions.

# **MILWAUKEE AREA TECHNICAL COLLEGE**

## **Vision, Mission, Purposes and Strategic Goals**

### **MATC Vision**

MATC is committed to being a world-class educational institution that empowers students, faculty, and staff to realize their potential.

### **Mission**

MATC is a publicly supported comprehensive higher education institution committed to increasing the potential and productivity of the people in its district through the delivery of high-quality instruction and programs which are consistent with current and emerging educational and labor market needs. General Education is an integral part of MATC programs which provides the knowledge and conceptual abilities that college-educated adults must have to achieve in occupational skills training and to perform more effectively in the demanding, complex world in which they live.

### **Purposes**

- Occupational programs and courses to prepare students for entry or reentry into the job market or to pursue further education.
- Education, training, and retraining which is necessary to maintain employability in a technically changing workplace.
- Liberal Arts and Science courses to complement occupationally specific instruction and to provide a transfer option for those who choose to pursue further education at an upper division college or university.
- Developmental education in basic skills where necessary for effective participation in occupational training, in employment, and in further higher education.
- Coordination, cooperation, and contracting with business, industry, labor; elementary, secondary, and higher education; and governmental agencies to provide educational opportunities to residents of the district.
- Education programs and technical assistance to support the economic development efforts within the district.
- Opportunities for personal, civic, and multicultural enrichment through courses and activities to improve the quality of life for residents of the district.

## MILWAUKEE AREA TECHNICAL COLLEGE

### Vision, Mission, Purposes and Strategic Goals (Cont.)

- Flexible instructional deliver systems designed to meet the unique and changing needs of the learner.
- Programs focused on creating an understanding of the global economy and enhancing the international competitiveness of the district's business and industry.

#### **Strategic Planning Goals**

MATC's activity plan for FY 2004-05 links operational activity plans with MATC's strategic planning goals. Strategic planning is a long-range planning process for reaching agreement on the goals, resources and strategies required to move towards the realization of the MATC vision and accomplishment of the MATC mission. The strategic planning goals are:

**Goal: *Learner Driven***

Improve processes to align instruction and curriculum to meet the changing needs of the workforce in high demand areas.

**Goal: *Innovative Enrollment Management & Student Support***

Maximize the recruitment and success of a well prepared and diverse student body in a supportive campus climate.

**Goal: *Strong Partnerships***

Be recognized as an essential and effective educational partner in the community.

**Goal: *An Essential Communications Resource***

Present new, high-quality programming and educational opportunities to citizens of southeastern Wisconsin through the college's public broadcasting service.

**Goal: *Optimized Human Resources***

Improve college's human resource activities to maintain a high-performance workplace.

**Goal: *Maximized Financial Resources***

Increase college's financial potential to ensure sustainability and provide a learning environment that is operated efficiently and effectively.

**Goal: *Strengthen Physical Resources***

Strengthen the physical assets of the District to accommodate current and future learning needs in an inviting environment that integrates with the Communities' neighborhoods and redevelopment plans.

## MILWAUKEE AREA TECHNICAL COLLEGE

### Vision, Mission, Purposes and Strategic Goals (Cont.)

#### **Objectives and Strategies**

The FY 2003-07 preliminary objectives for each strategic planning goal are listed below. Strategies are reviewed by the college community and finalized by the champion of each goal. Furthermore, objectives and strategies are continuously validated throughout the year. Based on environmental scan data, revisions to the plan are made annually.

#### **Learner Driven:**

- Objective 1: Continue efforts to expand faculty and staff capacity to fully implement the student outcomes assessment plan and other features of the learning college.*
- Objective 2: Increase courses/programs that are provided by alternative delivery.*
- Objective 3: Accelerate program repackaging to include laddering from short-term to diploma to associate degree.*
- Objective 4: Develop innovative strategies to address the increased need for pre-college education, ESL, bilingual and basic skills programs.*
- Objective 5: Continue to implement the tenets of the Learning College with a focus on greater student involvement in course/program improvement.*
- Objective 6: Continue to improve program review/evaluation process.*
- Objective 7: Expand articulation agreements with other educational institutions to improve the transfer success rate.*
- Objective 8: Develop and implement the MATC Academic Plan.*

#### **Innovative Enrollment Management & Student Support:**

- Objective 1: Implement an integrated marketing communication and enrollment management system based on research analysis.*
- Objective 2: Optimize enrollments in programs/courses through highly responsive recruitment strategies for high school and adult populations.*

