



**BOARD OF TRUSTEES
FINANCE AND FACILITIES COMMITTEE**

**Leonard D. Schiavone, Chair
John R. Jakubek, Vice Chair
All Trustees are Members**

**BACKGROUND MATERIALS
Wednesday, September 7, 2016**

- | | |
|---|--------------|
| 1. Budget and Interfund Transfers for the Quarter Ending June 30, 2016,
Reportable under Budget Transfers Policy Number 3356-3-11.1 (Previous Policy
Number 3010.01) | Tab 1 |
| 2. Diversity and EDGE Spend Report
Fourth quarter Diversity Spend Report with detail. | Tab 2 |
| 3. Report on Endowment Funds as of June 30, 2016 | Tab 3 |



YOUNGSTOWN STATE UNIVERSITY
Reportable Budget and Interfund Transfers
Quarter Ended June 30, 2016

BUDGET TRANSFERS WITHIN THE OPERATING BUDGET (i.e., General Fund and Auxiliaries):

FROM	TO	AMOUNT	REASON
<i>Various Operating Budgets</i>	<i>General Fund Budget Stabilization Reserve</i>		<i>Transfers totaling \$1,957,601 for Budget Reduction</i>
General Fund -Academic Depts.		\$967,524	
General Fund - Adm. Depts.		\$448,794	
College and Program Fees Funds		\$280,000	
Auxiliary Funds		\$261,283	

TRANSFERS OUTSIDE OF THE OPERATING BUDGET:

FROM	TO	AMOUNT	REASON
<i>FY2016 Year End Transfers</i>			
<i>General Funds</i>	<i>Operating Carry Forward (Designated Fund)</i>	\$2,835,251	<i>Transfer year end excess of \$2,835,251</i>
<i>Andrews Recreation & Wellness Center (Auxiliary Fund)</i>	<i>Various Funds (Unrestricted Plant Funds)</i>		<i>Transfer year end excess of \$89,501</i>
	Rec Center Improvement & Repairs Fund	\$50,000	
	Andrews Recreation & Wellness Center Plant Reserve	\$29,501	
	Wick Park Fitness Equipment	\$10,000	

TRANSFERS OUTSIDE OF THE OPERATING BUDGET:

FROM	TO	AMOUNT	REASON
<i>Housing Services (Auxiliary Fund)</i>	<i>Various Funds (Unrestricted Scholarship and Plant Funds)</i>		<i>Transfer year end excess of \$908,151</i>
	Scholarship Reserve	\$400,000	
	Lyden House Window Replacement PH1	\$200,000	
	Housing Internet Upgrade	\$100,000	
	FY17 Cafaro/Lyden Renovations	\$75,000	
	UC Renovation Fund	\$50,000	
	Lyden House Window Replacement PH2	\$50,000	
	Wick Park Fitness Equipment	\$25,000	
	Housing Services Plant Reserve	\$8,151	
<i>Housing Services (Various Plant Funds)</i>	<i>Housing Services Plant Reserve (Unrestricted Plant Fund)</i>	\$49,679	<i>Close out project funds.</i>
<i>Intercollegiate Athletics (Auxiliary Fund)</i>	<i>Various Funds (Plant Funds)</i>		<i>Transfer year end excess of \$144,901</i>
	Debt Service Reserve - Athletics	\$105,060	
	Bond Fund Series 2010 (Debt Service Fund)	\$39,841	
<i>Kilcawley Center</i>	<i>Kilcawley Center Plant Reserve (Unrestricted Plant Fund)</i>	\$24,899	<i>Transfer year end excess of \$24,899</i>

TRANSFERS OUTSIDE OF THE OPERATING BUDGET:

FROM	TO	AMOUNT	REASON
<i>Parking Services (Auxiliary Fund)</i>	<i>Various Funds (Unrestricted Plant Funds)</i>		<i>Transfer year end excess of \$710,206</i>
	Parking Services Plant Reserve	\$420,259	
	M70 & West of Fifth Gravel Lots	\$229,947	
	M36 Lot	\$60,000	
<i>Industry & Labor Steel Museum (Auxiliary Fund)</i>	<i>Research Office (Designated Fund)</i>	\$37,160	<i>Transfer year end excess of \$37,160</i>

TRANSFERS OUTSIDE OF THE OPERATING BUDGET:

