

**BOARD OF TRUSTEES  
FINANCE AND FACILITIES COMMITTEE**

**James E. "Ted" Roberts, Chair  
Samuel W. Grooms, Vice Chair  
All Trustees are Members**

**Wednesday, December 6, 2017  
2:00 p.m. or immediately following  
previous meeting**

**Tod Hall  
Board Meeting Room**

**AGENDA**

- A. Disposition of Minutes for Meeting Held September 6, 2017**
- B. Old Business**
- C. Committee Items**

**1. Finance and Facilities Action Items**

- Tab C.1.a. a. Resolution to Approve Room and Board Rates and Fees for University Housing, Effective Summer/Fall Semesters 2018**  
Eddie Howard, Associate Vice President for Student Experience, will report.
- Tab C.1.b. b. Resolution to Approve Room Rental Rates for University Courtyard Apartments, Effective Fall Semester 2018**  
Eddie Howard, Associate Vice President for Student Experience, will report.
- Tab C.1.c. c. Resolution to Modify and Amend the FY 2018 Parking Services Budget and Reverse the Transportation Fee Increase**  
Neal McNally, Vice President for Finance and Business Operations, will report.
- Tab C.1.d. d. Resolution to Approve the *Penguin Tuition Promise*, an Undergraduate Tuition Guarantee Program**  
Neal McNally, Vice President for Finance and Business Operations, will report.
- Tab C.1.e. e. Resolution to Approve the 2017 Affordability and Efficiency Report**  
Neal McNally, Vice President for Finance and Business Operations, will report.
- Tab C.1.f. f. Resolution to Approve Interfund Transfers**  
Katrena Davidson, Controller, will report.

**2. Finance and Facilities Discussion Items**

**Tab C.2.a.**

**a. Quarterly Update on FY 2018 Operating Budget**

Neal McNally, Vice President for Finance and Business Operations, will report.

**Tab C.2.b.**

**b. Planning and Construction Projects Update**

John Hyden, Executive Director of Facilities and Support Services, and Rich White, Director of Planning and Construction, will report.

**c. Update on Information Technology**

Jim Yukech, Associate Vice President and Chief Information Officer, will report.

**d. Report of Audit Subcommittee**

A verbal report of the Audit Subcommittee will be presented. James E. "Ted" Roberts will report.

**e. Report of Investment Subcommittee**

A verbal report of the Investment Subcommittee will be presented. Samuel W. Grooms will report.

**D. New Business**

**E. Adjournment**



**RESOLUTION TO APPROVE  
ROOM AND BOARD RATES FOR UNIVERSITY HOUSING,  
EFFECTIVE SUMMER/FALL SEMESTERS 2018**

**WHEREAS**, Ohio law provides that each Board of Trustees of state-assisted institutions of higher education may establish special purpose fees, service charges, and fines and penalties; and

**WHEREAS**, the University Housing is seeking an increase to its Room and Board Plans for FY18-19; and

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the room and board rates for University Housing, effective summer/fall semesters 2018, as shown in Exhibit \_\_, attached hereto.

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## **Justification for FY18-19 University Housing & Dining Rates Increase**

This is a request to increase the room and board fees as shown on attached. Chartwells contract allows for a 3% increase annually. We propose to increase the room rates for current students by 2.0 %. These will combine for a 2.3% proposed increase. The reason we are seeking an increase in room rates is we have decided to add Micro-fridges to each room. We anticipate an increase to salary rates with current negotiations. We have hired new staff who are doing so much more with programming for students and the re-creation of the living learning communities requires additional funding of events and activities. Additionally, the facilities audit has been completed and we need to invest monies into repairing and replacing systems.

We are also seeking an increase to single room costs – most universities charge a double cost (200%) for single rooms – we seek 150% for a single room. We will be adding some single rooms to our inventory for fall and so we needed a new rate for those rooms.

Additionally, we would like to change the break fees to not include meals. In the past, we charged for Pete's points. Now that the student's points roll over from fall to spring, we would like to not charge additional costs and let the students use accumulated points or pay on their own for food.

Finally, we have adjusted summer room fees to reflect an increase in room rents annually.

If the university moves forward with a four year guaranteed rate, we have proposed that cost which will stay for four years for entering students new to YSU in Summer/Fall 2018. This rate is estimated that even though we will lock in rates, most students will move to an apartment by junior year.

**YOUNGSTOWN STATE UNIVERSITY**  
**Housing Charges 2018-2019**

Fee Description	FY17-18 Actual	FY18-19		
		Proposed	\$ Change	%Change
<b>Room &amp; Board</b> (per academic year) <b>F2018 Cohort</b>		\$9,400.00		NEW
<b>Room &amp; Board</b> (per academic year) Continuing Students	\$9,090	\$9,312	\$222.00	2.30%
<i>Room</i>	\$5,558	\$5,671	\$113.00	2.00%
<i>Board</i>	\$3,532	\$3,641	\$109.00	3.00%
<b>Residence Hall Application Fee</b> (academic year and/or summer)		\$35	\$35.00	NEW
<b>Single Room Surcharge</b> (per semester)	\$900	\$1,400	\$500.00	55.56%
<b>Weller House Apartments</b> (per Academic Year-room only)	\$8,000	\$8,000	\$0.00	0.00%
<b>Weller House Shared Apartment</b>	\$7,000	\$7,000	\$0.00	0.00%
<b>Wellet House Family Apartments</b>	\$10,000	\$10,000	\$0.00	0.00%
<b>Student Housing During Academic Breaks</b>				
1 - 3 days (no meals, per day)	\$26	\$26	\$0.00	0.00%
Per week (no meals, per week)	\$205	\$182	(\$23.00)	-11.22%
<b>Summer</b>				
Room and Board (10 meals per week)	\$260	\$285	\$25.00	9.62%
Apartments in Weller House rates prorated for current tenants/per month		\$400	\$400.00	NEW

## Housing Fee Comparisons (Dbl. Room w/ Full Meal Plan) for 2017-2018

### OHIO

Institution	Fees	Type of Room	Room	Board
Kent State	\$11,620	Trad Dbl	\$6,876	\$4,744
Miami of OH	\$12,802	Multiple Occupancy	\$7,810	\$4,992
Ohio University	\$12,438	Double Occupancy	\$6,161	\$6,176
Ohio State	\$12,998	Dbl w/ ac	\$8,348	\$4,650
U of Akron	\$11,290	Trad Dbl	\$7,020	\$4,270
U of Cincinnati	\$11,118	Multiple Occupancy	\$6,624	\$4,494
Cleveland State	\$10,914	Dbl	\$7,054	\$3,860
U of Toledo	\$10,758	Dbl	\$7,108	\$3,680
Shawnee State	\$9,972	Apt./Townhouse	\$6,228	\$3,744
Bowling Green State U	\$9,892	Double Occupancy	\$5,580	\$4,312
Central State	\$9,934	Trad Dbl	\$5,340	\$4,594
Wright State	\$9,458	Trad Dbl	\$5,710	\$3,748
Youngstown State	\$9,090	Dbl	\$5,558	\$3,532

### W. PA

Institution	Fees	Type of Room	Room	Board
Clarion	\$12,478	Trad Dbl	\$8,770	\$3,708
California U of PA	\$11,764	1 BR 1 BA Suite (Dbl)	\$6,592	\$5,172
Edinboro	\$9,454	Trad Dbl	\$5,840	\$3,614
Slippery Rock	\$7,058	Trad Dbl	\$3,488	\$3,570



**RESOLUTION TO APPROVE ROOM RENTAL RATES  
FOR UNIVERSITY COURTYARD APARTMENTS,  
EFFECTIVE FALL SEMESTER 2018**

**WHEREAS**, Ohio law provides that each Board of Trustees of state-assisted institutions of higher education may establish special purpose fees, service charges, and fines and penalties; and

**WHEREAS**, the University Courtyard Apartments were acquired by the University in 2011; and

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the room rental rates for the University Courtyard Apartments, effective fall semester 2018, as shown in exhibit \_\_, attached hereto.

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**University Courtyard Apartments  
Monthly Room Rental Rates**

<u>Unit Type</u>	<u>Proposed FY 2019</u>	<u>Actual FY 2018</u>	<u>Percent Increase</u>	<u>Dollar Increase</u>
1 Bed / 1 Bath	\$815.00	\$805.00	1.2%	\$10.00
2 Bed / 2 Bath	\$690.00	\$680.00	1.5%	\$10.00
4 Bed / 2 Bath	\$600.00	\$590.00	1.7%	\$10.00

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**Exhibit \_\_\_\_**



## **Justification for FY18-19 University Courtyard Room Rental Rates Increase**

Effective fall semester 2018, Housing Services proposes to raise the rental rates for the University Courtyard Apartments by \$10 for each unit type, which is a flat rate that will provide additional revenue needed to maintain these facilities and fund auxiliary overhead charge increase and maintain competitive rates.

## University Courtyard - Youngstown 2018-19 Rental Rate Proposal

### Current Approved Rates for 2017-2018 School Year

Unit Type	Total Beds	Market Rent Per Bed Per Month	Monthly Gross Potential - Base Rent	Annual Gross Potential - Base Rent
1 bed 1 bath	8	\$805	\$6,440	\$77,280
2 bed 2 bath	88	\$680	\$59,840	\$718,080
4 bed 2 bath	312	\$590	\$184,080	\$2,208,960
			\$250,360	\$3,004,320

### Proposed Rates for 2018-2019 school year.

Unit Type	Total Beds	Market Rent Per Bed Per Month	Monthly Gross Potential - Base Rent	Annual Gross Potential - Base Rent
1 bed 1 bath	8	\$815	\$6,520	\$78,240
2 bed 2 bath	88	\$690	\$60,720	\$728,640
4 bed 2 bath	312	\$600	\$187,200	\$2,246,400
			\$254,440	\$3,053,280

### Rate Change Analysis

Unit Type	Total Beds	Total Rent 16-17	Total Rent 17-18	% Increase on Total Rent	\$ Increase on Total Rent
1 bed 1 bath	8	\$6,440	\$6,520	1.2%	\$80
2 bed 2 bath	88	\$59,840	\$60,720	1.5%	\$880
4 bed 2 bath	312	\$184,080	\$187,200	1.7%	\$3,120
<b>Average</b>		<b>\$83,453</b>	<b>\$84,813</b>	<b>1.5%</b>	<b>\$1,360.0</b>

### Breakdown of Beds Currently Leased in the month of October 2017

Unit Type	Beds	# Leased 16-17	# Leased 17-18	% Leased 17-18
1 bed 1 bath	8	8	8	100.00%
2 bed 2 bath	88	88	88	100.00%
4 bed 2 bath	312	307	312	100.00%
<b>Total</b>	<b>408</b>	<b>403</b>	<b>408</b>	<b>100.00%</b>

### Rental Rate History of University Courtyard-Youngstown

	2013-2014	2014-2015	2015-16	2016-17	2017-18	2018-19
1 bed 1 bath	\$735	\$757	\$780	\$780	\$805	\$815
2 bed 2 bath	\$620	\$639	\$660	\$660	\$680	\$690
4 bed 2 bath	\$535	\$551	\$570	\$570	\$590	\$600

Increase from prior year \$ or %						
	\$10	3%	3%	No increase	3% - 3.5%	\$10

\*Round up

## 2018-2019 Rental Rates

Competitor	1 bed/1 bath	2 bed/2 bath	3 bed/3 bath	4 bed/4 bath	5 bed/5 bath
The Enclave:	\$990	\$790	n/a	\$665 either unit type	n/a
University Edge:	\$999	n/a	\$649, \$659, \$669	\$619, \$629, \$639	\$609, \$619, \$629
Flats at Wick:	\$930	\$690	\$675	\$650	n/a
Erie Terminal:	unknown	unknown	n/a	n/a	n/a
UC Youngstown-Proposed:	815	690	n/a	600	n/a

\$10 increase across the board

**University Courtyard - 10-Year Marketable Plan**

Priority	Description	Estimated Total Cost	Estimated Fiscal Years	Comment
In process	Activity Center Upgrade	\$ 20,000	FY17,18	Upgrade activity center with tables, chairs, soft seating
1	Parking lot gates	\$ 20,000	FY18,19	Replacement of 3 gates is necessary due to continued malfunction and wear & tear.
1	Concrete sidewalk repair & curb stops	\$ 100,000	FY18,19	Settlement and spaulding of concrete causing trip hazards.
2	<b>Unit Upgrades:</b>			
	Appliance replacement	\$ 350,000	FY17,18,19	Upgrade/replace microwaves, dishwashers, stoves and refrigerators & garbage disposals
	Cabinetry & counter top replacement	\$ 250,000	FY17,18,19	Replace cabinets and counter tops as needed when replacing appliances
	Flooring replacement - interior units	\$ 315,000	FY17,18,19	Replace tile floor in 130 kitchens & 252 bathrooms
	Furniture inside the units	\$ 750,000	FY17,22,27	Upgrade couch, chair, bar stools, bed, dresser, desk, desk chairs, end tables
2	Landscape upgrades	\$ 150,000	FY17-FY27	Removal/replacement of trees/shrubs, install annual flowers for curb appeal and major clean up
2	Recreation/Clubhouse	\$ 300,000	FY20	Addition of a Rec/Clubhouse area by taking offline and converting 2 full units
3	Main fire alarm panel & smoke detectors	\$ 125,000	FY17,18,19	Upgrade the fire alarm panel and replace smoke detectors in each building to maintain proper function.
3	Lighting/surge protection	\$ 500,000	FY17,18	Install protection to protect the buildings from lightning and potential electrical surge.
3	Generator for both buildings	\$ 600,000	FY17,18	Install back up generator for both buildings
3	Storage shed/garage-overflow	\$ 25,000	FY17,18	Additional storage is needed due to limited storage within the building for items.
3	HVAC units	\$ 390,000	FY17-FY27	Replacement entire unit Current models are no longer manufactured.
3	Plumbing repairs/replacement	\$ 150,000	FY17-19, FY22-24	Replacement of toilets, tubs, hot water tanks, expansion tanks, backflow preventer (5) and related plumbing parts
	<b>Sub-Total for 5 Year Plan</b>	<b>\$ 4,045,000</b>		
<b>University Courtyard - Future Improvements</b>				
	Gator (maintenance golf cart)	\$ 5,000	FY18	Needed to transport equipment from one building to the other and for storage.
	Flooring - common area hallways	\$ 165,000	FY19,20,21,22	Resurface hallway floors and replace carpet in amenity areas. Two floors a year.
	Parking Lot and Basketball court	\$ 25,000	FY18-FY25	Sealcoat and restripe all parking lots and make minor repairs (complete every 2 years).
	Fitness Center upgrade	\$ 50,000	FY19,25	Upgrade fitness equipment with new equipment and activity center furniture and recreational items
	Drainage, gutters & downspout improvements	\$ 125,000	FY18,19	Will include some gutter/downspout changes repairs on the buildings.
	Paint exterior of buildings	\$ 200,000	FY18,19,20	Paint exterior trim and replace rotted trim as needed on both buildings.
	Light Poles in parking lot	\$ 150,000	FY19	Light poles are rusting out and require constant bulb/ballast replacement and replace bldg. wall pack lights to energy saving fixtures.
	Office equipment	\$ 26,000	FY19,22,26	Replacement of four office computers, printers and copier/fax/scan
	Computer labs	\$ 20,000	FY18,23,	Upgrade/replace 8 computers, 2 printers in the two computer labs.
	Office Furnishings	\$ 15,000	FY18	Replacement upgrade of desk, chairs, credenza and file cabinets for three offices.
	Unit door locks	\$ 100,000	FY18, 19	Upgrade unit door locks to eliminate card swipe and produce more functionality. One bldg. per year.
	Unit alarm and panic button system	\$ 60,000	FY18,19	Upgrade system to allow YSU PD to directly monitor system of 408 panic buttons & 130 door sensors and 254 window sensors.
	Replacement of perimeter fence	\$ 50,000	FY20	Replace perimeter fence that is showing signs of wear & tear.
	Camera upgrade and adding more	\$ 250,000	FY17,18,19,20	Add additional cameras, upgrade current cameras and software.
	Lighting (fixtures and upgrade to LED bulbs)	\$ 200,000	FY17,18,19,20	Replace fixtures on 4th floor each bldg; adapt current fixtures to accept LED cost saving bulbs.
	Roof replacement	\$ 900,000	FY23	Full replacement (original from 2003). Bldg. 100 in FY18, Bldg. 200 in FY19
	Window replacement	\$ 650,000	FY18,19,20,21	Replacement of 546 windows in both buildings.
	<b>Sub-Total of Future Improvements</b>	<b>\$ 2,991,000</b>		
	<b>Total of 5 Year and Future Improvement Plans</b>	<b>\$ 7,036,000</b>		
<b>Completed in 2016:</b>				
	Stairwells (6) resurface	\$ 61,000	Completed 7/2016	Resurface original concrete steps and landings with rubberized flooring.
	Replaced 2 of the 4 computers in the office	\$ 2,900	Completed 7/2016	Replaced the Resident Life Coordinator and Leasing Manager computer through RISE.
<b>Completed in 2015:</b>				
	Entry/exit doors to the building	\$ 53,000	Completed 7/2015	Replace 13 doors with heavy grade steel, new locks and new hardware.
<b>Completed in 2012:</b>				
	Replaced the fitness equipment	\$ 10,000	Completed 7/2012	Replaced original equipment with new 2 treadmills, 1 bike, 1 elliptical, 1 all-in-1
<b>Completed in 2017:</b>				
	Courtyard concrete replacement	\$ 84,545	Completed 7/2017	Thomas Pallotta & Sons-done through a combined contract with the stair project on the south side of building 100.
	Community Signage	\$ 8,832	Completed 10/2017	Completed by: Signs by Tomorrow. Replaced Courtyard large sign and small sign at Service Rd. entrance.
	HVAC units	\$ 9,941	Completed 2017	Replaced 8 HVAC units in (7) 2-bed units and (1) in 1 bed unit
	Install lobby/concierge desk	\$ 6,026	Complete 1/2017	Installed desk in the lobby area.



