Committee Advocating for Staff Interests
COLLEGE OF ENGINEERING
UNIVERSITY OF WISCONSIN-MADISON

MEETING MINUTES

CASI	Monthly meeting
Meeting date & time	09/22/2026 1:00 pm - 2:30 pm
Location	Mechanical Engineering 2188
Meeting purpose	General Monthly Meeting
Attendees	In person: Amanda Thuss, Jackie Cooper, Justin Bush, Kathryn Rasmussen, Kelly Petersen, Jason Jankowski, Rob Kohlhepp, Carly Andrew, Nathan Jung, and 6 guests including Devesh Ranjan, Adam Whitehorse, and Jason Jankoski. Online: Zach Smith, Jennifer Detlor, Christa Wille, and 47 guests including Lula Baker and David Noyce.

MEETING DETAILS

Time	Description	Presenter
1:00 pm	Call meeting to Order - Auto approval (8/25/26 minutes) – Icebreaker What is something you were into as a kid? • Devesh Ranjan – cricket (game) • Carly Andrew – Rent the musical • Nathan Jung – rock collecting • Adam Whitehorse – collecting baseball cards	C. Andrew
1:10 pm	Guests Re: Hiring Cap: • Presentation/Info • **See attached slides and handouts.** • Some positions are exempt from cap as noted in handout. • 258 FTE at CoE fall under the cap and we only receive the data once a year. Will get next round of data in March 2027. • Cap space is currently 9-10 positions. • Questions/Comments • Carly – do you see getting more cap space? • Jason – that was a one-time thing and I do not foresee us getting more cap space. • Justin – so what if your title is not on this page [referring to list of titles]? • Jason - If you are not on the list, your position is not exempt from the cap. • Carly – as we grow as a college, we will need more staff to support that growth. What is the process for that? • Adam – we're not sure what the process is for that at this time. The Dean will begin having converstaions with the Provost on what the process is to request more cap space. • Kelly – how does the cap interact with op-ex? • Adam – there's an overall campus position cap and the position cap resources will have to likely move with them if consolidation occurs.	Jason Jankoski/Adam Whitehorse Dean Ranjan

- Jackie – in yesterday's presentation, the Dean said there's a net gain of 44 new faculty. How many staff have been added to support those new faculty?
  - Jason – we recognize this is an issue and the tiger team led by Lula will be discussing this challenge.
  - Adam – the majority of what we're seeing for requests and what's being approved are replacement positions.
- Nathan – is it the case that the university has a pool of positions that they segment between individual schools and colleges?
  - Jason –There is a system cap. Once the position cap number was finalized at the system level and that number was provided to UW-Madison, campus gave each division/college their max number of positions subject to the cap with a certain number of "extras" due to the inherent fluctuations of positions and wanting to provide a buffer. Engineering's extra positions totaled 20, and it's unclear what other divisions/colleges extra allotments were. However, if Engineering maxes this extra allotment, the Dean will need to request additional positions from campus. These positions would have to come from somewhere else, but where these would come from and whether or not they'd come from other units' extras is unclear.
- Nathan – are we in competition for new openings or positions that could go elsewhere? If yes, is there anything we can do to make the case for our need?
  - Jason – there is an inherent challenge with the cap in that esentially someone else must lose for us to gain. For us to get an increase, it must come from somewhere else.
- Zach – how many exempt positions have been created since this requirement?
  - Jason – we're not tracking the creation of exempt positions because they're not required to track.
- Zach – how many positions were created in the Dean's office vs departments.
  - Jason – no idea
- Zach – what happened to existing positions that were not filled because of the cap?
  - Jason - There were not any positions that were not filled because of the cap. It's more likely that we changed the course of staffing. 60% of our positions are exempt, not under the cap.
- Rob – so we can hire positions that are exempt, but we're not hiring the nonexempt people to support them and we're still being asked to do the same level of work. How can we figure that issue out so that exempt entities can't make choices that impact nonexempt entities?
  - Jason – these are good questions that I don't have the answers to right now.
- Katrina – how many department-level units are asking for nonexempt positions and being denied? Are we finding ways to make things happen?
  - Jason – there haven't been any positions denied due to cap. It may be delayed as the details, like funding for example, are figured out.
- Carly – who defines which positions are and are not exempt? Is there anything we can do to make positions exempt?
  - Jason – the people who made these decisions likely may have not realized the impact. We've worked hard to meet the parameters under the cap and changing things would be difficult at this juncture. The list is made at the system level, not campus.

Leadership: Questions for/Updates from

- Devesh – introduced Amy Mikalofsky, his new assistant

	• Jackie – Why was there no background on the op-ex program before the topic was introduced at yesterday's all faculty/staff meeting?
	  ○ Devesh – chairs, department administrators, and CASI were notified. Devesh will share feedback with the Provost about why more background was needed.
	  ○ Carly – suggestion to add more context in the next faculty/staff newsletter via the meeting slides, a website, etc. to help people who have questions.
	  ○ Kelly – add elevator pitch about what this effort is.
	  ○ Lula – CoE was holding back on official announcements until after the meeting.
	  ○ Katrina – we have an opportunity to get involved early in the process and we as staff can focus on the potential impact of that input.
	• Justin – can we add a slide in the faculty/staff meeting PowerPoint presentation that summarizes the new staff who've joined the college moving forward? Yesterday's presentation showed just faculty.
	  ○ Devesh – Yes, this was requested but we wanted pictures of all the new staff to match how the faculty were presented and that was not received prior to the meeting.
	  ○ Carly – has also heard staff wanting this recognition in the meetings moving forward.
	• Justin – staff are happy with professional development offering.
	• Amanda – What conversations were had regarding the distribution of workload with the new story telling method presented by the college during the quarterly comms meeting on 9/17?
	  ○ Lula – same presentation to chairs and leadership. That is a conversation to have with your chairs.
	  ○ Devesh – there are many ways this role is used in departments, and many people are already doing something in this space.
	  ○ Jason – we're trying to get out as many stories as possible.	