FROM	TO	AMOUNT	REASON
<i>Fourth Quarter Transfers</i>			
Intercollegiate Athletics (Auxiliary)	Stadium Light Project (Unrestricted Plant Fund)	\$330,000	Transfer to fund portion of Stadium Light Project.
Parking Services (Auxiliary Fund)	M1 & M2 Summer 2015 Renovations (Unrestricted Plant Fund)	\$200,000	Transfer to fund parking deck renovations.
Insurance Deductible Fund (Unrestricted Plant Fund)	Capital Component Fund (Restricted Plant Fund)	\$192,243	Transfer funds back to source fund.
College Fee Carryforward Fund (Designated Fund)	Moser Hall 3rd Floor Lab (Unrestricted Plant Fund)	\$110,000	Transfer to fund portion of renovation project.
Financial Aid Match Funds (Restricted Funds)	General Fund	\$83,810	Transfer excess funds back to source fund.
General Fund	Technology Master Plan (Designated Fund)	\$75,000	Transfer to fund spending level reductions.
General Fund	AJT Tech Aide-Distance Learn 14 &15 (Restricted Fund)	\$70,500	Transfer for required match.
General Fund	Intercollegiate Athletics (Auxiliary)	\$60,431	Transfer to fund vacation payouts and salary adjustments.
General Fund	Capital Facilities Project Fund (Unrestricted Plant Fund)	\$55,508	Transfer fourth quarter administrative fee income.
General Fund	Academic Achievers (Restricted Fund)	\$50,000	Transfer to fund required match.
General Fund	Intercollegiate Athletics (Auxiliary)	\$44,140	Transfer to fund academic achievement incentives for coaches.
Judaic & Holocaust Studies Endowment Spending Fund (Restricted Fund)	Judaic & Holocaust Studies Endowment Fund (Endowment Fund)	\$40,000	Transfer unspent interest distributions to endowment principal.

TRANSFERS OUTSIDE OF THE OPERATING BUDGET:

<u>FROM</u>	<u>TO</u>	<u>AMOUNT</u>	<u>REASON</u>
Bond Fund - Series 2010 (Debt Service Fund)	Debt Service Reserve - General Fund (Unrestricted Plant Fund)	\$39,841	Transfer excess funds to original source.
College Fees Fund (General Fund)	Moser Hall 3rd Floor Lab (Unrestricted Plant Fund)	\$38,000	Transfer to fund portion of renovation project.
Veteran Resource Center (Restricted Gift Fund)	Debt Serve Reserve - Vets Center (Unrestricted Plant Fund)	\$37,010	Transfer quarterly cash received for Veterans Resource Center to debt service reserve fund. Outstanding pledges at 6-30-16 total \$120,750.
Debt Service Reserve - General Fund (Unrestricted Plant Fund)	Bond Fund - Series 2010 (Debt Service Fund)	\$36,448	Transfer to fund shortfall primarily due to federal subsidy reduction.
General Fund Plant Reserve (Unrestricted Plant Fund)	Salata Wall Rebuild Fund (Unrestricted Plant Fund)	\$31,600	Transfer to fund renovation project.
General Fund	Grad Assistant Intern - Thiel College (Restricted Fund)	\$25,500	Transfer for required match.

Youngstown State University
Fiscal Year 2016 Fourth Quarter Diversity Spend Report
April 1, 2016 through June 30, 2016

Diversity Spend - Goods and Services (excludes EDGE and construction)

	Fourth Quarter	Year to Date	% of Addressable	Prior Year	% of Addressable
MBE - Ohio Certified	\$526,754	\$889,895	6.45%	\$783,506	5.85%
MBE - Other Certified	133	9,545	0.07%	73,600	0.55%
Disability Challenged	186,010	571,714	4.15%	559,474	4.17%
Recycled Materials	25,817	106,242	0.77%	150,344	1.12%
Veteran Owned	17,096	49,122	0.36%	112,705	0.84%
Woman Owned	7,610	393,390	2.85%	234,915	1.75%
Total Diversity Spend	\$763,420	\$2,019,908	14.65%	\$1,914,544	14.28%
Total Addressable Spend - Goods and Services	\$3,221,430	\$13,787,913	100.00%	\$13,404,667	100.00%

EDGE Spend - Goods, Services, and Construction

	Fourth Quarter	Year to Date	% of Addressable	Prior Year	% of Addressable
EDGE - Ohio Certified - Construction	\$12,000	\$1,147,442	4.78%	\$297,841	1.41%
Total EDGE Spend	\$12,000	\$1,147,442	4.78%	\$297,841	1.41%
Total Addressable Spend - Goods, Services, and Construction	\$4,309,815	\$23,984,115	100.00%	\$21,153,422	100.00%

Youngstown State University (YSU) does not discriminate on the basis of race, color, national origin, sex, sexual orientation, gender identity and/or expression, disability, age, religion or veteran/military status in its programs or activities. Please visit YSU's [Commitment to Accessibility webpage](#) for contact information for persons designated to handle questions about this policy.