## MILWAUKEE AREA TECHNICAL COLLEGE

### Vision, Mission, Purposes and Strategic Goals (Cont.)

- Objective 3: Strengthen and improve admissions, financial aid, assessment, and registration.*
- Objective 4: Strengthen support processes for student success in conjunction with Student Services, academic units, and other service areas of the college.*
- Objective 5: Implement MATC web portal.*

#### **Strong Partnerships**

- Objective 1: Focus on business and partnership relationships that advance the College mission.*
- Objective 2: Stimulate Workforce Development efforts in the community.*
- Objective 3: Advance Southeastern Wisconsin economic development.*

#### **An Essential Communications Resource:**

- Objective 1: Identifying funding for and manage the transition of WMVS and WMVT to digital broadcasting.*
- Objective 2: Partner with community resources and seek local input in developing new programs and services that are responsive to diverse needs.*
- Objective 3: Identify new opportunities for students and lifelong learners of the college and community that utilize the facilities and broadcasts, and new media developed by, WMVS and WMVT.*

#### **Optimized Human Resources:**

- Objective 1: Focus on supporting quality employee performance.*
- Objective 2: Determine effective and efficient administrative structure and processes for Human Resources and Labor Relations Division.*
- Objective 3: Promote an atmosphere of respect, inclusiveness, and equality.*

## MILWAUKEE AREA TECHNICAL COLLEGE

### Vision, Mission, Purposes and Strategic Goals (Cont.)

#### **Maximized Financial Resources:**

- Objective 1: Increase operational resources to enhance short and long-term financial position.*
- Objective 2: Improve leadership systems through continual realignment of organizational structures that promote managerial accountability and equity among campuses.*
- Objective 3: Improve internal processes to realize efficiencies.*

#### **Strengthen Physical Resources:**

- Objective 1: Revise the facilities master plan to align with the Strategic and Academic Plan.*
- Objective 2: Increase utilization and/or explore the expansion of physical resources for increased enrollment and retention initiatives.*
- Objective 3: Create a physical presence that is welcoming at all campuses and enhances the image of the college.*
- Objective 4: Partner with the community in developing neighborhoods that are adjacent to the college.*
- Objective 5: Create a facilities and transportation access plan that accommodates students, staff and the community.*

## **MILWAUKEE AREA TECHNICAL COLLEGE**

### **Key Performance Indicators**

To determine if we are meeting the mission and purposes of the college, key performance indicators (KPI) were identified to measure our effectiveness. KPIs are defined as a measure of an essential outcome of a particular institutional performance activity, or an important indicator of a precise health condition of an environment. The KPIs developed for this plan are determined by internal data gathered as well as benchmarking against various performance indicators from the WTCS and other comparable national models. By defining measures for these KPIs and finding the gap between our mission and our performance, strategic goals may be developed. The strategic goals for 2003-07 are included in the plan to demonstrate alignment of mission and purposes of MATC.

### **The Key Performance Indicators Plan**

The KPI plan is based on MATC's mission and purpose statements (Board Policy A0101) which have been adopted in accordance with Wisconsin State Statute 38.001. The plan includes KPIs to measure if we are meeting our purposes are also included, as well as the 2003-07 Strategic Planning Goals. The KPI plan is currently being revised and will be available for use during the 2004-05 fiscal year.

# MILWAUKEE AREA TECHNICAL COLLEGE

## Budget Analysis

The consolidated budget for MATC consists of seven separate fund budgets. Given that a number of funds—i.e., Debt Service, Internal Service and Enterprise—are related to functions quite independent from the general operating activities of MATC, a single consolidated budget encompassing all funds does not provide a totally adequate tool for the review and evaluation of the financial status of MATC. For that reason, Section II of this budget document focuses on a fund-by-fund presentation and analysis.

The FY 2004-05 budget shows anticipated total operating revenues (General and Special Revenue – Operational Funds) of approximately \$161.7 million, representing a 6.0 percent increase when compared to FY 2003-04 projected revenues of \$152.5 million.

## Revenue Projections

In building the FY 2004-05 budget, the most probable revenue projections were used. A discussion of each projected revenue source follows.

