Youngstown
STATE UNIVERSITY

BOARD OF TRUSTEES
FINANCE AND FACILITIES COMMITTEE
Leonard D. Schiavone, Chair
John R. Jakubek, Vice Chair
All Trustees are Members

Wednesday, March 15, 2017   Tod Hall
2:00 p.m. or immediately following   Board Meeting Room
previous meeting

AGENDA

A.   Disposition of Minutes for Meeting Held November 30, 2016

B.   Old Business

C.   Committee Items

    1.   Finance and Facilities Action Item

Tab C.1.a.   a.   **Resolution to Establish New Room Rates to Accommodate Graduate and Family Housing for Weller House, Effective Summer Semester 2017**
Eddie Howard, Associate Vice President Student Experience, will report.

    2.   Finance and Facilities Discussion Items

Tab C.2.a.   a.   **Quarterly Update on FY 2017 Operating Budget**
Neal McNally, Vice President for Finance and Business Operations, will report.

Tab C.2.b.   b.   **Review of Fee Waiver Renewals, FY 2018 and FY 2019**
Neal McNally, Vice President for Finance and Business Operations, will report.

Tab C.2.c.   c.   **Planning and Construction Projects Update**
John Hyden, Executive Director of Facilities and Support Services, and Rich White, Director of Planning and Construction, will report.

Tab C.2.d.   d.   **Updated IT Master Plan**
Jim Yukech, Interim Associate Vice President and Chief Information Officer, will report.

e. **Report of Audit Subcommittee**
A verbal report of the Audit Subcommittee will be presented. Leonard D. Schiavone will report.

f. **Report of Investment Subcommittee**
A verbal report of the Investment Subcommittee will be presented. John R. Jakubek will report.

3. **Consent Agenda Item***

Tab C.3.a.   ***a. Resolution to Modify Electronic Information Technology (EIT) Accessibility Policy, 3356-5-14**
Holly Jacobs, Vice President and General Counsel, will report.

D. **New Business**

E. **Adjournment**

Youngstown
STATE UNIVERSITY

RESOLUTION TO ESTABLISH NEW ROOM RATES TO ACCOMMODATE GRADUATE AND FAMILY HOUSING FOR WELLER HOUSE, EFFECTIVE SUMMER SEMESTER 2017

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 would like to offer graduate and family housing not previously available at YSU; and

WHEREAS, the University Housing is seeking new room rates for Weller House; and

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees of Youngstown State University does hereby approve the resolution to establish new room rates to accommodate graduate and family housing for Weller House, effective summer semester 2017as shown in exhibit ___ attached hereto.

Board of Trustees Meeting
March 16, 2017
YR 2017-

Justification for New Room Rates for
Graduate and Family Housing in Weller House

University Housing has been asked by International Programs to provide housing for graduate students. In reviewing this request we would like to change Weller House to Graduate and Family Housing. Because the change will result in a reduction in occupancy to give graduate students the ability of private units, we would like to ask for new housing rates beginning with the Summer 2017.

Current Rate is $7,140 for the academic year.

Proposed new rates:

Two bedroom unit (3) suitable for families would be $10,000 for the entire academic year and a daily rate of $50 for night before or after contract dates.

Single apartments (11) either one bedroom or efficiency units would be $8,000 for the academic year with a daily rate of $40 a night.

Shared apartments but single bedrooms (2 units with 5 beds total) would be $ 7,000 per bed for the academic year with a daily rate of $35 a night per single bedroom.

This change in rates keeps our income at the same level as it would be with undergraduate housing. This will allow us to continue our current level of services. All these units have been updated in the last two years.

We will change the twin beds to full size beds. We will add some dishes and cooking-ware to assist our international students. These units would be open to any graduate student and twelve month leases are available with rates prorated for summer term.

Quarterly Update on FY 2017 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 only 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 six-month period ending December 31, 2016. Year-to-date, both revenues and expenses are tracking on target as planned, as denoted by the green business indicator assigned to all categories. Compared to the prior fiscal year, total revenues at December 31st were approximately $1 million or 0.9% greater, while total expenses were approximately $600,000 or 0.7% lower than last year.

YOUNGSTOWN STATE UNIVERSITY
Budget to Actual
For the 6-month period of 7/1/16 - 12/31/16

FY2017 Revenue 2nd Quarter, 12/31/16	Fiscal Year 2017		Actual as a % of Budget	Business Indicator	FY17 actual compared to FY16 actual
	Budget	Actual			
Tuition and mandatory fees	$92,469,697	$83,556,247	90.4%	🟢	↔
Other tuition and fees	$11,092,261	$10,867,774	98.0%	🟢	↑
Student charges	$1,222,000	$876,034	71.7%	🟢	↔
State appropriations	$42,755,237	$21,376,272	50.0%	🟢	↑
Recovery of indirect costs	$1,361,413	$697,774	51.3%	🟢	↓
Investment income	$1,053,533	$959,010	91.0%	🟢	↓
Other income	$1,845,900	$867,949	47.0%	🟢	↔
🟢 On/Above target Total	$151,800,041	$119,201,060	78.5%	🟢	↑

🟢 On/Above target

🟡 Caution

🔴 Warning

FY2017 Expenses 2nd Quarter, 12/31/16	Fiscal Year 2017		Actual as a % of Budget	Business Indicator	FY17 actual compared to FY16 actual
	Budget	Actual			
Wages	$74,383,902	$36,122,240	48.6%	🟢	↓
Benefits	$23,601,447	$13,691,236	58.0%	🟢	↔
Scholarships	$7,450,672	$2,766,981	37.1%	🟢	↑
Operations	$19,755,631	$6,603,652	33.4%	🟢	↓
Plant & maintenance	$8,293,519	$3,312,363	39.9%	🟢	↓
Fixed asset purchases	$363,600	$68,576	18.9%	🟢	↓
Transfers	$18,056,312	$17,961,663	99.5%	🟢	↔
🟢 On/Below target Total	$151,905,083	$80,526,711	53.0%	🟢	↓

🟢 On/Below target

🟡 Caution

🔴 Warning

Review of Fee Waiver Renewals, FY 2018 and FY 2019

Section 369.180 of current state budget legislation, House Bill 64, states in part:

> "The board of trustees of a state institution of higher education shall not authorize a waiver or nonpayment of instructional fees or general fees for any particular student or any class of students other than waivers specifically authorized by law or approved by the Chancellor [of the Ohio Department of Higher Education]."

During the FY 2016 – FY 2017 biennium, the Chancellor approved seven (7) fee waivers for Youngstown State University. Each waiver was approved by the YSU Board of Trustees and is intended to achieve certain strategic goals, namely growth and stability vis-à-vis enrolled students, retention, student success and tuition revenue.

Management anticipates that the above language will be retained in the next budget bill for the FY 2018 and FY 2019 biennium. In order to continue these waivers for the upcoming biennium, the Chancellor's staff has advised that the Board of Trustees should review YSU's existing waivers.

The amounts waived are subject to change. Board of Trustees' approval of these waivers for FY 2018 will be included in a separate agenda item at the June meeting of the Board: Resolution to Approve Changes to Tuition and Fees for the 2017-2018 Academic and Fiscal Year.

A summary of YSU's existing fee waivers appears in the table below. While each waiver will be evaluated prior to being submitting to the Chancellor for renewal, University management believes that each waiver has generally produced intended outcomes.

Waiver	Fee Waived	Amount Waived per Credit	Number* of Students Served (semester)
Affordable Tuition Advantage	Portion of Undergrad Nonresident Surcharge	$240.00	1,200
College Credit Plus (self-pay students):			
In-high school instruction	Blended to create flat rate equal to State CCP	$886.41	12
Online instruction	Blended to create flat rate equal to State CCP	$727.91	2
On-campus instruction	Blended to create flat rate equal to State CCP	$512.91	4
College of Ed. Regional Delivery	General Fee	$56.97	56
Distance Education	General Fee	$56.97	350
Jump Start	Blended to create flat rate	$510.97	36
Master of Respiratory Care - CCHMC	Portion of Grad Nonresident Surcharge	$132.76	6-10
Youngstown Early College	Blended to create special YEC fee	$230.97	180

*Number of students served varies by semester.

YSU Capital Projects Summary:

Capital Projects In Progress:

Utility Distribution Upgrades – Steam Line Repair/Replacement *$900k (Capital C34541) CL Firestone, Utility Contracting*
YSU 1516-34-2

This project will be the replacement of deteriorated steam lines between Meshel Hall and Bliss Hall with new piping within new tunnel sections. *Update:* **Work is underway and tie-ins to Wick Avenue should be completed by the end of February 2017.**

Building Exterior Repairs - Cushwa
YSU 1516-51

$55k (Capital Funds C34535) YSU Staff, Lencyk Masonry
Repairs to failing brick joints around the exterior of Cushwa Hall. This project will be completed within the next 60 days weather permitting.