Youngstown State University
Diversity Spend Detail Report - Goods and Services
(excludes EDGE and construction)
April 1, 2016 through June 30, 2016

Minority Business Enterprise (MBE) - Ohio Certified

Name	Address	Type of Contract	Purchases
B R Johnson Cleaning Services	P.O. Box 282, Akron, Ohio 44309	Janitorial Services	\$88,345
Brown Enterprise Solutions	5935 Wilcox Place, Suite E, Dublin, Ohio 43016	Computer Supplies	438,409
Subtotal - MBE - Ohio Certified			\$526,754

Minority Business Enterprise (MBE) - Other Certified

Name	Address	Type of Contract	Purchases
Staples - Tier 2	4170 Highlander Parkway, Richfield, Ohio 44286	Office Supplies	\$133
Subtotal - MBE - Other Certified			\$133

Disability Challenged

Name	Address	Type of Contract	Purchases
Compass Family Services	535 Marmion Avenue, Youngstown, Ohio 44502	Janitorial Services	\$186,010
Subtotal - Disability Challenged			\$186,010

Recycled Materials

Name	Address	Type of Contract	Purchases
Staples - Tier 2	4170 Highlander Parkway, Richfield, Ohio 44286	Office Supplies	\$25,817
Subtotal - Recycled Materials			\$25,817

Veteran Owned

Name	Address	Type of Contract	Purchases
D & D Industrial Supply	225 McClurg Road, Boardman, Ohio 44512	Linen Service	\$168
Ibis Specialized Vehicles	912 Pittsburgh Road, Butler, Pennsylvania 16002	Safety Equipment	11,123
McRoyal Industries Inc.	1421 Lilac Street, Youngstown, Ohio 44502	Maintenance Supplies	4,247
Roby Supply	42 North Torrence Street, Dayton, Ohio 45403	Janitorial Supplies	1,558
	Subtotal - Veteran Owned		\$17,096

Woman Owned

Name	Address	Type of Contract	Purchases
Data Ticket Inc.	4600 Campus Drive, Newport Beach, California 92660	Parking Software	\$174
iVideo Technologies	14885 Sprague Road, Strongsville, Ohio 44136	Video Supplies	270
Protect-N-Shred	P.O. Box 85, Cortland, Ohio 44410	Document Shredding	4,985
RBD Instruments Inc.	2437 NE Twin Knolls Drive, Bend, Oregon 97701	Laboratory Equipment	436
Roar Postal Supplies & Solutions	10600 W. 108th Terrace, Overland Park, Kansas 66210	Postal Supplies	348
Staples - Tier 2	4170 Highlander Parkway, Richfield, Ohio 44286	Office Supplies	831
Union Eyes Optical Inc.	Suite B, 229 Churchill Hubbard Road, Youngstown, Ohio 44505	Public Safety Supplies	115
Your Image Works	4353 W. 96th Street, Indianapolis, Indiana 46268	Promotional Items	451
	Subtotal - Woman Owned		\$7,610
	Total Diversity Spend		\$763,420

Youngstown State University
EDGE Spend Detail Report
April 1, 2016 through June 30, 2016

Encouraging Diversity, Growth, and Equity (EDGE) - Ohio Certified

Name	Address	Project	Purchases
Western Reserve Mechanical	3041 South Main Street, Niles, Ohio 44446	Melnick/Renovations	<u>\$12,000</u>
	Total EDGE Spend		<u><u>\$12,000</u></u>

