

# Board of Trustees Committee Meetings - March 12, 2025

Youngstown State University - Board of Trustees  
Board Meeting Room, 1st Floor, Tod Hall  
2025-03-12 10:00 - 17:00 EDT

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**B. Old Business**

**C. Committee Items**

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**D. New Business**

**E. Adjournment**



**YOUNGSTOWN STATE UNIVERSITY  
BOARD OF TRUSTEES COMMITTEES**

**Michael A. Peterson, Chair  
Charles T. George, Vice Chair  
Anita A. Hackstedde, Secretary**

**2024-2025 STANDING COMMITTEES**

**ACADEMIC EXCELLENCE AND  
STUDENT SUCCESS COMMITTEE**

Joseph J. Kerola, Chair  
Laura A. Lyden, Vice Chair  
All Trustees are members

**FINANCE AND FACILITIES COMMITTEE**

Allen L. Ryan, Jr., Chair  
Sergul A. Erzurum, Vice Chair  
All Trustees are members

**AUDIT SUBCOMMITTEE**

Richard C. Fryda, Chair  
Sergul A. Erzurum, Vice Chair  
Anita A. Hackstedde  
Joseph J. Kerola  
Sterling A. Williams

**INVESTMENT COMMITTEE**

Laura A. Lyden, Chair  
Charles T. George, Vice Chair  
All Trustees are members

**INTERCOLLEGIATE ATHLETICS COMMITTEE**

Joseph J. Kerola, Chair  
Richard C. Fryda, Vice Chair  
All Trustees are members

**INSTITUTIONAL ENGAGEMENT COMMITTEE**

Anita A. Hackstedde, Chair  
Allen L. Ryan, Jr., Vice Chair  
All Trustees are members

**WORKFORCE EDUCATION AND  
INNOVATION COMMITTEE**

Charles T. George, Chair  
Laura A. Lyden, Vice Chair  
All Trustees are members

**UNIVERSITY AFFAIRS COMMITTEE**

Anita A. Hackstedde, Chair  
Charles T. George, Vice Chair  
All Trustees are members

**GOVERNANCE COMMITTEE**

Michael A. Peterson, Chair  
Charles T. George, Vice Chair  
All Trustees are members

**EXECUTIVE COMMITTEE**

Michael A. Peterson, Chair  
Charles T. George, Vice Chair  
Joseph J. Kerola  
Anita A. Hackstedde  
Allen L. Ryan, Jr.  
Laura A. Lyden

## **BOARD OF TRUSTEES Meeting Schedule**

### **Wednesday, March 12, 2025**

10:00 a.m.	Investment Committee	Board Meeting Room 1st Floor, Tod Hall
10:15 a.m.*	Audit Subcommittee	Board Meeting Room 1st Floor, Tod Hall
10:30 a.m.*	Finance & Facilities Committee	Board Meeting Room 1st Floor, Tod Hall
11:00 a.m.*	Intercollegiate Athletics Committee	Board Meeting Room 1st Floor, Tod Hall
11:30 a.m.*	Academic Excellence & Student Success Committee	Board Meeting Room 1st Floor, Tod Hall
12:30 p.m.*	Workforce Education & Innovation Committee	Board Meeting Room 1st Floor, Tod Hall
12:45 p.m.	Lunch	Manchester Room 1st Floor, Tod Hall
1:15 p.m.*	Governance Committee	Board Meeting Room 1st Floor, Tod Hall
2:15 p.m.*	Institutional Engagement Committee	Board Meeting Room 1st Floor, Tod Hall
2:45 p.m.*	University Affairs Committee	Board Meeting Room 1st Floor, Tod Hall
3:30 p.m.*	Executive Committee	Board Meeting Room 1st Floor, Tod Hall
4:00 p.m.*	Executive Committee Dinner	Pollock House 603 Wick Avenue; Youngstown, OH

### **Thursday, March 13, 2025**

9:00 a.m.	Outgoing Board Member Reception	Tod Hall Lobby 1st Floor, Tod Hall
10:00 a.m.	Board Meeting	Board Meeting Room 1st Floor, Tod Hall

\*Approximate time for start of the meeting; the meeting will start immediately following preceding committee meeting.



*March 12, 2025*

# **YOUNGSTOWN STATE UNIVERSITY**



*1100 Superior Avenue East Suite 700  
Cleveland, Ohio 44114  
216.621.1090 | [clearstead.com](http://clearstead.com)*



# CLEARSTEAD OVERVIEW

**\$47B**

ASSETS UNDER  
ADVISEMENT

**1989**

YEAR  
ESTABLISHED

**250+**

NUMBER OF  
EMPLOYEES

**46**

STATES WITH CLIENT  
REPRESENTATION

## INSTITUTIONAL CONSULTING

- Outsourced Chief Investment Officer (OCIO)
- Fiduciary Governance & Oversight
- Investment Advisory

## PRIVATE WEALTH MANAGEMENT

- Financial & Estate Planning
- Tax Strategy & Compliance
- Investment Advisory
- Family Office Administration
- Trust Administration Services

## ADVISOR SOLUTIONS SERVICES

- A Strategic Partnership for Advisors
- Enhanced Support and Solutions
- Research & Investment Strategy

## RETIREMENT ADVISORY SERVICES

- 3(21) / 3(38) Fiduciary Services
- Plan Design & Benchmarking
- Participant Services
- Executive Advisory Services

## FIRM DEVELOPMENTS

### Succession Plan Execution

- ✓ 70+ firm shareholders, 10+ new shareholders in 2024
- ✓ As part of Clearstead's longstanding management succession plan, Brad Knapp, CFA, CAIA has succeeded David Fulton, CFA as Chief Executive Officer of the firm, effective January 1, 2025. Dave will remain involved with the firm on the Board of Directors as Chairman Emeritus.



### Bolstering of Investment Office & Firm Resources

	<b>25+</b>	
	INVESTMENT OFFICE TEAM	
<b>35+</b>		<b>70+</b>
CFA CHARTERHOLDERS		GRADUATE DEGREES

### Investing in Our Clients



Assets under advisement as of 4/1/2024 and includes employees and assets of Clearstead Advisory Solutions division, also includes Clearstead Trust and Avalon Trust, which are not registered by the SEC. Employee and firm figures as of 12/31/2024. Investment Office includes research and portfolio analyst employees.



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1. Initiatives
2. Capital Markets Update
3. Non-Endowment Assets: Performance & Asset Allocation Review
  - International Strategy Refinement

## **APPENDIX**

Endowment Assets: Performance & Asset Allocation Review

Detailed Performance

Supporting Information



## INITIATIVES

# 2025 CALENDAR YEAR INITIATIVES

		1Q	2Q	3Q	4Q	COMMENTS:
STRATEGIC / ADMINISTRATIVE	Investment Policy Review			<input type="checkbox"/>		
	Strategic Asset Allocation Review			<input type="checkbox"/>		
	Peer Review		<input type="checkbox"/>			
	2026 Oversight Dashboard				<input type="checkbox"/>	
	STAR Ohio/Plus Annual Review		<input type="checkbox"/>			
PORTFOLIO	Fixed Income Review		<input type="checkbox"/>			
	Alternative Investments Review				<input type="checkbox"/>	
	Global Equity Review	✓				
PERFORMANCE	Capital Markets Review	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Quarterly Performance Review	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Endowed Account Review / Oversight	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OTHER	Fee Review				<input type="checkbox"/>	
	ORC Compliance Review			<input type="checkbox"/>		
	Clearstead Firm Update	✓				

**LAST REVIEWED**

Investment Policy: 09/18/2024  
 Strategic Asset Allocation: 09/18/2024  
 Fee Review: 09/18/2024

**MEETING SCHEDULE**

1Q: March 12, 2025  
 2Q: June 25, 2025  
 3Q: September 17, 2025  
 4Q: December 10, 2025

**FOLLOW UP / INITIATIVES**



## **CAPITAL MARKETS UPDATE**

## WHAT HAPPENED LAST QUARTER?

- Mixed quarter for risk assets as economic growth remained positive and inflation progress slowed
  - U.S. economy continues to outperform other developed economies
  - U.S. GDP growth +2.6% annualized for the first three quarters
- Market returns broadened in 2<sup>nd</sup> half of year
  - Small cap stocks outperformed large cap
- Fixed income markets pulled back as long-term interest rates moved higher
  - Markets expect the Federal Reserve to be less aggressive with interest rate cuts

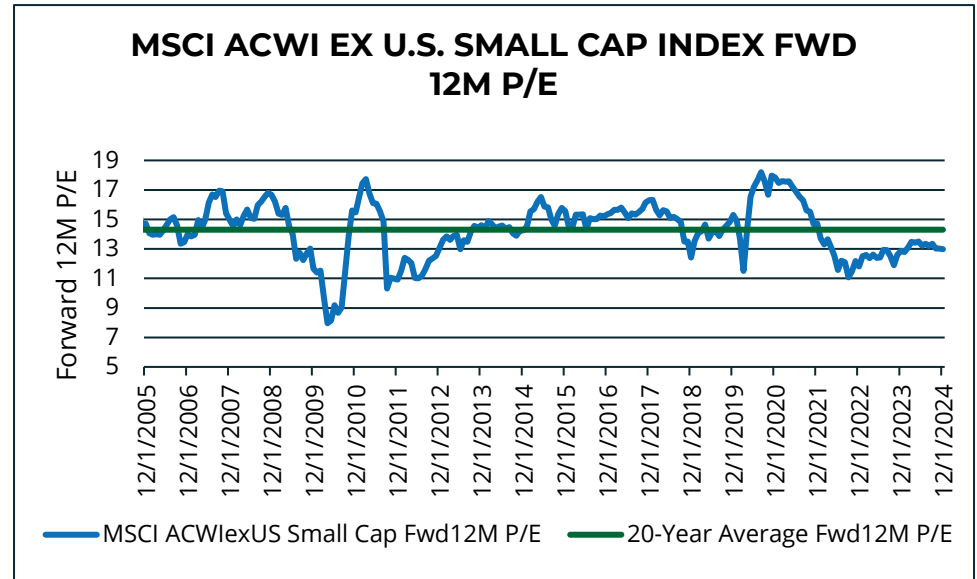
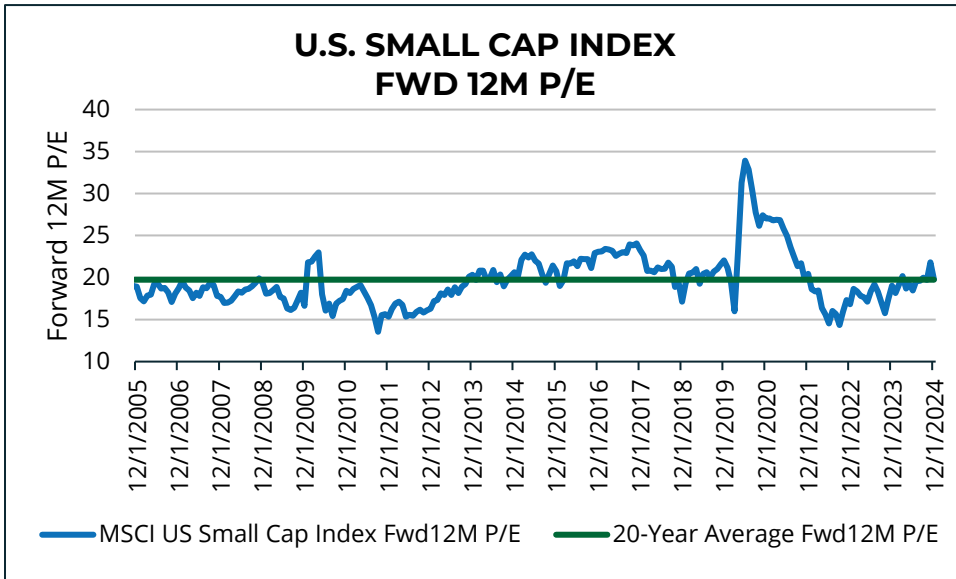
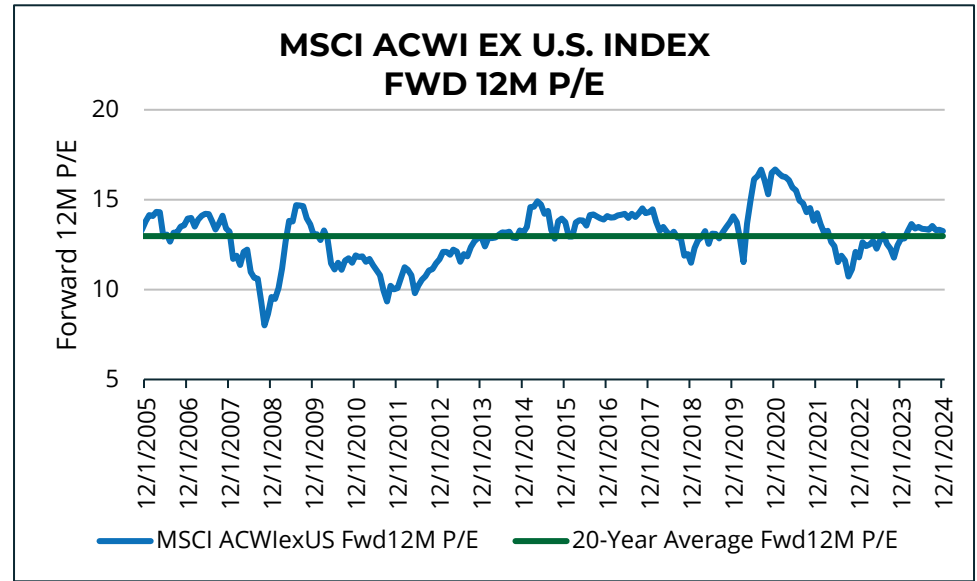
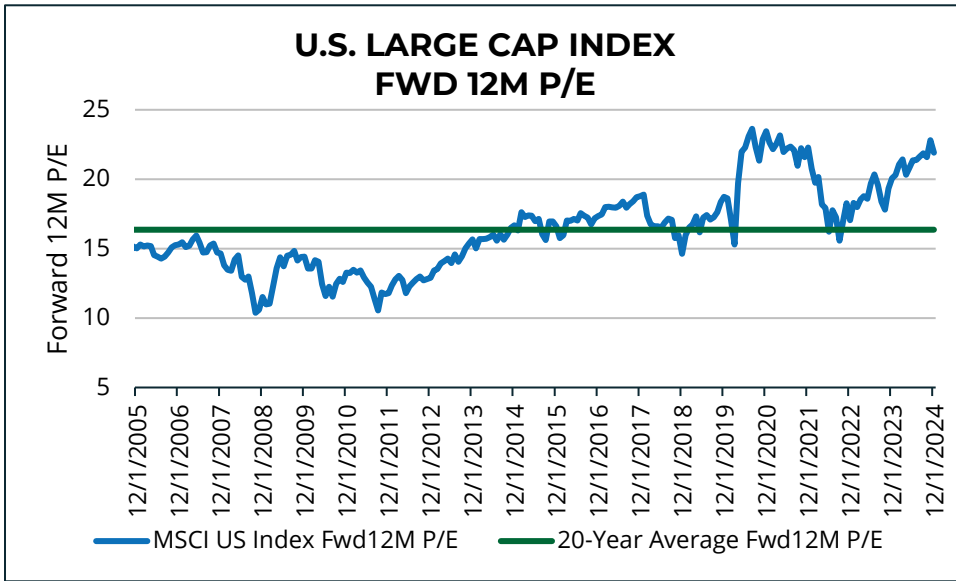
**4Q24 Returns:** S&P 500 +2.4%; Russell 2000 +0.3%; MSCI EAFE -8.1%; Bloomberg US Agg -3.1%

**2024 Returns:** S&P 500 +25.0%; Russell 2000 +11.5%; MSCI EAFE +3.8%; Bloomberg US Agg +1.3%

## INVESTMENT & ECONOMIC OUTLOOK:

- Economy: Slower, stable growth, with upside potential
- Consumer: Strong backdrop
  - Labor market at full employment
  - Delinquency rates with credit cards and auto loans has leveled off; consumer spending rates have rebounded
- Equity sentiment remains positive
  - Corporate balance sheets are strong with 15% earnings growth expected in 2025 (S&P 500)
  - Above average equity valuations are a risk; looking for further market broadening
  - Potential for increased worker productivity driven by advances in AI
  - Geopolitical risks remain, but there appear to be paths for de-escalation
- Fixed income investors should benefit from higher yields
  - Federal Reserve maintains the spotlight – anticipate 1-2 interest rate cuts in 2025

# GLOBAL EQUITY VALUATIONS



Source: Bloomberg. Data as of 12/31/2024.  
Past performance is not an indicator of future results

# JANUARY MARKET PERFORMANCE

January was strong month for markets as U.S. equities and fixed income registered gains. Economic growth was positive, inflationary pressures remain, and the Fed paused and emphasized patience.