1:40 pm	CASI/Subcommittee/Shared Governance business:
	• CASI Budget
	  • The Dean replenished to the CASI budget to $5k. He also encouraged us to think about additional things we'd like funds for and to bring those to his attention.
	• Future agenda topics - casi@engr.wisc.edu:
	  • Please email us and we will do our best to add your question/comment/interest to the agenda in a future month
	• Professional Development:
	  • Application can be submitted here
	  • There haven't been any applications yet, people are encouraged to apply.
	  • Jackie – there should be more messaging on professional development because it's currently buried in the body of the Friday email.
	  • Anyone have any opportunities they are thinking of applying it to?
	• Culture Committee representative
	  • Two people have stepped forward thus far
	  • Need a rep by 9/28
	  • Amanda – has experience with culture and community building in the CEE Department, which has historically been fragmented. Can bring some experience and insights to the college for this effort and would welcome the opportunity.
	  • Rob – Has a passion for culture and experience with similar initiatives at the campus level. Looking to activate this at the college level as well but is willing to stand down as other opportunities have presented themselves.
		C. Andrew

	• Carly - Amanda is the rep on the culture committee since Rob is standing down.
	• Academic Planning Council (APC) representative
	  • Justin attended September meeting
	  • Justin – At the APC meeting we reviewed bylaws and council members are invited to submit agenda items. There will be a formation of 5-year review committees. There will also be an AI summit.
	  • Rob – how does 5-year review program intersect with ABET accreditation?
	  • Jason – that is a question for Laura Albert.
	  • Also need a CASI representative for this
	  • Carly - Justin is the chair of APC and CASI rep as nobody else offered.
	• Sub-Committee Reports
	  • Planning and tending is working on meetings.
	  • Communications is reworking Kudos from CASI. The Dean's office has donated swag to give out for the fall and spring Kudos drawings.
	• Connect with CASI Submission
	  • Carly – read a submission from the Connect with CASI form on the CASI website. The submission asks about the promotion of teaching professors in title only, without a pay raise, and seeks clarity in the process to align both title and pay promotions. **See the next page for the full submission.**
	  • Jason – The dean and I met with the department to address their concerns. This is tied to a campus-level requirement/policy.
	  • Nathan – promotion processes for teaching faculty and professors are a little mysterious and it is something I've noticed as well.
	  • Jason – this is something we can pass along to Laura Albert for further review and communication to the people impacted.
	• Leadership Goals Check-in	

2:00 pm	Open Comments/ Questions from Constituents, if time permits	C. Andrew
2:30 pm	Adjourn (CASI members – please remember to leave your name tent on the table at the end of the meeting) Motion by Jackie, 2nd by Kelly	C. Andrew

Concern/Comment/Suggestions/Insight

This comment is in relation to promotion along the Teaching Professor Track.

The promotion of Teaching Professors is laid out in the 2021 CoE adopted guidelines. These guidelines have been generally adopted or adapted for each department. The process was designed to somewhat mimic the promotion requirements for faculty. For teaching faculty, a substantial dossier has to be provided similar to a tenure dossier but without the research requirement and with a great focus on teaching. Additionally, multiple letters have to be solicited outside of the organization. This dossier then has to be approved by several committees along with the Dean.

However, upon promotion, there is no automatic raise commensurate with the promotion and the additional expected criteria when going from Assistant to Associate Teaching Professor. The College of Engineering considers this "a title change only". It is up to the individual departments to increase salary. This is different than with tenure-track faculty as the salary increase is automatic upon promotion.

The qualms with this system are twofold.
The first is that the level of promotion meant to mimic that of faculty seems an arduous task for no guaranteed compensation. A PROMOTION title change without compensation is only useful for looking for other jobs. It also makes you feel like a second-class citizen compared to faculty. While we do not have the research requirement, we still have the same service requirements and double the teaching requirements.
The second is this policy can lead to odd interactions on pay scales between departments. It is currently possible for a promoted Associate Teaching Professors in one engineering department to be paid less than a newly hired Assistant Teaching Professor in another engineering department.

Campus guidelines can be found:
https://provost.wisc.edu/wp-content/uploads/sites/181/2020/05/0420-Campus-Guidelines_Acad-Staff-Teaching-Professor-Titles.pdf

The CoE and Departmental ones are available from me upon request.

Type of Staff Appointment

Instructional

Request a response from CASI

No need to respond, just sharing

Position Cap Overview

Position Cap Information Session \\ Agenda

- Background Information
- Exemption Reasons
- Engineering Position Cap Figure
- Position Approval Process
- Justification to Advance Position Form
- Questions

Position Cap \\ Background Information

- In December 2023, an agreement was approved between the UW System Board of Regents, the Universities of Wisconsin and state legislative leadership
- Agreement includes a provision requiring Universities of Wisconsin to institute a system-wide position cap beginning January 1, 2024, and will run indefinitely.
- Deans/division heads are responsible for managing their own position cap numbers and have authority to make decisions on position requests within their own S/C/D
- Required documented dean/division head review and approval on all positions within the position cap via a Justification to Advance Position Form

Position Cap \\ Exemption Reasons

Positions are not included in the position cap if they fit into at least one of the following exemption reasons:

1. Research positions funded at 75% or more by gift/grant/contract
2. Outreach positions funded at 75% or more by gift/grant/contract
3. 75% of the time working with students and/or patients
4. Other positions funded 100% by gift/grant/contract
5. Faculty/Instructional
6. Positions less than .5 FTE
7. Positions necessary to address subsequently enacted or expanded state and/or federal compliance mandates
8. Part-time students (student help and student assistants) and TEs