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
<i>Awards</i>				
CLASS	Candace Gay Memorial Awards Junior and senior high school student who exhibits distinctive writing ability and to provide a stipend to the annual author-lecturer at the YSU English Festival. Two \$100 awards.	\$ 230,868	\$ -	\$ 10,421
Financial Aid	Charles E. and Mary E. Franklin Fund Student research award.	2,337	685	109
CLASS	Charles W Baird Memorial (Honors Day) Award to be made each Honors day to student showing excellence in English.	17,665	-	827
CLASS	Clingan Jackson To be awarded for scholarship invigorated by the traditions of a free and inquiring press and by active participation in the work of a government agency or a political party.	5,902	-	276
CLASS	David Scott Ives Memorial Endowment To recognize achievement in classical languages at the advanced level.	7,524	445	352
CLASS	Gary L Green Award English major with 48-107 hours who has done outstanding work in English 3700 and otherwise shown strong academic promise. Annual award of \$300.	60,636	3	2,840
CHHS	Hajejan Feldmiller Human Ecology scholarship. \$400 award.	17,137	2,524	803
CCAC	Joseph Salvatore (Honors Day) Student majoring in studio art or art history with a 2.5 GPA. The award will be given at the Honors Convocation.	13,218	1,801	619
CSIS	Kenmore B Drake Memorial Award (Honors Day) Must be at least a junior by the subsequent Fall Semester. Applicants must be majoring in Information Technology with a minimum 2.5 GPA. Applicants must show leadership and a demonstrated commitment and enthusiasm for the field of information technology. Award will be made during the Honors Convocation.	10,026	2,128	470
CHHS	Margaret C Horvath Scholarship Endowment Travel money for Human Ecology students attending professional meetings outside Mahoning County. Preference given to students who are presenting at the meeting.	3,971	209	186
CLASS	Marion Blum Graduate History Award Provide a \$50 bond for a graduate history essay award.	3,856	2,628	181
STEM	Nicola & Rocchina Richley Memorial Award Sophomore Engineering or Engineering Technology major who has demonstrated academic excellence and is committed to program completion. Must have completed at least one term of the sophomore year with a minimum 3.0 GPA. Annual award given on alternate years.	19,252	1,813	902
CLASS	Robert R Hare Writing Award (Honors Day) Two awards. Recipient for Journalistic Writing should be a full-time student at YSU who has demonstrated distinction in journalistic writing. Recipient for Distinction in Creative and Critical Writing should be an English major at YSU who has demonstrated distinction in creative or critical writing or both. Each award \$250, \$500 annually.	26,902	-	1,260

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
	<i>Program Support</i>			
WCBA	Mary B Smith Full-time, non-traditional, female who has completed at least 45 hours and at maximum 145 hours with a minimum GPA of 2.5 and is currently enrolled.	12,893	1,665	604
CLASS	Sister Jean Gillespie Memorial Award (Honors Day) Outstanding senior in religious studies whose academic program best exhibits an interest in comparative religion.	8,297	818	389
CLASS	Albert J Shipka Memorial Speakers Fund Up to \$2,500 per year may be made available by faculty and students in discipline-related activities, including activities by the Philosophy and Religious Studies Club. The Chairperson of the Department of Philosophy and Religious Studies remains the signature authority for distribution of the funds for annual utilization in discipline-related activities.	577,985	24,714	26,996
CLASS	Alice Budge Peace Speakers Fund To support speakers on peace and justice issues.	13,552	7,199	635
Public Service Institute	Bertram Tamarkin Fund operations for the Center for Human Services.	21,279	-	997
University Relations	Campus Beautification To provide support for maintaining trees and planters.	29,166	109,031	1,366
Academic Administration	Dr. and Mrs. F.F. Piercy Book Fund Annual book purchases for Library.	23,372	9,440	1,095
CLASS	Dr. James Dale Ethics Center For exclusive use of the Ethics Center. Funds used to enhance the activities and programs of the Ethics Center.	505,456	14,297	23,676
Academic Administration	Edward J DeBartolo Fund Devoted exclusively to funding activities related to updating the University's curriculum.	701,404	223,675	32,855
Student Life	Ethel M Wood Epilepsy Foundation Fund Fund graduate assistantship to provide guidance and counseling services to handicapped students, particularly those afflicted with any form of epilepsy.	207,445	20,385	9,717
CLASS	Gratia Murphy Speaker Fund Interest income from this endowment will be used to pay expenses connected with bringing in an outside speaker or visiting scholar for public, University, and/or classroom presentations. Intended for English Department use other than the English Festival.	53,800	-	2,520
CLASS	James A Houck English Festival Funds used to support designated programs, contests, and student awards associated with the YSU English Festival. Maximum amount available for use each year shall be the amount of interest earned by the fund in the previous year. There is no minimum amount that must be used annually. Each year the English Festival Committee shall designate particular Festival activities for funding by the James A. Houck Fund.	29,576	73	1,385
CLASS	Judaic & Holocaust Fund To maintain and promote present and future Judaic & Holocaust courses. Sum up to \$500 can be set aside for annual advertising expenses.	354,828	36,616	20,460
WCBA	Michael I Monus Professor Entrepreneurship Development of the entrepreneurship program.	742,626	71,236	34,786
CLASS	Morris & Sophie Slavin Fund For the Department of History to bring to the campus recognized scholars in the field of history.	29,839	18,942	1,398