- Value outperformed growth, mid > large caps, and international developed rebounded from a challenging prior quarter

Interest rates were volatile and ended the month essentially unchanged. Core fixed income (Bloomberg U.S. Aggregate) finished January up +0.5% while high yield performed the best returning +1.4% during the month.

Markets traded higher, but the popularity of DeepSeek caused growth names—particularly AI and semiconductor companies—to sell off. The Fed closed out the month stressing patience and data dependency.

- U.S. economy remains solid, U.S. consumer is spending despite some signs of stress, and labor market remain stable.

MARKET	2023	Q1-2024	Q2-2024	Q3-2024	Q4-2024	Jan-25	YTD	Trend
S&P 500	26.3%	10.6%	4.3%	5.9%	2.4%	2.8%	2.8%	
Russell 2000	16.9%	5.2%	-3.3%	9.3%	0.3%	2.6%	2.6%	
MSCI EAFE	18.2%	5.8%	-0.4%	7.3%	-8.1%	5.3%	5.3%	
MSCI EM	9.8%	2.4%	5.0%	8.7%	-8.0%	1.8%	1.8%	
MSCI China	-11.2%	-2.2%	7.1%	23.5%	-7.7%	0.9%	0.9%	
MSCI ACWI	22.8%	8.3%	3.0%	6.7%	-0.9%	3.4%	3.4%	
Bloomberg US Agg Bond	5.5%	-0.8%	0.1%	5.2%	-3.1%	0.5%	0.5%	
Bloomberg High Yield Bond	13.5%	1.5%	1.1%	5.3%	0.2%	1.4%	1.4%	
Bloomberg Muni Bond	6.4%	-0.4%	0.0%	2.7%	-1.2%	0.5%	0.5%	
Credit Suisse Leveraged Loan	13.0%	2.5%	1.9%	2.1%	2.3%	0.7%	0.7%	

Source: Bloomberg 1/31/2025  
Past performance is not an indicator of future results.





**NON-ENDOWMENT ASSETS:  
PERFORMANCE & ASSET ALLOCATION  
REVIEW**

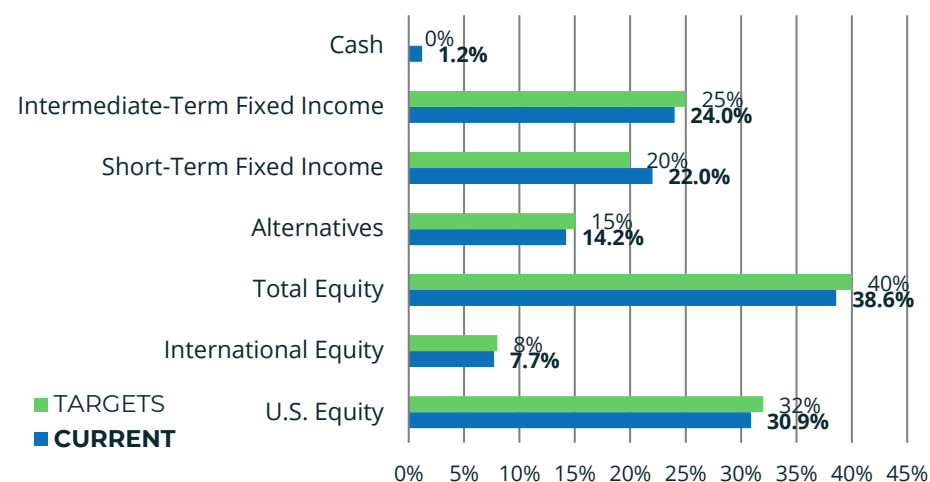
# NON-ENDOWMENT PERFORMANCE REVIEW (AS OF 12/31/2024)

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NON-ENDOWMENT ASSETS	MARKET VALUE (\$M)	TRAILING PERIODS								CALENDAR YEARS			SINCE INCEPTION <sup>4</sup>
		QTD	FYTD	CYTD	1 YR	2 YR	3 YR	5 YR	10 YR	2023	2022	2021	
<b>Total Non-Endowment Assets</b>	\$75.0	-0.2%	<b>4.0%</b>	<b>8.7%</b>	<b>8.7%</b>	<b>9.8%</b>	3.6%	<b>5.6%</b>	<b>4.9%</b>	<b>11.0%</b>	-7.8%	<b>7.8%</b>	<b>4.4%</b>
	<i>Benchmark<sup>1</sup></i>	0.5%	3.5%	7.8%	8.2%	8.2%	3.7%	4.2%	3.7%	8.7%	-4.7%	4.3%	3.4%
<b>Operating &amp; Short-Term Pool</b>	\$2.0	<b>1.2%</b>	2.4%	4.9%	4.9%	4.9%	3.7%	2.4%	1.7%	4.8%	<b>1.4%</b>	0.0%	1.2%
	<i>Benchmark<sup>2</sup></i>	1.1%	2.6%	5.2%	5.2%	5.1%	3.8%	2.4%	1.7%	5.0%	1.2%	0.0%	1.2%
<b>Long-Term Pool</b>	\$73.0	-0.2%	<b>4.4%</b>	9.7%	9.7%	<b>10.8%</b>	2.9%	5.3%	5.3%	<b>11.9%</b>	-11.2%	<b>9.5%</b>	<b>5.4%</b>
	<i>Benchmark<sup>3</sup></i>	0.0%	4.2%	9.7%	9.7%	10.7%	3.4%	5.5%	5.3%	11.7%	-9.7%	8.0%	5.1%

## LONG-TERM POOL ASSET ALLOCATION

	CURRENT	TARGETS	RANGE	+ / -
<b>U.S. Equity</b>	30.9%	32%	20-35%	-1.1%
<b>International Equity</b>	7.7%	8%	0-15%	-0.3%
<b>Total Equity</b>	38.6%	40%	25-45%	-1.4%
<b>Alternatives</b>	14.2%	15%	0-20%	-0.8%
<b>Short-Term Fixed Income</b>	22.0%	20%	25-45%	2.0%
<b>Intermediate-Term Fixed Income</b>	24.0%	25%	10-30%	-1.0%
<b>Cash</b>	1.2%	0%	0-5%	1.2%



1) 45% BofA Merrill Lynch 91-Day T-Bill / 17% BofA Merrill Lynch US Corp & Gov 1-3 Yrs / 11% BBgBarc US Govt/Credit Int TR / 8% Total Alternatives Benchmark / 15% Russell 3000 / 4% MSCI EAFE.  
 2) 95% BofA Merrill Lynch 91-Day T-Bill / 5% Barclays 1-3 Yr. Govt.  
 3) 27% Russell 3000 / 8% MSCI EAFE / 15% Total Alternatives Benchmark / 30% BofA Merrill Lynch US Corp & Gov 1-3 Yrs / 20% BBgBarc US Govt/Credit Int TR.  
 4) Inception date for Long-Term and Short-Term Pools: June 2010, Inception Date for Total Non-Endowment Assets: March 2004.

# LONG-TERM POOL: JANUARY PERFORMANCE UPDATE

AS OF 01/31/2025	MARKET VALUE (\$M)	JANUARY	CYTD	FYTD
<b>Total University Assets</b>	\$74.4	<b>+1.7%</b>	<b>+1.7%</b>	<b>+5.7%</b>
<b>Operating/Short-Term Pool</b>	\$0.2	<b>+0.3%</b>	<b>+0.3%</b>	<b>+2.7%</b>
<b>Long-Term Pool*</b>	\$74.2	<b>+1.7%</b>	<b>+1.7%</b>	<b>+6.1%</b>

Operating/Short-Term Pool market value decreased in January with operational cash needs, though have since been replenished. Investments generated +0.3% during the month and has returned +2.7% FYTD.

The Long-Term Pool started off the calendar year strong eclipsing \$74 million in market value as both equities and fixed income generated positive returns.

Most active managers outpaced their respective benchmarks on a FYTD basis through January.

- Equity managers have had mixed results this fiscal year; Clearstead is in the process of making some changes within the international equity portfolio
- Alternative managers Evanston (Weatherlow) and Cliffwater continued their strong absolute and relative performance and have returned +8.7% and +6.5% FYTD, respectively
  - H.I.G. has also performed well, though reports results on a lag (as of 9/30)
  - Infrastructure manager Apollo continues to call capital as it finds attractive investment opportunities
- All fixed income managers have outpaced their respective benchmarks on a FYTD basis; The portfolio’s transition to lock in higher yields by increasing intermediate-term bonds has been timely

\*Does not include performance from H.I.G. or Apollo as they report results on a lag. Their results are through 9/30.

# INVESTMENT POOL SUMMARY: AS OF 02/28/2025

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## YOUNGSTOWN STATE UNIVERSITY

AS OF FEBRUARY 28, 2025

	TICKER	INVESTMENT STRATEGY	MARKET VALUE (CURRENT)	% OF PORTFOLIO	POLICY TARGET	POLICY RANGE	TACTICAL +/-		
<b>Total Operating &amp; Short Term</b>					<b>\$20,154,119</b>	<b>100.0%</b>			
Federated Hermes Govt Obligations	GOFXX	Money Market	\$20,154,119	100.0%					
Star Plus*	-	Cash Equivalent	\$0	0.0%					
Star Ohio*	-	Cash Equivalent	\$0	0.0%					
<b>Total Long Term Reserves Pool</b>					<b>\$74,153,170</b>	<b>100.0%</b>			
<b>Domestic Equity</b>					<b>\$22,781,616</b>	<b>30.7%</b>	<b>32.0%</b>	<b>25-40%</b>	<b>-1.3%</b>
Vanguard Instl Index	VINIX	Large Cap Core	\$16,470,775	22.2%					
Vanguard Mid Cap Index Adm	VIMAX	Mid-Cap Core	\$2,819,452	3.8%					
Loomis Sayles Small Growth N2	LSSNX	Small Cap Growth	\$1,768,358	2.4%					
Victory Integrity Small Cap Value Y	VSVIX	Small Cap Value	\$1,723,031	2.3%					
<b>International Equity</b>					<b>\$5,994,308</b>	<b>8.1%</b>	<b>8.0%</b>	<b>0-15%</b>	<b>0.1%</b>
William Blair International Growth I	BIGIX	Foreign Growth	\$2,602,481	3.5%					
Dodge & Cox International Stock	DODFX	Foreign Value	\$3,391,827	4.6%					
<b>Total Equity</b>					<b>\$28,775,925</b>	<b>38.8%</b>	<b>40.0%</b>	<b>25-50%</b>	<b>-1.2%</b>
<b>Alternatives</b>					<b>\$10,513,568</b>	<b>14.2%</b>	<b>15.0%</b>	<b>0-20%</b>	<b>-0.8%</b>
H.I.G. Principal Lending Fund <sup>1</sup>	-	Private Credit	\$2,290,599	3.1%					
Cliffwater Corporate Lending Fund	CCLFX	Private Credit	\$2,555,673	3.4%					
Apollo Infrastructure Opps Fund III	-	Real Assets	\$22,389	0.0%					
Weatherlow Fund <sup>2</sup>	-	Diversifying Strategy	\$5,644,907	7.6%					
<b>Fixed Income</b>					<b>\$33,970,916</b>	<b>45.8%</b>	<b>45.0%</b>	<b>30-70%</b>	<b>0.8%</b>
<b>Short Term Fixed Income</b>					<b>\$16,138,235</b>	<b>21.8%</b>	<b>20.0%</b>	<b>15-35%</b>	<b>1.8%</b>
YSU Short Term Bond	-	Short-Term Fixed	\$13,797,111	18.6%					
Lord Abbett Short Duration	LLDYX	Short-Term Fixed	\$2,341,123	3.2%					
<b>Intermediate Fixed Income</b>					<b>\$17,832,681</b>	<b>24.0%</b>	<b>25.0%</b>	<b>15-35%</b>	<b>-1.0%</b>
JPMorgan Core Bond Fund R6 <sup>3</sup>	JCBUX	Core Plus Fixed	\$5,501,731	7.4%					
YSU Intermediate Term Fixed	-	Interm-Term Fixed	\$4,678,681	6.3%					
Breckenridge Intermediate Gov/Credit	-	Interm-Term Fixed	\$4,281,217	5.8%					
Fidelity Intermediate Treasury Index	FUAMX	Interm-Term Treasury	\$3,371,052	4.5%					
<b>Cash &amp; Cash Equivalents</b>					<b>\$892,762</b>	<b>1.2%</b>	<b>0.0%</b>	<b>0-5%</b>	<b>1.2%</b>
Federated Hermes Govt Obligations	GOFXX	Money Market	\$892,762	1.2%					
<b>Total University Assets</b>					<b>\$94,307,289</b>				

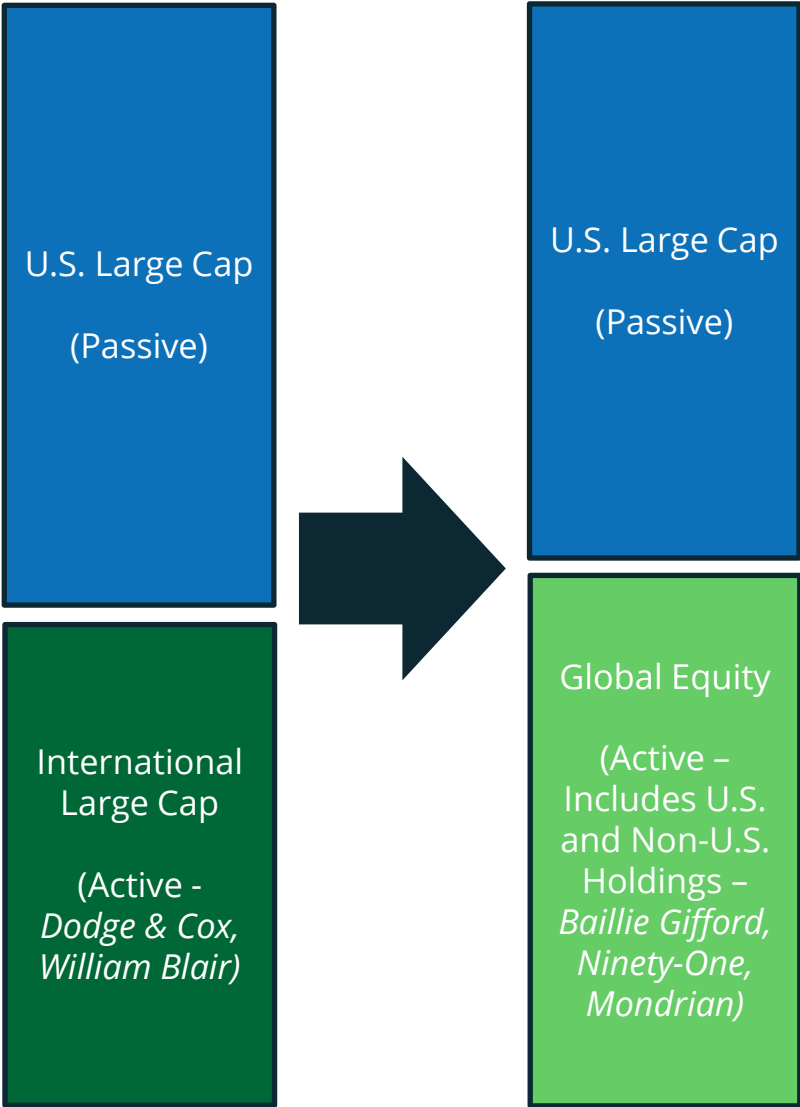
<sup>1</sup> As of 9/30/2024.

<sup>2</sup> As of 1/31/2025.

<sup>3</sup> Held at JPMorgan.