Position Cap \\ Exemption Reasons Resources

Use the following resources to help determine if a position is exempted from the cap:

1. Criteria, definitions and list of funds that are considered gift, grant or contract: https://hr.wisc.edu/hr-professionals/position-cap/
2. SJD exemption list: https://uwmadison.box.com/s/ay7u4pktxarkyb26kljxob0n65vnbu64

Engineering's Position Cap Figure *

Position Cap Figure:	258 FTE	(41%)
Exempt Positions:		(59%)
Instructional	75 FTE	
Student Facing	30 FTE	
Research/Exempt Funding	256 FTE	
Total	619 FTE	
Faculty	214 FTE	

** March 2026 Data*

Position Approval Process

When Filling a Vacancy:

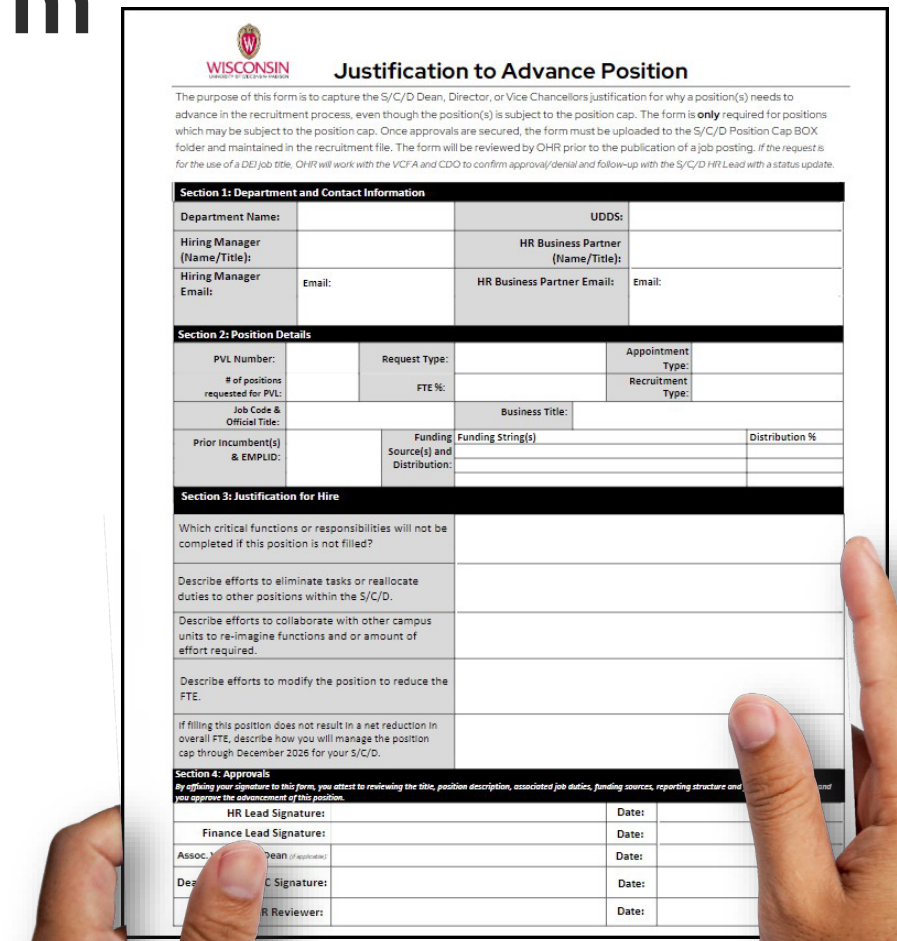
1. Identify funding for position *
2. Select the appropriate position cap definition on the Recruitment Info tab
3. Review and document the date the Dean, Director or Vice Chancellor approved the position *

** Was required step prior to position cap implementation.*



Position Cap \\ Justification Form

A Justification to Advance Position form is required in certain situations and must be received prior to a position being posted.



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Justification to Advance Position

The purpose of this form is to capture the S/C/D Dean, Director, or Vice Chancellors justification for why a position(s) needs to advance in the recruitment process, even though the position(s) is subject to the position cap. The form is **only** required for positions which may be subject to the position cap. Once approvals are secured, the form must be uploaded to the S/C/D Position Cap BOX folder and maintained in the recruitment file. The form will be reviewed by OHR prior to the publication of a job posting. *If the request is for the use of a DEI job title, OHR will work with the VCFA and CDO to confirm approval/denial and follow-up with the S/C/D HR Lead with a status update.*

Section 1: Department and Contact Information

Department Name:		UDDS:	
Hiring Manager (Name/Title):		HR Business Partner (Name/Title):	
Hiring Manager Email:	Email:	HR Business Partner Email:	Email:

Section 2: Position Details

PVL Number:		Request Type:		Appointment Type:	
# of positions requested for PVL:		FTE %:		Recruitment Type:	
Job Code & Official Title:			Business Title:		
Prior Incumbent(s) & EMPLID:		Funding Source(s) and Distribution:	Funding String(s)		Distribution %

Section 3: Justification for Hire

Which critical functions or responsibilities will not be completed if this position is not filled?	
Describe efforts to eliminate tasks or reallocate duties to other positions within the S/C/D.	
Describe efforts to collaborate with other campus units to re-imagine functions and or amount of effort required.	
Describe efforts to modify the position to reduce the FTE.	
If filling this position does not result in a net reduction in overall FTE, describe how you will manage the position cap through December 2026 for your S/C/D.	

Section 4: Approvals

By affixing your signature to this form, you attest to reviewing the title, position description, associated job duties, funding sources, reporting structure and … and you approve the advancement of this position.