Wick and Lincoln Ave. Projects
City of Youngstown

The Lincoln Avenue project has started with Parella-Panninzio as the contractor and depending on the weather, will be substantially complete by December 31, 2016. The Wick Avenue project has recently started with Marucci-Gaffney as the contractor and a weather dependent completion date of September 14, 2017.

Current Requests for Qualifications; Architects and Engineers

- **Jones Hall Roof** – eS Architecture, Columbus, Ohio Selected – Contract complete
- **Academic Area Renovations** – BSHM Architects, Youngstown, Ohio Selected – Contract complete
- **Don Constantini Multimedia Center** – MS Consultants, Youngstown, Ohio Selected – Contract complete
- **Campus Development** – Behnke Associates, Cleveland, Ohio Selected – Contract complete
- **Meshel Hall** – Mechanical Design Services, JM Verostko and CL Firestone selected – Contract Complete
- **Ward Beecher** – Seeking mechanical design proposals
- **EJSC Renovations** – Seeking mechanical design proposals
- **Campus Utility Distribution Renovations** – Posted on Ohio Facilities Construction Commission web site, project will start in 2018.
- **General Professional Design Qualifications For projects less than $50,000** – Posted on Ohio Facilities Construction Commission web site, responses due 2/17/17.

Projects at Controlling Board for Release of Funds:

- YSU 0100122 Non Credit Job Training – Rapids Grant C34529 – $670,509 Released 2/6/17

Capital Projects in Development for 2017:

Meshel Hall Renovations
YSU 1718-5

$2M (Capital Funds C34552) YSU Staff
This project will be the relocation of computer science classes and labs from the lower level of Meshel Hall to the third level. Communications will then be relocated from Maag to the lower level of Meshel. Also, restrooms on the lower level will be expanded and interior finishes within public spaces will be replaced. This project will be completed in a single phase by August 2017. This project is currently out for bids.

Ward Beecher Science Hall Renovations
YSU 1718-3

$2.5M (Capital Funds C34549) YSU Staff
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 in two phases with the final phase being completed by August 2018. Phase I will advertise for bids February 18th.

Jones Hall Facility Upgrades
YSU 1718-2

$2M (Capital Funds C34550) eS Architecture
This project will focus on the replacement of the original slate roof, gutter 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. Phase I will advertise for bids February 25th.

Campus Development
YSU 1718-6

$750k (Capital Funds C34553) Behnke Associates
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 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 in two phases with the final phase being completed by August 2018. Phase I will advertise for bids February 25th.

Academic Area Renovations
YSU 1718-4

$3.75M (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 throughout campus. This project will be a single phase, completed in two parts with the whole project being completed by August 2018. This project will be advertised for bids in late 2017.

Innovation and Commercialization Center
YSU 1718-14

$3M (Capital Funds C34554) YSU Staff and TBD
This project will be the purchase of property to create an innovation and commercialization center on YSU's campus. Property acquisition is underway with construction/renovation to follow.

Building System Upgrades Phase II
YSU 1718-19

$273k (Capital Funds C34542) JM Verostko
This project will be the continuation of upgrades to building systems in several buildings across YSU's campus. The final phase of this project is scheduled to advertise February 18th with a completion of August 2017.

Bliss Hall Graduate Program Renovations
YSU 1718-17

$175k (Capital Funds C34500) YSU Staff
This project will be minor renovations to an area in the lower level of Bliss Hall to accommodate graduate programs. The project is scheduled to advertise February 25th with a completion of August 2017.

Edmund J. Salata Complex Renovations
YSU 1718-20

$300k (Capital Funds C34539) YSU Staff
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 June 2017 and be complete by November 2017.

Heritage Park Wall YSU 1718-21	***$100k (Local Funds) YSU Staff, Lencyk Masonry*** This project will be the construction of a wall on the south side of the Central Utility Plant that will be for Heritage Award recognition. This project is scheduled to start in March 2017 and be complete by May 2017.
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, pressbox facilities, and coaching box facilities. This project is scheduled to start construction by fall of 2017 and be complete by August 2018.
Barnes and Noble Bookstore YSU 1718-22	***$5M (Local Funds) Continental Building Systems*** This project will be the construction of a Barnes and Noble Bookstore at the corner of Lincoln Avenue and Fifth Avenue. This project is scheduled to be complete by July 2017.

Capital Projects in Development for 2017/2018:

- **Storm Water Upgrades** - $250k Capital Funds, YSU Staff
  - Project preliminaries are underway. Project to start asap.
- **Instructional Space Upgrades Phase II** - $316k Capital Funds, YSU Staff
  - Bid documents are being developed for Spring 2018 construction.
- **Restroom Renovations Phase II** - $323k Capital Funds, YSU Staff
  - Bid documents are being developed for 2018 construction.
- **Ward Beecher HVAC Upgrades** - $133k Capital Funds, YSU Staff
  - Bid documents are being developed for 2017/2018 construction.
- **Kilcawley Center Roof Renovations** - $TBD, YSU Local Funds
  - Repair/Replace sections of roofing over Kilcawley Center.
- **Campus Utility Distribution Renovations** - $1.1M Capital Funds, TBD
  - Request for Qualifications is being drafted; project is being developed for 2018 construction.
- **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** - $80k Local Funds/Gifts, YSU Staff
  - Renovation to a structure on WRLC land for use by YSU Geology faculty and students.

BOT Facilities & Finance Committee IT Master Plan Update

AVP, INTERIM CIO
JIM YUKECH

and proud.

Agenda:

- ✓ **IT Strategic Plan & Operational Assessment**
- ✓ **ITS Reorganization**
- ✓ **ITS Infrastructure Investment Summary (FY17 thru FY18)**

Aligning ITS Initiatives with YSU Strategic Plan "Four Cornerstones"

Institutional accountability and sustainability	Student success
Transition to the urban research university mission	Regional engagement

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IT Guiding Principles:

FY17-FY20

Sustainability	• Implementing new, or migrating existing, technologies to technologies that have a positive Return on Investment (ROI).
Student Success	• Improving student access by implementing and optimizing enabling technologies for academic achievement.
Engagement	• Engaging Regional peer organizations to promote standardization and consolidation of IT services.
Innovation	• Implement enabling technologies that address the research needs of faculty, graduate students, undergraduates and research partners.

IT Strategic Plan Guiding Principle	Information Services Opportunities
Governance	• **Implement an effective IT Governance Structure** • All Committees met for the first time in January

Sustainability	• **Initiate Application Standardization & Rationalization project**
	  • Scheduled for FY18
	• **Refresh outdated IT Infrastructure**
	  • See Investment Summary slide
	• **Enhance utilization of Computer Labs/Classrooms**
	  • Assess virtualization of CL/CC devices
	  • Participate in CL/CC centralized scheduling initiative
	• **Expand Print Management efforts towards reducing the number of printers on campus, thus reducing total print spend**

IT Strategic Plan Guiding Principle	Information Services Opportunities

Student Success	• **Enhance Student computing experience:**
	  • Create standard image for student devices
	  • Assess device mandate for "first year" students
	  • Pilot "Genius Bar" concept to support mobile computing
	    • Submitted Ohio Innovation Grant ($300k)

Innovation	• **Engage in discussions with the STEM College to support Additive Manufacturing IT needs** • **Assess Research I.T. needs with Academic Leaders** • **Research BI needs with Business Leaders** • Research is dependent on the network infrastructure refresh project

IT Strategic Plan Guiding Principle	Information Services Strategic Plan Projects

Engagement	• **Assess Data Center refresh options with Regional peers**
	   • Recommending on-campus "High Availability" option to IT Governance; Phase 2, extend to Regional peers
	 • **Assess ERP upgrade options with Regional peers (WSU, UT, Miami, Kent)**
	   • Collaboration meeting set for Feb. 23rd at WSU
	 • **Implement new IT Service Mgt System (ITSM) and Redesign IT Service Workflows**
	   • Reached out to Miami of Ohio to assess their standard IT workflows
	   • System selection slated for end of February; Go-live, 90-days from kick-off

ITS Operational Assessment

YSU I.T. SWOT ANALYSIS

Strengths
- Customer-facing services are perceived favorably
- Reliable and secure wired network
- *Talented and dedicated I.T. staff*

S **W**

Weaknesses
- *Lack of Governance*
- Communication gaps
- Wireless coverage gaps
- Limited Mobility focus
- *Outdated/EOL Infrastructure*
- Reactive vs. Proactive
- "No First" Culture

Opportunities
- *Collaboration with other universities*
- I.T. Philosophy culture change
- Communicate more within and outside of I.T.
- *Develop a "Yes But" Culture*

O **T**

Threats
- *Financial constraints*
- Faculty willingness to change or standardize
- I.T. viewed as Operational and not Strategic
- Union culture