# EXECUTIVE SUMMARY: EVOLVING INTERNATIONAL EXPOSURE

- Clearstead has been implementing the use of global equity managers in client portfolios as an optimal way to access international equities
- Research identified the following:
  - The best performing companies in U.S. and non-U.S. markets have produced similar returns over time, but the average non-U.S. company has meaningfully underperformed
  - A minority of firms have created the majority of wealth globally over time – this supports the notion of a more concentrated portfolio
  - Top performing global equity managers have been able to provide consistent outperformance over time
- Clearstead believes that global equity managers that invest in a smaller number of foreign companies can add value to a portfolio based on the following factors:
  - Greater concentration increases idiosyncratic risk and active share, which can lead to alpha
  - Global managers have a wider opportunity set, allowing for more efficient capital allocation
- Although long-term results are strong, active global managers can experience tracking error from (benchmark) indices from time-to-time
  - It is key to finding strong managers that pair well
  - Patience is required for this long-term thesis to be successful



# STRONG PERFORMING COMPANIES EXIST INSIDE AND OUTSIDE OF THE U.S.

Why constrain a manager when their best idea could be found overseas?

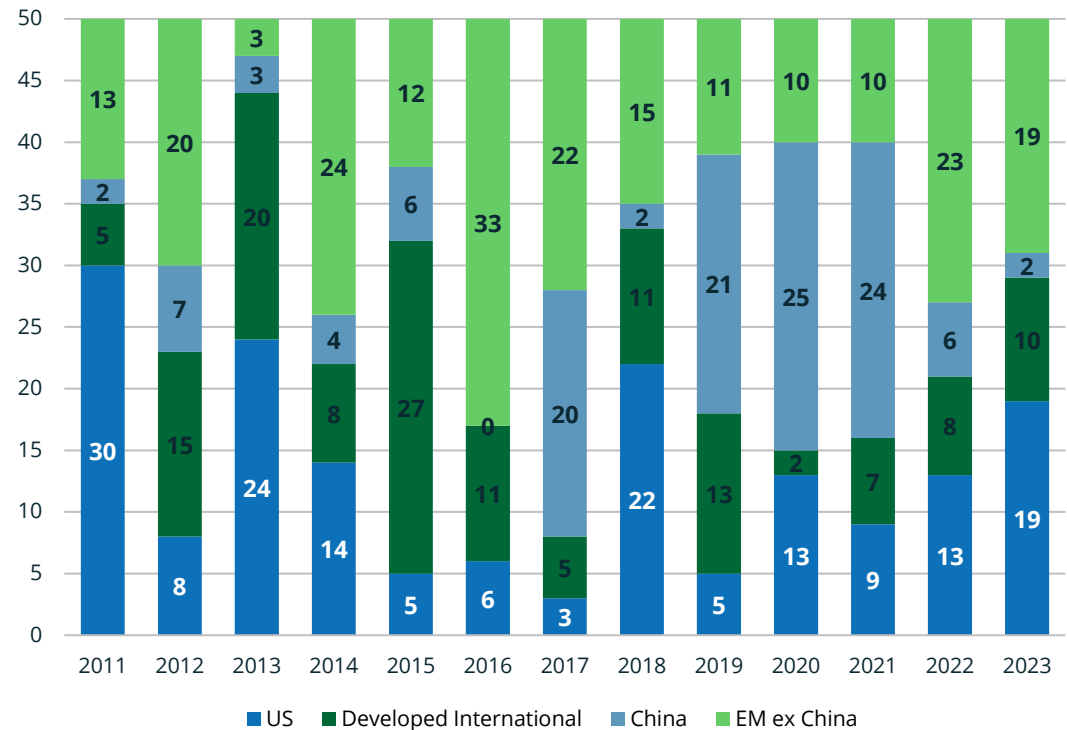
## TOP EARNERS GENERALLY EQUALS TOP RETURNERS<sup>1</sup>

Trailing 10-Year EPS Growth			
	S&P 500	EAFE	EM
Top Quintile EPS Grower	17.9%	15.9%	19.2%
Median Firm	10.9%	6.9%	9.0%
Bottom Quintile EPS Grower	3.6%	0.2%	0.7%

Annualized 10-Year Returns			
	S&P 500	EAFE	EM
Top Quintile EPS Grower	17.9%	17.0%	18.4%
Index Return	14.0%	5.8%	3.3%
Bottom Quintile EPS Grower	8.5%	3.8%	3.0%

## TOP 50 RETURNING GLOBAL LARGE CAP COMPANIES BY DOMICILE<sup>2</sup>

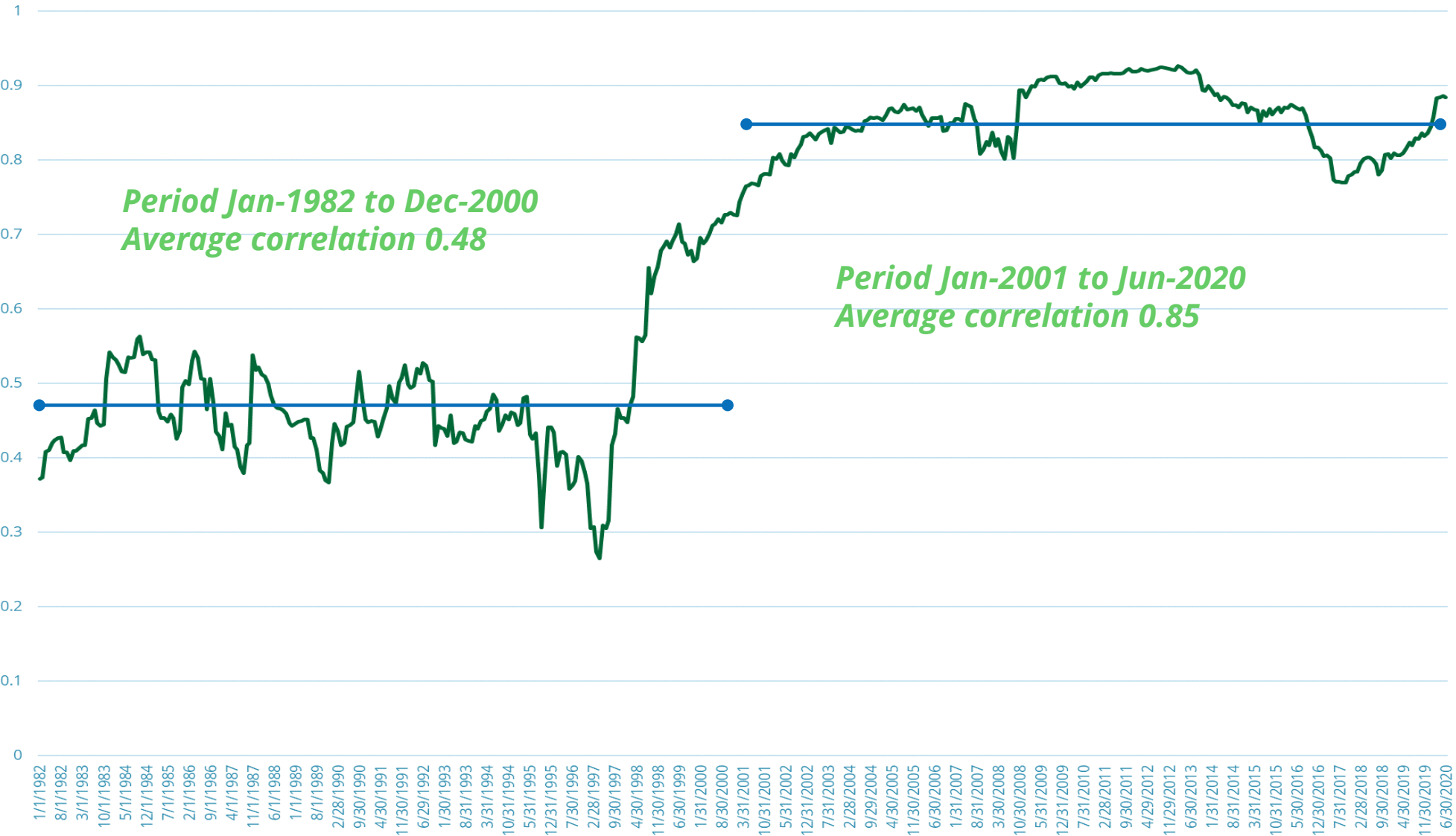


<sup>1</sup> Source: Clearstead, Morningstar 7/1/2010 – 6/30/2020 10-Yr EPS CAGR, 10-Yr Annualized Returns

<sup>2</sup> Source: Clearstead, Morningstar, MSCI ACWI.

# DIVERSIFICATION BENEFITS EBBED WITH THE DEVELOPMENT OF A GLOBAL BUSINESS CYCLE

ROLLING 5-YEAR CORRELATIONS EAFE TO S&P 500



# GLOBAL EQUITY MANAGERS: EXECUTIVE SUMMARY

## Clearstead's manager search process led to three managers receiving our highest conviction: Baillie Gifford, Ninety-One and Mondrian

- Each manager has a strong, financially stable organization, talented professionals, a disciplined and repeatable process, high conviction portfolios and excellent long-term performance
- These managers are complementary, in that they have different investment styles and utilize different criteria to identify investment ideas
- The resulting portfolio will have an increased allocation in top holdings, low fees and similar regional exposure

MANAGER	INVESTMENT STYLE	DISTINGUISHING FEATURES	COMMON FEATURES	ACCESSIBILITY
<b>Baillie Gifford</b>	Growth (Disruptive Change)	<ul style="list-style-type: none"> <li>• Size, depth and resources</li> <li>• Unique investment process</li> <li>• Long-term focus</li> </ul>	<ul style="list-style-type: none"> <li>• Long-term orientation (5-10 year investment framework)</li> <li>• High Active Share (&gt;85%)</li> </ul>	<ul style="list-style-type: none"> <li>• Mutual fund</li> </ul>
<b>Ninety-One</b>	Core (Superior Compounders)	<ul style="list-style-type: none"> <li>• High conviction portfolio</li> <li>• Free cash flow focus</li> <li>• Balance sheet quality leads to downside protection</li> </ul>	<ul style="list-style-type: none"> <li>• High Conviction Portfolios (&lt;30-70 names)</li> <li>• Team-based process; w/ deep analytic resources</li> </ul>	<ul style="list-style-type: none"> <li>• Mutual fund or LLC</li> </ul>
<b>Mondrian</b>	Value (Undervalued Dividend Growers)	<ul style="list-style-type: none"> <li>• Focused on dividend growth</li> <li>• Strong downside capture metrics</li> <li>• CIO / PM is impressive</li> </ul>	<ul style="list-style-type: none"> <li>• Strong client alignment; co-invested PMs, independent firms</li> <li>• Long-run track records demonstrating exceptional stock-picking abilities</li> </ul>	<ul style="list-style-type: none"> <li>• Mutual fund or LP</li> </ul>





## **APPENDIX**



**ENDOWMENT ASSETS:  
PERFORMANCE & ASSET ALLOCATION  
REVIEW**

# ENDOWMENT ASSETS: PERFORMANCE & ASSET ALLOCATION (AS OF 12/31/2024)

ENDOWMENT ASSETS	MARKET VALUE (\$MM)	TRAILING PERIODS								CALENDAR YEARS			SINCE INCEPTION <sup>3</sup>
		QTD	FYTD	CYTD	1 YR	2 YR	3 YR	5 YR	10 YR	2023	2022	2021	
<b>YSU Endowment Fund</b>	\$18.109	0.0%	5.3%	16.4%	16.4%	14.6%	3.4%	9.2%	8.5%	12.8%	<b>-15.7%</b>	<b>20.9%</b>	9.0%
	<i>Benchmark<sup>1</sup></i>	1.0%	6.8%	18.7%	18.7%	19.8%	6.2%	10.9%	10.3%	20.9%	-16.6%	20.6%	11.0%
	<i>Benchmark<sup>2</sup></i>	0.2%	5.8%	15.0%	15.0%	16.3%	4.5%	8.7%	8.5%	17.7%	-15.8%	15.9%	9.2%

## COMPLIANCE

- Reporting & Oversight by Clearstead, Management/Implementation by Huntington
- Asset Allocation Guidelines: 70% Equities (60-80%) / 30% Cash & Fixed Income (20-40%) **(IN COMPLIANCE)**

## HOLDINGS

- Equity Mutual Funds – 9% (Mutual Funds & ETFs)
- Stocks – 61% (30-60 Concentrated U.S. Large/Mid-Cap Stock Portfolio)
- Alternatives – 2% (Real Estate Mutual Fund)
- Fixed Income Mutual Funds – 2% (iShares High Yield, Stone Ridge)
- Individual Bonds – 21% (Individual Bond Portfolio: U.S. Corporate / Gov't / Asset Backed Debt)
- Cash – 5%

1) Benchmark: 75% S&P 500 / 25% BBg US Aggregate.

2) Benchmark: 60% S&P 500 / 40% BBg US Aggregate.

3) Inception date: 06/2013.



## **DETAILED PERFORMANCE**

# EXECUTIVE SUMMARY

	Market Value 10/01/2024	Market Value 12/31/2024	% of Portfolio	4th Quarter 2024 (%)	YTD (%)
<b>Total University Assets</b>	<b>\$94,961,718</b>	<b>\$74,965,230</b>	<b>100.0</b>	<b>-0.2</b>	<b>8.7</b>
<i>Total Policy Benchmark<sup>1</sup></i>				0.5	7.8
<b>Total Operating &amp; Short Term</b>	<b>\$21,821,830</b>	<b>\$1,952,497</b>	<b>2.6</b>	<b>1.2</b>	<b>4.9</b>
<i>Total Operating &amp; Short Term Benchmark<sup>2</sup></i>				1.1	5.2
<b>Total Long Term/ Reserves Pool</b>	<b>\$73,139,888</b>	<b>\$73,012,733</b>	<b>97.4</b>	<b>-0.2</b>	<b>9.7</b>
<i>Total Long Term/ Reserves Fund Benchmark<sup>3</sup></i>				0.0	9.7
<b>Total Domestic Equity</b>	<b>\$22,200,840</b>	<b>\$22,591,953</b>	<b>30.1</b>	<b>1.8</b>	<b>21.0</b>
<i>Russell 3000 Index</i>				2.6	23.8
<b>Total International Equity</b>	<b>\$6,091,865</b>	<b>\$5,629,838</b>	<b>7.5</b>	<b>-7.6</b>	<b>3.2</b>
<i>MSCI AC World ex USA (Net)</i>				-7.6	5.5
<b>Total Alternatives</b>	<b>\$10,091,569</b>	<b>\$10,371,161</b>	<b>13.8</b>	<b>2.6</b>	<b>12.2</b>
<i>Total Alternatives Benchmark<sup>4</sup></i>				2.1	9.2
<b>Total Fixed Income</b>	<b>\$33,889,740</b>	<b>\$33,530,266</b>	<b>44.7</b>	<b>-1.1</b>	<b>3.8</b>
<i>Total Fixed Income Benchmark<sup>5</sup></i>				-0.9	3.6
<b>Total Cash &amp; Cash Equivalents</b>	<b>\$865,875</b>	<b>\$889,515</b>	<b>1.2</b>	<b>1.1</b>	<b>4.9</b>
<i>90 Day U.S. Treasury Bill</i>				1.2	5.3

1) Total Policy Benchmark: 45% ICE BofA 91 Days T-Bills / 17% ICE BofA 1-3 Yr US Corp & Govt / 11% BBgBarc US Govt/Credit Int / 8% Total Alternatives Benchmark / 15% Russell 3000 / 4% MSCI EAFE.

2) Total Operating & Short-Term Benchmark: 95% ICE BofA 91 Days T-Bills / 5% BBgBarc US Govt 1-3 Yr.

3) Total Long-Term / Reserves Fund Benchmark: 27% Russell 3000 / 8% MSCI EAFE / 15% Total Alternatives Benchmark / 30% ICE BofA 1-3 Yr US Corp & Govt / 20% BBgBarc US Govt/Credit Int,

4) Total Alternatives Benchmark: 100% HFRI Fund of Funds Composite.

5) Total Fixed Income Benchmark: 64% ICE BofA 1-3 Yr US Corp & Govt / 36% BBgBarc US Govt/Credit Int.