HR Lead Signature:		Date:
Finance Lead Signature:		Date:
Assoc. … Dean (if applicable)		Date:
Dea… C Signature:		Date:
… R Reviewer:		Date:

Justification Form \\ When it's Required

A Justification to Advance Position Form is required when:

1. The position is included in the cap
2. The unit attests the position's funding is gift, grant or contract, however the fund is not on the position cap approved list of gift, grant or contract funds (reference the position cap website for the approved list of funds)
3. The position is exempt from the cap based on job responsibilities; however, the standard job description is not on the position cap list of exempted SJDs (reference the SJD exemption spreadsheet)

Justification Form \\ Required Signatures

For the form to be considered complete, the following signatures are required:

1. HR Lead
2. Finance Lead
3. Dean/Associate Dean Designee

Questions

Questions Sent by CASI

1. Can you clarify what the administrative position cap means for the College of Engineering and, specifically, for administrative staff? Which types of positions are included, and which are exempt?

2. How has the position cap affected the College of Engineering since it took effect? Are there ways it has influenced staffing decisions or workforce planning even if no formal requests for new positions have been denied?

3. How is the College monitoring the cumulative impact of staffing constraints on workload, burnout, retention, service levels, and employees' ability to take on new initiatives? What trends are leadership seeing?

Questions Sent by CASI

4. Some staff have heard that new administrative positions cannot be created or filled because of the position cap, while College leadership has shared that no positions have been denied because of the cap. Can you help us understand the difference between these messages?

5. As the College continues to grow and take on new initiatives, how is leadership thinking about the administrative staffing capacity needed to support that growth within the constraints of the position cap?

6. How is College leadership advocating on behalf of Engineering to campus leadership regarding the position cap, particularly as it relates to the College's continued growth and the administrative staffing needs?

Questions Sent by CASI

7. How does the creation of new administrative positions at the central campus level affect the ability of COE to create or fill positions? Are these managed within separate position caps, or can growth in one area of the university affect the staffing capacity available elsewhere?

8. Looking ahead, what does leadership anticipate the future of the position cap will look like? Given that it stems from a legislative agreement, is there a process or opportunity for the university to advocate for changes as the needs of UW–Madison and the College evolve?

Additional Questions

Job titles/positions exempt from cap

Job Code	Exemption Status	Title	Notes
AE002	75% Student Facing	Academic Advisor	
AE010	75% Student Facing	Academic Program Specialist	
AE015	75% Outreach	Cooperative Program Manager	Requires Funding Check
AE025	75% Student Facing	Admissions and Recruitment Coordinator I	
AE030	75% Student Facing	Graduate Program Admissions and Recruitment Coordinator I	
AE031	75% Student Facing	International Admissions and Recruitment Coordinator	
AE032	75% Student Facing	Career Development Coordinator	
AE037	75% Student Facing	Financial Aid Advisor	
AE041	75% Student Facing	Recreation Program Specialist	
AE042	75% Student Facing	Housing Coordinator I	
AE045	75% Student Facing	Residence Life Coordinator I	
AE046	75% Student Facing	Residence Life Coordinator II	
AE049	75% Student Facing	International Education Advisor	
AE050	75% Student Facing	International Education Coordinator	
AE056	75% Student Facing	Multicultural Initiatives Specialist	
AE057	75% Student Facing	Student Activities Coordinator	
AE061	75% Student Facing	Student Affairs Program Coordinator	
AE067	75% Student Facing	Veterans Services Coordinator	
AE069	75% Student Facing	Case Manager	
AE071	75% Student Facing	Student Processing Specialist	
AE072	75% Student Facing	Debate Program Specialist	
AE073	75% Student Facing	Graduate Program Admissions and Recruitment Coordinator II	
AE078	75% Student Facing	Student Loan Specialist	
AE080	75% Student Facing	Proctor	
AE084	75% Student Facing	Admissions and Recruitment Coordinator II	
AE089	75% Student Facing	Residence Life Coordinator III	
AE091	75% Student Facing	Graduate Program Coordinator	
AE093	75% Student Facing	Graduate Program Manager	
AE095	75% Student Facing	Recreation Program Supervisor	
AE105	75% Student Facing	Financial Aid Officer	
AE107	75% Student Facing	Retention Specialist	
AE110	75% Outreach	Cooperative Program Manager (B)	Requires Funding Check
AE137	75% Outreach	Cooperative Program Manager (C)	Requires Funding Check
AE163	75% Student Facing	Learning Center Specialist	
AE192	75% Student Facing	Student Affairs Program Specialist	
AE239	75% Student Facing	Graduate Advisor	
AN001	75% Patient Work	Veterinary Technician Assistant	
AN002	75% Patient Work	Veterinary Technician I	
AN003	75% Patient Work	Veterinary Technician II	
AN004	75% Patient Work	Veterinary Technician III	
AN008	75% Patient Work	Animal Care Technician I	
AN009	75% Patient Work	Animal Care Technician II	
AN010	75% Patient Work	Animal Care Technician III	
AN011	75% Patient Work	Veterinarian	
AN014	75% Research	Veterinary Pathologist I	Requires Funding Check
AN015	75% Research	Veterinary Pathologist II	Requires Funding Check
AN017	75% Patient Work	Attending Veterinarian	
AR001	75% Student Facing	Artist	
AR006	75% Student Facing	Costume Shop Supervisor	
AR008	75% Student Facing	Stage Manager	
AR010	75% Student Facing		
AR011	75% Student Facing	Arts Technician	
AR013	75% Student Facing	Marching Band Director (Inst)	
AT001	75% Student Facing	Assistant Spirit Coordinator	
AT010	75% Student Facing	Athletics Recruitment Coordinator	
AT012	75% Student Facing	Spirit Coordinator	
AT015	75% Student Facing	Strength and Conditioning Assistant Coach	
AT019	75% Student Facing	Head Strength and Conditioning Coach	
CC001	75% Student Facing	Coach	
CC002	75% Student Facing	Associate Coach	
CC003	75% Student Facing	Assistant Coach	
CM005	75% Outreach	Government Affairs Director (Inst)	Requires Funding Check
CM006	75% Outreach	Government Affairs Liaison II (Inst)	Requires Funding Check
CM049	75% Outreach	Government Affairs Liaison I (Inst)	Requires Funding Check
CM081	75% Outreach	External Relations Director	Requires Funding Check
CM082	75% Outreach	External Relations Director (B)	Requires Funding Check
CM083	75% Outreach	External Relations Director (C)	Requires Funding Check
CP027	75% Student Facing	Title IX Coordinator (Inst)	
EI001	75% Student Facing	Disability Services Advisor	