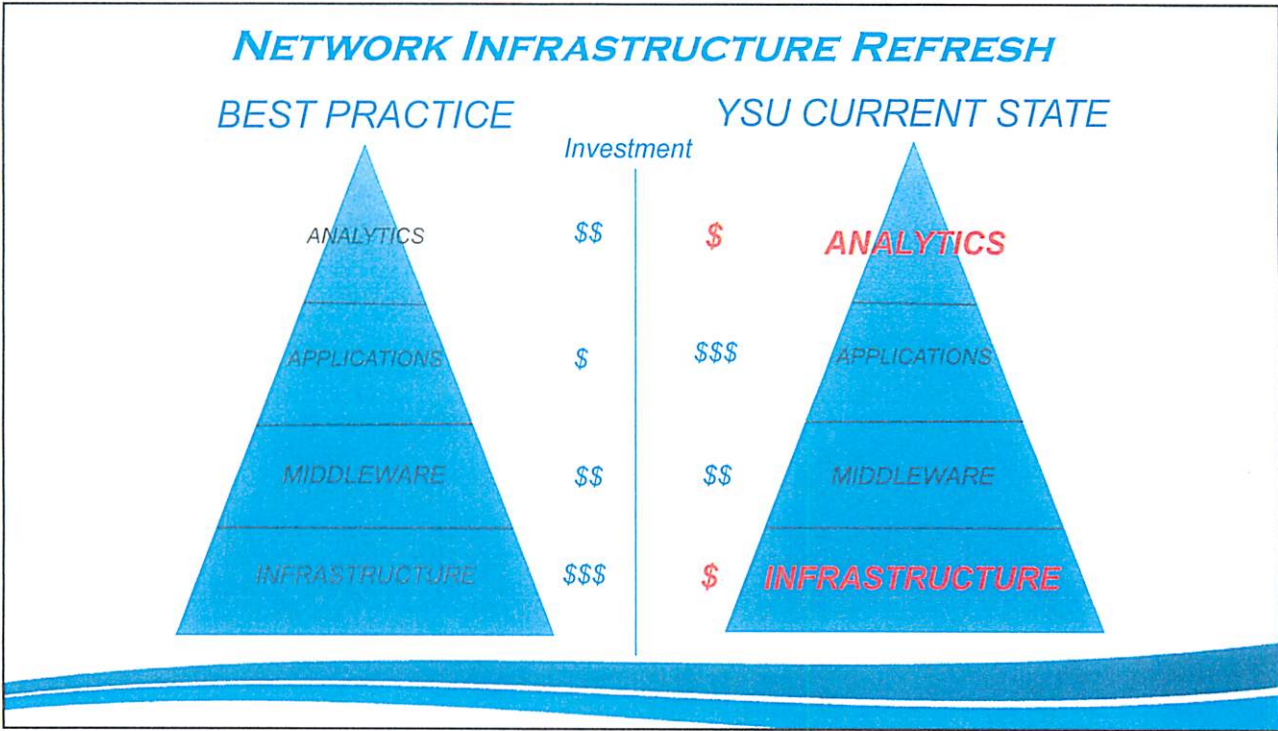## IT OPEX per University FTE

9% lower than benchmark; 24% lower than nearest peer

University	Value
YSU	$627.00
WSU	$897.00
CSU	$823.00
EDUCAUSE	$684.00

$0.00 $200.00 $400.00 $600.00 $800.00 $1,000.00

ITS Investment Summary
FY17-18

Infrastructure Investment Summary

1/27/2017

FY 2017:	Spend	Comments
Data Center Upgrades and Migration	$360,000	Preparing RFP; Data Center > 30 years-old
Network Refresh	$400,000	Refresh Schedule:
Network Monitoring Software	$80,000	Purchased and implemented
Moser	$50,000	Purchased hardware
Kilcawley	$150,000	Scheduled; High student traffice area
Maag Library	$120,000	Scheduled; High student traffice area
FY 2017 Infrastructure Total	$760,000	
Other FY 2017 ITS Investments	$100,000	($75,000 ITSM, $15,000; Genius Bar Pilot, $15,000; Managed Print Pilot $10,000)
FY 2017 Total	**$860,000**	

FY 2018:	Spend	Comments
Network CORE in Data Centers	$250,000	Refreshed last in 2008/10 years-old at refresh
Network Refresh	$750,000	Tentative Refresh Schedule (based on funding):
Debartolo (AP's only)	$50,000	Scheduled for August, 2017
Stadium	$125,000	Scheduled for August, 2017
Ward Beecher	Facilities capital	Included in Facility Capital renovations
Meshel	Facilities capital	Included in Facility Capital renovations
BCOE	$125,000	Scheduled for Q4 2017
Cushwa	$125,000	Scheduled for Q4 2017
Williamson	$125,000	Scheduled for Q1 2018
Jones	Facilities capital	Included in Facility Capital renovations
Beeghly Center	Facilities capital	Included in Facility Capital renovations
Bliss	Facilities capital	Included in Facility Capital renovations
Phelps	$125,000	Scheduled for Q2 2018
(Reserve for any overrun)	$75,000	Scheduled for Q2 2018
FY 2018 TOTAL	**$1,000,000**	Tentative, based on funding allocated

NETWORK INFRASTRUCTURE REFRESH

BEST PRACTICE

YSU CURRENT STATE

Investment

ANALYTICS	$$	$	ANALYTICS
APPLICATIONS	$	$$$	APPLICATIONS
MIDDLEWARE	$$	$$	MIDDLEWARE
INFRASTRUCTURE	$$$	$	INFRASTRUCTURE

NETWORK INFRASTRUCTURE

| Device	Last Refreshed / Age	Best Practice / Target	Recommendation
Core	2008 / 9	5 years	Refresh Core Network Electronics ASAP; will be 10 years old at refresh next year
Edge	2001 / 16	5 – 7 years	Edge switches in 6 of 47 buildings (14.3%) have been refreshed since 2001. Plan to refresh all buildings over the next six years, refreshing the six most current buildings in year 6.
Wireless	Varies significantly	4 – 6 years	Engage third-party consulting provider to conduct a campus-wide wireless network assessment; only 23% of WAP's are 802.11n compatible

INVESTMENT SUMMARY

Category	Investment (6 years)
Core	$250,000
Edge/Wireless	$5,500,000
Wireless Network Assessment(s)	$250,000
Total	$6.0M

* Figures do not include costs for closet environmental and power systems

DATA CENTER REFRESH

Proposed Upgrade & Migration
of YSU Data Centers
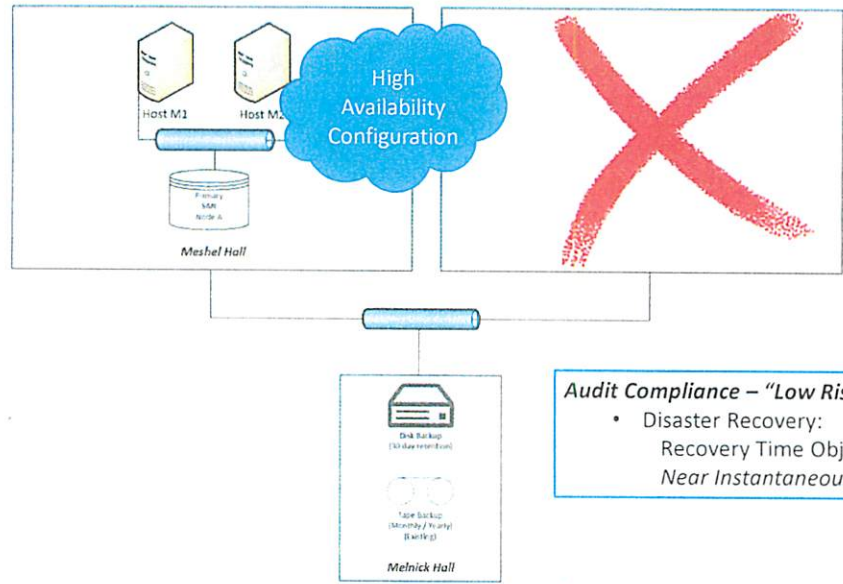
Audit Compliance – "Low Risk"
- Disaster Recovery:
  Recovery Time Objective =
  Near Instantaneous

DATA CENTER REFRESH

Benefits:

Cost Avoidance = $287,000

	Meshel	SOCC	Williamson
DC Tier	1	3	2.5
Investment	$649,000	$792,000	$362,000
Backup	95% *	100%	100%
Disaster Recovery (DR)	ZERO	PASSIVE	ACTIVE
Recovery Point Objective (RPO)	24 hour	24 hour	1 hour
Recovery Time Objective (RTO)	30-60 day	4 hour	Immediate