# SCHEDULE OF ASSETS

	Ticker	Account Type	Begin Market Value \$	Market Value 12/31/2024	% of Portfolio
<b>Total University Assets</b>			<b>\$94,961,718</b>	<b>\$74,965,230</b>	<b>100.0</b>
<b>Total Operating &amp; Short Term</b>			<b>\$21,821,830</b>	<b>\$1,952,497</b>	<b>2.6</b>
Federated Hermes Government Obligations Fund	GOSXX	Cash	\$21,821,830	\$1,952,497	2.6
<b>Total Long Term/ Reserves Pool</b>			<b>\$73,139,888</b>	<b>\$73,012,733</b>	<b>97.4</b>
<b>Total Domestic Equity</b>			<b>\$22,200,840</b>	<b>\$22,591,953</b>	<b>30.1</b>
Vanguard Institutional Index	VINIX	US Stock Large Cap Core	\$15,856,826	\$16,237,503	21.7
Vanguard Mid Cap Index Adm	VIMAX	US Stock Mid Cap Core	\$2,739,109	\$2,751,274	3.7
Loomis Sayles Sm Growth N	LSSNX	US Stock Small Cap Growth	\$1,793,642	\$1,823,146	2.4
Victory Integrity Small Value Y	VSVIX	US Stock Small Cap Value	\$1,811,263	\$1,780,029	2.4
<b>Total International Equity</b>			<b>\$6,091,865</b>	<b>\$5,629,838</b>	<b>7.5</b>
William Blair International Growth I	BIGIX	International	\$2,705,051	\$2,531,117	3.4
Dodge & Cox Internat'l Stock	DODFX	International	\$3,386,814	\$3,098,721	4.1
<b>Total Alternatives</b>			<b>\$10,091,569</b>	<b>\$10,371,161</b>	<b>13.8</b>
H.I.G. Whitehorse Principal Lending Offshore Feeder Fd, L.P.		Direct Lending	\$2,300,178	\$2,290,599	3.1
Weatherlow Offshore Fund I Ltd CI IIA		Hedge Fund	\$5,344,762	\$5,545,095	7.4
Apollo Infrastructure Opportunities Fund III (TE 892), L.P.		Infrastructure	-	\$22,389	0.0
Cliffwater Corporate Lending I		Private Debt	\$2,446,629	\$2,513,078	3.4
<b>Total Fixed Income</b>			<b>\$33,889,740</b>	<b>\$33,530,266</b>	<b>44.7</b>
JPMorgan Core Bond	WOBDX	US Fixed Income Core	\$5,530,945	\$5,366,316	7.2
YSU Intermediate Term Bond		US Fixed Income Core	\$4,685,331	\$4,610,285	6.1
Fidelity Interm Treasury Bond Index	FUAMX	US Fixed Income Core	\$3,408,156	\$3,275,415	4.4
Breckenridge Intermediate Gov/Credit		US Fixed Income Core	-	\$4,237,624	5.7
YSU Short Term Bond		US Fixed Income Short Term	\$13,703,414	\$13,721,443	18.3
Lord Abbett Short Duration Income I	LLDYX	US Fixed Income Short Term	\$6,561,894	\$2,319,183	3.1
<b>Total Cash &amp; Cash Equivalents</b>			<b>\$865,875</b>	<b>\$889,515</b>	<b>1.2</b>
Federated Hermes Government Obligations Fund	GOSXX	Cash	\$865,875	\$889,515	1.2

# ATTRIBUTION OF MARKET VALUE

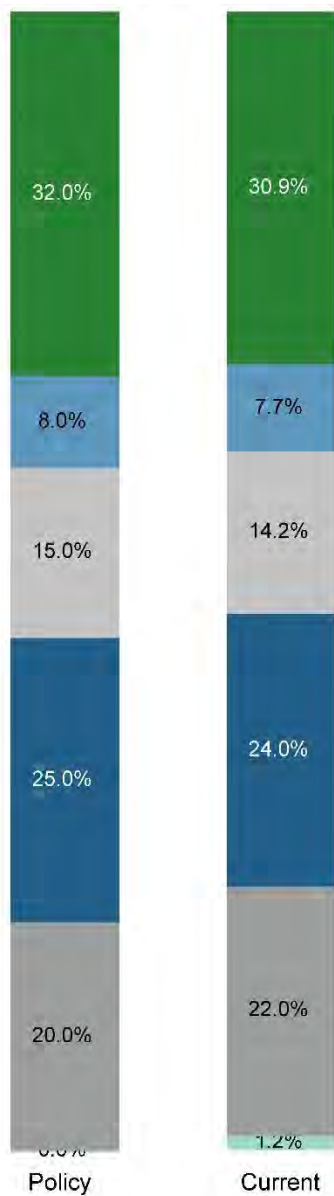
## TOTAL UNIVERSITY ASSETS

	Q1-2024	Q2-2024	Q3-2024	Q4-2024	One Year
Total University Assets					
Beginning Market Value	\$71,834,657	\$92,549,492	\$81,652,320	\$94,961,718	\$71,834,657
Contributions	\$18,000,000	-	\$19,000,000	\$22,389	\$37,022,389
Distributions	-\$24,332	-\$12,020,954	-\$9,013,015	-\$20,000,000	-\$41,058,301
Net Cash Flows	\$17,975,668	-\$12,020,954	\$9,986,985	-\$19,977,611	-\$4,035,912
Net Investment Change	\$2,739,168	\$1,123,782	\$3,322,413	-\$18,878	\$7,166,485
Ending Market Value	\$92,549,492	\$81,652,320	\$94,961,718	\$74,965,230	\$74,965,230
Change \$	\$20,714,836	-\$10,897,172	\$13,309,398	-\$19,996,489	\$3,130,573

## LONG-TERM POOL

	Q1-2024	Q2-2024	Q3-2024	Q4-2024	One Year
Total Long Term/ Reserves Pool					
Beginning Market Value	\$66,536,739	\$69,037,595	\$69,920,593	\$73,139,888	\$66,536,739
Contributions	-	-	-	\$22,389	\$22,389
Distributions	-\$24,332	-\$20,954	-\$13,015	-	-\$58,301
Net Cash Flows	-\$24,332	-\$20,954	-\$13,015	\$22,389	-\$35,912
Net Investment Change	\$2,525,188	\$903,952	\$3,232,311	-\$149,545	\$6,511,906
Ending Market Value	\$69,037,595	\$69,920,593	\$73,139,888	\$73,012,733	\$73,012,733
Change \$	\$2,500,856	\$882,998	\$3,219,296	-\$127,156	\$6,475,994

# ASSET ALLOCATION GUIDELINES: LONG-TERM POOL



	Current	%	Policy	Difference	Policy Range	Within Range
Domestic Equity	\$22,591,953	30.9	32.0	-1.1	25.0 - 40.0	Yes
International Equity	\$5,629,838	7.7	8.0	-0.3	0.0 - 15.0	Yes
Alternative	\$10,371,161	14.2	15.0	-0.8	0.0 - 20.0	Yes
Intermediate Bond	\$17,489,640	24.0	25.0	-1.0	15.0 - 35.0	Yes
Short-Term Bond	\$16,040,626	22.0	20.0	2.0	15.0 - 35.0	Yes
Cash	\$889,515	1.2	0.0	1.2	0.0 - 5.0	Yes
<b>Total</b>	<b>\$73,012,733</b>	<b>100.0</b>	<b>100.0</b>	<b>0.0</b>		



# PERFORMANCE SUMMARY (AS OF 12/31/2024)

	QTD (%)	FYTD (%)	1 Yr (%)	2 Yr (%)	3 Yr (%)	5 Yr (%)	7 Yr (%)	10 Yr (%)	2023 (%)	2022 (%)	2021 (%)	Inception (%)	Inception Date
<b>Total University Assets</b>	<b>-0.2</b>	<b>4.0</b>	<b>8.7</b>	<b>9.8</b>	<b>3.6</b>	<b>5.6</b>	<b>5.4</b>	<b>4.9</b>	<b>11.0</b>	<b>-7.8</b>	<b>7.8</b>	<b>4.4</b>	<b>Apr- 04</b>
<i>Total Policy Benchmark<sup>1</sup></i>	0.5	3.5	7.8	8.2	3.7	4.2	4.2	3.7	8.7	-4.7	4.3	3.4	
<b>Total Operating &amp; Short Term</b>	<b>1.2</b>	<b>2.4</b>	<b>4.9</b>	<b>4.9</b>	<b>3.7</b>	<b>2.4</b>	<b>2.3</b>	<b>1.7</b>	<b>4.8</b>	<b>1.4</b>	<b>0.0</b>	<b>1.2</b>	<b>Jul- 10</b>
<i>Total Operating &amp; Short Term Benchmark<sup>2</sup></i>	1.1	2.6	5.2	5.1	3.8	2.4	2.3	1.7	5.0	1.2	0.0	1.2	
<b>Total Long Term/ Reserves Pool</b>	<b>-0.2</b>	<b>4.4</b>	<b>9.7</b>	<b>10.8</b>	<b>2.9</b>	<b>5.3</b>	<b>5.4</b>	<b>5.3</b>	<b>11.9</b>	<b>-11.2</b>	<b>9.5</b>	<b>5.4</b>	<b>Jul- 10</b>
<i>Total Long Term/ Reserves Fund Benchmark<sup>3</sup></i>	0.0	4.2	9.7	10.7	3.4	5.5	5.5	5.3	11.7	-9.7	8.0	5.1	

1) Total Policy Benchmark: 45% ICE BofA 91 Days T-Bills / 17% ICE BofA 1-3 Yr US Corp & Govt / 11% BBgBarc US Govt/Credit Int / 8% Total Alternatives Benchmark / 15% Russell 3000 / 4% MSCI EAFE.

2) Total Operating & Short-Term Benchmark: 95% ICE BofA 91 Days T-Bills / 5% BBgBarc US Govt 1-3 Yr.

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4) Total Alternatives Benchmark: 100% HFRI Fund of Funds Composite.

5) Total Fixed Income Benchmark: 64% ICE BofA 1-3 Yr US Corp & Govt / 36% BBgBarc US Govt/Credit Int.

# PERFORMANCE SUMMARY (AS OF 12/31/2024)

	% of Portfolio	QTD (%)	FYTD (%)	1 Yr (%)	2 Yr (%)	3 Yr (%)	5 Yr (%)	7 Yr (%)	10 Yr (%)	2023 (%)	2022 (%)	2021 (%)	Inception (%)	Inception Date
<b>Total Operating &amp; Short Term</b>	<b>2.6</b>	<b>1.2</b>	<b>2.4</b>	<b>4.9</b>	<b>4.9</b>	<b>3.7</b>	<b>2.4</b>	<b>2.3</b>	<b>1.7</b>	<b>4.8</b>	<b>1.4</b>	<b>0.0</b>	<b>1.2</b>	<b>Jul-10</b>
<i>Total Operating &amp; Short Term Benchmark</i>		1.1	2.6	5.2	5.1	3.8	2.4	2.3	1.7	5.0	1.2	0.0	1.2	
Federated Hermes Government Obligations Fund	2.6	1.1	2.4	4.9	4.8	3.7	2.2	2.1	1.5	4.8	1.4	0.0	3.5	Nov-21
<i>90 Day U.S. Treasury Bill</i>		1.2	2.6	5.3	5.1	3.9	2.5	2.4	1.8	5.0	1.5	0.0	3.7	

- 1) Total Policy Benchmark: 45% ICE BofA 91 Days T-Bills / 17% ICE BofA 1-3 Yr US Corp & Govt / 11% BBgBarc US Govt/Credit Int / 8% Total Alternatives Benchmark / 15% Russell 3000 / 4% MSCI EAFE.
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# PERFORMANCE SUMMARY (AS OF 12/31/2024)

	% of Portfolio	QTD (%)	FYTD (%)	1 Yr (%)	2 Yr (%)	3 Yr (%)	5 Yr (%)	7 Yr (%)	10 Yr (%)	2023 (%)	2022 (%)	2021 (%)	Inception (%)	Inception Date
<b>Total Long Term/ Reserves Pool</b>	<b>100.0</b>	<b>-0.2</b>	<b>4.4</b>	<b>9.7</b>	<b>10.8</b>	<b>2.9</b>	<b>5.3</b>	<b>5.4</b>	<b>5.3</b>	<b>11.9</b>	<b>-11.2</b>	<b>9.5</b>	<b>5.4</b>	<b>Jul-10</b>
<i>Total Long Term/ Reserves Fund Benchmark</i>		0.0	4.2	9.7	10.7	3.4	5.5	5.5	5.3	11.7	-9.7	8.0	5.1	
<b>Total Domestic Equity</b>	<b>30.9</b>	<b>1.8</b>	<b>8.2</b>	<b>21.0</b>	<b>21.8</b>	<b>6.9</b>	<b>12.9</b>	<b>12.4</b>	<b>12.0</b>	<b>22.7</b>	<b>-17.7</b>	<b>26.9</b>	<b>14.1</b>	<b>Jul-10</b>
<i>Russell 3000 Index</i>		2.6	9.0	23.8	24.9	8.0	13.9	13.2	12.5	26.0	-19.2	25.7	14.6	
Vanguard Institutional Index	22.2	2.4	8.4	25.0	25.6	8.9	14.5	13.8	13.1	26.2	-18.1	28.7	14.9	Jul-10
<i>S&amp;P 500 Index</i>		2.4	8.4	25.0	25.7	8.9	14.5	13.8	13.1	26.3	-18.1	28.7	14.9	
Vanguard Mid Cap Index Adm	3.8	0.4	9.8	15.2	15.6	2.8	9.8	9.6	9.5	16.0	-18.7	24.5	11.9	Oct-10
<i>Vanguard Mid Cap Index Benchmark</i>		0.5	9.9	15.3	15.6	2.8	9.9	9.6	9.6	16.0	-18.7	24.5	11.9	
Loomis Sayles Sm Growth N	2.5	1.6	8.2	15.1	13.6	-0.2	8.0	9.4	9.8	12.1	-22.8	10.2	8.6	Sep-19
<i>Russell 2000 Growth Index</i>		1.7	10.3	15.2	16.9	0.2	6.9	7.2	8.1	18.7	-26.4	2.8	8.4	
Victory Integrity Small Value Y	2.4	-1.7	4.4	4.8	11.1	4.4	9.0	6.4	7.3	17.6	-7.7	33.6	10.2	Oct-10
<i>Russell 2000 Value Index</i>		-1.1	9.0	8.1	11.3	1.9	7.3	6.1	7.1	14.6	-14.5	28.3	9.4	
<b>Total International Equity</b>	<b>7.7</b>	<b>-7.6</b>	<b>-0.6</b>	<b>3.2</b>	<b>9.5</b>	<b>-0.4</b>	<b>4.9</b>	<b>4.0</b>	<b>4.9</b>	<b>16.2</b>	<b>-17.6</b>	<b>10.0</b>	<b>5.2</b>	<b>Oct-10</b>
<i>MSCI AC World ex USA (Net)</i>		-7.6	-0.1	5.5	10.5	0.8	4.1	3.5	4.8	15.6	-16.0	7.8	4.7	
William Blair International Growth I	3.5	-6.4	-2.1	2.4	8.7	-5.4	4.0	3.9	5.1	15.4	-28.3	9.0	6.5	Jul-12
<i>MSCI AC World ex USA (Net)</i>		-7.6	-0.1	5.5	10.5	0.8	4.1	3.5	4.8	15.6	-16.0	7.8	5.8	
Dodge & Cox Internat'l Stock	4.2	-8.5	0.6	3.8	10.1	4.1	5.1	3.7	4.4	16.7	-6.8	11.0	5.4	Oct-10
<i>MSCI EAFE (Net)</i>		-8.1	-1.4	3.8	10.8	1.6	4.7	4.1	5.2	18.2	-14.5	11.3	5.4	
<b>Total Alternatives</b>	<b>14.2</b>	<b>2.6</b>	<b>5.1</b>	<b>12.2</b>	<b>9.8</b>	<b>3.9</b>	<b>2.6</b>	<b>2.9</b>	<b>-</b>	<b>7.3</b>	<b>-6.9</b>	<b>5.3</b>	<b>2.6</b>	<b>Mar-15</b>
<i>Total Alternatives Benchmark</i>		2.1	4.2	9.2	7.6	3.1	3.2	3.3	-	6.1	-5.3	6.2	3.0	
H.I.G. Whitehorse Principal Lending Offshore Feeder Fd, L.P.	3.1	0.0	0.8	5.3	7.9	-	-	-	-	10.6	-	-	7.9	Jul-22
<i>S&amp;P UBS Leveraged Loan Index</i>		2.3	4.4	9.0	11.0	6.8	5.7	5.4	5.1	13.0	-1.1	5.4	10.2	
Weatherlow Offshore Fund I Ltd CI IIA	7.6	3.8	6.7	15.2	11.3	4.1	8.3	7.3	5.9	7.6	-8.9	5.6	3.0	Jul-21
<i>HFRI Fund of Funds Composite Index</i>		2.1	4.2	9.2	7.6	3.1	5.2	4.3	3.8	6.1	-5.3	6.2	3.0	
Apollo Infrastructure Opportunities Fund III (TE 892), L.P.	0.0	-	-	-	-	-	-	-	-	-	-	-	0.0	Dec-24
<i>FTSE Global Core Infrastructure 50/50 Index (Net)</i>		-5.7	7.1	9.5	5.8	2.1	3.3	5.0	5.4	2.2	-4.9	14.9	-5.8	
Cliffwater Corporate Lending I	3.4	2.7	5.5	12.6	12.6	10.6	10.1	-	-	12.7	6.6	10.3	13.8	Dec-23
<i>S&amp;P UBS Leveraged Loan Index</i>		2.3	4.4	9.0	11.0	6.8	5.7	5.4	5.1	13.0	-1.1	5.4	9.0	
<b>Total Fixed Income</b>	<b>45.9</b>	<b>-1.1</b>	<b>2.6</b>	<b>3.8</b>	<b>4.8</b>	<b>0.8</b>	<b>1.5</b>	<b>2.2</b>	<b>2.0</b>	<b>5.9</b>	<b>-6.7</b>	<b>0.1</b>	<b>2.1</b>	<b>Jul-10</b>
<i>Total Fixed Income Benchmark</i>		-0.9	2.5	3.6	4.2	0.9	1.3	1.8	1.6	4.9	-5.4	-0.8	1.7	
JPMorgan Core Bond	7.3	-3.0	2.1	2.0	3.9	-1.8	0.2	1.3	1.6	5.8	-12.3	-1.1	1.3	Sep-17
<i>Bloomberg U.S. Aggregate Index</i>		-3.1	2.0	1.3	3.4	-2.4	-0.3	1.0	1.3	5.5	-13.0	-1.5	0.9	
YSU Intermediate Term Bond	6.3	-1.6	2.6	3.3	4.5	0.2	1.3	2.0	1.9	5.7	-8.0	-1.3	3.1	Apr-04
<i>Bloomberg Intermed. U.S. Government/Credit</i>		-1.6	2.5	3.0	4.1	-0.2	0.9	1.7	1.7	5.2	-8.2	-1.4	2.8	