EI005	75% Student Facing	Assistive Technology Coordinator	
EI006	75% Student Facing	Communication Access Realtime Translation (CART) Provider	
EI007	75% Student Facing	Sign Language Interpreter	
FA020	Faculty	Professor	
FA030	Faculty	Associate Professor	
FA040	Faculty	Assistant Professor	
FA050	Faculty	Instructor	
FP001	75% Research	Agricultural Equipment Operator I	Requires Funding Check
FP002	75% Research	Agricultural Equipment Operator II	Requires Funding Check
FP003	75% Research	Agricultural Operations Manager	Requires Funding Check
FP004	75% Research	Greenhouse Supervisor	Requires Funding Check
FP005	75% Research	Soil Technician	Requires Funding Check
FP006	75% Research	Horticultural Technician	Requires Funding Check
FP044	75% Research	Instrument Maker	Requires Funding Check
FP045	75% Research	Instrument Shop Manager	Requires Funding Check
FP046	75% Research	Instrument Shop Supervisor	Requires Funding Check
FP048	75% Research	Machinist	Requires Funding Check
FP077	75% Research	Horticulture/Forestry Specialist	Requires Funding Check
FP081	75% Research	Plant Disease Specialist	Requires Funding Check
FP083	75% Research	Animal Science Meat Technician	Requires Funding Check
FP137	75% Research	Agricultural Laborer	Requires Funding Check
HS001	75% Patient Work	Public Health Educator	
HS011	75% Patient Work	Audiologist	
HS013	75% Patient Work	Clinical Counselor	
HS014	75% Patient Work	Clinical Social Worker	
HS017	75% Patient Work	Dietetic Technician	
HS018	75% Patient Work	Dietitian	
HS026	75% Patient Work	Nurse Practitioner	
HS028	75% Patient Work	Occupational Therapist	
HS029	75% Patient Work	Occupational Therapist Assistant	
HS030	75% Patient Work	Pharmacist	
HS031	75% Patient Work	Pharmacy Technician	
HS032	75% Patient Work	Physical Occupational Therapy Technician	
HS033	75% Patient Work	Physical Therapist	
HS034	75% Patient Work	Physical Therapy Assistant	
HS035	75% Patient Work	Physician	
HS036	75% Patient Work	Physician Assistant	
HS037	75% Patient Work	Psychologist	
HS039	75% Patient Work	Registered Nurse	
HS040	75% Patient Work	Rehabilitation Counselor	
HS041	75% Patient Work	Rehabilitation Specialist	
HS042	75% Research	Research Nurse	Requires Funding Check
HS043	75% Patient Work	Social Worker I	
HS044	75% Patient Work	Social Worker II	
HS058	75% Patient Work	Licensed Practical Nurse	
HS063	75% Patient Work	Certified Nursing Assistant	
HS073	75% Student Facing	Standardized Patient	
HS075	75% Patient Work	Clinical Nurse Specialist	
HS076	75% Patient Work	Athletic Trainer	
HS078	75% Patient Work	Counselor	
HS079	75% Research	Programmer Analyst - Health Sciences Research	Requires Funding Check
HS080	75% Patient Work	Patient Navigator	
HS115	75% Outreach	Business Engagement and Compliance Director	Requires Funding Check
HS116	75% Patient Work	Massage Therapist	
HS119	75% Patient Work	Athletic Trainer (D1/Horizon)	
HS120	75% Patient Work	Athletic Trainer (D2/D3)	
IC001	Instructional	Adjunct Professor	
IC002	Instructional	Adjunct Associate Professor	
IC003	Instructional	Adjunct Assistant Professor	
IC004	Instructional	Adjunct Instructor	
IC005	Instructional	Clinical Adjunct Professor	
IC006	Instructional	Clinical Associate Adjunct Professor	
IC007	Instructional	Clinical Assistant Adjunct Professor	
IC008	Instructional	Distinguished Clinical Professor	
IC009	Instructional	Clinical Professor	
IC010	Instructional	Associate Clinical Professor	
IC011	Instructional	Clinical Assistant Professor	
IC012	Instructional	Clinical Instructor	
IC013	Instructional	Distinguished Professor (CHS)	
IC014	Instructional	Professor (CHS)	
IC015	Instructional	Associate Professor (CHS)	
IC016	Instructional	Assistant Professor (CHS)	
IC017	Instructional	Instructor (CHS)	
IC018	Instructional	Professor Emeritus	