ITS Project Dashboard

Overall Program Health

Remaining Spend 2017 $ 726,019

Last Updated: 2/6/2017

Priority	Opportunity Name	Overall Status	Cornerstone	Resources	IT Leader	Project Manager	Project Budget FY17 Remaining	Expensed	Budgeted	Timeframe	Target Completion	Comments
1	Implement IT Governance Structure		Sustainability	Low	J. Yukech	J. Yukech	$ -	$ -	$ -	9/16-1/17	17-Jan	All committees met in January
2	Network Infrastructure Refresh		Sustainability	High	R. Geilhard	M. Caldwell	$ 260,914	$ 139,086	$ 400,000	1/17-1/23	23-Jan	6-year refresh plan; $1.0M per year
3	Campus-wide Managed Print Services Pilot		Sustainability	Medium	M. Hrishenko	M. Repetski	$ 10,000	$ -	$ 10,000	TBD	17-Aug	In-process; confirming pilot building
4	Data Center Relocation to WCBA		Sustainability	High	R. Geilhard	R. Geilhard	$ 360,000	$ -	$ 360,000	1/17-5/17	17-Jun	RFP in-process, TCO/ROI presented at BAC, TAC & ITSC. Still tracking for Spring Break implementation.
5	Application Standardization and Rationalization		Sustainability	High	R. Marsico	R. Marsico	$ -	$ -	$ -	1/17-1/19	19-Jan	2-year project; requires BPMO to start (est start June 1)
6	Standardized Student Device Pilot		Student Success	Medium	M. Hrishenko	M. Hrishenko	$ -	$ -	$ -	TBD		Compiling TCO - to calculate ROI
7	"Genius Bar" Pilot		Innovation	Medium	M. Hrishenko	J. Wormley	$ 15,000	$ -	$ 15,000	10/16-7/17	17-Jul	Applied for Innovation Fund Grant
8	ERP/Banner Optimization & Banner XE Upgrade		Student Success	High	R. Marsico	R. Marsico	$ -	$ -	$ -	TBD		Collaborating with (4) IUC universities
9	Upgrade/Replace ITSM (Tech Desk System)		Sustainability	Medium	M. Hrishenko	R. Ziobert	$ 75,000	$ -	$ 75,000	9/16-7/17	17-Jul	Team Dynamics vendor selected; Legal reviewing contract
10	VOIP Pilot		Sustainability	Low	R. Geilhard	M. Caldwell	$ -	$ -	$ -	TBD		FY2018 project/budget dependent; Pilot within ITS
11	SharePoint Pilot		Innovation	Low	R. Geilhard	J. Bettura	$ -	$ -	$ -	TBD		Pilot in ITS for file sharing
	Windows 10 Upgrade		Sustainability	High	M. Hrishenko	M. Hrishenko	$ -	$ -	$ -	TBD		FY18 Project/Will require budget $'s
13	Computer Lab Centralized Scheduling Project		Student Success	Low	M. Hrishenko	M. Hrishenko	$ -	$ -	$ -	TBD	17-Aug	Provost's Office leading this opportunity
14	Advanced CyberSecurity Environment		Sustainability	Low	C. Wentz	C. Wentz	$ -	$ 68,366	$ 70,000	TBD	17-Jan	Installed two new CyberSecurity apps
						Total	$ 720,914	$ 207,452	$ 930,000			

Youngstown
STATE UNIVERSITY

Explanation of Modifications to *University Policy*:

3356-5-14 Electronic Information Technology (EIT) Accessibility Policy

This policy is being modified as part of the Resolution Agreement with the United States Department of Education, Office for Civil Rights. The Office for Civil Rights approved the attached changes to the EIT Accessibility Policy. The modifications include expanding the scope of the policy to reach beyond students with disabilities, and to include employees, guests, and visitors with disabilities.

Board of Trustees Meeting
March 16, 2017
YR 2017-

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STATE UNIVERSITY

RESOLUTION TO MODIFY
ELECTRONIC INFORMATION TECHNOLOGY (EIT)
ACCESSIBILITY POLICY, 3356-5-14

WHEREAS, University Policies are reviewed and reconceptualized on an ongoing basis; and

WHEREAS, this process can result in the modification of existing policies, the creation of new policies, or the deletion of policies no longer needed; and

WHEREAS, action is required by the Board of Trustees prior to replacing and/or implementing modified or newly created policies, or to rescind existing policies; and

WHEREAS, the Electronic Information Technology (EIT) Accessibility policy has been reviewed pursuant to the five-year review cycle, and formatted in accordance with Policy 3356-1-09, Development and Issuance of University Policies.

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy Electronic Information Technology (EIT) Accessibility, policy number 3356-5-14, shown as Exhibit __ attached hereto. A copy of the policy indicating changes to be made is also attached.

Board of Trustees Meeting
March 16, 2017
YR 2017-

3356-5-14   **Electronic information technology (EIT) accessibility.**

(A)   Policy statement. Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990 prohibit discrimination on the basis of disability in programs and activities by public universities receiving financial assistance from the U.S. department of education. Youngstown state university ("YSU") is committed to ensuring that communication with university constituents with disabilities, ~~i.e.,~~including students, prospective students, employees, guests and visitors, with hearing, visual and manual impairments, or who otherwise require the use of assistive technology to access information, is as effective as communication with those without disabilities.~~, including learning disabilities.~~

       The university will ensure that all computer software and systems for public use will permit all persons with disabilities to acquire the same information, engage in the same interactions, and enjoy the same services with substantially equivalent ease of use as those without disabilities.

(B)   Purpose. All electronic and information technology ("EIT") must be accessible to university constituents and must adhere to the EIT accessibility standards referred to ~~in this rule~~below.

(C)   Scope. This policy applies to all electronic and information technology, excluding EIT intended for private use only. EIT includes:

       (1)   University web pages and linked information;

       (2)   All online learning content, including documents posted in learning management systems, ("Blackboard" and "Sakai"); and

       (3)   Distance education and e-learning tools and materials.

(D)   Definitions.

(1)   "Official university web page." An official university web page is any web page created by the university, its departments, colleges, or other administrative offices for the official business of the university. This includes Maag library, academics, athletics, student newspaper, and student groups and associations.

(2)   "University-related web page." A university-related web page is any web page created by or linked from a web page created by faculty, staff, students and/or registered student organizations that are either:

(a)   Linked from an official university web page;

(b)   Stored on one of the university-controlled web servers;

(c)   Created in support of university businesses and courses; or

(d)   On servers contracted by the university.

(3)   "Content editors." Authorized university faculty or staff trained by the information technology ("IT") and human resources ("HR") department on the EIT accessibility standards and on the approved content management system such that they are approved to maintain a department or office web page.

(4)   "Faculty." Authorized faculty who have received training on EIT accessibility standards and content management systems.

(5)   "EIT accessibility training." Required training conducted by staff of the IT and HR departments for all content editors and faculty prior to having authorization to publish EIT on the university website, web pages, or any university EIT.

(6)   "EIT accessibility coordinator." Staff member authorized to coordinate and implement the EIT accessibility policy.

(7)   "EIT accessibility standards." YSU's EIT accessibility standards are drawn from W3C web accessibility initiative ("WAI") and section 508 standards.

(8)   "Implementation timeline." Plan for the university to be fully compliant with the EIT accessibility standards.

(E)   Parameters.

(1)   Each administrative unit, department, or office, through an authorized content editor, is responsible for ensuring that EIT content is accessible. In addition, all software and IT systems purchased shall produce accessible products and documents and/or shall be compatible with assistive technology.

(2)   Content editors may develop and maintain official university web pages and are responsible for their content subject to the following requirements:

(a) Software used to develop official university web pages will be limited to packages approved by information technology services ("ITS").

(b) Official university web pages must run on ITS servers or servers contracted for by ITS.

(c) All official university web pages and related university web pages and all EIT must strictly adhere to the EIT accessibility standards.

(d) The EIT coordinator shall provide direction and guidance on standards to be followed for accessibility of all EIT. The standards shall be posted on the ADA accessibility compliance web page. The EIT coordinator is responsible for developing and implementing a plan to monitor all university EIT for adherence to EIT accessibility standards. The EIT coordinator is authorized to disable any EIT found to be in violation of the EIT accessibility standards.

(e) All official and university-related web pages and all EIT must adhere to:

(i) Applicable copyright laws.

(ii) Applicable state of Ohio and federal laws and rules.

(iii) Rule 3356-4-09 of the Administrative Code, "Acceptable Use of University Technology Resources," (where appropriate).

(iv) EIT accessibility standards.

(f) The use of university symbols (i.e., YSU word mark, YSU logo, university seal, and Pete the penguin) and related information should adhere to the university's graphic identity standards from the office of marketing and communications.

(g) Registered student organizations use of the university name must adhere to article V, section F, paragraph 16 of "The Code of Student Rights, Responsibilities, and Conduct."

(h) The following are examples of content prohibited from display on either official university web pages or university-related web pages, including all EIT:

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>
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>
> (iv)   Any content covered by rule 3356-4-13 of the Administrative
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>
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>   authorized for distribution, regardless of the purchase price or
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shall make assistive technology available at all student computer labs and
shall provide a notice of accessibility that includes contact information for
questions, inquiries, or complaints.