**RESOLUTION TO MODIFY AND AMEND  
THE FY 2018 PARKING SERVICES BUDGET AND REVERSE THE  
TRANSPORTATION FEE INCREASE**

**WHEREAS**, the Youngstown State University Board of Trustees approved in June 2017 the annual operating budget for the University's general and auxiliary funds for fiscal year 2018, in accordance with University policy 3356-3-11; and

**WHEREAS**, the approved FY 2018 operating budget for Parking Services is based on a \$40 increase in the student transportation fee that became effective fall semester 2018; and

**WHEREAS**, the Board of Trustees approved the \$40 transportation fee in June 2017 to ensure that the University has sufficient funds to meet debt service obligations related to renovations made to the University's parking infrastructure; and

**WHEREAS**, the Board of Trustees also approved the \$40 increase in the transportation fee in June 2017 as part of an established long-term strategic plan to ensure that the University has sufficient plant reserves to fund the future replacement of the 1,278-space parking garage on 5<sup>th</sup> Avenue, which is expected to exhaust its useful life in nine to twelve years from now; and

**WHEREAS**, parking and transportation on campus remain integral components of student life at YSU, with over 75% of students driving to and parking on campus daily; and

**WHEREAS**, the Chancellor of Ohio Higher Education has asked the University to roll back the \$40 increase in the transportation fee to comply with new language in Am. Sub. House Bill 49, the operating appropriations legislation for the FY 2018 – FY 2019 biennium; and

**WHEREAS**, the roll-back of the \$40 increase in the transportation fee will result in a significant revenue shortfall for the University's Parking Services auxiliary, requiring a budget modification pursuant to University policy 3356-3-11.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve a reduced transportation fee and an amended FY 2018 budget for Parking Services, as shown in Exhibit \_\_ and made part hereof.

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**Transportation Fee and Parking Services Budget Modification, FY 2018**

	<b>Adopted</b>	<b>Amended</b>		<b>Percent</b>
	<b>FY 2018</b>	<b>FY 2018</b>	<b>\$ Change</b>	<b>Change</b>
<b>Student Transportation Fee</b>	\$155	\$115	(\$40)	-25.8%

	<b>Adopted</b>	<b>Amended</b>		<b>Percent</b>
	<b>Budget</b>	<b>Budget</b>		<b>Change</b>
	<b>FY 2018</b>	<b>FY 2018</b>	<b>\$ Change</b>	<b>Change</b>
<b>EARNED INCOME</b>				
Faculty & Staff Permits	\$540,000	\$540,000	\$0	0.0%
Student Transportation Fee/Permits	3,333,500	2,408,720	(924,780)	-27.7%
Parking Fines	50,000	50,000	0	0.0%
Parking Fees-Special Events	110,000	110,000	0	0.0%
Daily Parking Fees	51,000	51,000	0	0.0%
Parking Meters	6,000	6,000	0	0.0%
Parking Permits-Contracted Service	40,000	40,000	0	0.0%
Control Card Replacement	100	100	0	0.0%
Weekly Permits	15,000	15,000	0	0.0%
<b>Total Earned Income</b>	<b>\$4,145,600</b>	<b>\$3,220,820</b>	<b>(\$924,780)</b>	<b>-22.3%</b>
<b>TOTAL RESOURCES</b>	<b>\$4,145,600</b>	<b>\$3,220,820</b>	<b>(\$924,780)</b>	<b>-22.3%</b>
<b>EXPENDITURES</b>				
Permanent Staff	\$439,185	\$439,185	\$0	0.0%
Temporary Staff	417,000	417,000	0	0.0%
Fringe Benefits	223,093	223,093	0	0.0%
Administrative Charge	150,000	150,000	0	0.0%
Shuttle Service	363,000	363,000	0	0.0%
Other Operating	1,269,336	1,220,356	(48,980)	-3.9%
Debt Service	393,186	393,186	0	0.0%
Inst. Work Study Transfer	15,000	15,000	0	0.0%
Transfer for Capital Improvements	875,800	0	(875,800)	-100.0%
<b>TOTAL EXPENDITURES</b>	<b>\$4,145,600</b>	<b>\$3,220,820</b>	<b>(\$924,780)</b>	<b>-22.3%</b>

**Board of Trustees Meeting**  
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**Exhibit \_\_**

**RESOLUTION TO APPROVE  
THE *PENGUIN TUITION PROMISE*,  
AN UNDERGRADUATE TUITION GUARANTEE PROGRAM**

**WHEREAS**, section 3345.48 of the Ohio Revised Code authorizes boards of trustees of state universities to establish an undergraduate tuition guarantee program; and

**WHEREAS**, a tuition guarantee program provides fixed tuition and fee rates for eligible undergraduate students for four consecutive years of attendance; and

**WHEREAS**, a tuition guarantee program provides students and their families with price-predictability as they plan for a four-year college education; and

**WHEREAS**, Youngstown State University has developed a plan for the implementation an undergraduate tuition guarantee program, the *Penguin Tuition Promise*, to become effective in the 2018-2019 academic year; and

**WHEREAS**, upon the approval of the Youngstown State University Board of Trustees, the *Penguin Tuition Promise* plan will be submitted to the Chancellor of Higher Education for final approval, as required by state law.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the Tuition Guarantee Plan for the *Penguin Tuition Promise* as shown in Exhibit \_\_ and made part hereof.

## Youngstown State University Tuition Guarantee Plan: *The Penguin Tuition Promise* Revised 11/22/2017

**This plan is contingent upon the approval of the Chancellor of Ohio Higher Education, and subject to changes that may be required by the Ohio Department of Higher Education.**

### 1. Introduction

The YSU Penguin Tuition Promise is a cohort-based, level-rate tuition and fee guarantee model that assures a student and his/her family a set of fixed rates for the pursuit of an undergraduate degree at Youngstown State University within the parameters outlined in this document. A student's tuition rate is established based on first enrollment and remains unchanged for four consecutive academic years. The Penguin Tuition Promise is designed to make the cost of college predictable and affordable, and encourages students to complete degree programs within four consecutive academic years. This program is governed by section 3345.48 of the Ohio Revised Code, and is subject to the approval of the Chancellor of the Ohio Department of Higher Education.

### 2. Communication of the Penguin Tuition Promise

These principles, along with the rates approved by the YSU Board of Trustees will be published on the websites of the YSU Bursar, Office of Financial Aid & Scholarships, other student service websites as may be appropriate, and in the university handbook and undergraduate catalog.

### 3. Definition of students included in the Penguin Tuition Promise

Beginning with the 2018-19 academic year, every new undergraduate degree-seeking first-year or transfer student will be part of the initial cohort of the Penguin Tuition Promise.

Each year, a new cohort rate may be established by the YSU Board of Trustees, as permitted by state law, to be effective for each new cohort that enrolls for the first time or transfers in during the academic year.

Additional details regarding the establishment of the student's cohort:

- a. Eligible students are assigned to a cohort based on the semester in which the student first enrolls as a degree-seeking student. Each academic year includes one summer, fall and spring term. Regardless of a student's initial term of enrollment, he/she will be eligible for the guaranteed cohort rate (in effect at the time of their initial enrollment) for four consecutive academic years.
- b. Establishment of the cohort group: Any new undergraduate degree-seeking transfer or first-year student registered for classes as of the day after the last day to withdrawal at 100% refund is considered "matriculated" for that Term. The first Term of enrollment establishes the cohort rate as outlined above. The establishment date is intentionally the same as the "no-refund" date. In addition this date has been chosen because all official





transcripts include all classes enrolled as of this date. For flexible schedule classes, the published “no-refund” date is the cohort established date.

- c. Continuing students: Neither degree-seeking nor non-degree seeking continuing students (students admitted and matriculated prior to summer term 2018) are not part of the Penguin Tuition Promise. These students will follow the traditional tuition model.
- d. Non-degree students: Students admitted or enrolled as non-degree students whose initial term of enrollment is after spring term 2018 will be charged the newest cohort rate in effect at the time of enrollment but are not assigned to a Penguin Tuition Promise cohort. However, once a student is defined as degree-seeking, he/she will be placed into the appropriate cohort, based upon the initial term enrolled as an undergraduate degree-seeking student.
- e. Re-enrolling students: Students re-enrolled who were admitted in an undergraduate degree program prior to summer term 2018 will follow the traditional tuition model, just as the continuing students do, and are not part of the Penguin Tuition Promise. Re-enrolling students who were initially admitted summer term 2018 or later will be in their respective cohort rate and will follow the regular rules after four consecutive years have elapsed unless they have stopped out and are required to be re-admitted.
- f. Re-admitted students: Students who have stopped out for the period of time designated by the University as to be re-admitted will fall into the cohort for the academic year in which they are re-admitted. Currently, the period of time designated by the University is three consecutive terms.
- g. Students enrolled in the state of Ohio’s College Credit Plus (CCP) program are not part of any guarantee cohort during CCP participation.

#### **4. Length of Cohort Guaranteed Rate**

A student in the Penguin Tuition Promise will have four consecutive years, including the initial summer, fall, or spring term of enrollment at the tuition cohort rate regardless of course load..

Because YSU’s academic year begins with summer term, students whose first enrollment is summer term will have an automatic one (1) term extension at the end of their guaranteed cohort period.

#### **5. Tuition and fees included and excluded from the Penguin Tuition Promise**

Undergraduate resident tuition is the sum of the undergraduate instructional fee and mandatory general fees that are uniformly charged to a student cohort. Each incoming cohort is charged a unique, guaranteed rate for four consecutive years. Full-time students pay additional tuition at their cohort rate for credit hours taken in excess of the established 12-18 credit hour bulk rate during a given term. Part-time students pay instructional and mandatory on a prorated, per-credit hour basis at their cohort rate. Please see Appendix A for details.

#### ***Fees included in the Penguin Tuition Promise:***

- a. The instructional fee covers instructional costs that eligible undergraduate students pay. Each incoming cohort is charged its unique, guaranteed instructional fee rate for four consecutive years.
- b. Mandatory fees include fees charged uniformly and universally to a student cohort as part of the blended general fee. A blended general fee significantly streamlines and reduces the



number of miscellaneous fees that would otherwise appear on a student bill. . An average per student cost has been determined and will be charged to all students in each eligible cohort, thereby minimizing unanticipated fee changes to a student's bill that might otherwise occur from year to year. The blended general fee includes:

- General fee
  - Information services fee
  - Career services fee
  - Matriculation fees
  - Graduation fee
  - Transportation fee
- c. Housing and dining rates are included in the Penguin Tuition Promise but may vary depending on students' chosen or available residence type and meal plan selection. Please see Appendix B for housing and meal plan costs that will become effective for the 2018-19 academic year for the first cohort of the Penguin Tuition Promise program and for continuing students.

***Fees NOT included in the Penguin Tuition Promise:***

- a. Nonresident surcharges.
- b. Program fees, lab and materials fees, and college fees that recognize the cost variation among different programs, courses and majors and which are not assessed uniformly or universally.
- c. Miscellaneous fines and service charges, such as late payment fees, library fines, and the (optional) duplicate diploma fee.

**6. Cohort Pricing Model**

After the first year, subsequent cohort increases will be determined by the combination of future biennial legislatively-prescribed tuition parameters and a rolling 5-year average of Consumer Price Index inflation (for all urban consumers).

**7. Full-Time / Part-Time Students**

Tuition and fees for the Penguin Tuition Promise are assessed on a per credit hour basis. YSU's full-time bulk rate is assessed to students taking 12 to 18 credit hours. Additional charges for hours taken above 18 credits shall be assessed at the per credit hour cohort rate.

**8. Students Who Stop-Out or Withdraw and Return**

If a student in the Penguin Tuition Promise cohort chooses to, for example withdraw (officially or unofficially), is financially suspended, administratively withdrawn, or is judicially suspended from YSU, the term(s) absent will count toward the four consecutive year guarantee. When this student re-enrolls, if four consecutive years have not been exhausted since initial enrollment, then the student will be charged the guaranteed rate for his/her original cohort. If four years have passed, then the re-enrolling student is moved to the cohort that went into effect the year immediately following his/her original cohort. The student will remain in that cohort for up to one year and if still enrolled after that cohort expires, will be placed into the next cohort until the student is no longer enrolled.

**9. Programs Requiring More Than 128 Credit Hours**



Students in programs that have been identified by the Ohio Department of Higher Education as requiring more than 128 hours to complete will automatically receive an additional term at the end of their fourth year of the guarantee. If a student internally transfers to one of these programs, he/she will receive the automatic extension of the Penguin Tuition Promise rate. A complete listing of undergraduate programs, including the number of credit hours required for graduation, can be viewed online at: [http://www.ysu.edu/academics#t\\_bachelors-degrees](http://www.ysu.edu/academics#t_bachelors-degrees)

#### **10. Students Completing More Than One Credential**

Students may complete as many undergraduate degrees, majors and minors, as they are able within the four consecutive year guarantee of the Penguin Tuition Promise. Undergraduate students pursuing any level of course credit will have their fees assessed based on their guaranteed cohort rate.

#### **11. Students Graduating in Fewer Than Four Years**

Students who earn an undergraduate degree in fewer than four consecutive years will continue to be permitted to enroll in undergraduate classes at the initial cohort rate until four consecutive years have passed.

#### **12. Students Who Require More Than Four Years to Graduate**

Students who take more than four consecutive years to earn an undergraduate degree, are not in a program approved to require more than four years as defined in section 9 of this document, and are not part of an exception group (defined below), at the end of their fourth consecutive year, will automatically be placed into the next cohort that went into effect immediately after the student's original cohort. The student will remain in that cohort for the duration of the cohort, and if still enrolled after that cohort expires, will be placed into the next cohort until the student is no longer enrolled.