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
<i>Program Support, continued</i>				
CLASS	Muses Fund Provide support to YSU Poetry Center annually. Poetry Center will include the name of the endowment in its program, publications and announcements.	22,390	205	1,049
STEM	R H Weichsel Instruction and faculty research and professional development in area of plane bearing technology.	4,018	3,212	188
Academic Administration	Richard James Owen II Use to purchase books, manuscripts, subscriptions for MAAG Library.	2,337	10,335	109
WYSU	Robert Coe (WYSU-FM Fund) Support of WYSU-FM in the broadcast of classical music.	189,117	52,607	8,859
Academic Administration	The Beckman Memorial Collection Buy books for MAAG library. Titles purchased will be in the fields of literature, music & engineering.	111,350	40,084	5,216
CLASS	Thomas & Carol Gay English Festival Lecture Fund To provide the services of the YSU English Festival's annual featured author-speaker.	343,499	-	15,686
CLASS	English Festival Support the objectives of the YSU English Festival.	82,892	7,426	3,821
CCAC	Donald P. Pipino Performing Arts Endowment In support for the Performing Arts Series at Youngstown State University. The funds are restricted to the support of productions in the Performing Arts Series, including the Dana Concert Series and opera.	14,693	-	688
CHHS	Danielle L. Peters Program Endowment to Promote Awareness of Eating Disorders This endowment was established to help fund education and outreach programs for YSU students, faculty, staff and community members on topics related to eating disorders and healthy body image. Funds are restricted to the support of expenses related to coordinating and presenting the program or activity.	10,233	198	474
<i>Scholarships</i>				
CCAC	Judith Rae Solomon Gallery Endowment Up to \$50,000 of this endowment will be used at the Dean's discretion to support physical improvements to Bliss Hall Gallery and critical needs of the College of Creative Arts and Communication; the balance will be used to establish a supporting endowment for programming and maintenance related to the Gallery as well as for the overall needs of the College of Creative Arts and Communication.	509	39	24
STEM	Adlaka & Associates Scholarship Five \$200 scholarships, three for senior civil or structural engineering and two for computer technology. Recipient shall be son or daughter coming from a family where the head of household is presently unemployed.	38,370	4,465	1,797
STEM	Albert A Guerrieri, Jr. Memorial Scholarship Annual scholarship of \$500 to be presented each year at Honors Convocation to a Physics/Astronomy major with at least 45 hours, maintaining a 3.0 GPA or above and in need of scholarship money. The student is to be selected by the chair and faculty of the Physics and Astronomy Department.	22,761	1,275	1,066
Financial Aid	Ann & Jerome Schmerin Scholarship Full or part-time students with a 2.5 GPA or better and demonstrating financial need. Recipient must be a non-traditional student with a major in the College of Creative Arts and Communication. The scholarship is renewable.	17,571	5,447	823