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university websites or pages and EIT.

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contact the university website manager at webmaster@ysu.edu in order to be
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accessibility standards by producing accessible products and documents. The software or
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the same interactions, and enjoy the same services with substantially equivalent ease of
use as those without disabilities. See computer software accessibility purchasing
standard that will be placed into the terms and conditions and request for proposal
documents provided by the office of procurement services.

(H)   Reporting violations.

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    (2)   In addition, any person desiring to file a formal complaint for EIT accessibility issues may contact the Title II/section 504 coordinator for students or the Title II/section 504 coordinator for employees. The university grievance policy can be found at university grievance policy. The contact information for individuals serving in those roles on behalf of the university can be found at the university's web page dedicated to accessibility compliance.

3356-5-14   Electronic information technology (EIT) accessibility.

Responsible Office:	Finance and Business Operations
	(Information Technology Services)
Responsible Officer:	Vice President for Finance and Business Operations
Revision History:	December 2013; March 2014; June 2015; December 2015;
	March 2017
Board Committee:	Finance and Facilities
BOT Approval Date:	**March 16, 2017**
Next Review:	2022

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Progress report

An evaluation of how institutions responded
to "Action Steps to Reduce College Costs"

Review conducted by the business leaders from the
Ohio Task Force on Affordability and Efficiency in Higher Education

Feb. 7, 2017

Contents

Our mission

In early 2015, Gov. John R. Kasich established the Ohio Task Force on Affordability and Efficiency in Higher Education to recommend solutions for institutions of higher education based on three simultaneous needs:

- to be more efficient both in expense management and revenue generation
- while offering an education of equal or higher quality
- and decreasing costs to students and their families

The eight-member task force delivered Action Steps to Reduce College Costs in October 2015 with a clear message: Efficiencies are essential, and students must benefit.

Further, the report specifically called on the boards of trustees of Ohio colleges and universities to lead the charge for affordability and efficiency.

To provide flexibility, the report was designed as a practical toolbox that each institution could apply to its circumstances. But an overriding expectation applied to each college or university: "The focus on affordability should extend beyond the specific recommendations of this report to produce a new culture of cost consciousness in higher education."

This fall, Gov. Kasich asked the three business leaders from the task force to review the action plans that Ohio institutions submitted in response to the report. The governor sought our independent evaluation to measure the quality of responses, both as a group and for individual institutions. Gov. Kasich asked task force Chairman Geoff Chatas to facilitate the discussion.

We submit this progress report with a renewed appreciation for the importance of this work.

In an era of affordability concerns and pressure on public budgets, colleges and universities must embrace the mandate to put every dollar to its highest purpose. Ohio students need direct action to reduce their costs and increase the quality of their education.

We encourage trustees at each public college and university to provide active leadership in addressing this challenge on behalf of Ohio's students.
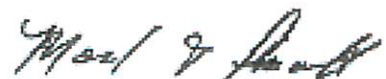
Submitted Feb. 7, 2017

Patrick Auletta   Pamela Morris   Mark T. Small

Executive summary

Ohio's 14 public universities plan to generate nearly $1.2 billion in efficiency savings and new resources over the next five years, according to the action plans they submitted in response to the recommendations of the Ohio Task Force on Affordability and Efficiency in Higher Education.

If achieved, that would equate to more than 11 percent of the average annual operating budgets of these schools. However, this impressive number is merely a start for the important work ahead.

- Too few schools have identified how resources will be focused on the most crucial priorities: affordability for students and tangible investments in the quality of their education.

- Too many schools have pursued efficiencies in silos instead of utilizing every tool that would generate substantive results. We do not expect that every single recommendation will be applicable at every single school, but each institution should demonstrate sustained focus across a variety of operating areas.

- And we encourage boards of trustees to provide active, hands-on leadership that this effort demands. As the final authorities at Ohio colleges and universities, boards should be setting expectations, tracking key performance indicators and ultimately ensuring that their students benefit.

Five-year goals

A summary of the 5-year plans to generate efficiency savings and new resources by Ohio's 14 public universities:

$1.2 billion	Total 5-year savings and new resources
$579 million	Total from savings
$572 million	Total new resources
$10.3 billion	Avg. annual operating expenses
11.3%	5-year total, as pct. of annual expenses

These three themes stood out as we evaluated the progress of Ohio's universities in responding to the challenge facing higher education here and across the nation.

In our evaluation of the action plans, we found some significant signs of progress. There are examples of innovative partnerships to better serve students, meaningful work to drive down costs and enhanced financial literacy programs to help students limit or avoid college debt.

Yet these achievements were nestled amid a patchwork of efforts across the state and within individual institutions. In coming years, strong progress needs to be the norm throughout Ohio.

Student debt, which is a particularly significant issue in Ohio, speaks to the need most powerfully.

Compared with national averages, more students from Ohio institutions graduate with debt and these graduates are saddled with larger debt loads.

Cost is part of the equation: Tuition and fees in Ohio remain higher than national averages, by 6 percent for four-year public institutions and 28 percent for two-year institutions, according to 2016-17 College Board data.

Regardless of the origins of the problem, the result is unacceptable. And while there may be a variety of stakeholders who can help address the issue, Ohio's colleges and universities hold an unmistakable obligation to do everything in their realm to provide students with an affordable, high-quality education.

Our review

To provide the most impactful evaluation for this progress report, we focused on the action plans of the state's 14 four-year universities because they have more varied operations to address.

But our findings and the themes of this report should apply to both two- and four-year public institutions in Ohio.
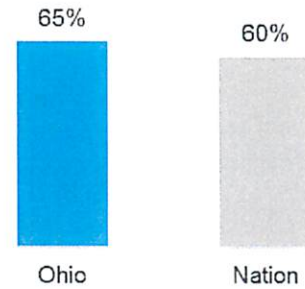
We evaluated how well the 14 four-year universities responded to the two master recommendations and six particularly high-impact recommendations that provide a broad cross-section of ideas in the Action Steps report.

Figures 1 and 2: Student debt for graduates of public, four-year institutions, 2013-14

Percent of graduates with debt

65% Ohio
60% Nation

Average debt (for those with debt)

$28,146 Ohio
$25,902 Nation

Source: The Institute for College Access & Success, College InSight
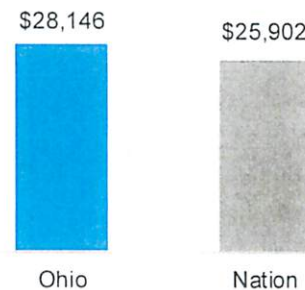
MASTER RECOMMENDATIONS

- **Students must benefit:** Savings and/or new resources must be employed to reduce the cost of college for students and benefit the quality of students' education.

- **Five-year goals:** Each institution must set a goal for efficiency savings and new resources along with a framework for investing those dollars to benefit students.

HIGH-IMPACT RECOMMENDATIONS

- **Campus contracts:** Each institution must require that its employees use existing contracts for purchasing goods and services.

- **Collaborative contracts:** Ohio's colleges and universities must pursue new and/or strengthened joint purchasing agreements in six identified areas.

- **Operations review:** Each institution must conduct an assessment of non-academic operations that might be run more efficiently.

- **Cost diagnostic:** Each institution must produce a diagnostic to identify its cost drivers, along with priority areas that offer the best opportunities for efficiencies.

- **Develop digital capabilities:** Institutions must be part of a consortium to develop digital tools and materials, including open educational resources.

- **Financial advising**: Ohio's colleges and universities should make financial literacy a standard part of students' education.

For each of these areas, we reviewed each university's action plan and assigned one of three possible ratings — strong progress, continued progress needed or unacceptable.

The Action Steps report called on institutions to take broad action that reflects "a new culture of cost consciousness in higher education." Accordingly, we did not view any recommendation as a check-the-box exercise that could be "completed."

Instead, we sought evidence of both accomplishment and momentum that would carry benefits to students. Meeting minimum standards demonstrated only that continued progress is needed. Universities earned strong ratings when they demonstrated an ongoing, substantive commitment to progress, and that they were focused on generating benefits to students.

Across our review, we sought evidence of three standard signs of quality:

- Action plans broadly embraced opportunities for impact

- A tracking mechanism was in place to measure and demand success

- Savings and/or new resources were or would be redirected to benefit students

In our evaluation, we found that institutions generally need to show continued progress to achieve the goals of the Action Steps report.

No institution was judged to have a strong response to all of the areas we reviewed, reflecting that even the universities that were well-rated overall have work to do.

Only three institutions earned strong ratings on the master recommendation to create five-year plans for efficiencies and new resource generation, largely because many institutions did not provide clear plans for directing benefits to students.