Students who take more than four consecutive years to earn an undergraduate degree will be given the opportunity to request an extension of their current cohort rate by the end of their fourth consecutive year until no later than 30 days after the end of their fourth consecutive year. Students who receive an approved extension will have an extension to not exceed one (1) term immediately following their fourth consecutive year.

#### **13. Exceptions for Students Requiring More Than Four Consecutive Years**

There will be some students who require more than four consecutive years to graduate due to circumstances beyond their control. Each case will be evaluated on its own merit. An appeals committee will be established to evaluate exceptional cases. In most cases, these extenuating circumstances fall within the precedents already established by YSU's long-standing Fees & Fines Appeals Committee, which will lay the foundation for a new process for appeals related to the Penguin Tuition Promise.

A student called to active military duty will be given an automatic extension of the guaranteed cohort rate for as many terms impacted by his/her time served. Documentation of military service is required for this exception.

A non-exhaustive list of examples of cases that could be considered for an exception appeal include:



- a. *Reasonable accommodation for disability:* If it is determined that additional terms are a reasonable accommodation of a student's disability, the Associate Provost for Student Success will make a recommendation for the appropriate continuation.
- b. *Medical Conditions:* A student who has extenuating medical issues may submit an appeal to extend the cohort rate. The appeal will be evaluated individually and a determination made based on the nature of the medical issue.
- c. *University Errors:* If it is determined that a University error caused a student to extend his/her enrollment beyond four years, then the student will be afforded additional terms to complete his/her degree.

If a student is not able to complete his/her degree program in the four consecutive years of their established cohort as a result of a required course being unavailable, YSU will provide the necessary courses in compliance with Ohio Revised Code section 3345.48. To be considered for this exception, a student must file an appeal through the Penguin Tuition Promise appeals committee by the last day to add a course in their final term.



**Appendix A**  
**Initial Cohort Tuition & Fees**  
**Academic Year 2018-19**

YSU's proposed tuition and fees are under review by the Chancellor's staff at the Ohio Department of Higher Education. Once approved by the Chancellor, YSU's cohort tuition schedule will be submitted to the Board of Trustees for approval and incorporated into this plan document.



**Appendix B**  
**Initial Cohort Room & Board Rates**  
**Academic Year 2018-19**

YSU's proposed room and board rates are under review by the Chancellor's staff at the Ohio Department of Higher Education. Once approved by the Chancellor, YSU's cohort room and board schedule will be submitted to the Board of Trustees for approval and incorporated into this plan document.



**RESOLUTION TO APPROVE THE  
2017 AFFORDABILITY AND EFFICIENCY REPORT**

**WHEREAS**, Section 3333.95 of the Ohio Revised Code requires the Chancellor of Higher Education to maintain an Efficiency Advisory Committee to ensure that each state college and university prepare an affordability and efficiency report to identify examples of and opportunities for shared services, streamlined administrative operations, and shared best practices in efficiencies among institutions; and

**WHEREAS**, the Chancellor requires that the Boards of Trustees at each state college and university annually approve each institution's affordability and efficiency report; and

**WHEREAS**, the Ohio Department of Higher Education has provided a template through which to document and report each institution's efficiency and affordability report; and

**WHEREAS**, Youngstown State University's 2017 efficiency and affordability report is a product of a collaborative process that included input from various levels of campus stakeholders to assess progress and capture examples of efficiencies, academic practices, policy reforms, cost savings, redeployment of savings and tangible benefits to students; and

**WHEREAS**, Youngstown State University's 2017 report provides evidence of affordability and efficiency in various categories, including direct savings, deferred revenue (direct savings to students), cost avoidance (that would otherwise increase expenses), funds raised (reducing pressure on fees), and savings or funds raised by auxiliary enterprises; and

**WHEREAS**, Youngstown State University faculty provide a high-quality education as evidenced by licensure and certification results, job placement and other measures, and staff contributions to student and institutional success, while tuition and total cost of attendance as reported via IPEDS are amongst the lowest in the state; and

**WHEREAS**, all sections of the report indicate that Youngstown State University continues to make substantial progress in all categories required by the report, including an updated five-year plan; and

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the 2017 efficiency and affordability report as shown in Exhibit \_\_ and made part hereof.



Department of  
Higher Education

John R. Kasich, Governor  
John Carey, Chancellor



Affordability & Efficiency

## FY2017 Efficiency Reporting Guidance

In the early part of 2015, Gov. John R. Kasich created the Ohio Task Force on Affordability and Efficiency in Higher Education to make recommendations to Ohio's colleges and universities based on three simultaneous principles 1) to be more efficient both in expense management and revenue generation 2) while offering an education of equal or higher quality and 3) decreasing costs to students and their families. The Task Force met several times during the course of 2015. In October, the Task Force issued a report with ten recommendations to advise colleges and universities on efficiency and academic practices to improve both the quality of education and lower costs for students. For additional information on each category and recommendation, please review the [Action Steps to Reduce College Costs report](#), issued by the Ohio Task Force on Affordability and Efficiency.

Section 3333.95 of the Ohio Revised Code requires the Chancellor of Higher Education to maintain an Efficiency Advisory Committee, composed of members from each of Ohio's public colleges and universities. The purpose of this committee is to generate efficiency reports for campuses, identify shared services opportunities, streamline administrative operations, and share best practices in efficiencies among colleges and universities. The law additionally requires an annual report to be completed by the Department of Higher Education. The college and university data captured from this report for fiscal year 2017 will allow ODHE to produce the 2017 Efficiency Advisory Committee Report by December 31, 2017, as required by law.

The template is structured into four sections:

- **Section 1: Efficiencies** – The first section captures practices likely to yield significant savings that can then be passed on to students. This includes Procurement, Administrative/Operational, and Energy.
- **Section 2: Academic Practices** – This section covers areas such as textbooks, time to degree incentives, and academic course and program reviews. While improvements to academic processes and policies may not convey immediate cost savings, there will likely be tangible benefits that improve the quality of education for students.
- **Section 3: Policy Reforms** – This section captures additional policy reforms recommended by the Task Force.
- **Section 4: Cost Savings, Redeployment of Savings & Tangible Benefits to Students** – The last section asks colleges and universities to provide, if applicable, cost savings in actual dollars saved for each of the recommendations. Furthermore, colleges and universities must advise if the savings have been redeployed as a cost savings to students or if they offered a benefit to the quality of education for students.

For any questions, please contact Sara Molski at 614-728-8335. Please submit your survey by email to [smolski@highered.ohio.gov](mailto:smolski@highered.ohio.gov) by **October 13, 2017**.



## Youngstown State University

### Section I: Efficiency Practices

#### Procurement

**Recommendation 3A | Campus contracts:** Each college/university must require that its employees use existing contracts for purchasing goods and services, starting with the areas with the largest opportunities for savings. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES-This is a significant change from last year as **this is now a requirement.** Please see below.

On June 14, 2017, the YSU Board of Trustees adopted Resolution 3356-3-01 related to Purchasing. Item 3(E) states:

(3) All purchases for goods and services for which there is an existing university contract or price agreement with one or more preferred vendors **must be made from those vendors.***(emphasis added)* This applies regardless of payment method (purchase order, p-card, etc.). Some existing university contracts and agreements can be found on punch out catalogs on the university's online procurement system.

Importantly, the same item (3) further states:

Instances where significant cost savings can be achieved by purchasing from a vendor not on an existing university contract or price agreement requires approval by the director or procurement services prior to vendor commitment and/or actual purchase.

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

Based on 2017 YSU negotiated contracts, there was an estimated savings of \$67,000 for 2017. This amount does not include savings accrued from prior-year multi-year negotiated contracts. Therefore, actual savings for 2017 were greater than \$67,000.

Effective July 1, 2017, the University implemented a purchasing guideline requiring three written quotes on goods or services purchased for \$10,000 or more up to \$49,999. Purchases related to construction/renovation projects requires three written quotes for \$50,000 or more up to \$214,999. Exceptions require the approval of the Director of Procurement Services.

**Recommendation 3B | Collaborative contracts:** Ohio's colleges and universities must pursue new and/or strengthened joint purchasing agreements in the following categories:

- Copier/printer services
- Computer hardware
- Travel services
- Outbound shipping
- Scientific Supplies and Equipment
- Office Supplies and Equipment

**Were there any updates/changes in FY17? If yes, please complete the below chart.**

Prior to revising the University's Purchasing Policy in June 2017, employees were always strongly encouraged to use the preferred vendors identified in the University's electronic procurement system, which are all on some sort of group purchasing agreement. However, this is now a requirement as noted above effective June 14, 2017.

For collaborative contracts and use of group purchasing agreements there was an estimated savings of \$1,818,000 for 2017. Of the \$1,818,000 estimated total savings, \$1,280,000 was in the six contract types identified in the Governor's Taskforce Report and the remaining \$538,000 was from other contract types identified by the University. There is a plan to spend \$1,000,000 in computer hardware over the next 7 years. Using the 2017 negotiated discount rate of 35%, savings of approximately \$538,000 is anticipated for each of the next 6 years. There should be an increase in savings for all collaborative contracts and group purchasing agreements in future years because of the new University Purchasing Policy.

Contract Type	Is the college/university participating in joint contracts? [yes, no, plan to]	Include additional explanation here if needed. If the college/university chooses not to participate, please explain why.
<b>Copier/printer services</b>	YES	<p>It was determined during 2016 that copier/printer services could not be contracted to achieve a lower price than the existing and planned copier/printer management system. As a result of the efficiency strategy for printers on campus, toner purchases have been reduced by 50% (savings of \$112,614: FY17). The number of printers have been reduced by 20% (1,240 printers to 995). Thus, a potential capital expenditure was reduced by 245 printers or \$73,500 annually. All Enhanced Print Management project devices are Multifunctional Devices that permit printing and copying as well as electronic handling of documents such as scanning and emailing to reduce the need for and cost of paper and toner.</p> <p>The University purchases printers from various group purchasing agreements to leverage additional savings.</p>

Youngstown State University  
2017 Affordability & Efficiency Report

		As a result of the noted copier/printer efficiency strategies, paper costs are estimated to be reduced by \$13,000 per year.
<b>Computer hardware</b>	YES	The State of Ohio STS contracts were used to purchase \$1,971,000 of computer hardware with an estimated savings of over a \$1,000,000 at an estimated 35% discount. The University also uses several group purchasing agreements such as CDW and GovConnect for these types of purchases.
<b>Computer software</b>	YES	The Midwestern Higher Education Compact (MHEC) has been used for maintenance of Novell (Micro Focus) licenses. MHEC provides a 46% discount as compared to the 23% educational discount provided by the vendor's Academic License Agreement. In FY17, this reduced the University's financial outlay from \$74,804 to \$52,442 for a savings of \$22,362.
<b>Travel services</b>	YES	<p>A private consultant conducted an assessment of Travel Service practices for the IUC-PG in April 2017 and determined that the use of a contracted vendor and use of credit cards to be both successful and a best practice.</p> <p>The University is proud of the fact that it implemented such a best practice beginning March 2014 when the use of a locally-negotiated Travel Services contract was mandated to secure optimal pricing.</p> <p>This requirement increased the use of institutional credit cards thereby decreasing the time and costs associated with processing reimbursement requests and increasing the success of the affinity partnership with the credit card agency.</p> <p>Rebates received for use of travel and Pcard credit card purchases for 2017 were \$79,745, up almost \$4,000 from the previous year (see section 4C Affinity partnerships and sponsorships).</p> <p>The University will consider the outcomes of an IUC-solicited travel management services request for proposal contract.</p> <p>The University utilizes the IUC Enterprise Fleet Program.</p> <p>The Department of Athletics has reduced travel expenses by a total of \$59,210 for air and bus charters.</p>
<b>Outbound shipping</b>	YES	For outbound shipping the E&I group purchasing agreement is used for an estimated 26% discount with a savings of \$5,600 for 2017.

<b>Scientific supplies &amp; equipment</b>	YES	For scientific equipment and supplies, YSU uses both IUC and E&I group purchasing agreements with an estimated savings of at least \$87,000.
<b>Office supplies &amp; equipment</b>	YES	The University purchases office supplies and equipment from both the IUC and NJPA group purchasing agreements for an estimated savings of \$126,000 using an estimated discount of 30%.

## Assets and Operations

### Recommendation 4 | Assets and Operations

**4A Asset review:** Each college/university must conduct an assessment of its noncore assets to determine their market value if sold, leased or otherwise repurposed. Where opportunities exist, colleges and universities must consider coordinating these efforts with other colleges and universities to reap larger benefits of scale. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used for the college/university's asset review and the key outcomes below or on additional pages:**

YES

YSU continually reviews the utility and viability of its assets and operations from the perspectives of reducing costs, increasing revenue, gaining efficiency, or leveraging assets for cost-avoidance.

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

This was fully implemented in FY16 but additional progress has been made.

While not substantial, the sale of surplus assets generated \$25,008 (a 94% increase over the previous year).

Since 2016, the University has entered into two long-term ground-lease arrangements for the private development of student housing and student-focused amenities. Both lease agreements enable YSU to meet student demand, while at the same time generating revenue and limiting the University's exposure to debt and construction-related liabilities.

In addition to the 2016 private development lease that was reported in last year's report, YSU leased 2.1 acres of campus property in 2017 to another private developer (LRC) to develop a 194-bed student housing complex. This 40-year lease agreement was approved by Ohio Attorney General Mike DeWine, the Director of the Department of Administrative Services, and Governor Kasich. Per the terms of

the lease agreement, the developer will pay YSU \$1.4 million over the lease term. Proceeds from this agreement will generate approximately \$35,000 per year to support the University's general scholarship fund. Moreover, the project enables YSU to meet student demand while facilitating a \$10 million private investment in the YSU campus—without raising the University's debt service obligations.

**4B Operations review:** Each college/university must conduct an assessment of non-academic operations that might be run more efficiently by a regional cooperative, private operator or other entity. These opportunities must then be evaluated to determine whether collaboration across colleges and universities would increase efficiencies, improve service or otherwise add value. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If so, please provide an overview of the process used for the college/university's operations review and the key outcomes below or on additional pages:**

YES

Collaborative opportunities are regularly discussed, particularly via the InterUniversity Council meetings of the presidents and vice presidents of Ohio's public universities. Discussions continue about the possibility of leveraging across the State, health care and other benefits such as insurance, vision, dental, and disability.

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

This recommendation was implemented in 2016 and progress continues today. The University took advantage of a favorable interest rate environment and refinanced existing debt during FY 2017, thereby reducing debt service expenses by \$1.6 million and creating an economic gain of \$1.2 million, while at the same time raising \$5 million in new capital to support the construction of a new campus bookstore building. This opportunity leveraged a \$1 million investment by the University's bookstore partner, Barnes & Noble, to outfit and furnish the new building. The 2016 outsourcing of the University's bookstore to Barnes & Noble generated \$775,000 through a signing-incentive and sales commissions to support the University's general scholarship fund (also reported below in Affinity partnerships and sponsorships but not double counted in Section IV).

**4C Affinity partnerships and sponsorships:** Colleges and universities must, on determining assets and operations that are to be retained, evaluate opportunities for affinity relationships and sponsorships that can support students, faculty and staff. Colleges and universities can use these types of partnerships to generate new resources by identifying "win-win" opportunities with private entities that are interested in connecting with students, faculty, staff, alumni or other members of their communities. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the**

**key outcomes. Please identify partnerships/sponsorships within the below chart.**

**YES**

YSU has and continues to evaluate opportunities for affinity partnerships that align with strategic and academic priorities with significant attention to minimizing “mission creep.” YSU intends to assure that affinity partnerships link in a significant manner to core strategic purposes.