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
<i>Scholarships, continued</i>				
Financial Aid	Bernadine Marinelli Memorial Scholarship The recipient shall be an outstanding Resident Assistant with Housing and Residence Life and/or a student supervisor in Kilcawley Center or the YSU Bookstore. The scholarship shall be awarded on the basis of merit as determined by a Selection Committee.	66,091	6,994	3,095
Financial Aid	Betty J Connors Memorial Award Non-traditional full or part-time woman who's completed 45 quarter hours with at least a 3.2 GPA. Must be an English major. Annual award of \$300.	24,071	1,647	1,128
Athletics	Bill Dailey Scholarship Current member of the YSU Intercollegiate Basketball Team to continue and/or complete undergraduate studies.	17,324	962	811
Financial Aid	Brier Hill Scholarship Present or former descendants of Briar Hill with a 2.8 GPA. Preference will be given to non-traditional student with Junior rank or higher. All circumstances being equal, financial need will be considered.	24,893	881	1,166
CLASS	Dorothy Z Greenberger Memorial Scholarship Fund Annual scholarship grant to a needy student or students with academic ability majoring in Arts and Sciences.	22,060	3,463	1,033
EDUC	Dr. Gunapala Edirisooriya Scholarship The recipient must be a candidate in good standing pursuing a degree in Educational Administration or their doctorate in Educational Leadership; and, either have demonstrated an exemplary commitment to the education and social development of children who, by circumstances not of their own making, are at risk of not fulfilling their potential; or, have engaged in dissertation research that holds out unusual promise of promoting social justice by altering school policies or practices that pose a barrier to equal and equitable educational opportunities for students.	14,494	91	679
EDUC	Dr. Phillip Ginnetti Memorial Scholarship Resident of Mahoning County, preference given to a resident of Struthers, Ohio. Early or Middle Childhood Education major. Formally accepted into upper division coursework in the Beeghly College of Education. Must have an overall GPA of 3.5 or better and be a full-time student.	13,579	1,038	634
CCAC	DUSI Memorial Scholarship Fund Scholarships for worthy music students.	124,371	6,904	5,826
STEM	Edmund J Salata Memorial Scholarship Civil engineering student with a 3.0 GPA.	12,547	697	588
CCAC	Elaine Glasser Memorial Art Education Scholarship Junior or senior art education major showing financial need with a 3.0 GPA. Recipient must teach at least two years in the first five years after graduating or must repay the scholarship amount.	18,626	1,356	872

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
	<i>Scholarships, continued</i>			
CCAC	<p>Esotto & Vera Pellegrini For music students based on outstanding ability or potential for excellence in field of brass playing. Must be a full-time student, maintain a 3.0 GPA and be a member of a major ensemble. Will be selected through an audition process before the brass faculty and director of Dana School of Music. The scholarship should be awarded first to a qualified trumpet player. If there is not a suitable trumpet candidate, then the award may go to a qualified brass student selected by the brass faculty.</p>	43,504	2,415	2,038
Financial Aid	<p>Eugene Green Memorial Scholarship Two equal scholarships would be awarded annually. Recipient must be a sophomore standing or higher. Preference given to members or direct descendants of a Western Reserve Building and Construction Trades member, in good standing, in Mahoning, Trumbull, or Columbiana counties. Open to all majors with first preference to students enrolled in WCBA. Full-time student with an overall GPA of 2.5 or better.</p>	66,932	19,079	3,135
Financial Aid	<p>Ferdinand Jagatich Scholarship Student majoring in math, physics or engineering and demonstrating financial need. The student must maintain at least a 2.5 GPA or better, may be at any level of their degree and be a full or part-time student. If a part-time, the student must maintain employment to be eligible. Scholarship renewable.</p>	29,212	3,890	1,368
BCOE	<p>Florence Amon Scholarship Fund Full or part-time student majoring in Education with a 3.0 GPA and demonstrating financial need.</p>	19,724	6,332	924
STEM	<p>Frank M Clark Students majoring within the department of Physics & Astronomy. Awarded on basis of academic achievement and need. Amount and date will be decided by the department. Any residue may be used to purchase equipment for student or faculty research at the discretion of the faculty of the Department of Physics and Astronomy.</p>	29,600	1,646	1,387
STEM	<p>Gerhard M Stein Electrical Engineering Electrical engineering student.</p>	5,256	315	246
Financial Aid	<p>Gina Tenney Memorial One annual scholarship around \$400 to a sophomore that qualifies for the Dean's list with a major in Arts or Humanities and is active in campus activities. Must complete an application and submit two letters of recommendation.</p>	13,670	6,931	640
WCBA	<p>Grocery Manufacturers Rep's of Youngstown (GMRY) School of Business student whose parents work in the Youngstown area grocery business if possible.</p>	5,843	2,738	274
Athletics	<p>Harry K Graebing Athletic Scholarship Fund Provide scholarships or other forms of financial assistance to deserving students of the University; and that awards be made only to deserving students who may be participants in University athletics and are residents of either Ohio or Pennsylvania.</p>	35,036	1,945	1,641
BCOE	<p>Harvey Neal Kretzer Memorial Scholarship Scholarship for School of Education master's candidate in school counseling and/or related pupil personnel services with a demonstrated interest in pursuing a career with disadvantaged students. If no worthy recipient is available, scholarship may be awarded to undergraduate student pursuing a career in teaching with a demonstrated interest in disadvantaged students. All awards based upon scholarship and need.</p>	90,844	6,461	4,255