1) Total Policy Benchmark: 45% ICE BofA 91 Days T-Bills / 17% ICE BofA 1-3 Yr US Corp & Govt / 11% BBgBarc US Govt/Credit Int / 8% Total Alternatives Benchmark / 15% Russell 3000 / 4% MSCI EAFE.  
 2) Total Operating & Short-Term Benchmark: 95% ICE BofA 91 Days T-Bills / 5% BBgBarc US Govt 1-3 Yr.  
 3) Total Long-Term / Reserves Fund Benchmark: 27% Russell 3000 / 8% MSCI EAFE / 15% Total Alternatives Benchmark / 30% ICE BofA 1-3 Yr US Corp & Govt / 20% BBgBarc US Govt/Credit Int,  
 4) Total Alternatives Benchmark: 100% HFRI Fund of Funds Composite.  
 5) Total Fixed Income Benchmark: 64% ICE BofA 1-3 Yr US Corp & Govt / 36% BBgBarc US Govt/Credit Int.

# PERFORMANCE SUMMARY (AS OF 12/31/2024)

	% of Portfolio	QTD (%)	FYTD (%)	1 Yr (%)	2 Yr (%)	3 Yr (%)	5 Yr (%)	7 Yr (%)	10 Yr (%)	2023 (%)	2022 (%)	2021 (%)	Inception (%)	Inception Date
Fidelity Interm Treasury Bond Index	4.5	-3.9	1.3	0.4	2.2	-3.0	-0.7	0.7	0.9	4.1	-12.7	-3.0	3.7	Dec-23
<i>Bimbg. U.S. Treasury: 5-10 Year</i>		-3.9	1.3	0.2	2.2	-3.0	-0.7	0.7	1.0	4.1	-12.6	-3.0	0.2	
Breckenridge Intermediate Gov/Credit	5.8	-0.3	-	-	-	-	-	-	-	-	-	-	0.0	Nov-24
<i>Bimbg. Intermed. U.S. Government/Credit</i>		-1.6	2.5	3.0	4.1	-0.2	0.9	1.7	1.7	5.2	-8.2	-1.4	0.0	
YSU Short Term Bond	18.8	0.1	3.1	4.8	4.9	2.1	1.9	2.2	1.8	5.0	-3.3	-0.4	2.4	Apr-04
<i>ICE BofA 1-3 Yr. Gov/Corp</i>		0.0	3.0	4.4	4.5	1.7	1.6	1.9	1.6	4.6	-3.8	-0.4	2.2	
Lord Abbett Short Duration Income I	3.2	0.3	3.2	5.6	5.5	2.0	2.1	2.5	2.5	5.4	-4.6	1.1	2.6	Apr-18
<i>ICE BofA 1-3 Yr. Gov/Corp</i>		0.0	3.0	4.4	4.5	1.7	1.6	1.9	1.6	4.6	-3.8	-0.4	2.0	
<b>Total Cash &amp; Cash Equivalents</b>	<b>1.2</b>	<b>1.1</b>	<b>2.4</b>	<b>4.9</b>	<b>4.8</b>	<b>3.7</b>	<b>2.3</b>	<b>-</b>	<b>-</b>	<b>4.8</b>	<b>1.5</b>	<b>0.0</b>	<b>2.0</b>	<b>Apr-18</b>
<i>90 Day U.S. Treasury Bill</i>		1.2	2.6	5.3	5.1	3.9	2.5	2.4	1.8	5.0	1.5	0.0	2.4	
Federated Hermes Government Obligations Fund	1.2	1.1	2.4	4.9	4.8	3.7	2.2	2.1	1.5	4.8	1.4	0.0	2.2	Dec-19
<i>90 Day U.S. Treasury Bill</i>		1.2	2.6	5.3	5.1	3.9	2.5	2.4	1.8	5.0	1.5	0.0	2.5	

1) Total Policy Benchmark: 45% ICE BofA 91 Days T-Bills / 17% ICE BofA 1-3 Yr US Corp & Govt / 11% BBgBarc US Govt/Credit Int / 8% Total Alternatives Benchmark / 15% Russell 3000 / 4% MSCI EAFE.  
 2) Total Operating & Short-Term Benchmark: 95% ICE BofA 91 Days T-Bills / 5% BBgBarc US Govt 1-3 Yr.  
 3) Total Long-Term / Reserves Fund Benchmark: 27% Russell 3000 / 8% MSCI EAFE / 15% Total Alternatives Benchmark / 30% ICE BofA 1-3 Yr US Corp & Govt / 20% BBgBarc US Govt/Credit Int,  
 4) Total Alternatives Benchmark: 100% HFRI Fund of Funds Composite.  
 5) Total Fixed Income Benchmark: 64% ICE BofA 1-3 Yr US Corp & Govt / 36% BBgBarc US Govt/Credit Int.

# JANUARY REPORT

	Market Value 01/01/2025	Market Value 01/31/2025	% of Portfolio	1 Mo (%)	FYTD (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)	Inception (%)	Inception Date
<b>Total University Assets</b>	<b>\$74,965,126</b>	<b>\$74,383,913</b>	<b>100.0</b>	<b>1.7</b>	<b>5.7</b>	<b>10.1</b>	<b>5.0</b>	<b>6.0</b>	<b>4.4</b>	<b>Apr-04</b>
<i>Total Policy Benchmark<sup>1</sup></i>				1.0	4.6	8.4	4.6	4.4	3.5	
<b>Total Operating &amp; Short Term</b>	<b>\$1,952,497</b>	<b>\$154,119</b>	<b>0.2</b>	<b>0.3</b>	<b>2.7</b>	<b>4.8</b>	<b>3.8</b>	<b>2.4</b>	<b>1.2</b>	<b>Jul-10</b>
<i>Total Operating &amp; Short Term Benchmark<sup>2</sup></i>				0.4	2.9	5.1	3.9	2.5	1.2	
Federated Hermes Government Obligations Fund	\$1,952,497	\$154,119	0.2	0.3	2.7	4.8	3.8	2.3	3.5	Oct-21
<i>90 Day U.S. Treasury Bill</i>				0.4	2.9	5.2	4.0	2.5	3.7	
<b>Total Long Term/ Reserves Pool</b>	<b>\$73,012,629</b>	<b>\$74,229,794</b>	<b>99.8</b>	<b>1.7</b>	<b>6.1</b>	<b>11.2</b>	<b>4.6</b>	<b>5.7</b>	<b>5.5</b>	<b>Jul-10</b>
<i>Total Long Term/ Reserves Fund Benchmark<sup>3</sup></i>				1.6	5.9	10.8	5.0	5.7	5.2	
<b>Total Equity</b>	<b>\$28,221,791</b>	<b>\$29,127,629</b>	<b>39.2</b>	<b>3.2</b>	<b>9.8</b>	<b>20.8</b>	<b>8.6</b>	<b>12.1</b>	<b>12.5</b>	<b>Jul-10</b>
<b>Total Domestic Equity</b>	<b>\$22,591,953</b>	<b>\$23,264,117</b>	<b>31.3</b>	<b>3.0</b>	<b>11.5</b>	<b>24.1</b>	<b>10.3</b>	<b>13.7</b>	<b>14.2</b>	<b>Jul-10</b>
<i>Russell 3000 Index</i>				3.2	12.5	26.3	11.4	14.6	14.7	
Vanguard Institutional Index	\$16,237,503	\$16,688,790	22.4	2.8	11.4	26.3	11.9	15.1	15.0	Jul-10
<i>S&amp;P 500 Index</i>				2.8	11.5	26.4	11.9	15.2	15.1	
Vanguard Mid Cap Index Adm	\$2,751,274	\$2,873,321	3.9	4.4	14.7	22.2	7.2	10.9	12.1	Oct-10
<i>Vanguard Mid Cap Index Benchmark</i>				4.5	14.8	22.2	7.2	10.9	12.2	
Loomis Sayles Sm Growth N	\$1,823,146	\$1,890,059	2.5	3.7	12.2	22.2	5.9	8.6	9.2	Sep-19
<i>Russell 2000 Growth Index</i>				3.2	13.7	22.7	6.2	7.8	8.9	
Victory Integrity Small Value Y	\$1,780,029	\$1,811,947	2.4	1.8	6.3	9.9	6.4	10.6	10.2	Oct-10
<i>Russell 2000 Value Index</i>				2.1	11.2	15.5	4.7	8.9	9.5	
<b>Total International Equity</b>	<b>\$5,629,838</b>	<b>\$5,863,511</b>	<b>7.9</b>	<b>4.2</b>	<b>3.5</b>	<b>9.5</b>	<b>2.4</b>	<b>6.3</b>	<b>5.4</b>	<b>Oct-10</b>
<i>MSCI AC World ex USA (Net)</i>				4.0	3.9	10.9	3.4	5.5	4.9	
William Blair International Growth I	\$2,531,117	\$2,618,237	3.5	3.4	1.2	6.7	-0.4	4.9	6.7	Jul-12
<i>MSCI AC World ex USA (Net)</i>				4.0	3.9	10.9	3.4	5.5	6.1	
Dodge & Cox Internat'l Stock	\$3,098,721	\$3,245,274	4.4	4.7	5.4	12.0	4.7	7.1	5.7	Oct-10
<i>MSCI EAFE (Net)</i>				5.3	3.7	8.7	5.1	6.3	5.8	

# JANUARY REPORT

	Market Value 01/01/2025	Market Value 01/31/2025	% of Portfolio	1 Mo (%)	FYTD (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)	Inception (%)	Inception Date
<b>Total Alternatives</b>	<b>\$10,371,161</b>	<b>\$10,494,636</b>	<b>14.1</b>	<b>1.2</b>	<b>6.3</b>	<b>12.4</b>	<b>5.1</b>	<b>3.2</b>	<b>2.7</b>	<b>Mar-15</b>
<i>Total Alternatives Benchmark<sup>4</sup></i>				1.2	5.3	9.6	4.4	3.4	3.1	
Weatherlow Offshore Fund I Ltd CI IIA	\$5,545,095	\$5,644,907	7.6	1.8	8.7	15.6	6.1	8.4	3.4	Jul-21
<i>HFRI Fund of Funds Composite Index</i>				1.2	5.3	9.6	4.4	5.4	3.3	
Apollo Infrastructure Opportunities Fund III (TE 892), L.P.	\$22,389	\$22,389	0.0	0.0	-	-	-	-	0.0	Nov-24
<i>FTSE Global Core Infrastructure 50/50 Index (Net)</i>				0.8	7.9	13.1	3.4	3.0	-2.4	
Cliffwater Corporate Lending I	\$2,513,078	\$2,536,742	3.4	0.9	6.5	12.5	10.7	10.2	12.6	Jan-24
<i>S&amp;P UBS Leveraged Loan Index</i>				0.7	5.1	9.0	7.0	5.8	9.0	
H.I.G. Whitehorse Principal Lending Offshore Feeder Fd, L.P.	\$2,290,599	\$2,290,599	3.1	0.0	0.8	5.3	-	-	7.7	Jul-22
<i>S&amp;P UBS Leveraged Loan Index</i>				0.7	5.1	9.0	7.0	5.8	10.2	
<b>Total Fixed Income</b>	<b>\$33,530,163</b>	<b>\$33,714,767</b>	<b>45.3</b>	<b>0.6</b>	<b>3.2</b>	<b>3.9</b>	<b>1.4</b>	<b>1.4</b>	<b>2.1</b>	<b>Jul-10</b>
<i>Total Fixed Income Benchmark<sup>5</sup></i>				0.5	3.0	3.8	1.4	1.2	1.7	
JPMorgan Core Bond	\$5,366,212	\$5,400,532	7.3	0.6	2.7	2.5	-1.1	-0.1	1.3	Sep-17
<i>Blmbg. U.S. Aggregate Index</i>				0.5	2.5	2.1	-1.5	-0.6	1.0	
YSU Intermediate Term Bond	\$4,610,285	\$4,636,168	6.2	0.6	3.2	3.6	0.9	1.1	3.2	Apr-04
<i>Blmbg. Intermed. U.S. Government/Credit</i>				0.6	3.1	3.4	0.5	0.7	2.8	
Fidelity Interim Treasury Bond Index	\$3,275,415	\$3,298,070	4.4	0.7	2.0	0.9	-2.2	-1.1	1.0	Jan-24
<i>Blmbg. U.S. Treasury: 5-10 Year</i>				0.7	1.9	0.9	-2.1	-1.1	0.8	
Breckenridge Intermediate Gov/Credit	\$4,237,624	\$4,262,204	5.7	0.6	-	-	-	-	0.6	Nov-24
<i>Blmbg. Intermed. U.S. Government/Credit</i>				0.6	3.1	3.4	0.5	0.7	0.6	
YSU Short Term Bond	\$13,721,443	\$13,782,703	18.5	0.4	3.6	4.7	2.5	1.9	2.4	Apr-04
<i>ICE BofA 1-3 Yr. Gov/Corp</i>				0.5	3.4	4.5	2.1	1.6	2.2	
Lord Abbett Short Duration Income I	\$2,319,183	\$2,335,090	3.1	0.7	3.9	5.6	2.4	2.0	2.7	Apr-18
<i>ICE BofA 1-3 Yr. Gov/Corp</i>				0.5	3.4	4.5	2.1	1.6	2.1	
<b>Total Cash &amp; Cash Equivalents</b>	<b>\$889,515</b>	<b>\$892,762</b>	<b>1.2</b>	<b>0.3</b>	<b>2.7</b>	<b>4.8</b>	<b>3.8</b>	<b>2.3</b>	<b>2.0</b>	<b>Apr-18</b>
<i>90 Day U.S. Treasury Bill</i>				0.4	2.9	5.2	4.0	2.5	2.4	
Federated Hermes Government Obligations Fund	\$889,515	\$892,762	1.2	0.3	2.7	4.8	3.8	2.3	2.3	Dec-19
<i>90 Day U.S. Treasury Bill</i>				0.4	2.9	5.2	4.0	2.5	2.5	

<sup>1</sup>90 Day U.S. Treasury Bill: 45.00%, Russell 3000 Index: 15.00%, Blmbg. Intermed. U.S. Government/Credit: 17.00%, MSCI AC World ex USA (Net): 4.00%, ICE BofA 1-3 Yr. Gov/Corp: 11.00%, Total Alternatives Benchmark: 8.00%

<sup>2</sup>90 Day U.S. Treasury Bill: 95.00%, Blmbg. 1-3 Govt: 5.00%

<sup>3</sup>Russell 3000 Index: 27.00%, Blmbg. Intermed. U.S. Government/Credit: 30.00%, MSCI AC World ex USA (Net): 8.00%, ICE BofA 1-3 Yr. Gov/Corp: 20.00%, Total Alternatives Benchmark: 15.00%