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

This recommendation was implemented in FY16 but additional opportunities have emerged or are positioned for implementation in FY18 as noted below.

**Please identify partnerships and sponsorships in effect for FY2017:**

<b>Partnerships/Sponsorships</b>	<b>Description</b>
Barnes & Noble	\$775,000 was generated through a signing-incentive and commissions via a new arrangement with Barnes & Noble that occupies a new location on campus-including the bookstore and Starbucks Café. The University’s partnership with Barnes & Noble, and the resultant relocation of the bookstore, freed-up 18,000 square feet of I&G space in the University’s Student Center, which was reprogrammed as the new location for services that directly benefit YSU students, including the Student Counseling Center, the Office of Student Disability Services, the Student Government Association, and the Office of Student Activities.
JP Morgan Purchase-Card	\$79,745-rebate to the university that was generated as a function of expenditures charged to the P-cards; mandatory travel contract services resulted in a significant increase in the use of P-cards for travel
Under Armour; Rawling; The Game; Dolfin; Wilson/DeMarini	\$50,000 in Athletics apparel/equipment/supplies and sponsorships are expected to increase to greater than \$100,000 annually
Various sponsorships	\$853,000 Athletics sponsorship income from various companies or agencies
YSU Foundation	\$8.1 million in annual base support for student scholarships, including both merit-and need-based programs.  \$50 million in gift funds raised and pledged to support projects that will directly benefit students, including renovations to the Jones Hall Student Success Center and other classroom buildings, the creation of an innovation and commercialization center, and student scholarships and work opportunities.

	\$120,000 expected for FY18 for Student Mobility Support Stations
	\$167,804 in Scholarship for Excellence Funds, a 3.5% increase from the previous year
Pepsi Contract	\$55,000-exclusive pouring rights contract similar to those secured by other Ohio public universities, sometime with Coca Cola
Concert at the stadium	\$1,453,853 in revenue through 16,208 tickets issued that created the opportunity for the regional community to experience and visit the YSU campus

## Administrative Practices

### Recommendation 5 | Administrative cost reforms

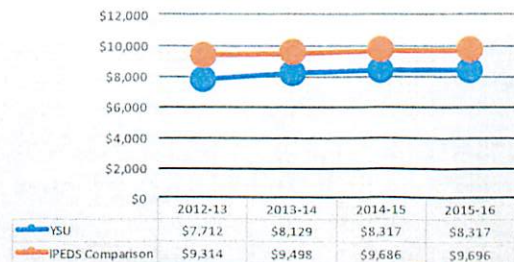
**5A Cost diagnostic:** Each college/university must produce a diagnostic to identify its cost drivers, along with priority areas that offer the best opportunities for efficiencies. This diagnostic must identify, over at least a 10-year period:

- Key drivers of costs and revenue by administrative function and academic program;
- Distribution of employee costs — both among types of compensation and among units;
- Revenue sources connected to cost increases — whether students are paying for these through tuition and fees, or whether they are externally funded;
- Span of control for managers across the college/university — how many employees managers typically oversee, by the manager’s function; and
- Priority steps that would reduce overhead while maintaining quality — which recommendations would have the most benefit?

Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university produced a cost diagnostic? If yes, please provide an overview of the process used and the key outcomes.**

**Tuition & Mandatory Fees**



**YES.** This is a significant change from last year as a **Cost Diagnostic has been completed.** Please see below.

**CONTEXT.** YSU tuition and mandatory fees are less than the average cost of tuition of nearly all public universities in Ohio. In 2015-16 YSU tuition and mandatory fees was \$1,379 less than comparable public urban universities in Northern Ohio (Cleveland State University, University of Akron, and University of Toledo)

Perhaps more importantly, YSU's total cost of attendance is less than the average cost of tuition of most public universities in Ohio. In 2014-15 the total cost of attendance was \$4,802 less than comparable public urban universities in Northern Ohio (Cleveland State University, University of Akron, and University of Toledo)

Average Net Price

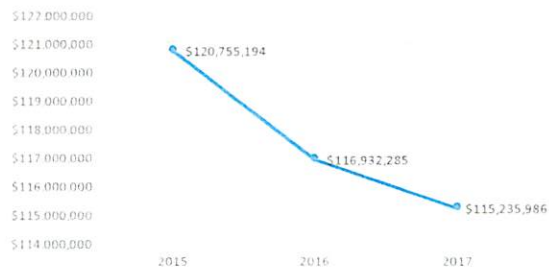


While the same IPEDS assessment indicates little difference in management positions, YSU has fewer full-time equivalent staff for all IPEDS classification categories in the areas of instructional support, business & financial operations, computer/engineering/science, healthcare, and the "other" categories.

This cost diagnostic reviewed the information submitted via Ohio HEI and IPEDS. A more sophisticated Diagnostic will be completed at a later date; however, the top cost drivers and the outcomes of initiatives related to control those costs are reported below.

**Please provide details on the result(s) of the assessment. What are the cost drivers, based on the categories above? Please discuss the college/university's priority areas that offer the best opportunities for recommendation.**

Compensation



The primary cost driver for YSU is compensation. This cost has been reduced by \$5,519,208 over the previous three years. This has occurred during a time where enrollment has begun to stabilize. Compensation as a percentage of the general funds expenditures was 69.2%, 68.1%, and 67.6% for 2015, 2016, and 2017, respectively.

A significant cost driver is fringe-benefits. The fringe-benefit rate has decreased by 1.6% over the previous three years representing a savings of \$2,886,530 in FY17 compared to FY15. The fringe-benefit rates were 33.9%, 33.2% and 31.3% for FY15, 16, and 17, respectively.

Net Health Care Expense



A significant cost driver is health care. The net health care cost decreased by \$533,167 over the previous three years. Health care cost as a percentage of the general funds expenditures was 8.6%, 9.7%, and 9.4% for 2015, 2016, and 2017, respectively.

As reported in the Health Care portion of the efficiency report, the change in the proportion of health care costs paid by those insured through the Plan (6% to 15%) has reduced the annual expenditure for health care by \$1.6 million.





A significant cost driver is operations. The net cost of operations decreased by \$1,307,781 over the previous three years. Operational costs as a percentage of the general funds budget is 6.9%, 6.5%, and 6.4% for 2015, 2016, and 2017, respectively.

Each of these cost drivers have decreased significantly over the previous three years, concurrent with the declined enrollment experienced as the same time.

Investing in student success is a high priority. Investments in scholarships have compared to the average investment for priority. Investments in scholarships have compared to the average investment for

Specifically, the institutional investment in Excellence program increased \$1.1 million institution having enrolled a higher students. The contribution by the YSU 3.5% to \$167,804.



priority. Investments in scholarships have compared to the average investment for

student success via the Scholarship for or 37% from FY16 to FY17, reflecting the proportion of academically prepared Foundation to this program increased by

The cost of compensation is largely related to negotiated contracts. The YSU Board of Trustees has primary responsibility for the outcome of negotiations in which case they are exercising their fiduciary responsibilities in the best interests of the university.

It is anticipated that upcoming negotiations will result in an increased investment in compensation that will attract and retain the best faculty and staff, thereby contributing to student access and success, academic excellence and community engagement in mutually beneficial ways. This cost diagnostic will be updated for the FY18 report given the outcomes of negotiations expected to be successfully completed after the deadline for this Report. An important future emphasis will be Institutional Planning and Effectiveness that will take these changes into consideration as the University embarks upon a strategic planning process.

The University will assure a balanced budget by a combination of initiatives including the contributions of reduced costs, cost avoidance or increased revenues as illustrated in this document, as well as initiatives including but not limited to a strategic increase in enrollment (resident, non-resident, and international students), purposeful increases in matriculation, retention and persistence, as well as an assessment of the relationships between scholarships, discounting and other actions on net tuition revenue. The implementation of a Tuition Guarantee program will also be a component of this planning exercise as well as determining the successful actionable outcomes needed via successful fundraising efforts via the YSU Foundation as well as improvements in affinity relationships and sponsorships

across the institution.

While enrollment in NE-Ohio public institutions of higher education is lower than last year by an average 2.8%, enrollment for YSU is lower by only 0.9%. On the other hand, student FTE enrollment increased by 0.4% this fall as follows: 10,149, 10,034, 10,389, and 10,431 for FY15, FY16, FY17, and FY18, respectively

Even under these financial circumstances, the second largest class in the institution's history graduated during the 2016-2017 academic year. See the Section II. Academic Practices, Recommendation 7. Time to Degree, Item 7A, Education Campaign below.

**If the college/university has not produced a cost diagnostic, is there a plan to? If yes, what is the implementation plan? If the college/university has not completed a cost diagnostic and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

The above information is new as a cost-diagnostic had not been completed for the FY16 report

**5B Productivity measure:** While the measure should be consistent, each college/university should have latitude to develop its own standards for the proper level of productivity in its units. This will allow, for instance, for appropriate differences between productivity in high-volume environments vs. high-touch ones.

**What steps has the institution taken to improve the productivity measure score? Or, what are the institution's plans to improve your score? You may view your productivity measure score [here](#). For more information on the Productivity Measure, please visit [here](#).**

Given the fact that YSU's tuition is the lowest in the State and expenditures are equal to or less than income, YSU represents a highly efficient organization. The University is now exploring an enterprise approach to help optimize the use of expenditures to achieve strategic outcomes associated with the Strategic Plan.

Some productivity measures via the Ohio Department of Education are expressed per management FTE; however, given the fact the University exists to serve its students, the appropriate values reflected in the productivity measures table should be relativized to student FTE to reflect institutional investments towards student success.

The Student Achievement Measure as endorsed by many higher education associations, should be used to reflect higher education institution productivity. Through student-level data tracking via the National Student Clearinghouse, this measure reveals those who graduated from or who continue attendance at the institution at which they initially enrolled as well as revealing those who graduated from or who continue attendance at a different institution from which they initially enrolled. In reality, this is a "System-Level" measure of student achievement.

These perspectives should be considered in the development of new indicators of institutional effectiveness.

**Has the college/university implemented or considered utilizing Lean Six Sigma methodology as a tool to evaluate the college/university's processes?**

**YES**

YSU uses process redesign, position necessity review, and value engineering in capital projects to reduce costs, as is the intent of using Lean Six Sigma methodology. YSU is also exploring how to implement an institution-wide Effectiveness Strategy to increase efficiency, but most importantly, to assure resources are utilized to gain optimal results for their investment-effectiveness.

**5C Organizational structure:** Each college/university should, as part or because of its cost diagnostic, review its organizational structure in line with best practices to identify opportunities to streamline and reduce costs. The college/university reviews should consider shared business services — among units or between college/university, when appropriate — for fiscal services, human resources and information technology. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university reviewed its organizational structure? If yes, please provide an overview of the process used and the key outcomes.**

**YES**

**If the college/university has not reviewed the organizational structure, is there a plan to? If yes, what is the implementation plan? If the college/university has not completed a review and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

This recommendation was implemented in 2016; work continues to improve the institution's organizational structure

During FY17, YSU implemented shared governance for purchases related to information technology. As such, all technology purchases or renewals over \$10,000/year require a detailed Total Cost of Ownership and Return on Investment analysis. In one instance, this assessment will result in a savings of \$150,000 over a five-year period in hard cost savings (\$30,000 in each of the years 2017 through 2021) by transitioning from College-based licenses to University/enterprise licensing.

The reduction by one department in the College of Education created a cost savings associated with the secretary and chair stipend of \$75,000 per year.

Student advising, financial aid counseling, orientation and first year experiences by students have significantly reduced the institution's write-off of "bad debt" which decreased by 66% over three years. The write-off for bad student debt was \$1,001,602, \$753,976, and \$342,871 for FY15, FY16, and FY17, respectively. This is a decrease of \$411,105 from FY16 to FY17.

**5D Health-care costs:** A statewide working group should identify opportunities to collaborate on health-care costs.

**(Optional) Has the college/university identified any healthcare reforms that the working group should consider? Please describe.**

As described in the 2016 report, a statewide or regional consortium should be pursued to allow state colleges and universities to leverage purchasing power within the marketplace for health care insurance. Special legislation should be introduced that would remove health care insurance coverage from collective bargaining in the public sector. This would enable employee health care plans to be normalized across various campuses and public employers, creating the optimal health care cost to service relationship.

**(Optional) Has the college/university achieved any expected annual cost savings through health-care efficiencies? Please explain how cost savings were estimated.**

Through the collective bargaining process YSU continues to evaluate the appropriate distribution of costs between YSU and employees.

Significant and incremental savings have been accrued by the institution as 10 years ago the university paid 94% of the individual health care premium. The percentage is now 85%; with employee contribution to the health care premium at 15% as opposed to 6%, there is savings of \$1,600,000 per year.

**5E Data centers:** The College/university must develop a plan to move their primary or disaster recovery data centers to the State of Ohio Computer Center (SOCC). Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

**YES**

The asset represented by the SOCC is appreciated. As can be seen from below, there is a plan to transition some aspects data center and other IT support to SOCC.

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

YSU assessed using the SOCC as the primary Data Center in FY17 since the University's Data Center hardware was due for refresh. It was determined to be unfeasible from a capital investment perspective because of the high cost to build in the level of redundancy and to maintain acceptable service levels. Even though the annual operating expenses were competitive with provisioning these services on-site, the SOCC did not offer a multi-tenant hosted model for virtualized servers at the time of the assessment.

The University plans to move disaster recovery for data recovery to the SOCC in FY18.

The University will assess the feasibility of migrating one-half of the high availability computing environment to the SOCC in FY19.

**5F Space utilization:** Each college/university must study the utilization of its campus and employ a system that encourages optimization of physical spaces. Please complete the section that aligns with the implementation status of your college/university. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

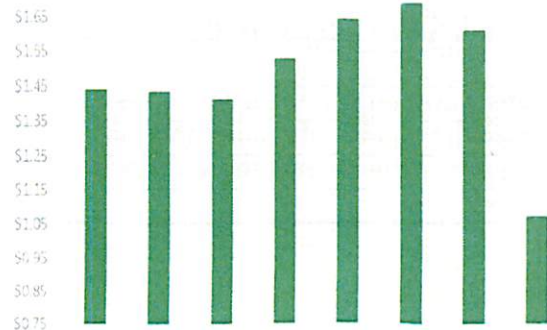
**Please provide details on the results of the assessment below or on additional pages:**

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

The University conducted a comprehensive three-semester review and analysis of classroom/lab space utilization via AdAstra and ODHE to more effectively select and outfit rooms with permanent multimedia. A contracted vendor provided a utilization study of all spaces according to industry taxonomy. The report revealed some opportunities to optimize space and also to gain efficiency. This report will be the subject of review for possible implementation in whole or in part in the upcoming fiscal year.

Utility Costs per Gross Square Foot



## Energy

**Energy Efficiencies** seek to refine sustainable methods utilized by college/university to procure and use energy (resulting in more efficient use of energy), including, but not

limited to lighting systems, heating & cooling systems, electricity, natural gas, and utility monitoring.

**Were there any updates/changes to college/university energy efficiency projects in FY17? If yes, please complete the below chart.**

There has been a significant focus on reducing utility costs. The outcome has been significant with a reduction in utilities costs of 5% (\$351,981) for FY16, and a 33.5% reduction in utility costs (\$2,255,607) for FY17. This is illustrated in the graphic reported to the YSU Board of Trustees June 14, 2017.

Project	Collaborative Partnership(s)	Explanation
Phase I energy conservation initiative	Johnson Controls, Inc.	The 10-year reduction in energy consumption was estimated to be \$11,200,000 annually over 10 years. The actual savings in FY17 year was \$1,260,000, that was \$60,000 more than projected
Phase II energy conservation initiative	Johnson Controls, Inc.	Construction of the on-campus steam plant is completed. The savings are captured in the utilities savings graphic above
Summer energy curtailments	Hess Energy & Calpine Energy	YSU's engagement in the energy curtailment program with Hess Energy and Calpine Energy produced savings of over \$100,000 in FY17. The energy cost avoidance is estimated to be in excess of \$500,000 for FY17.