### ◆ *Tax Levy*

- The proposed FY 2004-05 budget includes a total tax rate of \$1.9449 per \$1,000 of equalized property value. This is a decrease of 1.5 percent from prior year's tax rate of 1.9746. The total tax rate includes \$1.50 for operations and \$0.4449 for debt service. The tax rate for operations may not exceed \$1.50 per state statute.
- The tax levies provided by the rates noted above are \$90,532,000 for operations and \$26,854,000 for debt service, an increase over prior year's budget of 8.2 percent for operations and a decrease of 4.8 percent for debt service. In total, the tax levy is projected to increase 4.9 percent.

### ◆ *State*

- General state aid for operating purposes is projected to be \$25.8 million, a 0.5 percent reduction from state aid expected for FY 2003-04 of \$25.9 million. The decline in state aid is due to no increase in the aid appropriation and characteristics of the state aid distribution formula. State aid is distributed through a complex equalized formula that is affected by relative conditions in the other 15 WTCS districts. This projection appears most probable but could vary from the projection depending on changes in conditions in the other districts during the budget year.
- MATC continues to aggressively seek funding from various state sources.

## MILWAUKEE AREA TECHNICAL COLLEGE

### Budget Analysis (Cont.)

#### ◆ *Fees and Tuition*

- The fees and tuition revenue in the General Fund of \$30.6 million compares to the current year projection of \$28.4 million based on a projected increase in tuition rates and an increase in college enrollments. College parallel will increase by 6.2 percent and vocational tuition will increase by 8.6 percent as determined by state statute.

#### ◆ *Interest, Contracts, and Other Income*

- These sources of income within the General Fund are projected to decrease due to low interest rates and drops in contract and parking revenue.

#### ◆ *Federal*

- Federal revenues are expected to remain flat for FY 2004-05 with no significant increases.

#### ◆ *Note Borrowing*

- The proposed FY 2004-05 budget anticipates borrowing of \$28,500,000. This includes \$7,000,000 for annual renovation and remodeling projects, \$13,200,000 for capital equipment, \$3,300,000 for public television activities, and \$5,000,000 for an applied technology center.

### **Expenditures**

- ◆ The consolidated budget displays institutional expenditures within seven functional categories. This is a uniform classification required by the State Board and is part of the Federal IPEDS (Integrated Postsecondary Education Data System) reporting system.
- ◆ The operating subtotal for FY 2004-05 (General and Special Revenue – Operational Funds) is projected at \$160.3 million compared to the current FY 2003-04 estimated of \$154.6 million.

The goal of the financial information section of this document is to present what is essentially a very complex set of governmental accounting statements in a simplified format to facilitate public review.