IC019	Instructional	Associate Emeritus Professor	
IC020	Instructional	Assistant Emeritus Professor	
IC021	Instructional	Instructor Emeritus	
IC022	Instructional	Professor L/I	
IC023	Instructional	Associate Professor L/I	
IC024	Instructional	Assistant Professor L/I	
IC025	Instructional	Professor of Military Science	
IC026	Instructional	Associate Professor of Military Science	
IC027	Instructional	Assistant Professor of Military Science	
IC028	Instructional	Instructor of Military Science	
IC029	Instructional	Visiting Professor	
IC030	Instructional	Visiting Associate Professor	
IC031	Instructional	Visiting Assistant Professor	
IC032	Instructional	Visiting Instructor	
IC036	Instructional	Visiting Lecturer	
IC037	Instructional	Instructor L/I	
OE002	75% Outreach	Adult and Student Services Coordinator	Requires Funding Check
OE007	75% Outreach	Outreach Program Evaluation Specialist	Requires Funding Check
OE009	75% Outreach	Outreach Specialist	Requires Funding Check
OE010	75% Outreach	Camp Counselor	Requires Funding Check
OE013	75% Outreach	Pre-College Services Advising Specialist	Requires Funding Check
OE015	75% Outreach	Pre-College Services Coordinator	Requires Funding Check
OE017	75% Outreach	Outreach Associate	Requires Funding Check
OE042	75% Outreach	Pre-College Services Manager	Requires Funding Check
OT008	75% Student Facing	Teaching Supervisor	
PD001	Instructional	Graduate Intern/Trainee	
PD002	Instructional	Intern (Non-Physician)	
PD003	Excluded by Budget	Postdoctoral Fellow	
PD004	Excluded by Budget	Postdoctoral Trainee	
PD005	Instructional	Postgraduate Trainee 1	
PD006	Instructional	Postgraduate Trainee 2	
PD007	Instructional	Postgraduate Trainee 3	
PD008	Instructional	Postgraduate Trainee 4	
PD009	Instructional	Postgraduate Trainee 5	
PD010	Instructional	Postgraduate Trainee 6	
PD011	Instructional	Postgraduate Trainee 7	
PD012	75% Research	Research Associate	
PD014	Excluded by Budget	Postdoctoral Scholar	
RE001	75% Research	Client-Based Researcher I	Requires Funding Check
RE002	75% Research	Client-Based Researcher II	Requires Funding Check
RE003	75% Research	Client-Based Researcher III	Requires Funding Check
RE004	75% Research	Instrumentation Technologist I	Requires Funding Check
RE005	75% Research	Process Development and Manufacturing Scientist I	Requires Funding Check
RE006	75% Research	Process Development and Manufacturing Scientist II	Requires Funding Check
RE007	75% Research	Process Development and Manufacturing Scientist III	Requires Funding Check
RE009	75% Research	Quality Control Scientist I	Requires Funding Check
RE010	75% Research	Quality Control Scientist II	Requires Funding Check
RE011	75% Research	Quality Control Scientist III	Requires Funding Check
RE014	75% Research	Research Subject Matter Expert	Requires Funding Check
RE015	75% Research	Clinical Research Coordinator I	Requires Funding Check
RE016	75% Research	Clinical Research Coordinator II	Requires Funding Check
RE020	75% Research	Data Scientist I	Requires Funding Check
RE021	75% Research	Data Scientist II	Requires Funding Check
RE022	75% Research	Research Analyst I	Requires Funding Check
RE023	75% Research	Research Analyst II	Requires Funding Check
RE024	75% Research	Statistician I	Requires Funding Check
RE025	75% Research	Statistician II	Requires Funding Check
RE026	75% Research	Biostatistician I	Requires Funding Check
RE027	75% Research	Biostatistician II	Requires Funding Check
RE028	75% Research	Biostatistician III	Requires Funding Check
RE030	75% Research	Histology Technician I	Requires Funding Check
RE031	75% Research	Histology Technician II	Requires Funding Check
RE035	75% Research	Research Professor	Requires Funding Check
RE038	75% Research	Research Technician	Requires Funding Check
RE040	75% Research	Researcher I	Requires Funding Check
RE041	75% Research	Researcher II	Requires Funding Check
RE042	75% Research	Researcher III	Requires Funding Check
RE043	75% Research	Scientist I	Requires Funding Check
RE044	75% Research	Scientist II	Requires Funding Check
RE045	75% Research	Scientist III	Requires Funding Check
RE047	75% Research	Research Specialist	Requires Funding Check
RE050	75% Research	Research Vessel Crew	Requires Funding Check
RE051	75% Research	Instrumentation Technologist II	Requires Funding Check
RE056	75% Research	Programmer Analyst - Research	Requires Funding Check