### Regional Compacts

**Ohio Revised Code Section 3345.59 requires regional compacts of Ohio's public colleges and universities, with an executed agreement in place by June 30, 2018 for colleges and universities to collaborate more fully on shared operations and programs. Per O.R.C. §3345.59 {E} colleges and universities shall report within their annual efficiency report the efficiencies gained as a result of the compact. This provision will be included in the FY18 Efficiency Advisory Committee survey; therefore, institutions should prepare accordingly to meet this timeline.**

The institution is currently engaged in two such compacts

Since March 2017, YSU has engaged in a collaborative effort with the University of Toledo, Kent State University, Wright State University and Miami of Ohio University to share best practices regarding Banner 9 upgrade efforts. As a result, KSU is crafting an MOU with YSU to share Database Administration Services between the two schools. This effort will increase knowledge sharing, employee satisfaction and retention, and mitigate separation-risk of these key resources. Within two years this collaboration will eliminate the

need for contractor DBA resources thereby lowering costs. In addition, the five CIO's are negotiating collectively with Ellucian (parent company of Banner) to negotiate a single MSA encompassing the five universities. This MSA could produce a one-time savings for YSU of \$250,000 in FY18 and reduce maintenance by \$370,000 over the five-year term of the agreement.

YSU is facilitating a collaborative effort with the other IUC universities to develop a standard hardware configuration for Multi-media Classroom (MMCR) hardware. Currently, YSU's MMCR hardware cost is \$10,000/unit. Based on best practices, the IUC-PG estimates that a negotiated standard would save 30% or \$3,000/unit. For YSU, the savings would be \$651,000 over 5 years or \$130,200 per year in capital cost avoidance upon MMCR refresh.

## Section II: Academic Practices

### Recommendation 6 | Textbook Affordability

**6A Negotiate cost:** Professional negotiators must be assigned to help faculty obtain the best deals for students on textbooks and instructional materials, starting with high-volume, high-cost courses. Faculty must consider both cost and quality in the selection of course materials. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

**YES—significant progress has been made**

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

This recommendation was implemented in FY16 but progress continues as described below.

Textbooks can cost the average University Student \$1,225. These costs have risen dramatically. From 1996 to 2004, the cost of a new textbook increased an average of 6 percent a year. That was more than twice the pace of inflation. The trend has continued unabated in recent years, with textbook prices climbing 6 percent a year between 2002 and 2013 while general household prices increased at an average of two percent annually. Textbook rental programs and digital options offer some opportunities to reduce costs for many students. Because textbooks are a reflection of an individual student's field of study, and the choices made by the faculty in those courses, students may not know the true cost of their education until they have enrolled in classes. Improving the affordability of textbooks and other course materials offers a direct way to lower the cost of a higher education for students. With these perspectives in mind, YSU engaged Barnes & Noble College, Inc. as a professional negotiator to help faculty obtain the best prices for students on

textbooks and instructional materials.

Using data provided by Barnes & Noble College, while the dollar amount of sales is down 3% in FY18, the actual number of units sold is up by 4% compared to the previous FY17 term. This data suggests that students are buying/renting more books at a lower cost. Specifically, **units of digital textbooks sold are up 124% compared to last fiscal year.** This decrease in total dollars sold and increase in digital textbook units purchased is partly due to an implemented pilot program called First Day ready. The new agreement with Barnes & Noble also produces a minimum \$10,000 annually for textbooks scholarships. In FY17, the University also awarded \$156,237 in textbook scholarship funds from the YSU general scholarship fund.

In the First Day Ready program, the cost of the course material is charged directly to the student bill allowing the student to have access to the course material in electronic form for the first day of class. Below are the test courses piloted in this program.

1) First Day Ready PSYC 1560 – The YSU Bookstore engaged in negotiation with McGraw Hill to lower the cost to 872 students for course materials for PSYC 1560. Contingent upon increased sell thru, the bookstore negotiated a retail price of \$85 for an eBook with an access code. As the same course materials originally cost \$212, the savings to the students is \$37, a 30% reduction and a savings of \$32,264..

2) First Day Ready Physical Therapy Majors - Negotiations with McGraw Hill offered a subscription to a product called AccessPhysiotherapy. The F.A. Davis PT collection enables students, educators, and practitioners to tap into the most current and reliable physiotherapy information available today. The ultimate goal is to provide users with the tools and resources they need to understand every aspect of physical therapy and to deliver the best patient care possible. The cost of the subscription, depending on the number of subscribers, can range from \$169 to \$185 per year. It is estimated the book costs for the 3-year program in prior years was around \$2,000. The first year was the heaviest and exceeded \$1,000. The subscription this Fall 2017 term is the most students will ever pay. Next year the Department of Physical Therapy II and I students will split the cost so the per year price will decrease by about 50%. In the third year, the cost per student will be based on 90 students. With the implementation of the subscription, YSU expects students will spend less than \$1,000 on the subscription over their three years. This represents a \$1,000 savings over three years of (\$29,970 savings per year).

The Williamson College of Business Administration negotiated, with Barnes & Noble's assistance, a subscription to materials designed to assist students in the new Master of Accountancy program with CPA review materials. The book vendor Gleim, sold the premium package for all four parts of the CPA exam to YSU for \$885. Gleim has a retail price on that premium package of approximately \$1,600. The goal with this initiative is to provide the CPA materials to students in the most cost-effective manner. This subscription represents a \$715 (45%) savings for each student. This represents total savings of \$64,350 (90 students).

Going into Spring 2018 and further into the 18-19 school year, Barnes & Noble will work with other departments/instructors to offer a first day ready model putting YSU at the **forefront of realizing these affordability opportunities.** With the implementation of this model for PSYC 1560, YSU has set an example for other initiations to follow towards achieving the important goal of reducing college costs for students.



In Fall 2016, YSU's Maag Library became actively engaged in increasing the number of print textbooks available to students through the Closed Course Reserves (3-hour loan periods). The library solicited copy donations from the faculty/departments, purchased textbooks from the YSU Barnes & Noble Bookstore (classes with 100 or more enrollment), and partnered with the Student Government Association for a student textbook donation campaign in exchange for athletic ticket vouchers. In fall 2016, the number of textbooks available through course reserves was 167, an increase of almost 60 required textbooks from the previous year.

In Fall 2017, the library followed similar strategies extending its textbook purchases to include classes with enrollment of 50 or more. Between the Maag and CRC locations, students are able to checkout 346 textbooks in 3-hour loans, an increase of 179 textbooks from fall 2016. These are required textbooks for 186 courses in the 1000, 2000, 3000, and 4000 levels. Some high-demand or high-enrollment courses have multiple textbook copies, in some cases up to three.

Older textbook editions along with previously required textbooks are available in the general collection that students can check out for the entire semester. Students are also encouraged to use OhioLINK as an alternative for their textbook needs.

Maag Library also created a dedicated page on its website tailored to textbook resources that is easy accessible by students. It provides instructions for how and where to find textbooks either through the library or the bookstore. It provides no-cost textbooks alternatives through Maag Library and the OhioLINK state consortium. To better serve the students in easily locating the textbooks, a detailed list includes all textbooks available at the Maag Library Course Reserves (three-hour loan periods) with course number, title, author, call number, and location. <http://www.maag.ysu.edu/textbook>

The library actively promotes to students the use of textbooks through various initiatives. Circulation staff have observed that some students are using the textbook services daily who otherwise would not be able to have access to the required course material. We have also observed an increased use of these resources by international students.

**6B Standardize materials:** Colleges and universities must encourage departments to choose common materials, including digital elements, for courses that serve a large enrollment of students. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

**YES, the successful outcomes of several initiatives are outlined below**

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

Implemented in FY16 but progress continues as illustrated below.

Standardized materials for common courses is reflected in Article 28.2 of our Ohio Education Association agreement as follows: “In multiple sections of sequential courses that are also prerequisites to advanced courses in the sequence, uniform texts will be selected.”

As noted above for the First Day Ready initiative for PSYC 1560, standardized materials are required for 872 students. This produced a savings of \$32,264

Blackboard Learn, as the university Learning Management System (LMS), provides a common shared repository specifically structured for academically oriented digital elements serving a large enrollment of students. A key outcome is a common online learning environment experience for students regardless of discipline. Additionally, YSU is adding Blackboard Collaborate functionally to further augment the interactive online learning experience and standardized methods of sharing lectures and course content.

In October 2015, Academic Senate approved a new category of General Education courses for First Year Experience (FYE). These courses serve as a cornerstone for new student success initiatives with goals of improving completion and retention of students. Each of the six colleges created at least one 2-4 credit hour course for FYE domain of General Education Requirements. Fifteen different FYE courses were created and approved to assist incoming students with the transition to college, the disciplines within the college, and YSU. Included in the 15 courses, for students designated as “undecided” or “exploratory,” are two courses designed to meet their needs to decide on a major and establish goals for their future educational success. Each of the fifteen courses allows YSU to fulfill mandates for first year students, including Federal Campus Sexual Vio Elimination (Campus SaVe) Act, and a call for career assessment by all incoming freshmen. Further, the potential mandate for students to participate in financial literacy training was also considered and added as a component to the courses. Students in the FYE courses are required to participate in college and campus activities and programs, as well as a common intellectual experience. Rather than reading a common book, YSU is unique in creating PenguinThink. The theme for PenguinThink 2017-18 is *The Unintended Consequences of Innovation*. Subsequently, consideration has been given to also include information literacy as well as diversity and inclusion themes.

In academic year 2016-17, FYE courses were piloted in 5 of the 6 undergraduate colleges. During the Fall 2016 semester, approximately 45 sections were offered serving 1100 students; for Spring 2017; 19 sections were offered, serving approximately 500 students. Fall 2017 includes 88 sections serving 2,346 students (100% of YSU’s incoming freshman class).

Overview of First Year Experience Components shared via Blackboard9 to all sections:

- Sexual Violence/Alcohol Awareness: Title IX/Campus SaVe – on line training delivered by Campus Clarity: *Think About It*
- Career Planning: ODHE – delivered by YSU Career Services/ varies by course, but must contain OhioMeansJobs.com search; video with pre-class assignment on Blackboard.
- Financial Literacy: mandate may be coming soon – online training delivered by EverFi: *Transit: Financial Wellness*.
- Common Intellectual Experience: “PenguinThink” [2017-18: *The Unintended Consequences of Innovation*]. Includes a PenguinThink Contest yielding \$500 textbook scholarships in each college each term. Introductory information share on Blackboard for students; curricular support supplied to instructors. All Interactive Presentations posted on Blackboard.

- Proof of attendance and feedback at Interactive Presentations recorded through YSU app (oohlala.com).
- Campus Engagement/Activities: Participate in four activities with at least one being outside of the specific college/varies by college. Eventually attendance will be recorded through YSU app (oohlala.com). Currently students posting to Blackboard or other online platforms per instructor's direction.

**6C Develop digital capabilities:** Colleges and universities must be part of a consortium to develop digital tools and materials, including open educational resources, that provide students with high-quality, low-cost materials. Please complete the section that aligns with the implementation status of your college/university.

**Please explain your efforts to develop digital tools and materials.**

**YES—significant progress has been made** as illustrated below

In addition to becoming an Open Textbook Network Consortium member in September 2016, and hiring an Open Education Resource point-person, many efforts are underway regarding digital content that are also expanded upon in the subsequent section:

- Instigated a Barnes & Noble agreement for access to LoudCloud Open Access Resources providing supplemental resources for ten General Education Courses at a cost of \$50 per student. This approach is being considered for adoption by faculty for use in other circumstances
- The First Day Ready textbook cost reduction initiative was piloted resulting in savings of at least \$36,000
- The B&N Price-Match program saved students \$15,000; a program that will continue
- In an effort to encourage the adoption of Open Education Resources, the following incentives are available to faculty:
  - \$200 Open Textbook Network and Open Textbook Network course review
  - \$750 for Open Resource or LoudCloud adoption (with minimal changes in material) or \$1,500 for department making such a group decision
  - \$1000 for individual course LoudCloud adoption with some significant edits (editor would receive stipend)
    - Since incentivizing, total student savings for English 1550, Polit 1560 and Geo 2626 has totaled \$33,600
- Units of digital textbooks sold are up 124% compared to last fiscal year.

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

In March 2017, an Instructional Designer was hired in the Office of Distance Education to assist in the creation of online courses and materials and in the promotion and adoption of open educational resources.

Students are also encouraged to use OhioLINK as an alternative for their textbook needs. Maag Library also created a dedicated page within its website tailored to textbook resources that is easy accessible by students. It provides instructions in how and where to find textbooks either through the library or the bookstore. It provides no-cost textbooks alternatives through Maag Library and the OhioLINK

state consortium. To better serve the students in easily locating the textbooks, a detailed list includes all textbooks available at the Maag Library Course Reserves (three-hour loan periods) with course number, title, author, call number, and location. <http://www.maag.yzu.edu/textbook>

Via the appropriate campus consultation, YSU will interact with OSU about the possibility of joining the Unizin agreement.

**Ohio Revised Code Section 3333.951(C) requires Ohio's public colleges and universities to report their efforts towards reducing textbook costs for students. Please discuss all practices implemented that ensure students have access to textbooks at an affordable price. Also, please identify efficiencies captured from your practices.**

Working with deans, department chairs and faculty, the Office of Academic Affairs and the Undergraduate Student Government and University Libraries have played leadership roles focusing efforts at various areas within the institution to lower the costs of textbooks to make a degree from the University more affordable, notwithstanding the University's already highly competitive tuition and total cost of attendance (see the Cost Diagnostic section above).

Please see the compilation of activities and initiatives listed above undertaken by the University to reduce the costs of textbooks. Notable outcomes summarized from the above include:

- Report from the Barnes & Noble indicating total sales are down while the sale of individual items is up suggesting increased use by students of rental and lower-cost materials
- Availability and access of digital content is up 124%
- Directly negotiated contracts for course materials has produced a cost reduction to students of \$160,184
- In some circumstances, the costs for materials have been reduced by more than 50%
- The First-Day Ready initiative is a unique partnership with Barnes & Noble to reduce the cost of textbooks that will be expanded to the greatest extent possible
- While Barnes & Noble provides at minimum \$10,000 in textbook scholarships, the University provides \$157,237 in textbook scholarships

**Ohio Revised Code Section 3333.951(D) requires Ohio's public colleges and universities to conduct a study to determine the current cost of textbooks for students enrolled in the institution and submit the study to the Chancellor by a date prescribed by the Chancellor. Please note that the study will be due on the same submission timeline as the FY18 Efficiency Advisory Committee survey; therefore, institutions should prepare accordingly to meet this timeline.**

The Office of Academic Affairs will work with Barnes & Noble and via appropriate governance processes to conduct a study to determine the current cost of textbooks for students and will submit to the Chancellor via the FY18 Efficiency Advisory Committee survey.

## Recommendation 7 | Time to Degree

**7A Education campaign:** Each college/university must develop a coordinated campaign to educate its full-time undergraduates about the course loads needed to graduate on time (two years for most associate degrees and four years for most bachelor's degrees). Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

This has been implemented via advising practices, communications strategies, and via new student orientation.

Changing the bulk-rate from 12-15 SCH to 12-17 SCH has incentivized students to take more credits fostering earlier completion. Beginning in FY16, revenue was reduced by approximately \$860,000 per semester; thus, savings students \$1.7 million per academic year.

There has been a robust involvement in the College Credit Plus program. There are agreements with 46 school districts and in aggregate, over the past two-years, 2,852 students saved \$5,020,410 (\$2,453,922 for 2015-16 for 1,375 students, and \$2,593,086 for 2016-2017 for 1,450 students). The credit hours earned by these students will ultimately reduce the number of semesters in which they will enroll to complete their Bachelor's degree.