Universities performed best in responding to the financial advising and operations review recommendations, for which five institutions earned "strong progress" ratings in each category. More institutions could join their ranks by providing financial advising and literacy to *all* students who borrow for college and by demonstrating follow-through on operations reviews that would track results and benefits to students.

Universities struggled most with the recommendation to conduct cost diagnostics that led to action. In this case, four institutions provided responses that either lacked detail or showed an unacceptable commitment to action.

Figure 3: Overview of ratings

2016 progress report ratings, by recommendation

■ Strong progress　　■ Continued progress needed　　■ Unacceptable

Recommendation	Strong progress	Continued progress needed	Unacceptable
Develop 5-year goals	3	11	0
Utilize existing contracts	1	10	3
Utilize joint contracts	3	11	0
Conduct operations review	5	7	2
Conduct cost diagnostic	4	6	4
Develop digital capabilities	1	10	3
Provide financial advising and literacy	5	9	0

This progress report details our findings in each of these areas.

As we challenge institutions to do more, we also applaud the many instances of progress that we encountered. Even where continued progress is needed, we often found ideas with promise.

We encourage each college and university to move ahead more forcefully in coming years. We hope that this progress report will assist in that effort.

Master scorecard: Progress report ratings

	Master Rec.	Strategic Procurement		Assets and Operations	Admin. Cost Reforms	Textbook Affordability	Policy
	2	3A	3B	4B	5A	6C	10A
	Develop five-year goals	Utilize existing contracts	Utilize joint contracts	Conduct operations review	Conduct cost diagnostic	Develop digital capabilities	Provide financial advising and literacy
Akron	CPN	CPN	CPN	CPN	U	CPN	CPN
Bowling Green	CPN	CPN	SP	SP	CPN	CPN	CPN
Central State	CPN	CPN	SP	CPN	CPN	CPN	CPN
Cincinnati	CPN	CPN	CPN	CPN	CPN	CPN	SP
Cleveland State	CPN	CPN	CPN	CPN	SP	U	SP
Kent State	CPN	CPN	CPN	SP	CPN	CPN	CPN
Miami	SP	CPN	CPN	SP	SP	CPN	CPN
NEOMED	CPN	U	CPN	U	U	U	SP
Ohio State	SP	SP	SP	SP	CPN	SP	CPN
Ohio U.	CPN	CPN	CPN	CPN	CPN	CPN	CPN
Shawnee State	CPN	U	CPN	CPN	SP	CPN	CPN
Toledo	SP	CPN	CPN	SP	SP	CPN	SP
Wright State	CPN	CPN	CPN	U	U	CPN	SP
Youngstown State	CPN	U	CPN	CPN	U	U	CPN

SP = Strong progress   **CPN = Continued Progress Needed**   **U = Unacceptable**

Five-year goals

> **Master recommendation 2 | Five-year goals**: Each institution must set a goal for efficiency savings and new resources to be generated through fiscal 2021, along with a framework for investing those dollars in student affordability while maintaining or improving academic quality. **Timeline**: 1-3 years

The Action Steps to Reduce College Costs report included two master recommendations designed to accelerate progress on operational efficiencies and ensure that students benefit in the end.

Master recommendation 1 set out the principle that students must benefit: "Savings and/or new dollars generated from these recommendations must be employed to reduce the cost of college for students. Any other uses must have tangible benefits for the quality of students' education."

Master recommendation 2, to set five-year goals, placed a big-picture emphasis on the need for efficiency savings and new resources. Beyond individual recommendations, this was designed as a tool for each institution to commit to a path that fits its circumstances to increase affordability and efficiency.

Notably, the report also spelled out an expectation that institutions would track redeployable dollars and report how those were being used to reduce costs or improve quality for students.

This progress report reflects that emphasis on tracking progress and defining success.

Key point: We awarded "strong progress" ratings to universities that set substantial goals, sought to utilize a number of recommendations to achieve them and demonstrated how students would benefit.

We did not employ a simple mathematical test to determine our ranking, but we did review the size of each institution's five-year goals against the size of its student body and average annual operating expenses.

There are too many variables — including the relative financial health of each institution, the state of its affordability efforts and whether associated medical centers should count as part of operating expenses — to measure by a simple metric. But these ratios provided some insight into each institution's ambitions, and we have included the data here.

Scorecard: Five-year goals

	Rating: 5-year goals	Efficiency Savings	New Resource Generation	Total five-year goal	Total/ Student FTE (FY15)	Total/ Avg. Op. Expenses (FY11-FY15)	Notes
Akron	CPN	$2.7M	$6.0M	$8.7M	$408	1.8%	Savings primarily used to balance budget.
Bowling Green	CPN	$60.2M	$2.3M	$62.5M	$3,689	17.8%	Strong procurement efforts; more evidence needed of benefits to students.
Central State	CPN	$11.3M	$.5M	$11.7M	$6,938	19.7%	Detail needed about plan to benefit students.
Cincinnati	CPN	$46.3M	$6.2M	$52.6M	$1,413	4.9%	Detail needed about plan to benefit students.
Cleveland State	CPN	-	-	$11.5M	$850	3.8%	More detail needed about use of funds through FY21.
Kent State	CPN	$31.8M	$5M	$36.9M	$1,026	5.7%	Primary source of savings is required by the state.
Miami	SP	$56.5M	$85M	$141.5M	$6,290	26.7%	Many actions with benefits, including financial aid.
NEOMED	CPN	$4.9M	$36.7M	$41.6M	$39,794	69.4%	Detail needed about plan to benefit students.
Ohio State	SP	$200M	$200M	$400M	$6,531	8.6%	$100M committed to financial aid; $35M in place.
Ohio U.	CPN	$51.1M	$8.9M	$60.0M	$1,793	9.3%	Beyond tuition guarantee, more detail needed.
Shawnee State	CPN	$16.4M	$3.5M	$19.9M	$5,401	31.3%	Detail needed about plan to benefit students.
Toledo	SP	$11.4M	$181.9M	$193.2M	$10,468	22.7%	ProMedica partnership provides direct benefits.
Wright State	CPN	$64.5M	$29M	$93.5M	$6,276	23.4%	Detail needed about plan to benefit students.
Youngstown State	CPN	$20.4M	$7.7M	$28.1M	$2,658	13.6%	Detail needed about plan to benefit students.

SP = Strong progress	CPN = Continued Progress Needed	U = Unacceptable

Procurement

> **Recommendation 3A | Campus contracts**: *Each institution must require that its employees use existing contracts for purchasing goods and services, starting with the areas with the largest opportunities for savings. To ensure transparency about these decisions, institutions must report the utilization rates of existing contracts annually to their boards of trustees.* **Timeline**: *Immediate*
>
> **Recommendation 3B | Collaborative contracts**: *Ohio's colleges and universities, working collaboratively through the IUC Purchasing Group, must pursue new and/or strengthened joint purchasing agreements in six categories listed in the report.* **Timeline**: *1-3 years*

The two procurement-related recommendations are intertwined and provide significant opportunities to drive administrative savings for colleges and universities.

Recommendation 3A is focused on aggregating spending by requiring employees to use negotiated contracts. This step often provides savings on its own, but it is also a necessary first step to obtain the best possible pricing on products and services.

Recommendation 3B then calls on colleges and universities to seek opportunities to combine their buying power in six areas: copier/printer services, computer hardware, travel services, outbound shipping, scientific equipment and office supplies.

We found wide variations in how universities responded to both recommendations.

Mandates to use existing contracts were applied unevenly, and institutions should be tracking utilization rates or other metrics to drive progress.

Key point: As with the five-year goals, the universities that received "strong progress" ratings demonstrated not just plans but action — and how savings were being used to benefit students.

Many institutions cited ongoing work by the Inter-University Council of Ohio Purchasing Group to develop joint contracts in the identified areas. We are pleased that the IUC-PG has taken a serious approach in this area and encourage the group to work with its members to deliver on the opportunity.

Because this work is ongoing, many individual institutions that are involved in the process necessarily received ratings of "continued progress needed" on this recommendation.

Scorecard: Procurement recommendations

	Utilize existing contracts	Utilize joint contracts	Evaluation notes
Akron	CPN	CPN	Need more reporting on how institution will track performance and benefits to students.
Bowling Green	CPN	SP	Progress seen on copier/printer savings of $1.9M through 3B. Need more reporting on how institution will track performance and benefits to students for 3A.
Central State	CPN	SP	Progress seen on 3B joint purchasing. Need more reporting on how institution will track performance and benefits to students for 3A.
Cincinnati	CPN	CPN	Need more reporting on how institution will track performance and benefits to students.
Cleveland State	CPN	CPN	Policy change to redirect spending to existing contracts is promising. Need more reporting on how institution will track performance and benefits to students.
Kent State	CPN	CPN	Policy change to enforce mandates is promising - if utilized. More progress needed, with tracking.
Miami	CPN	CPN	Amended policy on 3A mandates is promising. Tracking of results and benefits to students is needed.
NEOMED	U	CPN	Need to demonstrate progress from centralized system, along with tracking of results and benefits to students.
Ohio State	SP	SP	Increased utilization of contracts translated into savings for university, including $2.8 million for student aid.
Ohio U.	CPN	CPN	New mandates for preferred vendors is promising. Tracking of results and benefits to students is needed.
Shawnee State	U	CPN	Action on purchasing authority is on hold due to reorganization. Tracking of results and benefits to students is needed.
Toledo	CPN	CPN	Need more reporting on how institution will track performance and benefits to students.
Wright State	CPN	CPN	Need more reporting on how institution will track performance and benefits to students.
Youngstown State	U	CPN	Has not acted to mandate existing contracts. Tracking of results and benefits to students is needed.