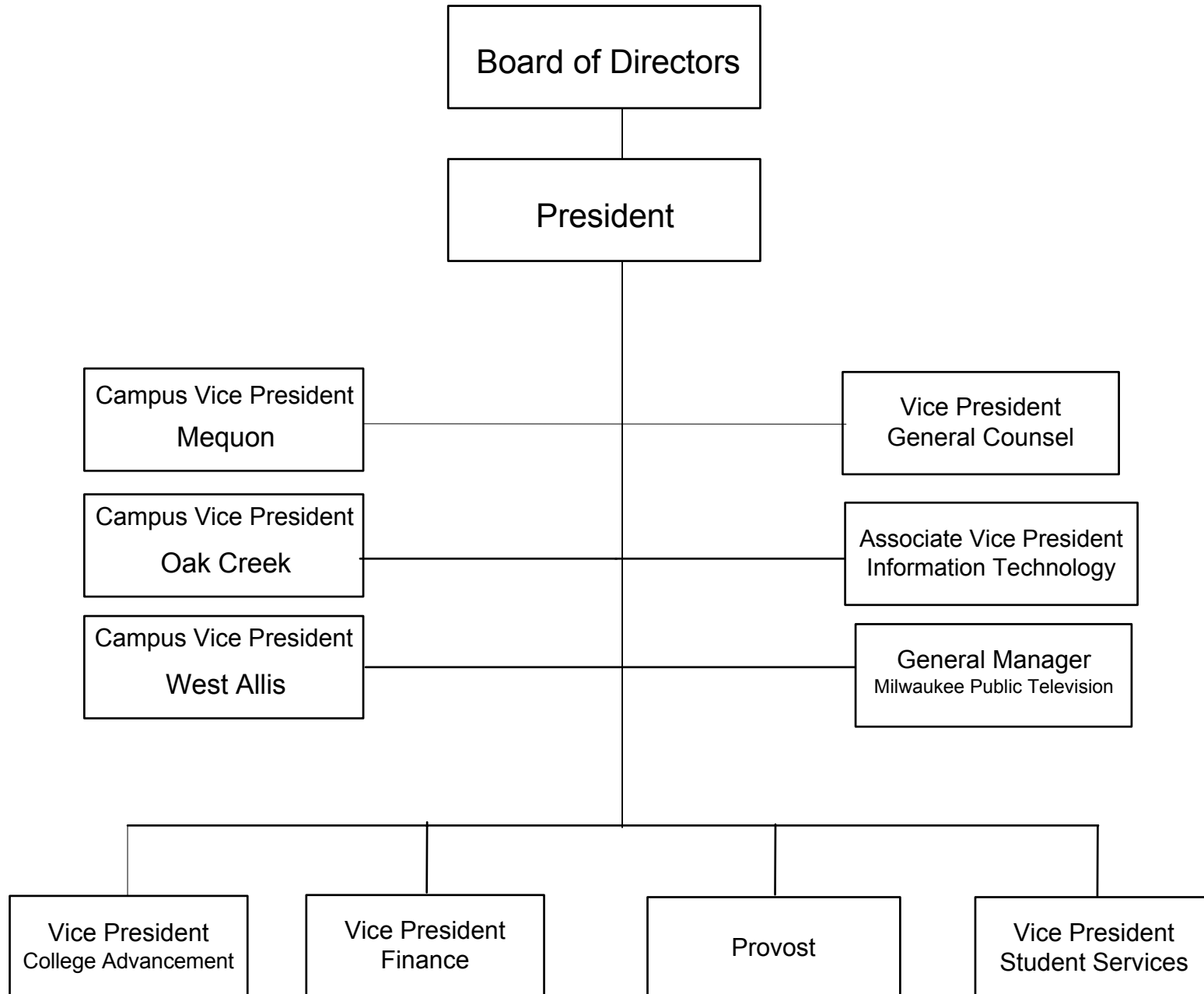
**MILWAUKEE AREA TECHNICAL COLLEGE**  
**Position Summary - FTE Basis (1)**

<b>Category</b>	<b>2002-03 Actual</b>	<b>2003-04 Estimated</b>	<b>2004-05</b>			<b>TOTAL</b>
			<b>General Fund</b>	<b>Special Revenue Funds</b>	<b>Proprietary Fund</b>	
Administrator/ Supervisors	80	80	68	3	7	78
Teachers	574	593	574	19		593
Specialists	21	21	20	1		21
Sub-Total Educational	675	694	662	23	7	692
Other Staff	773	734	525	75	138	738
<b>Total</b>	<b>1,448</b>	<b>1,428</b>	<b>1,187</b>	<b>98</b>	<b>145</b>	<b>1,430</b>

(1) Based on authorized full-time positions.

# Milwaukee Area Technical College

## Organizational Chart



**MILWAUKEE AREA TECHNICAL COLLEGE**

**Board Members**

<b>Name</b>	<b>Board Officer</b>	<b>Membership Type</b>	<b>Term Expires</b>	<b>Employer and Position</b>
Mark S. Maierle*	Chairperson	Employee	6/30/04	International Union of Operating Engineers Local 317 Business Manager
Lauren Baker	Vice-Chairperson	Additional Member	6/30/05	Trade and Technical Education – MPS Program Coordinator
Bobbie R. Webber	Secretary	Employee	6/30/06	Milwaukee Fire Department Captain
Peter G. Earle*	Treasurer	Employer	6/30/04	Law Offices of Peter Earle
Jeannette Bell		Elected Official	6/30/05	City of West Allis Mayor
Linda S. Sowell		Employer	6/30/06	Potawatomi Bingo Casino Public Relations Director
Carl A. Gobel		Additional Member	6/30/05	Semi-retired, independent consultant
William H. Hughes		Additional Member	6/30/06	Greendale School District Superintendent
Keith B. Terry*		Additional Member	6/30/04	Keith B. Terry Construction Services, Inc. Chairman

*NOTE: The composition and number of MATC District Board members are stipulated by Wisconsin law. The membership must have representatives of employers, employees, elected officials, and a school district administrator.*

\*Mr. Maierle's, Mr. Earle's, and Mr. Terry's term expires June 30, 2004. Mr. Maierle and Mr. Earle have received reappointments, expiring June 30, 2007; Mr. Terry will be replaced by Mr. Lenard Wells, effective July 1, 2004.