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
<i>Scholarships, continued</i>				
BCOE	Helen Edward Stoll Students majoring in Education with interest in the learning disabled with a 2.5 GPA and resident of Mahoning County.	32,740	7,333	1,534
CCAC	Helen Goering Schmitt Music Trust Scholarships for students in the Dana School of Music.	7,012	389	328
STEM	Herta Jackson Memorial Scholarship Needy engineering students.	431,461	52,941	20,210
Financial Aid	Honorable Erskine Maiden Jr. Scholarship Student who is a resident of Mahoning County and demonstrates financial need as determined by the FAFSA. Office of Financial Aid & Scholarships will have the final decision in awarding this scholarship.	568,154	41,935	26,613
WCBA	JAD Scholarship Fund Full-time student in good standing with 2.5 GPA demonstrating financial need. One annual scholarship.	193,665	23,738	9,072
University Wide	John and Lucille Fedor Scholarships for worthy students.	728,082	-	34,104
CLASS	Julia Spitzer Jewish students who show financial need.	33,360	7,581	1,563
Financial Aid	Louis D Tauro Scholarship Entering freshman based on financial need and high school academic achievement. Must maintain a 3.0 GPA or higher. The donor may nominate recipients. Renewable for four years.	111,668	17,913	5,231
CHHS	Mary E Pinney Nursing Scholarship Assist freshman or sophomore nursing students. Applicants must be residents of Ohio or Pennsylvania.	35,059	1,946	1,642
CCAC	Mary P Rigo Memorial Scholarship YSU student(s) who have completed 95 hours, must be a music major with emphasis in keyboard instruments, restricted to students who are residents of Mahoning County. Scholarship not to exceed \$500 each for one or more students.	26,964	1,295	1,257
STEM	Michael A Rigo Memorial Scholarship YSU student(s) who have completed 95 hours, award restricted to Mechanical Engineering student(s) who are residents of Mahoning County. Scholarship not to exceed \$500 each for one or more students.	26,964	1,649	1,257
CLASS	Michael Klasvosky Geography Award Geography students selected by geography department.	22,680	1,060	1,062
CLASS	Michael Klasvosky Urban Studies Scholarship Students majoring in geography who are employed in the department of Urban Studies.	10,451	1,619	490
CSIS	Mildred N Graebing Business Education & Technology Scholarship Fund Annual awards to deserving students who are enrolled as full-time students in an information technology major.	35,059	16,365	1,642
CLASS	Myron C Wick, Jr. Three academic scholarships, two in the physical sciences and one in engineering.	217,363	12,234	10,182
CCAC	Nellie P Nick Scholarship Fund Provide scholarships or other forms of financial assistance to deserving students of the University; and that awards be made only to women students who may be enrolled in the Dana School of Music.	11,686	649	547