RE061	75% Research	Data Scientist III	Requires Funding Check
RE062	75% Research	Data Science Facilitator I	Requires Funding Check
RE063	75% Research	Data Science Facilitator II	Requires Funding Check
RE064	75% Research	Data Engineer I	Requires Funding Check
RE065	75% Research	Data Engineer II	Requires Funding Check
RE066	75% Research	Statistician III	Requires Funding Check
RE067	75% Research	Statistical Consultant I	Requires Funding Check
RE068	75% Research	Statistical Consultant II	Requires Funding Check
RE070	75% Research	Instrumentation Engineer I	Requires Funding Check
RE071	75% Research	Instrumentation Engineer II	Requires Funding Check
RE072	75% Research	Instrumentation Engineer III	Requires Funding Check
RE073	75% Research	Research Cyberinfrastructure Specialist I	Requires Funding Check
RE074	75% Research	Research Cyberinfrastructure Specialist II	Requires Funding Check
RE075	75% Research	Research Cyberinfrastructure Specialist III	Requires Funding Check
RE076	75% Research	Research Cyberinfrastructure Manager	Requires Funding Check
RE077	75% Research	Research Cyberinfrastructure Facilitator I	Requires Funding Check
RE078	75% Research	Research Cyberinfrastructure Facilitator II	Requires Funding Check
RE079	75% Research	Research Cyberinfrastructure Facilitator III	Requires Funding Check
RE080	75% Research	Research Cyberinfrastructure Facilitation Manager	Requires Funding Check
RE107	75% Research	Clinical Trials Data Coordinator	Requires Funding Check
RE109	75% Research	Protocol Writer	Requires Funding Check
RE111	75% Research	Clinical Research Monitor	Requires Funding Check
RE112	75% Research	Research Assistant Professor	Requires Funding Check
RE113	75% Research	Research Associate Professor	Requires Funding Check
RE124	75% Research	Quality Control Manager	Requires Funding Check
RE125	75% Research	Process Development and Manufacturing Manager	Requires Funding Check
RE130	75% Research	Assistant Visiting Scientist	Requires Funding Check
RE131	75% Research	Associate Visiting Scientist	Requires Funding Check
RE132	75% Research	Senior Visiting Scientist	Requires Funding Check
SA001	SA/GA/EIT	Advanced Opportunity Fellow	
SA002	SA/GA/EIT	Fellow	
SA003	SA/GA/EIT	Housefellow/Resident Assistant	
SA004	SA/GA/EIT	Lecturer (SA)	
SA005	SA/GA/EIT	Program Assistant	
SA006	SA/GA/EIT	Project Assistant	
SA007	SA/GA/EIT	Program Assistant-Grader/Reader	
SA008	SA/GA/EIT	Project Assistant-Grader/Reader	
SA009	SA/GA/EIT	Research Assistant	
SA010	SA/GA/EIT	Scholar	
SA011	SA/GA/EIT	Teaching Assistant-Standard	
SA012	SA/GA/EIT	Teaching Assistant-Senior	
SA013	SA/GA/EIT	Trainee	
SA014	SA/GA/EIT	Undergraduate Assistant	
SA015	SA/GA/EIT	Undergraduate Intern	
SA016	SA/GA/EIT	Teaching Asst Doct	
SA017	SA/GA/EIT	Teaching Asst Dissertat	
SA018	SA/GA/EIT	Teaching Assistant	
SA019	SA/GA/EIT	Prog Asst Doctoral	
SA020	SA/GA/EIT	Prog Asst Dissertator	
SA021	SA/GA/EIT	Proj Asst Doctoral	
SA022	SA/GA/EIT	Proj Asst Dissertator	
SA023	SA/GA/EIT	Graduate Assistant	
SH001	Excluded by Budget	Student Help	
TL001	Instructional	Instructional Administrator	
TL005	75% Student Facing	Psychometrician	
TL007	75% Student Facing	Continuing Education Program Instructor	
TL008	75% Student Facing	Continuing Education Specialist	
TL011	Instructional	Preceptor	
TL020	Instructional	Lecturer	
TL021	75% Student Facing	Music Coach	
TL022	Instructional	Teaching Professor	
TL023	75% Student Facing	Tutor	
TL024	75% Student Facing	Teaching Specialist	
TL025	Instructional	Teaching Faculty I	
TL026	Instructional	Teaching Faculty II	
TL027	Instructional	Teaching Faculty III	
TL031	Instructional	Teaching Faculty IV	
TL033	75% Student Facing	Athletics Learning Specialist	
TL036	75% Student Facing	Academic Assessment Specialist	
TL037	75% Outreach	Family Resource Specialist	Requires Funding Check
TL053	Instructional	Professor of Practice	
TL055	Instructional	Teaching Assistant Professor	
TL056	Instructional	Teaching Associate Professor	
TL059	Instructional	Professor of Practice (Non-Credit)	

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Position Cap Exemption Criteria Definitions

The following are the approved criteria definitions for position cap exemptions **as of June 11, 2024.**

1. **Research positions funded at 75% or more by gift/grant/contract.**
    a. Positions that (both):
        i. Spend 75% of their FTE over the course of the appointment term designing, conducting, providing direct physical or technical support for, or analyzing the results from experiments, investigations, or studies designed to expand knowledge in a particular field or discipline.
        ii. Whose salary cost **at the point of hire** is expected to be funded at **75%** or more by any individual or combination of the following funds reported to the Joint Committee on Finance; or, for funds not listed below, where the hiring unit can clearly demonstrate that the funding source for the position is an external gift, grant, or contract.
            1. Fund 130 – State Laboratory of Hygiene
            2. Fund 133 – Non-Federal Grants and Contracts
            3. Fund 135 – Gifts & Donations – Wisconsin Alumni Research Association
            4. Fund 165 – Veterinary Diagnostic Lab Non-State Agency Fees
            5. Fund 233 – Gifts – General
            6. Fund 533 – UW Madison Athletics – Gifts & Grants
            7. Fund 142 - Fed aid - Hatch Adams - Land Grant Research
            8. Fund 143 - Fed aid - Smith Lever - Land Grant
            9. Fund 144 - Fed aid - Special Projects
            10. Fund 145 – Fed aid – Work Study
            11. Fund 147 - Fed aid - Student Loans
            12. Fund 150 - Fed aid - Federal Indirect Cost Reimbursement
            13. Fund 199 - Veterinary Diagnostic Lab-Federal Aid
            14. Fund 161 - Endowment Trust Fund Income (876)
            15. Fund 163 - Discovery Farm Grants (259)
            16. Fund 172 - Rural Physician Residency Assistance Program (237)

2. **Outreach positions funded at 75% or more by gift/grant/contract.**
    a. Positions that (both):

i. Spend 75% of their FTE over the course of the appointment term designing programs for or engaging directly with local communities, businesses, non-profits, or governments on behalf of the university.

ii. Whose salary cost **at the point of hire** is expected to be funded at **75%** or more by any individual or combination of the following funds reported to the Joint Committee on Finance; or, for funds not listed below, where the hiring unit can clearly demonstrate that the funding source for the position is an external gift, grant, or contract.