<sup>4</sup>HFRI Fund of Funds Composite Index: 100.00%

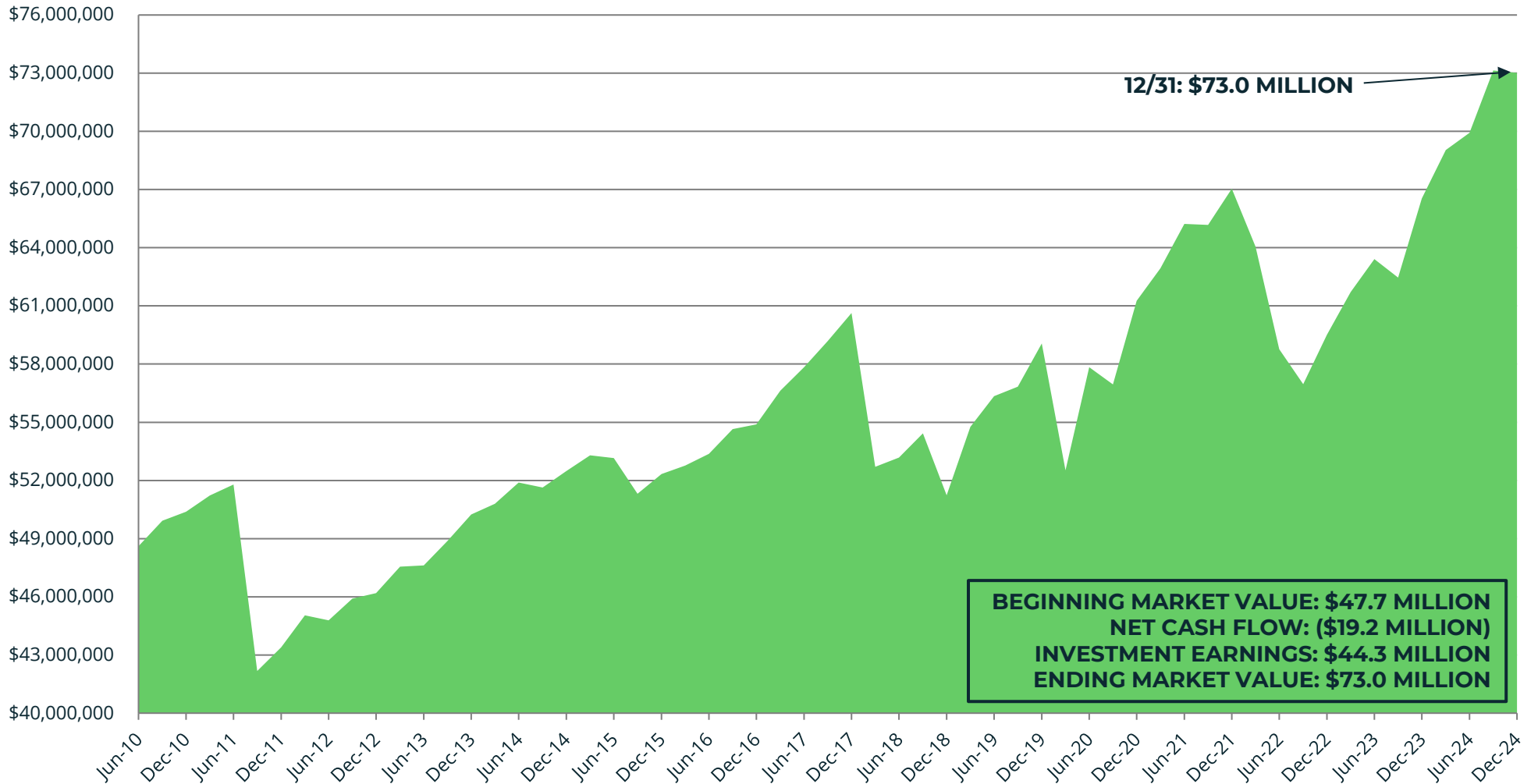
<sup>5</sup>Blmbg. Intermed. U.S. Government/Credit: 55.00%, ICE BofA 1-3 Yr. Gov/Corp: 45.00%



## **SUPPORTING INFORMATION**

# LONG-TERM POOL: MARKET VALUE GROWTH SINCE INCEPTION 33

**LONG-TERM POOL MARKET VALUE CHANGE  
(07/01/2010 - 12/31/2024)**



The University made strategic withdrawals from the Long-Term Pool as follows: In 2011 to support an early retirement incentive program that required a large purchase of state service credit; in 2018 to support capital improvement projects on campus; and in 2020 to cover a projected COVID-19-related shortfall in the short-term operating pool.

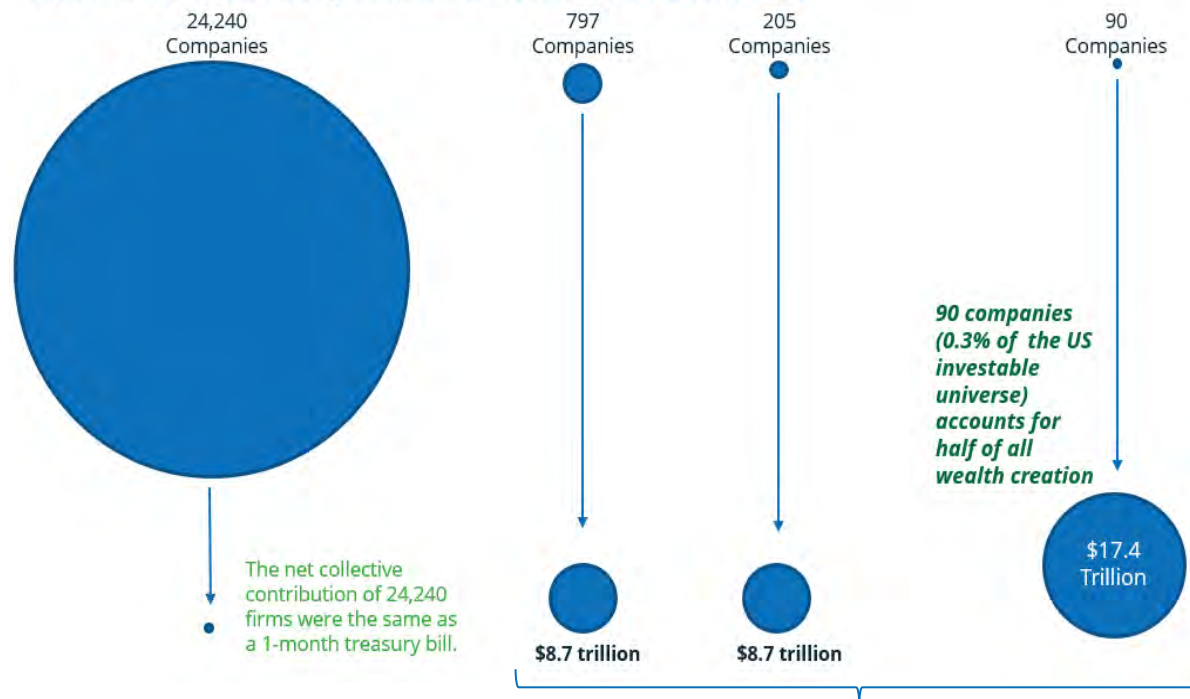


# GLOBAL EQUITY: WHAT ARE WE SEEKING

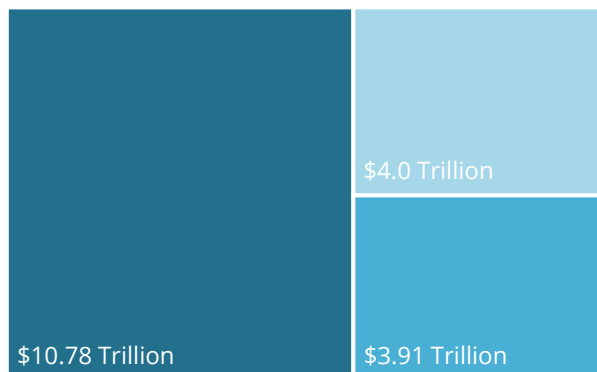
- Talented stock pickers operating in the widest possible universe.
  - Concentrated 30-60 holdings
  - High-active share >85%
  - Long-track record of success
  - Deep analytic team, human capital = to global opportunity
- Diversification through independent process/style of investing.
- Fee sensitive, high client-alignment/co-investment, tax sensitive, best idea strategy.

## SMALL NUMBER OF FIRMS DRIVE WEALTH CREATION

Total Net Worth Created by all listed US Common Stocks 1926-2016



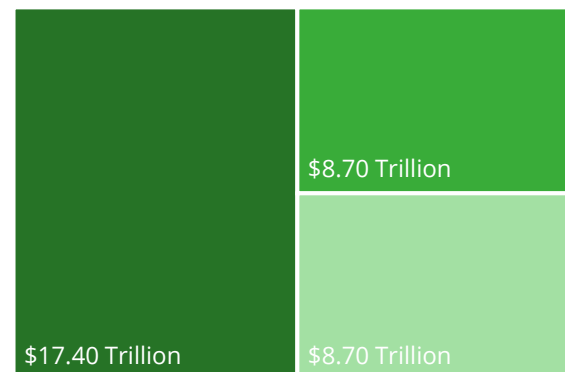
### International Equity: 1990 to 2018



Similar findings for non-U.S. equity markets

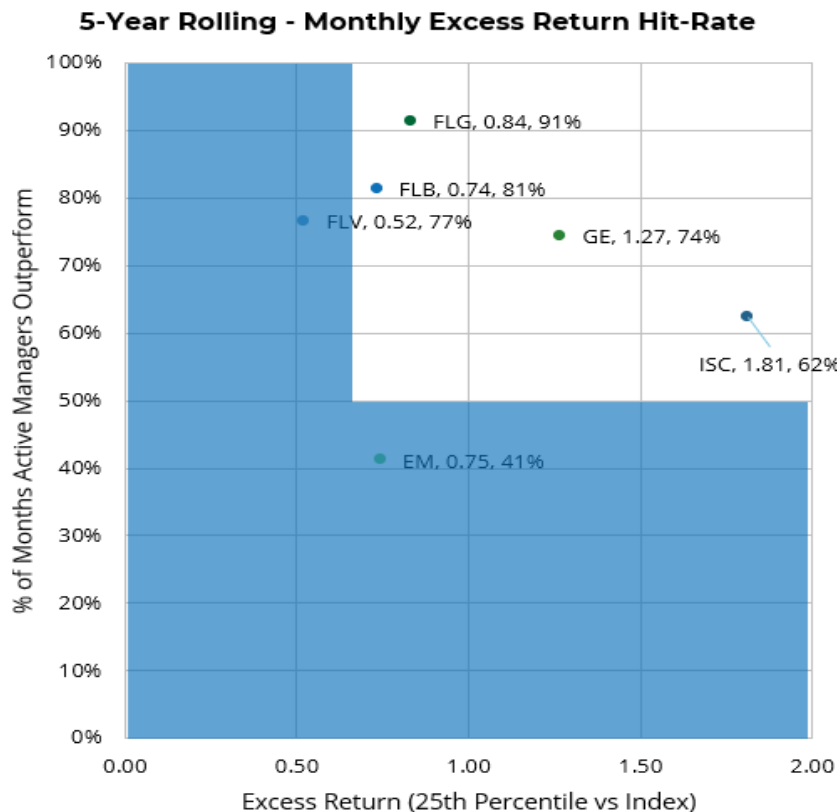


### US Equity: 1926 to 2016

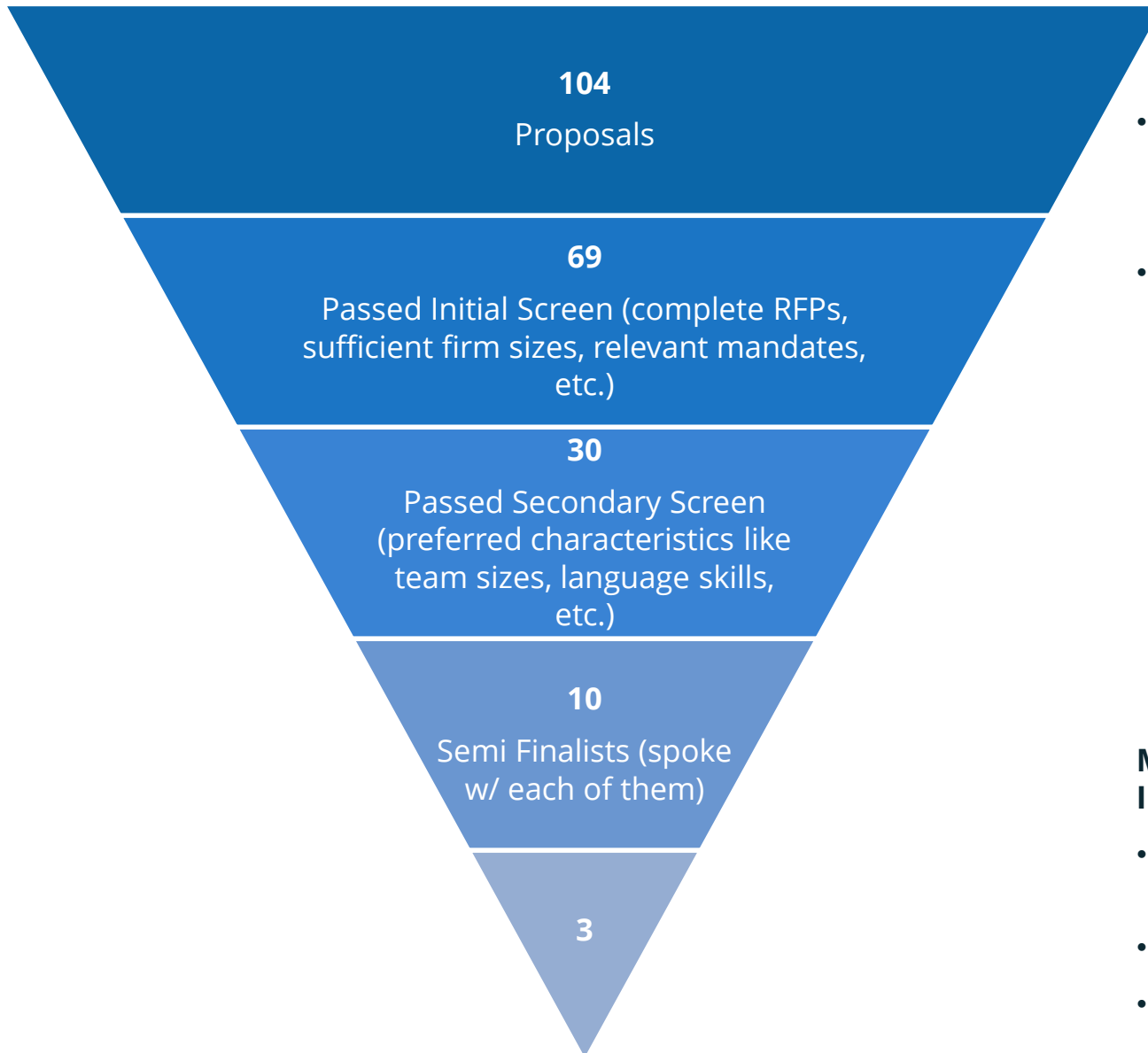


# GLOBAL LARGE CAP EQUITIES: WHY A GLOBAL MANDATE

- In any given year, the highest performing stocks are widely spread throughout various parts of the world; long-run earnings growth of top-tier companies on par w/ best US firms.
  - No second-best ideas, wider opportunity set, nimbleness allows optimal allocation.
  - Inefficient asset class; low-quality non-US firms, country specialties—**ACTIVE works**.