The focus of the faculty and staff on student access and success has produced a robust focus on degree completion. This focus created the second largest graduating class in 2017 in the history of the university.



Significant student success initiatives are underway, including those that will emerge from the efforts of the newly hired associate provost for student success. The objective is to do better than degree completion predicted by incoming academic preparation.

The catch-22 is that as an institution more successfully graduates students, total enrollment will decline absent a strategy to increase the number of new students' equal to the increased graduation success.

**7B Graduation incentive:** Colleges and universities should consider establishing financial incentives to encourage full-time students to take at least 15 credits per semester. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

YSU already has the lowest tuition cost and estimated total cost of the other institutions in NE Ohio as well as the University of Toledo (see Cost Diagnostic)

The institution intends to create a Tuition Guarantee program as permitted by Ohio legislation and implemented by several other Ohio public universities.

**7C Standardize credits for degree:** Colleges and universities should streamline graduation requirements so that most bachelor's degree programs can be completed within 126 credit hours or less and associate degree programs can be completed within 65 credit hours or less. Exceptions are allowed for accreditation requirements. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

During the previous academic year, the faculty evaluated every academic program and the total credit hours to complete the degree were reduced to 120 credit hours, absent those related to accreditation. Only 26 of 95 degree programs require more than 120 credit

hours to graduate due to the strict educational and practicum requirements of accrediting organizations, typically for professional degree programs

**7D Data-driven advising:** Colleges and universities should enhance academic advising services so that students benefit from both high-impact, personalized consultations and data systems that proactively identify risk factors that hinder student success. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

An associate provost for student success has been hired and will help transform advising at YSU. This will include approaches to data analytics that instigates advising steps or indicators that allow anticipatory or "just-in-time" advising.

YSU implemented Starfish Early Alert in 2011 to enable academic support staff to identify students at risk for poor academic performance. During the 2016-2017 academic year, course instructors raised a total of 7,717 flags for students who had poor attendance, low grades, would have benefited from tutoring or academic coaching, and/or were possibly in need of a counseling support. Some students received more than one flag; the average number of flags per student was 2.35. Peer mentors, professional coaches, academic support coordinators, and Counseling Center staff intervened with students as appropriate.

**7E Summer programs:** Colleges and universities must develop plans to evaluate utilization rates for summer session and consider opportunities to increase productive activity. In particular, colleges and universities should consider adding summer-session options for high-demand classes and bottleneck courses that are required for degree completion. Please complete the section that aligns with the implementation status of your college/university.

**Please provide details on the results of the assessment. In particular, please address whether the campus added summer session options for high-demand and bottleneck classes.**

YES

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please**

**provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

The Jump Start Summer program offers a menu of General Education courses at reduced tuition (\$500/class for up to 2 three credit classes). Board of Trustees and ODHE approvals were obtained for the tuition reduction and fee waiver. The program was designed to increase Fall matriculation and decrease cost and time to degree. Enrollment has been good, and the Fall matriculation rates of accepted incoming freshmen are higher than that of the general student body (94% vs. 33%). Collectively over 2015, 2016, and 2017, by successfully completing this program, 221 students saved an aggregate \$162,826 or \$726 per student). The savings for FY17 totaled \$35,488 or \$865 per student.

**7F Pathway agreements:** Colleges and universities should continue to develop agreements that create seamless pathways for students who begin their educations at community or technical colleges and complete them at universities. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

**Please provide details. In particular, how many articulation agreements does the college/university have with other Ohio colleges and universities (either 2+2 or 3+1)? Please provide a list.**

A complete list of articulation agreements with other universities, community and technical colleges and school districts is attached.

There are a large number of Articulation Agreements with four-year and two-year institutions and technical centers. Currently, there are three agreements with four-year institutions, 45 agreements with two-year institutions, 53 agreements with technical centers, and two consortium agreements. The consortium agreements provide collaborative opportunities between YSU and other institutions including University of Akron, Cleveland State University, Kent State University, and the Northeast Ohio Medical University in offering the Master of Fine Arts and Master of Public Health as well as the BS to MD program.

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

YES--Progress and involvement continues in this category as reported below.

Delivery of academic programs on the Lakeland Community College Campus (or via hybrid delivery) served 21, 12, 46, and 21 students



in allied health, criminal justice, and social work bachelor's degrees, and the master's degree in social work, respectively.

Delivery of academic programs on the Lakeland Community College Campus (or via hybrid delivery) served 27, 14, 32, 59, and 11 students in allied health, public health, criminal justice, and social work bachelor's degrees, and the master's degree in social work, respectively.

In 2017 there were 60 transfer students who each transferred more than 30 credits to the institution potentially lowering each students' cost by the differential between 30 credits at a community college tuition cost versus the cost of tuition at YSU.

From an Information Technology perspective, YSU worked collaboratively with Jefferson County Community College (JCCC, now Eastern Gateway Community College EGCC) to acquire the Blackboard Learn Learning Management System (LMS) at a significant discount for a hosted solution. Hosting versus in-house hardware installation resulted in immediate and on-going improved data backup, data & application redundancy and system disaster recovery benefits. Such collaborations create important technology pathways allowing students greater focus on coursework instead of navigating intricacies of same purpose but different technology tools.

**7G Competency-based education:** Colleges and universities should consider developing or expanding programs that measure student success based on demonstrated competencies instead of through the amount of time students spend studying a subject. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

See the response to the next question

**If applicable, please provide additional details. In particular, how many students does the college/university estimate the competency-based education programs will serve?**

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

The institution has considered this recommendation and has concluded it will not move substantially in this direction, absent the current professional programs that are offered that already have a component of competency based education build into their curriculum, particularly given that licensure/certification tests often require the demonstration of various professional competencies.

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

See the statement above.

### **Recommendation 8 | Course and Program Evaluation**

**8 Duplicative Programs:** Colleges and universities should review and address low-enrolled courses and programs and consolidate programs duplicated at other colleges and universities in your geographic area. Please indicate the section that aligns with the implementation status of your college/university. There is no need to provide your report.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**

This recommendation was implemented as reflected in the FY16 report. Nonetheless, assessment of low enrollment courses and programs is on-going.

Progress continues as illustrated in the table below.

**Course and Program Sharing: What courses/programs are currently being shared with other colleges and universities?  
Course and Program Modifications: What courses/programs are currently being adjusted considering low enrollment or to increase enrollment?**

Partnering College/University	Explanation
<ul style="list-style-type: none"> <li>• ICP (International Business/Trade/Commerce) CIP5211101</li> </ul>	Being considered for revision as a new program
<ul style="list-style-type: none"> <li>• BSB Management (Management Information Systems General) CIP: 521201</li> </ul>	Restructured into a new program
<ul style="list-style-type: none"> <li>• BSE ED-BSE Integrated Business Education (Business Teacher Education) CIP: 131325</li> <li>• BA French (French Language and Literature) CIP: 160901</li> <li>• BA Art History (Art History, Criticism and Conservation) CIP: 500703</li> <li>• AA Marketing (Marketing) CIP: 521401</li> <li>• AAS Drafting and Design (Drafting) CIP: 151301</li> </ul>	Programs that have been deleted or in the process of being deleted

**Recommendation 9 | Co-located Campuses**

Ohio Revised Code Section 3333.951 requires Ohio's co-located colleges/universities to annually review best practices and shared services in order to improve academic and other services and reduce costs for students. Co-located campuses are then required to report their findings to the Efficiency Advisory Committee.

Co-located Campus: NOT APPLICABLE

<p><b>Type of Shared Service or Best Practice (IE: Administrative,</b></p>	<p><b>Please explain in detail your findings related to this shared service or best practice.</b></p>
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Academic, etc.)	

**Please explain your approach and process to sharing services with your co-located campus.**

**Please identify and discuss best practices that have been identified by the co-located campuses.**

**Please provide your estimated cost savings from shared services between the co-located campuses.**

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## Section III: Policy Reforms

### Recommendation 10 | Policy Reforms

**10A Financial advising:** Ohio's colleges and universities should make financial literacy a standard part of students' education. Please complete the section that aligns with the implementation status of your college/university.

**Has the college/university implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.**

YES

**If the college/university has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the college/university has not implemented this recommendation and does not plan to do so, please provide the rationale.**

**If this recommendation was fully implemented in FY16 and no substantial changes occurred in FY17, please indicate below.**  
In academic year 2016-2017, 1,946 first-year students enrolled in pilot sections of First Year Experience classes. 1,067 (55%) of those

students completed *Financial Literacy 101*, a financial literacy tool provided by Decision Partners.

During the 2017-18 academic year, all first-year students (2,254 students) will take a First Year Experience class. Students in all sections are required to complete the *Transit: Financial Wellness* program already in place w/EverFi and Campus Clarity -- two companies that are joining together and already provides online training modules to HR for HR training as well as *Think About It* for on campus safety, sexual assault and bystander training.

**10B Obstacles:** The state Department of Higher Education and/or state legislature should seek to remove any obstacles in policy, rule or statute that inhibit the efficiencies envisioned in these recommendations.

**What legislative obstacles or policy roadblocks, if any, inhibit efficiencies and affordability practices at the college/university?**

- Recognition of the perspective of YSU's already low tuition (see Cost Diagnostic)
- Reducing barriers to monetizing assets such as the sale of property

#### **Construction Reform**

**With the Construction Reform legislation in 2012, please describe the outcomes, efficiencies gained, and benefits to students from implementing this reform.**

The University uses the standardized processes and procedures required for campus construction to optimize the price of construction.

#### **Additional Practices**

**Are there additional efficiency practices your college/university implemented in FY17 to ensure students have access to an affordable and quality education? Please identify.**

The institution determined there were savings above those captured in the standardized categories for item 3B Collaborative Contracts in the amount of \$538,000.

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## **Section IV: Cost Savings, Redeployment of Savings & Tangible Benefits to Students**

The following charts allow each college/university to report this information. For the first chart, please provide, if applicable, any actual cost savings to the college or university and/or students for fiscal year 2017 (or expected annual cost savings) for each of the recommendations from the Task Force. (Please note this does NOT include cost avoidance.)

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For the second chart, please provide more detail as to how cost savings were deployed, specifically in the following categories: reductions in cost of attendance, student financial aid, student services, investment in efficiency and affordability tools, and student program improvements. Please use the explanation field to provide further detail.

**Please use the chart below to capture, if applicable, FY17 cost savings, or expected annual savings, to the college/university in actual dollars:**

Recommendation	If applicable, provide the actual FY17 cost savings, or expected annual cost savings, to the institution and/or student. Please specify. <small>*Put NA if no savings</small>
<b><i>Efficiency Practices</i></b>	
3A: Campus Contracts- <u>savings to institution</u>	\$67,000 via contracts; toner saving \$112,614; decreased annual capital outlay for printers \$73,500 (reduced printers by 245); reduced annual expenditure for copy/printer paper \$13,000
3B: Collaborative contracts- <u>savings to institution</u>	\$1,818,000 including areas beyond those identified by the Task Force (see additional efficiency practices below); for those identified by the Task Force \$1,280,000; savings from athletics travel \$59,200 per year
4A: Asset Review - <u>savings to institution</u>	\$25,008 funds secured via surplus sales; \$35,000/y for revenue from property lease related to private student housing development.
4B: Operations Review - <u>savings to institution</u>	\$1,000,000 investment by Barnes & Noble in bookstore location for student gathering space; \$775,000 commission towards the general scholarship fund via Barnes & Noble new agreement
4C: Affinity partnerships and sponsorships - <u>savings to institution</u>	Barnes & Noble \$775,000 (also noted above but not duplicated in summary below); JP Morgan-Chase \$79,745; Various sponsorships for athletics \$903,000; Pepsi \$55,000; Concert \$1,453,853 and 16,258 tickets for institutional exposure value; YSU Foundation \$8,100,000 scholarship funds; \$50,000,000 Student Success Center; \$1,200,000 Student Mobility initiative FY18; \$167,804 Scholarship of Excellence
5A: Cost diagnostic	Preliminary diagnostic completed revealing compensation and benefits are the primary cost-drivers for the institution; health care costs have decreased; operations are essential foundational costs without which campus operations would be impaired yet the cost of utilities has decreased significantly
5B: Productivity measure -	Comments provided; should be relativized to a per student FTE framework as opposed to a per management FTE framework

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5C: Organizational Structure - <u>savings to institution</u>	\$30,000 savings through improved negotiations for software; cost reduction of \$75,00 for reduction by one department in College of Education; Bad student debt decreased by \$411,105 from FY16 to FY17
5D: Health-care costs - <u>savings to institution</u>	\$1,600,000 associated with negotiated changes in employee contributions to proportion of health care costs 15% current (6% ten years ago)
5E: Data Centers - <u>not applicable</u>	Will move to data recovery to Ohio State Computer Center (OSCC) in FY18 and will evaluate moving ½ high value computing environment to OSCC
5F: Space utilization- <u>not applicable</u>	Participating in the Ohio Department of Higher Education pilot project related to efficiency of academic space utilization that compares historical enrolment and space use with actual to help inform course offering/space utilization decisions in the future
Energy projects – <u>savings to institution</u>	\$2,255,607 reduction in utilities costs (\$351,981 for utilities cost reduction in FY16 possibly not reported in FY16); \$100,000 savings linked to energy curtailment and at least \$500,000 cost avoidance via Hess and Calpine Energy
Regional compacts beginning FY18 - <u>savings to institution</u>	Reduced enterprise costs for Banner \$250,000 reduction in FY18 and \$74,000 reduction per year FY19-FY24; classroom multimedia reduction \$130,200 per year FY18-FY22
<b>Academic Practices and Policies</b>	
6A – 6C and textbook efficiency practices- <u>savings to students</u>	While dollar amount of sales is down 3% in FY18, the actual number of units sold is up by 4% compared to the previous beginning of term FY17. This data seems to indicate that students are buying/renting more books at a lower cost: \$126,584 for the combination of negotiated agreements for First-day Ready, Physiotherapy and Business accounting; Barnes & Noble agreement creates a minimum of \$10,000 per year in textbook scholarships, whereas the University invests \$156,237 per year in textbook scholarships; joined Open Textbook Network Consortium and hired an Open Education Resource person (\$56,000); The use of digital materials through Barnes & Noble is up 124% over one year ago; In one instance a change to digital content saved students \$33,600
7A: Education Campaign- <u>savings to students</u>	Beginning in FY16, \$1,720,000 in reduced revenue from students taking courses in the 15-17 credit hours bulk discount; in 2016-17, 1,450 students saved \$2,593,086 by enrolling in College Credit Plus courses which will reduce their time to degree regardless of the institution they attend to complete their college degree
7B: Graduation Incentive- <u>savings to students</u>	The University will implement a Tuition Guarantee in the future; Independent of an incentive, the University graduated the second largest class in history
7C: Standardize credits for degrees- <u>savings to students</u>	All programs absent those linked to accreditation requirements require 120 credit ours to graduate; only 26 of 95 programs require more than 120 credits to graduate and this is linked to those programs retaining accreditation; The First-Year Experience course in Fall 2017 included 88 sections serving 2,346 students (100% of YSU's incoming freshman class).