1. Fund 130 – State Laboratory of Hygiene
2. Fund 133 – Non-Federal Grants and Contracts
3. Fund 135 – Gifts & Donations – Wisconsin Alumni Research Association
4. Fund 165 – Veterinary Diagnostic Lab Non-State Agency Fees
5. Fund 233 – Gifts – General
6. Fund 533 – UW Madison Athletics – Gifts & Grants
7. Fund 142 - Fed aid - Hatch Adams - Land Grant Research
8. Fund 143 - Fed aid - Smith Lever - Land Grant
9. Fund 144 - Fed aid - Special Projects
10. Fund 145 – Fed aid – Work Study
11. Fund 147 - Fed aid - Student Loans
12. Fund 150 - Fed aid - Federal Indirect Cost Reimbursement
13. Fund 199 - Veterinary Diagnostic Lab-Federal Aid
14. Fund 161 - Endowment Trust Fund Income (876)
15. Fund 163 - Discovery Farm Grants (259)
16. Fund 172 - Rural Physician Residency Assistance Program (237)

3. **75% of the time working directly with students and/or patients.**

a. Positions that will spend 75% of their FTE over the course of the appointment term, either exclusively or in combination, engaging in frequent and consistent physical or virtual interactions that are directly related to the position's assigned job duties:

i. With individuals considering enrollment, accepted for enrollment, or enrolled at UW-Madison, or,

ii. With a human or animal that is under UW-Madison or an affiliate's medical care.

4. **Other positions funded 100% by gift/grant/contract.**
    a. Positions not otherwise included in the "Research" (1) and "Outreach" (2) categories whose salary cost at the **point of hire** is expected to be funded 100% by any individual or combination of the following funds reported to the Joint Committee on Finance; or, for funds not listed, where the hiring unit can clearly demonstrate that the funding source for the position is an external gift, grant, or contract.
        i. Fund 130 – State Laboratory of Hygiene
        ii. Fund 133 – Non-Federal Grants and Contracts
        iii. Fund 135 – Gifts & Donations – Wisconsin Alumni Research Association
        iv. Fund 165 – Veterinary Diagnostic Lab Non-State Agency Fees
        v. Fund 233 – Gifts – General
        vi. Fund 533 – UW Madison Athletics – Gifts & Grants
        vii. Fund 142 - Fed aid - Hatch Adams - Land Grant Research
        viii. Fund 143 - Fed aid - Smith Lever - Land Grant
        ix. Fund 144 - Fed aid - Special Projects
        x. Fund 145 – Fed aid – Work Study
        xi. Fund 147 - Fed aid - Student Loans
        xii. Fund 150 - Fed aid - Federal Indirect Cost Reimbursement
        xiii. Fund 199 - Veterinary Diagnostic Lab-Federal Aid
        xiv. Fund 161 - Endowment Trust Fund Income (876)
        xv. Fund 163 - Discovery Farm Grants (259)
        xvi. Fund 172 - Rural Physician Residency Assistance Program (237)

5. **Part-time student**
    a. Any position with employee category of Student Help or Student Assistant, or position with SJD in Job Families of Student Assistant, or Student Hourly, and is occupied by an individual that is concurrently enrolled in an official degree program.
        i. For the purposes of this definition, "Employees in training" (ETs) are not considered students. ETs are typically funded 100% by gifts/grants and their work is solely dedicated to their further development post degree attainment in their specific field.

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Position Cap Exemption Criteria Definitions

6. **Positions necessary to address subsequently enacted or expanded state and/or federal compliance mandates:**
    a. Positions necessary to address subsequently enacted or expanded state and/or federal compliance mandates, as validated by the university's central legal and human resources departments.

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Justification to Advance Position

The purpose of this form is to capture the S/C/D Dean, Director, or Vice Chancellors justification for why a position(s) needs to advance in the recruitment process, even though the position(s) is subject to the position cap. The form is **only** required for positions which may be subject to the position cap. Once approvals are secured, the form must be uploaded to the S/C/D Position Cap BOX folder and maintained in the recruitment file. The form will be reviewed by OHR prior to the publication of a job posting. *If the request is for the use of a DEI job title, OHR will work with the VCFA and CDO to confirm approval/denial and follow-up with the S/C/D HR Lead with a status update.*

Section 1: Department and Contact Information

Department Name:		**UDDS:**	
Hiring Manager (Name/Title):		**HR Business Partner (Name/Title):**	
Hiring Manager Email:	**Email:**	**HR Business Partner Email:**	**Email:**

Section 2: Position Details

PVL Number:		**Request Type:**		**Appointment Type:**	
# of positions requested for PVL:		**FTE %:**		**Recruitment Type:**	
Job Code & Official Title:			**Business Title:**		
Prior Incumbent(s) & EMPLID:		**Funding Source(s) and Distribution:**	**Funding String(s)**		**Distribution %**

Section 3: Justification for Hire

Which critical functions or responsibilities will not be completed if this position is not filled?	
Describe efforts to eliminate tasks or reallocate duties to other positions within the S/C/D.	
Describe efforts to collaborate with other campus units to re-imagine functions and or amount of effort required.	
Describe efforts to modify the position to reduce the FTE.	
If filling this position does not result in a net reduction in overall FTE, describe how you will manage the position cap through December 2026 for your S/C/D.	

Section 4: Approvals

By affixing your signature to this form, you attest to reviewing the title, position description, associated job duties, funding sources, reporting structure and justification for hire and you approve the advancement of this position.

HR Lead Signature:		**Date:**	
Finance Lead Signature:		**Date:**	
Assoc. VC/Assoc. Dean *(if applicable)*		**Date:**	
Dean/Director/VC Signature:		**Date:**	
OHR Reviewer:		**Date:**	