SP = Strong progress	CPN = Continued Progress Needed	U = Unacceptable

Operations review

Recommendation 4B | Operations review: Each institution 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 institutions would increase efficiencies, improve service or otherwise add value. Timeline: 1-3 years

Along with recommendations to review non-core assets and evaluate opportunities for affinity relationships or other partnerships, this operations review was squarely focused on non-academic areas that are outside of the core mission of colleges and universities.

For this progress report, we began with a simple question of whether the university had produced an operations review, but that was simply a starting point.

Key point: More broadly, we put a strong emphasis on outcomes from that process.

- Was there an action plan based on the findings?

- Did the institution provide its reasoning if it determined that certain operations should continue as is?

- And, as always, how would the university track results and ensure that students benefitted?

Scorecard: Operations review

	Conduct operations review	Evaluation notes
Akron	CPN	Progress demonstrated in food service, custodial and transportation. More detail needed about tracking benefits to students.
Bowling Green	SP	Progress demonstrated in areas including dining, maintenance and student health services. Strong mechanisms to prioritize next steps and track results.
Central State	CPN	Has acted in areas including bookstore, maintenance and student transportation. More detail needed about tracking benefits to students.
Cincinnati	CPN	More detail needed about outcome of consultant review as well as how benefits to students would be tracked.
Cleveland State	CPN	Has acted in areas including bookstore, dining, residence halls and maintenance. More detail needed about tracking savings and benefits to students.
Kent State	SP	Shared joint contract with Wright State and Youngstown State. Exploring actions in dining, transportation and dining that would generate significant savings.
Miami	SP	Savings identified from student health center and printing services. Opportunities identified for next steps. A study supported current status of several operations.
NEOMED	U	Sole focus seems to be idea of shared ERP and external service center. While a promising idea, other action steps should be explored.
Ohio State	SP	Outsourcing of parking operation has generated more than $100 million for scholarships, faculty hires and other needs. Energy under exploration. Progress also seen in custodial operations.
Ohio U.	CPN	Sharing some services with city but detail needed about how savings are being used and tracked.
Shawnee State	CPN	More detail needed about tracking savings and benefits to students from actions taken.
Toledo	SP	Comprehensive review included operations already using private partners. Health restructuring to save students 31% to 57%.
Wright State	U	Shared joint contract with Kent State and Youngstown State. Need more detail about next steps and how any benefits would be tracked.
Youngstown State	CPN	Shared joint contract with Kent State and Wright State. More detail needed about tracking savings and benefits to students from actions taken such as bookstore, health clinic. Detail needed about outcomes on other areas under consideration.

SP = Strong progress	CPN = Continued Progress Needed	U = Unacceptable

Cost diagnostic

> **Recommendation 5A | Cost diagnostic**: Each institution must produce a diagnostic to identify its cost drivers, along with priority areas that offer the best opportunities for efficiencies. **Timeline**: Immediate

Beyond the base recommendation that each institution produce a diagnostic to identify its cost drivers, the task force report was explicit that the purpose of the exercise was to lead to an action plan, particularly focused on cost drivers that translate into higher expenses for students.

For this progress report, that action step was a key to our evaluation.

Key point: In our ratings, we sought evidence that each institution had addressed cost drivers (not simply budget data), demonstrated an action plan for efficiencies and included accountability measures to track results and identify next steps.

Scorecard: Cost diagnostic

	Conduct cost diagnostic	Evaluation notes
Akron	U	Diagnostic not completed.
Bowling Green	CPN	Detail needed about action steps and accountability for results.
Central State	CPN	Detail needed about action steps and accountability for results.
Cincinnati	CPN	Detail needed about action steps and accountability for results.
Cleveland State	SP	Projects identified in specified areas and administrative structure.
Kent State	CPN	Detail needed about action steps and accountability for results.
Miami	SP	Projects identified and metrics tracked, including spending per student.
NEOMED	U	Diagnostic not completed.
Ohio State	CPN	More detail needed about findings of diagnostic and how progress is being tracked.
Ohio U.	CPN	Detail needed about action steps and accountability for results.
Shawnee State	SP	Projects identified, including focus on health-care costs and alternative revenue sources.
Toledo	SP	Detailed diagnostic with clearly tied action steps, including process to identify contribution margin by program.
Wright State	U	Diagnostic not completed.
Youngstown State	U	Diagnostic not completed.

SP = Strong progress	CPN = Continued Progress Needed	U = Unacceptable

Digital capabilities for textbooks

> **Recommendation 6A | Develop digital capabilities**: *Institutions 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.* **Deadline**: *Immediate*

Textbooks and other educational materials can add significant costs, and students often cannot predict how expensive materials will be until after signing up for individual courses.

The task force recognized these issues and focused a number of recommendations on addressing textbook costs, including the call for institutions to join consortiums that can help produce high-quality, affordable materials.

Key point: For this progress report, we considered whether an institution had joined a consortium as well as several related questions:

- Were efforts to develop digital capabilities pursued broadly at the institution level?

- Are there metrics to track progress and measure success?

Most institutions demonstrated some work to address these issues, but in most cases the examples indicated isolated areas of progress more than an institutional-level initiative. These responses were rated as continued progress needed.

The three universities that received unacceptable ratings had not entered into a consortium, did not show substantive action steps to do so and provided little evidence of a widespread institutional effort to enhance their digital capabilities.

Scorecard: Digital capabilities for textbook affordability

	Develop digital capabilities	Evaluation notes
Akron	CPN	More detail needed about institutional initiative, plans for a consortium and metrics to track progress.
Bowling Green	CPN	Participating in IUC subgroup; more detail needed about institutional initiative and metrics to track progress.
Central State	CPN	More detail needed about institutional initiative, plans for a consortium and metrics to track progress.
Cincinnati	CPN	First cohorts underway from Center for Excellence in eLearning; detail needed on plans for a consortium and metrics to track progress.
Cleveland State	U	Response lacks action plan and metrics to track progress.
Kent State	CPN	Participating in IUC subgroup; more detail needed about institutional initiative and metrics to track progress.
Miami	CPN	Recommendations pending from Open Educational Resources Committee; detail on progress and accountability metrics needed.
NEOMED	U	No response provided.
Ohio State	SP	Unizin consortium has been used to deploy Canvas for online courses; digital textbook project is expected to save students $1 million in FY17.
Ohio U.	CPN	Consortium to be sought in 1- to 2-year goals; more detail needed about institutional initiative and metrics to track progress.
Shawnee State	CPN	More detail needed about progress toward consortium and metrics to track progress.
Toledo	CPN	Participating in Open Source Pilot with Barnes & Noble; more detail needed about progress and metrics.
Wright State	CPN	More detail needed about institutional initiative, plans for a consortium and metrics to track progress.
Youngstown State	U	Response lacks action plan and metrics to track progress.

SP = Strong progress	CPN = Continued Progress Needed	U = Unacceptable

Financial advising and literacy

> **Recommendation 10A | Financial advising:** *Students ultimately determine how much to borrow, but the task force calls on Ohio's colleges and universities to help educate students about those choices by providing financial literacy services.* **Timeline:** *1-3 years*

The task force recognized that the burden of student debt has grown for many reasons, including some that are beyond the control of colleges and universities.

This recommendation sought to ensure that students are making more informed choices when they take on debt. While every institution offers some kind of financial advising to students, the Action Steps report called for this to be expanded so that financial advising is offered as a standard part of the education provided to every student who takes out college loans.

Key point: Many institutions offered a variety of financial advising services to students, but we awarded strong ratings to universities that demonstrated widespread programs. We considered these factors:

- Was financial advising offered as a standard part of new student orientation or first-year experience programs?

- Were there continuing workshops or programs available throughout students' college careers?

- Was participation mandatory for students who borrow?

- And are there accountability measures to track participation rates, the efficacy of existing programs or other success metrics?

The responses to this recommendation demonstrated a promising variety of action steps, even among institutions that did not receive the top rating. In addition to traditional programs, several institutions have begun proactively communicating with students about their debt load and ensuring multiple touch points with students.