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7D: Data-driven advising- <u>savings to students</u>	Early Alert System activated and utilized with 7,717 flags with an average of 2.35 flags per student, effect on retention and completion is underway and will be on-going	
7E: Summer programs- <u>savings to students</u>	Summer Early Start program produced 94% vs. 33% matriculation rate for students in the program vs. those not in the program; those in the Summer Early Start program saved \$35,488 or \$865 per student	
7F: Pathway agreements- <u>savings to students</u>	Substantial number of pathway agreements (103)	
7G: Competency-based education - <u>benefit to students</u>	Competency based education is incorporated into most all professional degree programs as this is assessed in practicum aspects of those degree programs	
8: Duplicative and low-enrollment courses and programs - <u>benefit to institution</u>	Assessment of duplicative and low-enrollment courses and programs is on-going	
9: Shared services at co-located campuses - <u>benefit to students</u>	There is a value for YSU hosting the Learning Management System (LMS) for EGCC and JVCC when students who transfer to YSU do not need to learn a different LMS	
Construction Reform	University utilizes all State of Ohio processes and procedures to optimize the cost of construction	
10A: Financial advising- <u>savings to students</u>	Implemented into First Year Experience classes in which 100% of the entering class enrolled	
Additional efficiency practices- <u>savings to institution</u>	There were efficiency savings in procurement practices beyond those requested in the standard efficiency reporting format equivalent to \$538,000 (see 3B collaborative contracts above)	
<b>Total Expected Annual Cost Savings:</b>	Given the information listed above the following efficiencies expressed in various categories emerged:	
	Direct Savings	\$4,811,942
	Deferred Revenue (direct savings to students)	\$6,687,203
	Cost avoidance (that would otherwise increase expenses)	\$2,511,105
	Funds raised (reducing pressure on fees)	\$1,102,557
	Savings or Funds raised by auxiliary enterprises	\$997,200
	<b>GRAND TOTAL</b>	<b>\$16,110,007</b>

Please utilize the chart below to show how the total actual cost savings listed above were redeployed to either (1) reduce the cost of college for students or (2) to provide tangible benefits for the quality of students' education:



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These savings noted above will permit YSU to invest more resources in core functions of instruction, instructional support, technology for enhanced teaching for value-added learning, and community engagement through service and applied research.

<b>Category</b>	<b>Amount Invested for academic excellence and quality enhancement (or Student Costs Avoided)</b>	<b>Explanation</b>
Reductions to the total cost of attendance (tuition, fees, room and board, books and materials, or related costs — such as technology)	\$1,720,000	<i>This represents the revenue reduction resulting from students taking courses in the bulk rate discussion that moved from 12-15 to 12-17 credit hours.</i>
Student financial aid	\$26,027,072 (\$3,931,715 increase over the previous year)	<i>Student scholarships offered by the university that effectively reduces costs and defers revenue</i>
Textbook Affordability	<i>Direct Savings to students of \$126,584 and University and Barnes &amp; Noble and University textbook scholarships of \$166,237</i>	<i>Focused efforts on negotiating the costs of text books and the availability and use of scholarships for textbook purchases will have an impact on lowering the overall cost of a degree, particularly as these practices continue.</i>
Organizational arrangements and sponsorships that benefit the institution	\$775,000	A new agreement with Barnes & Noble generated this additional revenue to benefit the institution as a whole that also leveraged in investment by B&N in a Starbucks and student study areas in the new bookstore
Student success services, particularly with regard to completion and time to degree	\$115,000	Associate provost for student success was hired and is now working with the colleges and academic programs to engage in data-informed discussions related to student progress, completion, and placement
Investments in tools related to affordability and efficiency	\$262,000	Investment in upgrades, license continuation for StarFish and other site licenses related to student success
Improvements to high-demand/high-value student programs	\$56,000	Instructional Designer hired in Office of Distance Education to increase access to on-line courses and to increase access to open digital content
Investment in attraction and retention of faculty and staff via negotiated contracts	Investment to be finalized at a later date and reported in the FY18 Report	To assure student access and success, academic excellence, and engagement with the community in mutually beneficial ways

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<p>As the result of BOT-endorsed and YSU Foundation Board-endorsed investment in academic excellence, student access and success and community engagement via fund-raising campaign</p>	<p>Investment to be realized over time</p>	<p>\$8.1 million in annual base support for student scholarships, including both merit- and need-based programs.</p> <p>\$50 million in gift funds raised and pledged to support projects that will directly benefit students, including renovations to the Jones Hall Student Success Center and other classroom buildings, the creation of an innovation and commercialization center, and student scholarships and work opportunities.</p>
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**YOUNGSTOWN STATE UNIVERSITY  
FY17 AFFORDABILITY AND EFFICIENCY SUMMARY TABLE**

	FY-17						
	Direct Savings	Deferred (direct student savings at YSU)	Cost Avoidance	Funds Raised	Savings or Funds Raised by Auxiliary Unit		
Campus Contracts						\$266,114	
	General	\$67,000					
	Toner	\$112,614					
	Printers	\$73,500					
	Paper purchases	\$13,000					
Collaborative Contracts						\$1,280,000	
	Computer hardware	\$1,000,000					
	Travel services (Athletics)				\$59,200		
	Outbound shipping	\$5,600					
	Scientific equip/supplies	\$87,000					
	Office supplies/equip	\$126,000					
	Misc	\$2,200					
Asset Review						\$60,008	
	Surplus sales			\$25,008			
	Residenc hall ground lease				\$35,000		
Operations Review						\$1,000,000	
	Barnes&Noble arrangement		\$1,000,000				
Affinity Partnerships/sponsorships						\$1,980,549	
	Barnes & Noble arrangement			\$775,000			
	JPMorgan Chase			\$79,745			
	Various partnerships- Athletics				\$903,000		
	Pepsi			\$55,000			
	YSU Foundation (Scholarship of Excellence)			\$167,804			
Organizational Structure						\$516,105	
	Sortware negotiations	\$30,000					
	Reorganization College of Education	\$75,000					
	Bad Student Debt			\$411,105			
Health Care Costs						\$1,600,000	
	Reduction if YSU contribution			\$1,600,000			
Energy						\$2,855,607	
	Steam Plant Implementation	\$2,255,607					
	Energy curtailment	\$100,000					
	Energy curtailment avoidance savings			\$500,000			
Textbook Affordability						\$326,421	
	Negotiate costs	\$94,320					
	Standardize materials	\$32,264					
	Develop Digital Capabilities	\$33,600					
	Textook schoarships B&N	\$10,000					
	YSU textbook scholarships	\$156,237					
Graduation Incentive						\$1,720,000	
	Change in Bulk-rate Tuition		\$1,720,000				
Summer Programs						\$35,488	
	Jump Start Program		\$35,488				
Additional Efficiency Practices							
	Others savings Identified beyond Collaborative Contracts Above	\$538,000				\$4,469,715	
	Institutional Scholarships (Increase from FY16)		\$3,931,715				
<b>Total</b>		<b>\$4,811,942</b>	<b>\$6,687,203</b>	<b>\$2,511,105</b>	<b>\$1,102,557</b>	<b>\$997,200</b>	<b>\$16,110,007</b>

Direct Savings	\$4,811,942
Deferred Revenue (direct savings to students)	\$6,687,203
Cost avoidance (that would otherwise increase expenses)	\$2,511,105
Funds raised (reducing pressure on fees)	\$1,102,557
Savings or Funds raised by auxillary enterprises	\$997,200
<b>GRAND TOTAL</b>	<b>\$16,110,007</b>

**MASTER RECOMMENDATION 2: FIVE-YEAR GOAL FOR INSTITUTIONAL EFFICIENCY SAVINGS AND NEW RESOURCE GENERATION**

Category	Recommendation	Component	Description	FY 2017 (Estimate)	FY 2017 (Actual)	FY 2018 (Estimate)	FY 2019 (Estimate)	FY 2020 (Estimate)	FY 2021 (Estimate)	Subtotal	Budget Narrative/Explanation of Efficiency Savings \$\$ (attach additional sheets if necessary)	
Efficiency Savings	3A	Campus contracts	Require employees to use existing contracts for purchasing goods and services.	\$ 150,000	\$ 67,000	\$ 100,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 317,000	Board of Trustees passed a resolution June 2017 requiring the use of State and Local contracts; this savings will be significantly increased next year as a result	
	3A	Campus contracts	Savings linked to print management program (identified via 4B operations review in FY16 report)	\$ 142,000	\$ 199,114	\$ 178,255	\$ 262,255	\$ 281,255	\$ 281,255	\$ 1,003,020	Print management implementation (toner \$112,614; printers \$73,500; paper \$13,000)	
	3B	Collaborative contracts	Pursue new and/or strengthened joint purchasing agreements.	\$ 100,000	\$ 1,280,000	\$ 750,000	\$ 500,000	\$ 250,000	\$ 200,000	\$ 3,080,000	The University substantially optimized use of collaborative contracts (computer hardware \$1,000,000; travel services athletics \$59,300; outbound shipping \$5,600; scientific equip/supplies \$87,000; office equip supplies \$ 126,000; misc. \$2,200). There are savings in areas other than those in the Template as illustrated on next line.	
	3B	Collaborative contracts	Collaborative contracts beyond those categories identified in Template	\$ -	\$ 538,000							
	4B	Operations review	Conduct an assessment of non-academic operations that might be run more efficiently by a regional cooperative, private operator or other entity.	\$ 340,000	\$ 1,000,000	\$ 340,000	\$ 350,000	\$ 450,000	\$ 300,000	\$ 2,440,000	The result of this assessment created a new agreement with Barnes & Noble, the revenue for which is reported in the section below. The step to facilitate this action was the result of refinancing of Bonds at no additional cost to the University that provided for an additional \$5,000,000 bonds for this project to work...leveraging an additional \$1,000,000 from Barnes & Noble to outfit the Starbucks/Student Lounge and study space (reported on this line as value realized absent investment of YSU funds).	
	5C	Organizational structure	Each institution should review its organizational structure in line with best practices to identify opportunities to streamline and reduce costs	\$ 900,000	\$ 516,105	\$ 1,000,000	\$ 1,000,000	\$ 750,000	\$ 750,000	\$ 4,016,105	Savings derived from enhanced software contracts \$30,000; Reorganization College of Education \$75,000; Bad student debt reduction \$411,105	
	5D	Health care costs	Like other employers, colleges and universities, have experienced rapid growth in health care costs	\$ -	\$ 1,600,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 3,600,000	Shifting share of employee share of health care costs from 6% to 15% reduces institutional expenditures by \$1,600,000 annually	
	5E	Data Centers	YSU had entered into a reciprocity agreement with the University of Akron to share data center space and is currently negotiating with Cleveland State University for a similar agreement	\$ 10,000	\$ -	\$ 17,000	\$ 17,000	\$ 20,000	\$ 20,000	\$ 74,000	See document regarding moving aspects of disaster recovery to the Ohio Supercomputer Center in FY18 and other aspects of enterprise technology in years thereafter	
	N/A	Energy	YSU's construction of a new steam plant will provide sustainable energy that is produced more efficiently and cleanly and at a significantly lower cost than purchasing steam from outside vendors	\$ 1,700,000	\$ 2,855,607	\$ 2,000,000	\$ 2,000,000	\$ 1,600,000	\$ 150,000	\$ 8,605,607	Steam plant implementation \$2,255,607; Energy curtailment \$100,000; Energy curtailment avoidance savings \$500,000	
	6A	Textbook Affordability	Savings to students via negotiated costs of materials; standardizing materials; developing digital capabilities; Barnes & Noble; and YSU investment		\$ 326,421						\$ 326,421	Savings to students via negotiated costs \$94,320; standardized materials \$32,264; develop digital capabilities \$33,600; B&N textbook scholarships \$10,000; YSU textbook scholarships \$156,237
	7A	Graduation incentive	Change in bulk tuition rate		\$ 1,720,000						\$ 1,720,000	Estimated savings to students for taking credit hours in the tuition plateau
	7E	Summer Programs	Jump Start Program		\$ 35,488						\$ 35,488	Savings to students for enrollment in summer early-start courses/program
	N/A	Additional Efficiency Practice	Increased scholarships for students		\$ 3,931,715						\$ 3,931,715	
	N/A	Compacts	Enterprise systems savings				\$ 130,200	\$ 130,200	\$ 130,200	\$ 130,200	\$ 520,800	
N/A	Compacts	Multimedia classroom savings				\$ 250,000	\$ 74,000	\$ 74,000	\$ 74,000	\$ 472,000		
Subtotal Efficiency Savings				\$ 3,342,000	\$ 14,069,450	\$ 5,265,455	\$ 4,883,455	\$ 4,105,455	\$ 2,455,455	\$ 30,142,156		
Category	Recommendation	Component	Description	FY 2017		FY 2018	FY 2019	FY 2020	FY 2021	Subtotal	Budget Narrative/Explanation of New Resource Generation \$\$ (attach additional sheets if necessary)	
New Resource Generation	4A	Asset review	Conduct an assessment of non-core assets to determine their market value if sold, leased or otherwise repurposed.	\$ 80,000	\$ 25,008	\$ 160,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 865,008	Sale of surplus property (\$25,008)	
	4A	Asset review	YSU has outsourced the campus bookstore, effective June 2016. This has resulted in new commissions and sponsorship income	\$ 300,000	\$ 775,000	\$ 350,000	\$ 350,000	\$ 400,000	\$ 400,000	\$ 2,275,000	New Barnes & Noble agreement that provides general scholarship funding	
	4A	Asset review	YSU is working with the Ohio Department of Administrative Services regarding the possible sale or lease of a 408-bed student housing facility	\$ 500,000	\$ 35,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 2,035,000	Long-term land lease linked to residence hall (\$35,000)	
	4A	Asset review	YSU is engaged in discussion with external parties to develop partnerships to be the exclusive provider for on-line distance education programming	\$ -	\$ -	\$ 250,000	\$ 350,000	\$ 500,000	\$ 500,000	\$ 1,600,000	Not implemented not likely to be successful as too much tuition revenue is required in return	
	4C	Affinity partnerships and sponsorships	Upon determining assets and operations that are to be retained, evaluate opportunities for affinity relationships and sponsorships	\$ 80,000	\$ 134,745	\$ 120,000	\$ 250,000	\$ 250,000	\$ 300,000	\$ 1,134,745	These are funds linked to affinity arrangements and sponsorships as discussed in the FY17 report (JP Morgan-Chase (\$79,745); Pepsi (\$55,000))	
	4C	Affinity partnerships and sponsorships	particularly academic excellence, student access and success and community engagement	\$ -	\$ 167,804						\$ 167,804	Funds raised to support student access and success
	4C	Affinity partnerships and sponsorships	Partnerships via YSU athletics	\$ -	\$ 903,000						\$ 903,000	Various partnerships with YSU Athletics that reduces pressure to increase fees
	4C	Affinity partnerships and sponsorships	YSU Foundation partnership	\$ -	\$ -	\$ 120,000	\$ 120,000	\$ 120,000	\$ 120,000	\$ 480,000	\$ 480,000	Student mobility support stations
Subtotal New Resource Generation				\$ 960,000	\$ 2,040,557	\$ 1,500,000	\$ 1,770,000	\$ 1,970,000	\$ 2,020,000	\$ 9,460,557		
<b>TOTAL OF COMBINED INSTITUTIONAL OPPORTUNITIES FOR ENHANCED STUDENT AFFORDABILITY</b>				\$ 4,302,000	\$ 16,110,007	\$ 6,765,455	\$ 6,653,455	\$ 6,075,455	\$ 4,475,455	\$ 39,602,713		

**SPECIFIC RE-DEPLOYMENT OF SAVINGS TO STUDENTS:** Please use the area below to describe, in detail, how you plan to re-deploy the institutional resources that are saved and/or generated through the task force components outlined above to reduce costs for students.  
 YSU intends to redeploy resources in a manner that will directly benefit students, enable access, help reduce the cost of attendance, reduce the time to degree and assure job placement as well as invest to attract and retain faculty and staff to stimulate academic excellence as follows:

Continue investments in the Division of Student Success including the associate provost as well as targeted redeployment or investment in academic advisers and career counselors  
 Continue investments in various types of scholarship program opportunities to help reduce the overall cost of attendance for families particularly aligned with a families ability to pay  
 Reallocate resources in such a manner that academic program quality is enhanced, including investments in faculty and staff, in consideration of the tuition cap and the ability to implement a Tuition Guarantee  
 Continue to invest in and raise funds to decrease the costs of textbooks and to enable the progress made in negotiated costs of course materials, particularly for the professional colleges and the high-cost materials in the STEM areas  
 Implement a strategy that optimally deploys available resources to enhance technology-enable teaching and learning, particularly applications linked to individualized instruction and learning outcomes assessment  
 Assure continued enhancement of the student employment strategy to further optimize the positive relationship between on-campus employment and student continuation and completion

**SIGNIFICANT CHANGE(S) IN 5-YEAR GOALS FROM FY16 SUBMISSION TO FY17 SUBMISSION:** Please use the area below to describe, in detail, significant deviation in your institution's 5-year goals from the FY16 submission to the FY17 submission, if applicable.