- The chart shows how often does the median active manager outperform (net of fees) the index on a rolling 5-year basis (y-axis):
  - Global Equity 74%
- What is a top-quartile manager’s typical ALPHA (net of fees) when they do outperform (x-axis):
  - Global Equity +174bps



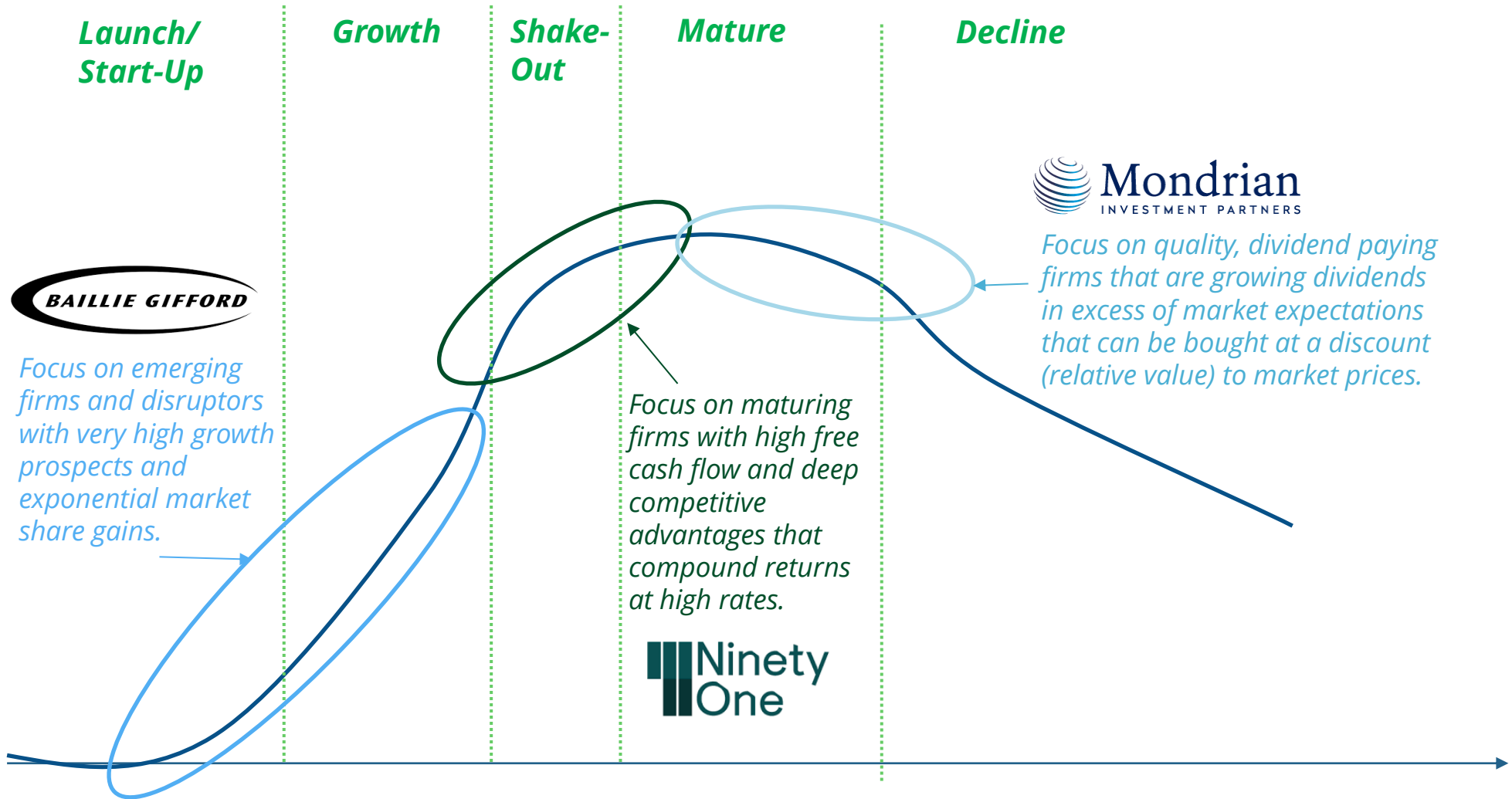
- Clearstead conducted a broad search for global equity managers.
- Stringent, collaborative vetting process.
  - Parent
  - People
  - Philosophy/Process
  - Portfolio
  - Principles
  - Performance

### Managers Approved by Clearstead Investment Committee

- Baillie Gifford Long-Term Global Growth
- Ninety-One Global Franchise
- Mondrian Global Value Equity

# GLOBAL EQUITY MANAGERS: “FISH IN DIFFERENT PONDS”

## BUSINESS LIFE CYCLE / PHASES



Source: Clearstead

# ASSET CLASS RETURNS

2015	2016	2017	2018	2019	2020	2021	2022	2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024 YTD
Large Cap 1.4%	Sm/Mid 17.6%	Em Mkt 37.3%	Cash 1.9%	Large Cap 31.5%	Sm/Mid 20.0%	Large Cap 28.7%	Cash 1.5%	Large Cap 26.3%	Large Cap 10.6%	Em Mkt 5.0%	Glb Bonds 9.4%	Large Cap 2.4%	Large Cap 25.0%
US Bonds 0.6%	Hi Yld 17.5%	Dev Intl 25.0%	US Bonds 0.0%	Sm/Mid 27.8%	Large Cap 18.4%	Sm/Mid 18.2%	Hdg Fnds -5.3%	Dev Intl 18.2%	Sm/Mid 6.9%	Large Cap 4.3%	Sm/Mid 8.8%	Hdg Fnds 1.7%	Sm/Mid 12.0%
Cash 0.1%	Large Cap 12.0%	Large Cap 21.8%	Glb Bond -0.9%	Dev Intl 22.0%	Em Mkt 18.3%	Dev Intl 11.3%	Hi Yld -11.2%	Sm/Mid 17.4%	Dev Intl 5.8%	Cash 1.3%	EM Mkt 8.7%	Cash 1.2%	Hdg Fnds 10.0%
Hdg Fnds -0.3%	Em Mkt 11.2%	Sm/Mid 16.8%	Hi Yld -2.3%	Em Mkt 18.4%	Hdg Fnds 10.9%	Hdg Fnds 6.2%	US Bonds -13.0%	Hi Yld 13.5%	Hdg Fnds 4.2%	Hi Yld 1.1%	Dev Intl 7.3%	Sm/Mid 0.6%	Hi Yld 8.2%
Dev Intl -0.8%	US Bonds 2.7%	Glb Bond 9.3%	Hdg Fnds -4.0%	Hi Yld 14.4%	Glb Bond 9.5%	Hi Yld 5.4%	Dev Intl -14.5%	EM Mkt 9.8%	Em Mkt 2.4%	Hdg Fnds 0.5%	Large Cap 5.9%	Hi Yld 0.2%	Em Mkt 7.5%
Sm/Mid -2.9%	Glb Bond 1.9%	Hdg Fnds 7.8%	Large Cap -4.4%	US Bonds 8.8%	Dev Intl 7.8%	Cash 0.1%	Large Cap -18.1%	Hdg Fnds 6.1%	Hi Yld 1.5%	US Bonds 0.1%	Hi Yld 5.3%	US Bonds -3.1%	Cash 5.3%
Hi Yld -4.6%	Dev Intl 1.0%	Hi Yld 7.5%	Sm/Mid -10.0%	Hdg Fnds 8.4%	US Bonds 7.5%	US Bonds -1.5%	Sm/Mid -18.4%	US Bonds 5.5%	Cash 1.3%	Dev Intl -0.4%	US Bonds 5.2%	Glb Bond -7.4%	Dev Intl 3.8%
Glb Bond -4.8%	Hdg Fnds 0.5%	US Bonds 3.5%	Dev Intl -13.8%	Glb Bond 5.0%	Hi Yld 6.2%	Em Mkt -2.5%	Glb Bond -19.6%	Cash 5.1%	US Bonds -0.8%	Glb Bond -3.1%	Hdg Fnds 2.8%	EM Mkt -8.0%	US Bonds 1.3%
Em Mkt -14.9%	Cash 0.3%	Cash 0.9%	Em Mkt -14.6%	Cash 2.3%	Cash 0.5%	Glb Bond -8.2%	Em Mkt -20.1%	Glb Bonds 4.2%	Glb Bond -3.8%	Sm/Mid -4.3%	Cash 1.4%	Dev Intl -8.1%	Glb Bond -5.6%

Past performance is not an indicator of future results. Asset classes represented by: Large Cap – S&P 500 Index; Sm/Mid – Russell 2500 Index; Dev Intl – MSCI EAFE Index; Em Mkt – MSCI Emerging Markets Index; Hi Yld – Bank of America Merrill Lynch U.S. High Yield Master II; US Bonds – Barclays Capital U.S. Aggregate; Glb Bond – Barclays Capital Global Treasury ex US; Hdg Fnds – HFRI FOF: Diversified Index; Cash – Merrill Lynch 91-day Tbill . Data as of 12/31/2024. Source: Morningstar Direct.

# U.S. ECONOMIC PROJECTIONS

		2024	2025	2026	2027	LONG RUN*
<b>GDP</b>	December 2024	2.5%	2.1%	2.0%	1.9%	1.8%
	September 2024	2.0%	2.0%	2.0%	2.0%	1.8%
	June 2024	2.1%	2.0%	2.0%		1.8%
	March 2024	2.1%	2.0%	2.0%		1.8%
<b>Unemployment Rate</b>	December 2024	4.2%	4.3%	4.3%	4.3%	4.2%
	September 2024	4.4%	4.4%	4.3%	4.2%	4.2%
	June 2024	4.0%	4.2%	4.1%		4.2%
	March 2024	4.0%	4.1%	4.0%		4.1%
<b>Core PCE Inflation</b>	December 2024	2.8%	2.5%	2.2%	2.0%	
	September 2024	2.6%	2.2%	2.0%	2.0%	
	June 2024	2.8%	2.3%	2.0%		
	March 2024	2.6%	2.2%	2.0%		
<b>Federal Funds Rate</b>	December 2024	4.4%	3.9%	3.4%	3.1%	3.0%
	September 2024	4.4%	3.4%	2.9%	2.9%	2.9%
	June 2024	5.1%	4.1%	3.1%		2.8%
	March 2024	4.6%	3.9%	3.1%		2.6%
<b># of implied 25 bps rate changes year</b>	December 2024	-4	-2	-2	-1	
	September 2024		-4	-2		
	June 2024		-4	-4		
	March 2024		-3	-3		

*"Inflation is not yet back to target, so we still have more work to do, but we don't think we need to be nearly as restrictive as we once were to finish that job."*

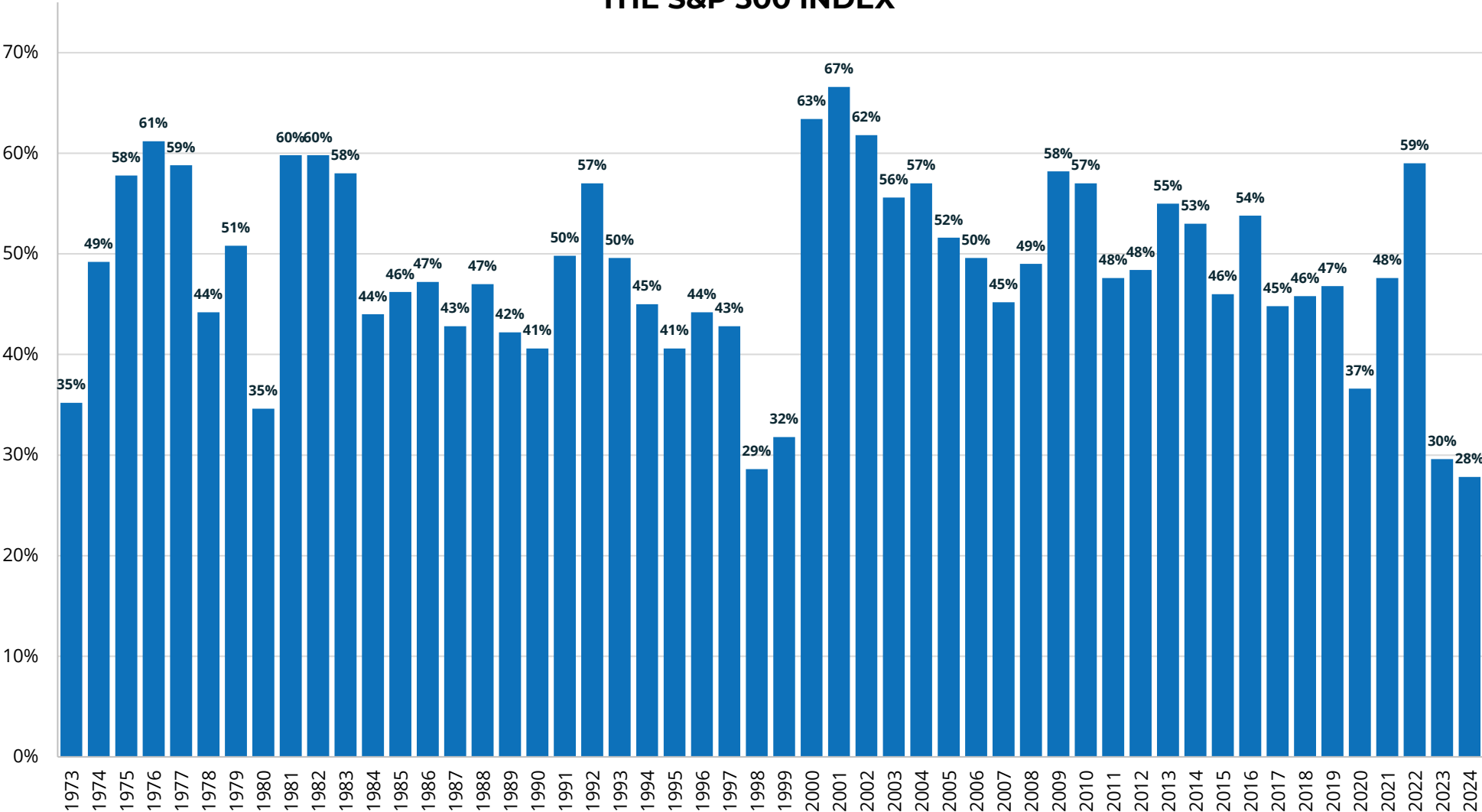
-Federal Reserve Bank of Richmond President Barkin

\*Long run projections: The rates to which a policymaker expects the economy to converge over time – maybe in five or six years – in the absence of further shocks and under appropriate monetary policy

Source: Clearstead, U.S. Federal Reserve. Expectations of Fed board members/bank presidents. Data as of 12/31/2024. Past performance is not an indicator of future results.