Scorecard: Financial advising and literacy

	Provide financial advising and literacy	Evaluation notes
Akron	CPN	Request for proposals pending on comprehensive literacy program. Detail needed about participation requirement and success metrics.
Bowling Green	CPN	New effort tells students total loans outstanding. More detail needed about participation requirement and success metrics for advising.
Central State	CPN	More detail needed about participation requirement and success metrics.
Cincinnati	SP	Comprehensive literacy effort has helped to reduce default rate from 10.5% to 7.6% over three years.
Cleveland State	SP	Money Smarts program presented to all incoming freshmen; 71% followed up to access budget module.
Kent State	CPN	Pilot program underway. Additional action needed, including detail on participation requirement and success metrics.
Miami	CPN	Outreach, counseling and debt tracking includes website with personalized debt info. Detail needed about participation requirements for advising and success metrics.
NEOMED	SP	Program is incorporated in student instruction. More detail needed about success metrics.
Ohio State	CPN	Scarlet and Gray Financial includes coaching, online education and group presentations. More detail needed about participation requirements and success metrics.
Ohio U.	CPN	More detail needed about participation requirements and success metrics.
Shawnee State	CPN	Incorporated in first-year experience. More detail needed about participation requirements and success metrics.
Toledo	SP	Comprehensive effort in orientation, first-year experience and housing check-in with required forms. Detail needed about success metrics.
Wright State	SP	Comprehensive program includes first-year seminar, orientation and websites. New survey identifies top student needs. Detail needed about success metrics.
Youngstown State	CPN	Details needed about first-year experience course to be implemented in fall 2017, including participation requirements and success metrics.

SP = Strong progress	CPN = Continued Progress Needed	U = Unacceptable

Next steps

We encourage Ohio colleges and universities, and particularly their boards of trustees, to review this progress report as another guidepost to the path forward.

Throughout the task force process and during this evaluation, we learned about the many case studies where institutions had taken important steps on affordability and efficiency. Those were encouraging.

Our collective belief is that many more examples are needed and that the benefits to students need to be more profound. The consistent themes of our report can be applied going forward at each institution and to guide collaborative opportunities.

- Institutions should keep a clear focus on improving affordability and quality for students to crystalize the value of any proposed initiative. Efficiency savings and new resources must be directed to cost reductions or tangible benefits to students to meet the primary goal.

- There is no one tool for addressing the challenges facing higher education. Each institution ought to take action on a variety of steps that together will generate substantial progress.

- Boards of trustees must lead these efforts on behalf of their students — and to strengthen the institutions that they represent. By setting expectations and tracking progress, boards can put Ohio's colleges and universities in the best position of strength.

We believe that these three principles, along with the original recommendations of the Ohio Task Force on Affordability and Efficiency in Higher Education, provide colleges and universities with a strong toolbox to propel progress.

Finally, we wish to reiterate a key message of the original task force report: "The focus on affordability should extend beyond the specific recommendations of this report to produce a new culture of cost consciousness in higher education."

No matter the steps to get there, the end goal is to improve the affordability and quality of higher education in Ohio.

Acknowledgements

This progress report reflects our best judgement, given what we learned during the development of the Action Steps report and the responses from the 14 public universities in Ohio.

Our findings are our responsibility, but we owe a debt of gratitude to the full Task Force on Affordability and Efficiency in Higher Education for its original work. The Action Steps report offered clear, practical guidance to institutions and we relied strongly on that framework to evaluate their responses.

As such, we owe a debt of gratitude to the other task force members for their many contributions to the original report:

- **Chair:** Geoff Chatas, senior vice president and CFO, The Ohio State University

- Rep. Mike Duffey, R-Worthington

- Rep. Dan Ramos, D-Lorain

- Senate President Keith Faber, R-Celina

- Sen. Sandra Williams, D-Cleveland

For this progress report, Geoff Chatas provided continuing support to help facilitate our discussions. As a representative of Ohio State, he could not take part in rating the responses of his university or its peers, but he helped to provide context and answer questions during our discussion.

We also continued to rely on the Ohio Department of Higher Education, as we did during the task force process, to provide background information and data to help guide our evaluations.

Finally, we reiterate our appreciation for all of the higher education officials who shared best practices and perspective during the development of the Action Steps report. Those discussions continued to guide our thinking.

Appendix: Recommendations from 'Action Steps' report

Master recommendation 1 | **Students must benefit:** Savings and/or new dollars generated from these recommendations must be employed to reduce the cost of college for students. Any other uses must have tangible benefits for the quality of students' education.

Master recommendation 2 | **Five-year goals:** Each institution must set a goal for efficiency savings and new resources to be generated through fiscal 2021, along with a framework for investing those dollars in student affordability while maintaining or improving academic quality.

STRATEGIC PROCUREMENT

Recommendation 3A | **Campus contracts:** Each institution must require that its employees use existing contracts for purchasing goods and services.

Recommendation 3B | **Collaborative contracts:** Ohio's colleges and universities must pursue new and/or strengthened joint purchasing agreements in copiers and printers, computers, travel services, outbound shipping, scientific lab equipment and office supplies.

ASSETS AND OPERATIONS

Recommendation 4A | **Asset review:** Each institution must conduct an assessment of its non-core assets to determine their market value if sold, leased or otherwise repurposed.

Recommendation 4B | **Operations review:** Each institution must conduct an assessment of non-academic operations that might be run more efficiently by a regional cooperative, private operator or other entity. This review should include dining, housing, student health insurance, child care, IT help desk, janitorial, landscaping, facility maintenance, real-estate management and parking.

Recommendation 4C | **Affinity partnerships and sponsorships:** Institutions 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.

ADMINISTRATIVE COST REFORMS

Recommendation 5A | **Cost diagnostic:** Each institution must produce a diagnostic to identify its cost drivers, along with priority areas that offer the best opportunities for efficiencies.

Recommendation 5B | **Productivity measure:** The Department of Higher Education should develop a common measurement of administrative productivity that can be adopted across Ohio's public colleges and universities.

Recommendation 5C | **Organizational structure:** Each institution should review its organizational structure to identify opportunities to streamline and reduce costs.

Recommendation 5D | **Health-care costs:** To drive down costs and take advantage of economies of scale, a statewide working group should identify opportunities to collaborate on health-care costs.

Recommendation 5E | **Data centers:** Institutions must develop a plan to move their primary or disaster recovery data centers to the State of Ohio Computer Center.

Recommendation 5F | **Space utilization:** Each Ohio institution must study the utilization of its campus and employ a system that encourages optimization of physical spaces.

TEXTBOOK AFFORDABILITY

Recommendation 6A | **Negotiate cost:** Professional negotiators must be assigned to help faculty obtain the best deals for textbooks and instructional materials, starting with high-volume, high-cost courses. Faculty must consider both cost and quality in selecting course materials.

Recommendation 6B | **Standardize materials for gateway courses:** Institutions must encourage departments to choose common materials, including digital elements, for gateway courses that serve large volumes of students.

Recommendation 6C | **Develop digital capabilities:** Institutions 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.

TIME TO DEGREE

Recommendation 7A | **Education campaign:** Each institution must develop a campaign to educate its full-time undergraduates about the course loads needed to graduate on time.

Recommendation 7B | **Graduation incentive:** Institutions should consider establishing financial incentives that encourage full-time students to take at least 15 credit hours per semester.

Recommendation 7C | **Standardize credits for degree:** Institutions should streamline graduation requirements so that most bachelor's degree programs can be completed within four years or less and most associate degree programs can be completed in two years or less. Exceptions should be allowed because of accreditation or quality requirements.

Recommendation 7D | **Data-driven advising:** Institutions 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.

Recommendation 7E | Summer programs: Each campus must develop plans to evaluate utilization rates for summer session and consider opportunities to increase productive activity.

Recommendation 7F | Pathway agreements: Ohio institutions 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.

Recommendation 7G | Competency-based education: Institutions 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.

DUPLICATIVE PROGRAMS

Recommendation 8 | Program review: Institutions should consider consolidating programs that are duplicated at other colleges and universities in their geographic area.

CO-LOCATED CAMPUSES

Recommendation 9 | Joint oversight boards: The state should establish joint oversight boards between co-located community colleges and regional campuses of universities with a mandate to improve efficiencies and coordination while maintaining the differentiated mission of each.

POLICY REFORMS

Recommendation 10A | Financial advising: Ohio's colleges and universities should make financial literacy a standard part of students' education.

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

Recommendation 10C | Real estate sales: State law should be updated to streamline the process for how public institutions sell, convey, lease or enter into easements of real estate.

Recommendation 10D | Insurance pools: State law should be clarified related to the IUC Insurance Consortium, which buys property and casualty insurance on a group basis for most institutions.

IMPLEMENTATION

Recommendation | Implementation: The chancellor of the Ohio Department of Higher Education and the state's public colleges and universities should make use of existing groups (including the state's Efficiency Advisory Committee and institutional efficiency councils) and resources to coordinate next steps from these recommendations.