



*College of Engineering
Centralized and College Assessment Rates & Account Exemptions
March 24, 2026*

Purpose

This memorandum formalizes the College of Engineering (CoE) assessment [policy](#) as established in the December 31, 2014 memorandum issued by Dean Ian Robertson. This has been most recently updated in January 2026 and endorsed by Dean Devesh Ranjan. The applicable assessment rates, affected account types, and exemptions to ensure consistent application and understanding across the College are listed below.

Assessment Rates and Applicability

College and Campus Assessment Structure

The assessment is applied as follows:

1. Centralized Services Assessments (CSA)

a. Discretionary/Gift Accounts (233 accounts)

- 10% College of Engineering quarterly assessment on expenses
- No campus level assessment on 233 funds
- Assessed Quarterly
- Exemptions listed below in section 5.

b. Revenue-Generating Accounts (136 accounts <https://policy.wisc.edu/library/UW-3030>)

- Total assessment: 12% of revenue, comprised of:
 - 7% Campus assessment [Revenue Producing policy](#) and [Centralized Services Assessment policy](#)
 - The quarterly billing will be processed at the beginning of the [Centralized Services Assessment - UW-Madison Policy Library](#) month following the end of the quarter (e.g., the Q1 billing will be based on July – Sept data and will post in early October) per campus [policy](#).
 - 5% College of Engineering assessment (5% of base revenue)
 - Timing to match campus, processed quarterly by the college.

- Exemptions:
 - Break even conferences or colloquium hosted by fac/dept on a 136 account as an example would require a request for exemption.
 - Exemption request process in [campus policy](#)
 - Could use code 9321- Conferences, Workshops, etc.
 - Workday Processing – 136 Accounts
Due to Workday system configuration, Fund 136 assessments will post in two ways each quarter:
 - Campus assessment will post as a Supplies & Expenses (S&E) charge.
 - College of Engineering assessment will post as a revenue charge.
 - Reference: Campus policy on establishing a new [Revenue Producing Activity](#).
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Program-Specific Revenue Assessments

2. Accelerated Master's Programs (131 accounts)

- **30% total assessment on revenue.** Revenue = Gross tuition minus tuition waivers (Athletics, Veterans)
 - **10% campus assessment- [Policy](#)** (includes reference to the campus assessment but not the 10% number explicitly)
 - Applied in period 13 pre-Workday
 - Anticipating this will be applied annually at FY end going forward
 - **20% College of Engineering assessment on revenue.**
 - Applied quarterly in coordination with campus level assessment.
 - Instruction compensation- students enrolled in an MS accelerated program and taking courses across departments and colleges - refer to the Accelerated Programs Instructional Administrator (Lee DeBaillie as of 2026)

3. Summer Instruction Revenue

- Revenue distribution:
 - **10% Campus assessment on gross revenue, [Policy](#)**
 - **20% College of Engineering assessment on gross revenue**
- Summer expenses are charged to a department-specific, college-owned account prior to allocation of the summer revenue.
- Summer revenue is allocated to the College. They receive 90% of the gross, less campus assessment.

- The college applies a 20% assessment of the gross revenue and distributes the remaining revenue to departments based on course enrolments, less expenses accrued in expenses accounts, see above.
- This is typically finalized in mid-Fall semester.

131 rules override the Summer rules - if a student is enrolled in the MS accelerated program over the summer, the tuition will follow the 131 MS accelerated distribution policies (see section 2)

4. Interdisciplinary Professional (InterPro) Tuition Revenue Share

- **131 on-line Master's Degree Programs**
 - Per annual [Memorandum in DA Box folder](#)
 - 45% of gross course revenue is shared/transferred to the department teaching the course (the department paying/funding the instructor)
 - This is distributed to departments annually during the late spring semester.
- Revenue distribution:
 - 45% to Academic department per bullet above
 - 45% to InterPro
 - 10% Campus assessment

5. Assessment Exempt Accounts

The following account types are exempt from the **College of Engineering** assessments:

- 135 accounts funded by the Wisconsin Alumni Research Foundation (WARF)
- 233 department-use accounts
 - Professorships
 - Start-up packages
 - Retention packages
 - Competitive fellowships, scholarships, or traineeships
 - Residual research balance accounts
 - Residual balance accounts from fixed-price contracts
 - Departmental betterment accounts
 - Grainger Institute for Engineering Accounts
- 150 accounts
- 136 accounts that received an approved campus-level exemption (see 1b.)
- For all other exemptions or requests, please consult with the COE Deans Office Finance team (coebusserv@engr.wisc.edu).

Administration and Compliance

Departments and administrative units are responsible for ensuring assessments are applied accurately and that exempt accounts are properly classified. Questions regarding account eligibility, assessment application, or interpretation of this policy should be directed to the College of Engineering Dean's Office or designated fiscal leadership.