All areas of the report have been effectively responded to with significant progress made in all areas particularly Textbook Affordability and a Cost Diagnostic clearly illustrating the efficiency of the institution (lowered total cost of compensation; health care; and fringe benefits) and the lowest cost of tuition and total cost of attendance for IPEDS comparison institutions  
 The University is in a much better position to track and associate investments/savings with strategies/efficiencies/effectiveness but optimizing this links to an Enterprise system investment/enhancement  
 Substantially more savings than projected was secured via collaborative contracts, considering savings accrued in areas not "tracked" in the standardized categories  
 Combination of Asset and Operational Reviews resulted in a very successful Barnes & Noble arrangement  
 Significant increase in the University investment in scholarships and in Scholarships for Excellence  
 Increased negotiated cost-savings for textbooks as well as investment by the University in textbook scholarships  
 Improved business processes and interactions with students substantially reduced student "bad debt"  
 Full implementation of the Steam Plant resulted in an unprecedented substantial savings in energy consumption

**RESOLUTION TO APPROVE  
INTERFUND TRANSFERS**

**WHEREAS**, University Policy Number 3356-3-11.1, Budget Transfers, requires Board of Trustees approval for inter-fund transfers of \$100,000 or more for operating purposes or for any purpose other than a specific capital improvement project, for capital improvements or construction projects of \$500,000 or more, and for transfers out of operating reserves regardless of amount; and

**WHEREAS**, certain accounting and budget adjustments and transfers outside the operating budget are necessary during the course of a fiscal year and at the end of a fiscal year.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the transfer of funds, as detailed in Exhibit \_\_\_.



YOUNGSTOWN STATE UNIVERSITY  
Interfund Transfers Requiring Board Approval  
Transfers Outside of the Operating Budget  
Requested Transfers for First Quarter 2018

FROM	TO	AMOUNT	REASON
Parking Services Plant Reserve (Auxiliary Plant Fund)	M-70 Parking Lot Re-pavement (Auxiliary Plant Fund)	\$650,000	Transfer to fund parking project.

## Quarterly Update on FY 2018 Operating Budget

The fiscal year *Budget to Actual Report* presented on the following page is a summary analysis of year-to-date actuals compared to budgets in standard account categories. This report displays financial information for the University's general fund and is summarized in a "dashboard" format using color-coded business indicators as follows:

-  On target
-  Caution
-  Warning

This report is for the first fiscal quarter of FY 2018 that encompasses the three-month period of July 1 through September 30, 2017. Year-to-date, revenues are tracking on target as planned, as denoted by the green business indicator assigned to most income categories. Revenues from tuition and mandatory fees, however, are tracking below budget as a result of fall semester FTE enrollment growth being +0.4%, below the 2% growth upon which the budget is based. But overall revenues are on target as a result of above-budget income in other categories, namely investment income and other student fees.

Expenses are on target in all categories. Fluctuations in wages and benefits are likely to appear in next quarter's report, as the provisions of the recently-ratified OEA Faculty agreement are implemented in October.

Compared to the prior fiscal year, total revenues at September 30<sup>th</sup> were approximately \$1.5 million or 2.3% greater; and total expenses were approximately \$2.8 million or 6.2% higher than last year.

**YOUNGSTOWN STATE UNIVERSITY**  
**Budget to Actual**  
**For the 3-month period of 7/1/17 - 9/30/17**

FY2018 Revenue 1st Quarter, 9/30/17	Fiscal Year 2018		Actual as a % of Budget	Business Indicator	FY17 actual compared to FY16 actual
	Budget	Actual			
Tuition and mandatory fees	\$94,190,000	\$46,336,845	49.2%	●	↓
Other tuition and fees	\$13,505,285	\$7,121,610	52.7%	●	↑
Student charges	\$1,302,450	\$750,425	57.6%	●	↑
State appropriations	\$42,860,983	\$10,726,428	25.0%	●	↔
Recovery of indirect costs	\$1,756,413	\$424,471	24.2%	●	↑
Investment income	\$1,550,000	\$936,906	60.4%	●	↑
Other income	\$1,711,600	\$375,300	21.9%	●	↓
<b>Total</b>	<b>\$156,876,731</b>	<b>\$66,671,985</b>	<b>42.5%</b>	<b>●</b>	<b>↑</b>

● On/Above target

● Caution

● Warning

FY2018 Expenses 1st Quarter, 9/30/17	Fiscal Year 2018		Actual as a % of Budget	Business Indicator	FY17 actual compared to FY16 actual
	Budget	Actual			
Wages	\$74,754,583	\$15,109,306	20.2%	●	↓
Benefits	\$23,878,809	\$4,883,865	20.5%	●	↓
Scholarships	\$8,096,526	\$3,784,860	46.7%	●	↑
Operations	\$22,374,175	\$3,534,099	15.8%	●	↑
Plant & maintenance	\$7,756,798	\$1,823,708	23.5%	●	↑
Fixed asset purchases	\$684,794	\$26,686	3.9%	●	↑
Transfers	\$19,402,206	\$19,360,831	99.8%	●	↑
<b>Total</b>	<b>\$156,947,891</b>	<b>\$48,523,355</b>	<b>30.9%</b>	<b>●</b>	<b>↑</b>

● On/Below target

● Caution

● Warning



# YSU Capital Projects Summary:

Board Projects Update 11/2/2017

## Capital Projects In Progress:

**Wick and Lincoln Ave. Projects**  
City of Youngstown

***Parella-Pannunzio, Marucci-Gaffney***

The Lincoln Avenue project has started with Parella-Pannunzio as the contractor and depending on the weather, will be substantially complete by December 31, 2016. The Wick Avenue project is underway with Marucci-Gaffney as the contractor and a weather dependent completion of October 2017. **These projects are substantially complete.**

**Jones Hall Facility Upgrades - Roofing**  
YSU 1718-2

***\$934k (Capital Funds C34550) eS Architecture, Charles F. Evans Co.***

This project will focus on the replacement of the original slate roof, gutters and downspouts, as well as reconfiguring interior spaces and addressing worn, dated interior finishes. This project will be in two phases with the final phase being completed by August 2018. **This project is substantially complete.**

**Campus Development Phase 1**  
YSU 1718-6

***\$285k (Capital Funds C34553) Behnke Associates, Thomas Pallotta***

This project will focus on issues throughout our campus core. Included in this project will be steps at University Courtyard that extend from Wick Oval to Walnut Street, concrete repair and brick replacement at the fountain, new pavers and landscape items at Veterans Circle, and new pavers and deck repair at the south Beeghly Center entrance. This project will be complete in two phases with the final phase being completed by August 2018. **Phase 1 of this project is complete.**

## Projects Currently Advertised For Bids:

**Don Constantini Multimedia Center**  
YSU 1718-7

***\$2M (Local Funds/Gifts) MS Consultants***

This project will be an addition to the east side stands of Stambaugh Stadium. The new center will have teaching spaces, offices, press box facilities, and coaching box facilities. This project is scheduled to start construction by fall of 2017 and be complete by August 2018. **Bids open November 8<sup>th</sup>, 2:00pm.**

**Academic Area Renovations - Natatorium**  
YSU 1718-4

***\$1.7M (Capital Funds C34551) BSHM Architects***

This project will be the renovation and upgrade to the Beeghly Center natatorium and well as renovations to several laboratories and class/labs within Ward Beecher. This project will be a single phase, completed in two parts with the whole project being completed by August 2018. **The Natatorium portion of this project is currently out for bids with a bid opening date of November 15<sup>th</sup>.**

## Projects at State of Ohio Controlling Board for Release of Funds:

- YSU 01000139 – Youngstown Tech Block Building #5 – \$200,000 – November 13<sup>th</sup> hearing date
- YSU 01000140 – Design Fees, Mahoning Valley Innovation Commercialization Center, SSOE Group – \$509,000 – November 13<sup>th</sup> hearing date

## Request for Qualifications Currently Posted:

- YSU 1718-35 John J. & Janet Cafaro Hall Addition – Qualifications due November 17<sup>th</sup>

## Capital Projects in Development for 2018:

**Ward Beecher Science Hall Renovations 2**  
YSU 1718-3-2

***\$1.75M (Capital Funds C34549) YSU Staff (Bill Spencer)***

This project will be the interior renovation of Ward Beecher. Flooring, ceilings, lighting, interior/exterior doors and hardware, wall finishes, and minor plumbing and heating, ventilating, and air conditioning (HVAC) issues will be addressed. This project will be completed in two phases with the final phase being finished by August 2018. **Phase 1 is complete and Phase 2 will begin May 2018 with a completion of August 2018.**

**Edmund J. Salata Complex Renovations**  
YSU 1718-20

***\$300k (Capital Funds C34539) YSU Staff (Bill Spencer)***

This project will be renovations to areas within the Edmund J. Salata Complex. Windows will be replaced, restrooms upgraded, exterior doors will be replaced, and areas will be reconfigured. **This project is scheduled to bid Spring 2018 and be complete by late Fall 2018.**

**Innovation and Commercialization Center**  
YSU 1718-14

***\$6M (Capital Funds C34554) SSOE***

This project will be the purchase and renovation of property adjacent to YSU's campus to create an Innovation and Commercialization Center. Property acquisition is underway with construction/renovation to follow. **The property has been acquired and an A/E firm chosen (SSOE Group from Toledo). A request for design fees is currently at the controlling board. Design should begin by late November or early December.**

**Academic Area Renovations – Biology Labs**  
YSU 1718-4

***\$1.75M (Capital Funds C34551) BSHM Architects***

This project will be the renovation and upgrade to the Beeghly Center Natatorium and well as renovations to several laboratories and class/labs within Ward Beecher. This project will be a single phase, completed in two parts with the whole project being completed by August 2018. **The Biology Lab portion of this project will bid in February and be ready for a May 2018 construction start.**

**Campus Utility Distribution Renovations**

***\$1.1M (Capital Funds C34500) Scheeser Buckley Mayfield***

<p>YSU 1718-23</p>	<p>This project will be the installation of tunnel sections for steam and chilled water lines along Wick Avenue and University Plaza. <b>Construction is scheduled for Spring 2018.</b></p>
<p><b>Restroom Renovations Phase 2</b> YSU 1718-35</p>	<p><b><i>\$323k (Capital Funds C34544) YSU Staff (Bill Spencer)</i></b> This project is a continuation of the restroom upgrades project. These funds will be rolled into the Ward Beecher Phase 2 project to renovate the restrooms on each floor. <b>This project will start in May 2018 and be complete by the start of the Fall Semester.</b></p>
<p><b>Instructional Space Upgrades Phase 2</b> YSU 1718-36</p>	<p><b><i>\$316k (Capital Funds C34524) YSU Staff (Summer Barker)</i></b> This project is a continuation of the Instructional Space Upgrades project and will focus on classrooms on the lower level of the Lincoln Building. <b>This project will start in May 2018 and be complete by the start of the Fall Semester.</b></p>
<p><b>Jones Hall Renovations Phase 2</b> YSU 1718-2-2</p>	<p><b><i>\$1M (Capital Funds C34550) YSU Staff (Summer Barker)</i></b> This project is a continuation of the Jones Hall project and will focus on interior spaces and restroom facilities. <b>This project will start in May 2018 and be complete by the start of the Fall Semester.</b></p>
<p><b>Campus Development Phase 2</b> YSU 1718-6-2</p>	<p><b><i>\$378k (Capital Funds C34553) Behnke Assoc., Walker Parking</i></b> This project will focus on the Beeghly Center south plaza deck. Repairs will be made to the deck and the brick pavers will be replaced. <b>This project will start in May 2018 and be complete by the start of the Fall Semester.</b></p>

### **Additional Projects in Development for 2017/2018:**

- **Storm Water Upgrades** - \$250k Capital Funds, YSU Staff (Tom/Richard)
  - Project preliminaries are underway. Project to start asap.
- **Kilcawley Center Roof Renovations** - \$ TBD, YSU Local Funds
  - Repair/Replace sections of roofing over Kilcawley Center.
- **Courtyard Apartments Kitchen and Bath Renovations** - \$ TBD, YSU Staff?
  - Phased upgrades to kitchens and baths. Project is being developed for 2017/2018.
- **Geology Western Reserve Land Conservancy Building Renovations** - \$50k Local Funds/Gifts, YSU Staff-RW
- **Renovation to a structure on WRLC land for use by YSU Geology faculty and students.**
- **Kilcawley Center Bookstore Space Renovations/Disability Svs. Move** - \$145k, Local Funds, YSU Staff (Bill Spencer)
  - Renovation of old bookstore space in Kilcawley Center.
- **Parking Facilities/Deck Maintenance** - \$TBD, Local Funds
  - Construct new/renovate existing parking facilities.
- **Moser Hall Fluids Lab Renovations** - \$110,000, Local Funds
  - Fill-in open floor sections in the lower level Moser Fluids Lab.
- **SMAB Lab** - \$100,000, Local Funds
- **Jambar Renovations** - \$ TBD, Local Funds

## Higher Education Six-Year Capital Plan 2019-2024 **\*\*DRAFT\*\***

Youngstown State University

Capital Plan Template 2019-2024

Priority	Biennium	UNIQUE PROJECT TITLE	STATE FUNDS	LOCAL FUNDS	OTHER FUNDS
Project 1	1920	Meshel Hall Renovations Phase 2	2,250,000		
Project 2	1920	Cushwa Hall Physical Therapy Renovations/Expansion	2,300,000		
Project 3	1920	Ward Beecher Structural	1,750,000		
Project 4	1920	Fedor Hall Renovations	1,000,000		
Project 5	1920	Pedestrian Bridge Renovations	1,500,000		
Project 6	1920	Campus Roof Replacements	2,500,000		
Project 7	1920	Building Envelope Renovations	1,500,000		
Project 8	1920	Basic Renovations	1,000,000		
Project 9	1920	Stairwell Safety Renovations and Upgrades	1,000,000		
Project 10	1920	Campus Wide Concrete Upgrades	750,000		
<b>1920 Subtotal</b>			<b>15,550,000</b>		
Project 11	2122	STEM Science Lab Renovations	2,500,000		
Project 12	2122	Utility Distribution Upgrades/Expansion	2,250,000		
Project 13	2122	Emergency Generator Upgrades	1,500,000		
Project 14	2122	Moser Hall Renovations	2,500,000		
Project 15	2122	Elevator Safety Repairs and Replacements	2,500,000		
Project 16	2122	Basic Renovations	1,500,000		
Project 17	2122	Campus Development	1,250,000		
Project 18	2122	Building Envelope Renovations	1,000,000		
<b>2122 Subtotal</b>			<b>15,000,000</b>		
Project 19	2324	Instructional Space Upgrades	2,750,000		
Project 20	2324	Instructional Lab Renovations and Upgrades	2,750,000		
Project 21	2324	Roof Repairs and Replacements	2,750,000		
Project 22	2324	Campus Wide Building System Upgrades	2,500,000		
Project 23	2324	Campus Development	1,750,000		
Project 24	2324	Utility Distribution Upgrades/Expansion	2,500,000		
<b>2324 Subtotal</b>			<b>15,000,000</b>		
<b>Six-Year Total</b>			<b>45,550,000</b>	0	0