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
<i>Scholarships, continued</i>				
Financial Aid	Peter George Parthemos Recipient is to be an entering student or existing YSU student who has a major in the Williamson College of Business Administration and is of Greek decent. One recipient will receive a \$500 scholarship, renewable annually, considering the recipient maintains a 3.0 GPA, or higher. The second scholarship will be awarded, preferably, to a parishioner at St. John's Greek Orthodox Church. Father Tom Constantine will assist in the selection of this recipient, along with the Office of Financial Aid and Scholarships. If there isn't anyone eligible for this component, then the scholarship will be deferred to a WCBA student.	72,134	14,910	3,379
STEM	Reel & Fabek Memorial Scholarship Sophomore or higher status, with financial need and in good standing majoring in electrical engineering.	21,711	1,206	1,017
Student Affairs	Ronald Barnes and Emily Parker Mackall Scholarship Junior or senior with at least a 2.8 GPA. Student must have completed one year of basic economic principles and one year of fine arts classes. Available to students in the 5 county area as well as Beaver County, PA.	66,795	4,522	3,129
CHHS	Roseann Waindel Memorial Nursing FD Nursing scholarship. Evidence of financial need with a 3.0 GPA. Must have an interest in a career as a nurse.	23,191	1,287	1,086
CHHS	Theodore & Evelyn Chengelis Memorial (Honors Day) Student of Hellenic heritage who will matriculate to medical school. Recipient will be selected by the Chengelis family of Boston and the award will be given at the Honors Convocation.	29,137	2,076	1,365
Financial Aid	Thomas Fabek & Peter Fabek Scholarship Endowment An orphan or foster child from Youngstown with 2.5 or higher GPA. If candidate from Youngstown doesn't qualify, a candidate may come from another city in Mahoning County. First year students may apply. Scholarship is renewable for recipient that maintains a 2.5 GPA. Catholic Services or Mahoning Juvenile Dept. may suggest candidate.	25,818	1,560	1,209
Financial Aid	UAW Local 1112-BOC Lordstown Scholarship Fund Spouses and dependents of UAW Local 1112 and full-time salaried employees of BOC Lordstown Assembly plant. Employees must have been affiliated with the union and/or assembly plant for more than one year. Full-time sophomore to senior status with a 2.5 GPA. Students receiving other financial aid, including G.I. Bill are not eligible. Students with loans may apply.	44,950	28,564	2,106
STEM	Virgil A Hobart Scholarship Worthy engineering student based on need or merit. One award per year, \$1,000 maximum amount.	22,785	1,266	1,067
WCBA	William Petrych Memorial Scholarship Junior or senior majoring in accounting with a 3.2 GPA and displaying financial need. Scholarship is renewable each year until student graduates. One or two scholarships annually.	226,283	13,247	10,599
Financial Aid	YSU General Endowment Fund Assist the financial needs of advanced education.	874	-	
CCAC	Robert E. Fleming Memorial Scholarship Students accepted into the Dana School of Music. First choice to school districts within the Mahoning Valley. Second choice to school districts within the Shenango Valley. Third choice to deserving students outside of the immediate region. Must be majoring in music education or music performance and maintain a 2.5 GPA. FASFA must be completed.	14,879	205	697

YOUNGSTOWN STATE UNIVERSITY
Endowment Fund Report as of June 30, 2016

COLLEGE or AREA	ENDOWMENT FUND - RESTRICTION	ENDOWMENT FUND BALANCE (FAIR VALUE)	SPENDING FUND BALANCE	FY 2017 INCOME DISTRIBUTION
<i>Scholarships, continued</i>				
CCAC	Albert D. Caldron Memorial Scholarship Endowment Students accepted into the Dana School of Music. Be a full-time student and registered for major level lessons in clarinet as a Music Education or Music Performance major. Maintain a minimum 3.0 GPA. Preference will be given to students demonstrating financial need.	22,428	1,184	1,051
N/A	APAS Scholarship Endowment First priority given to an APAS dependent. Must have completed 12 semester hours at YSU or 9 semester hours as a graduate student and be enrolled at least half time. GPA of 2.5 or higher for undergraduate students and 3.0 or higher for graduate students. One-time, non-renewable scholarship.	7,300	570	328
WCBA	Robert C. & Janice Machin Endowment Student must be pursuing a Bachelor of Science in Business Administration or a Master of Business Administration with a demonstrated interest in or experience in international business. Must have aspirations for a career in international business, have a desire to work abroad and to serve as a senior-level executive in the future. Sophomore standing or higher with an overall GPA of 3.0 or better. Full-time student.	26,986	1,474	1,264
WCBA	Mark E. Moore Memorial Scholarship Students pursuing a BSBA at Williamson College of Business Administration. Must be a Boardman high school graduate. Freshman standing or higher with an overall GPA of 2.7 or better. Full-time student with financial need as a consideration.	11,353	628	532
CHHS	The Marjorie A. Morley Endowed Scholarship Fund for Nursing Students must be a junior or senior, enrolled full time pursuing a major in nursing. Must have a 3.0 GPA or higher, be a graduate from a high school in the Mahoning Valley and demonstrate financial need.	10,156	414	476
STEM	The Bernard James Yozwiak Mathematics Scholarship Must be a full time student and have attained the class rank of Senior at Youngstown State University with a major in Mathematics. The student must also demonstrate outstanding academic performance, particularly in mathematics. They also must show potential to make continuing contributions to, and participation in, the discipline of mathematics.	12,301	367	564
Totals June 30, 2016		\$ 8,399,683	\$ 1,013,529	\$ 396,269