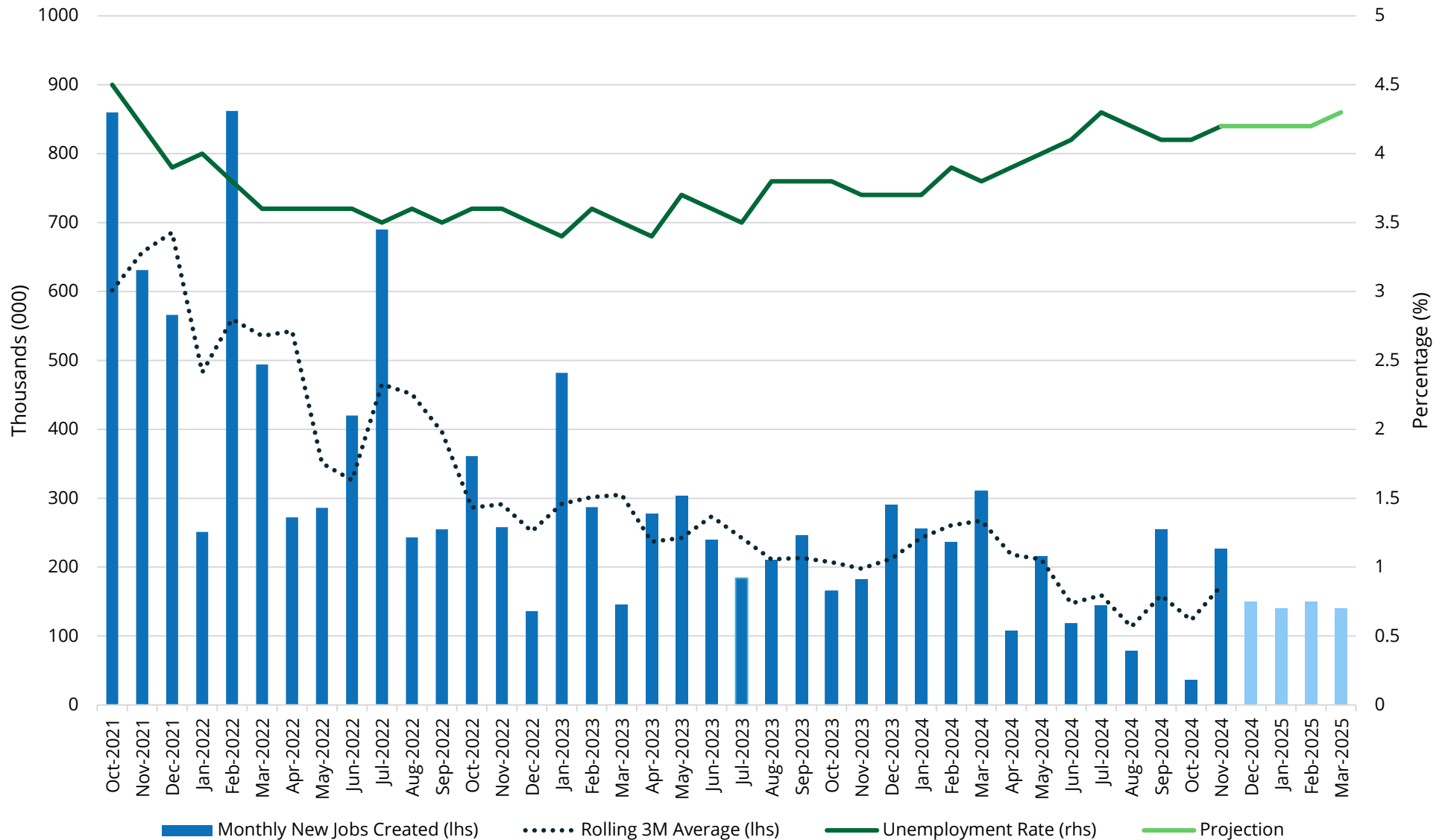
# EQUITY MARKET CONCENTRATION

## PERCENTAGE OF STOCKS BEATING THE S&P 500 INDEX



Source: Clearstead, NDR. As of 12/31/2024. Long-term average of stocks outperforming the index = 49%. Past performance is not an indicator of future results

# LABOR MARKET

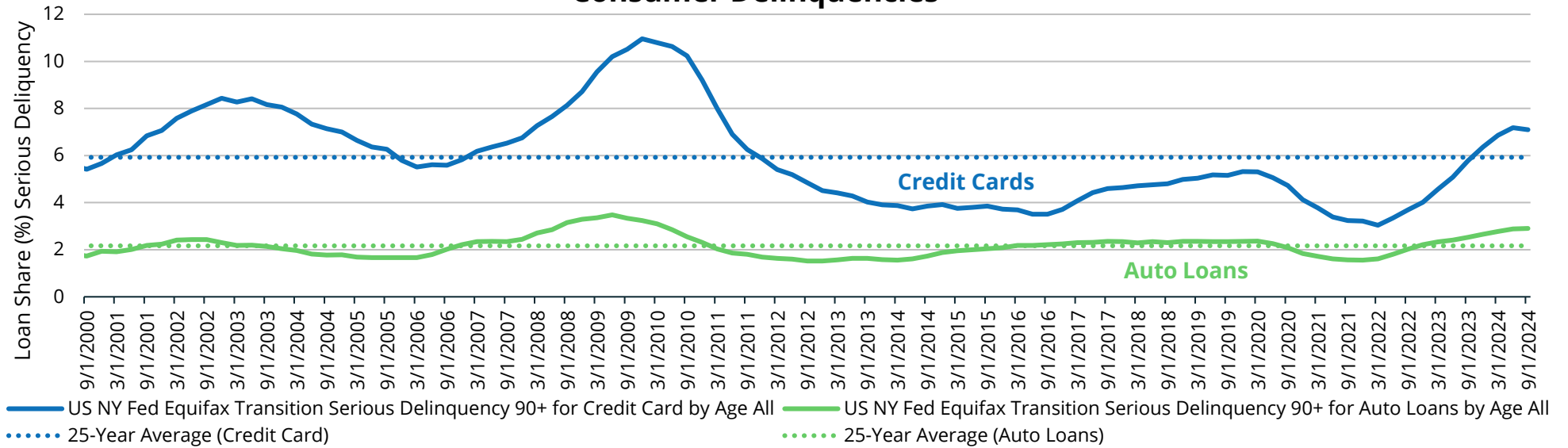


Source: Clearstead; Bloomberg LP - 12/20/2024; Labor market projection reflects U.S. Federal Reserve expectations of Fed board members.

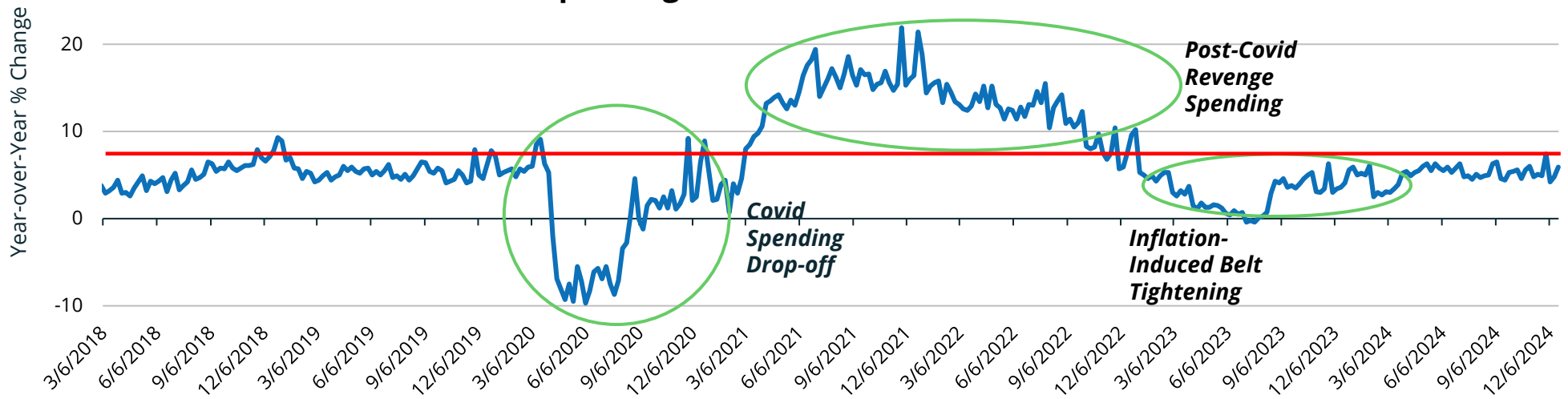


# U.S. CONSUMER HEALTH: DELINQUENCIES STABILIZE, SPENDING RESUMES

### Consumer Delinquencies

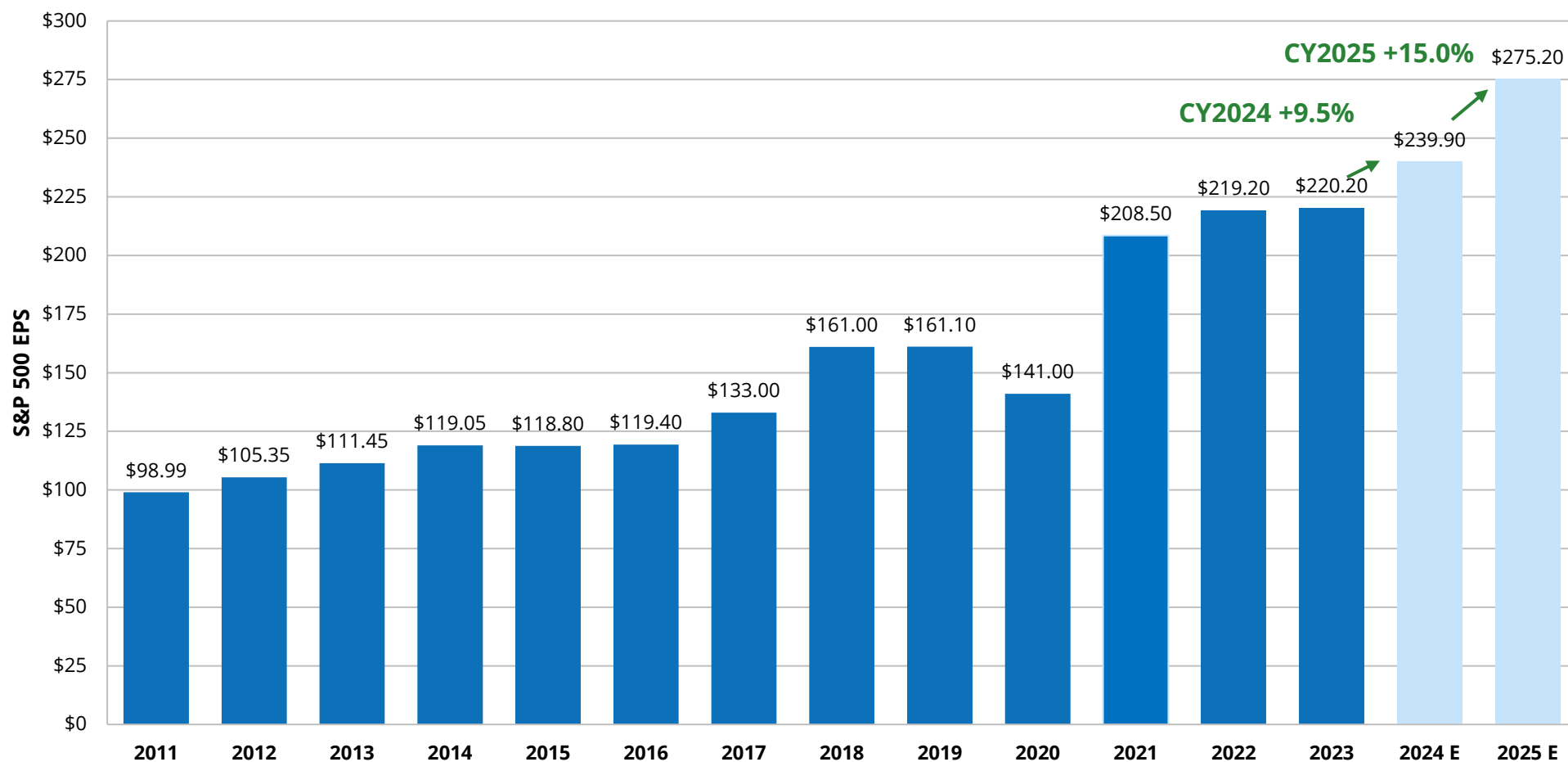


### Consumer Spending: Redbook - Same Store Retail Sales YoY



Source: Clearstead, Bloomberg LP; as of 1/8/2025

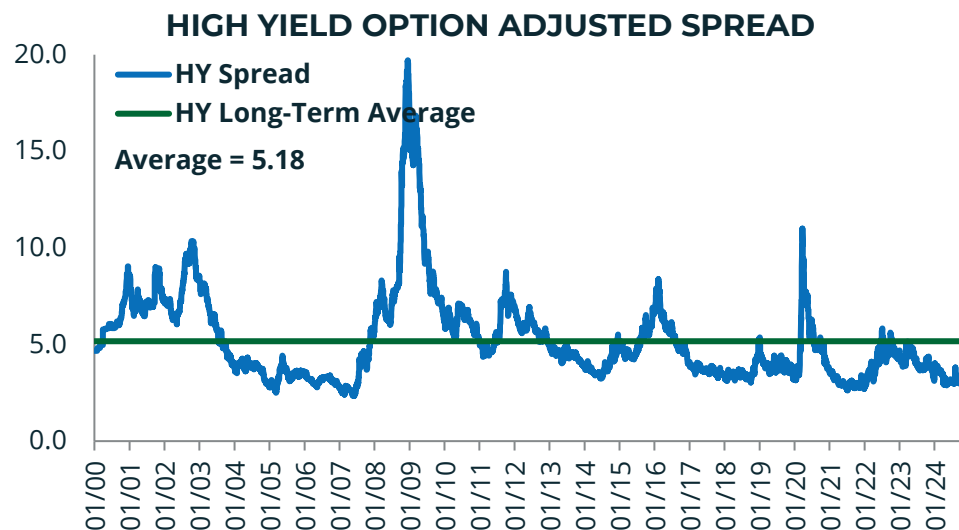
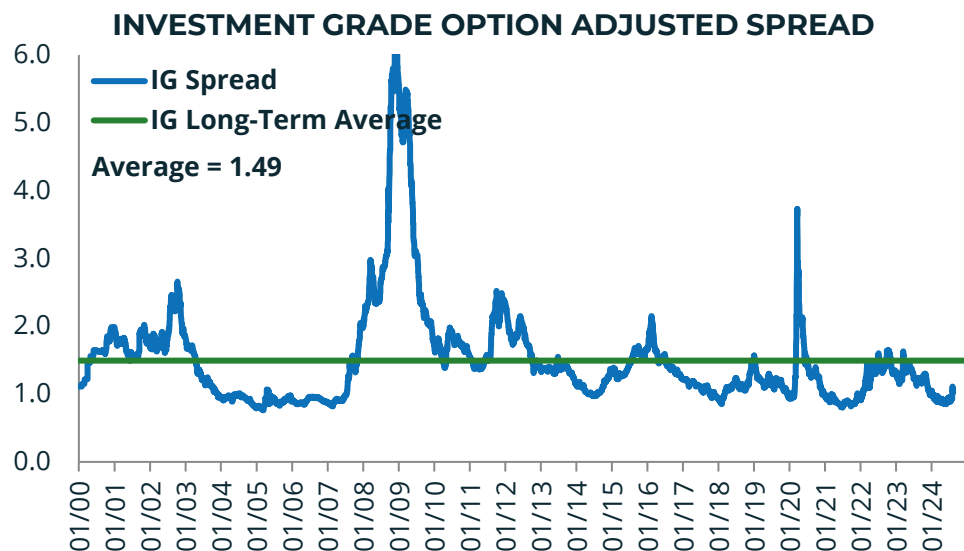
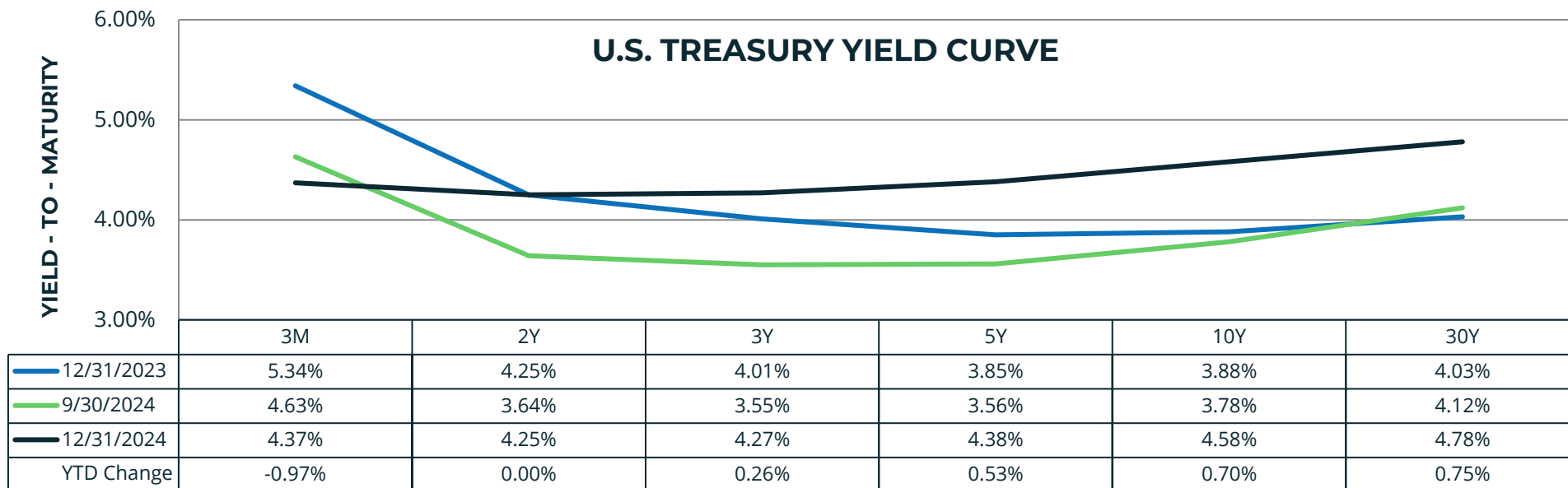
# S&P 500 EARNINGS OUTLOOK




Bottoms up earnings estimates for CY2025: ≈+15% and reflect a stable and positive U.S. macro environment.

- Expectations (and partial realization) for margin expansion and positive sentiment have kept CY2024 EPS at \$240
- Expectations for CY2025 also remain robust even as the US economy may slow marginally in 2025 from 2024 growth rates

Source: Clearstead, Factset. Data as of 12/31/2024.  
Past performance is not an indicator of future results.



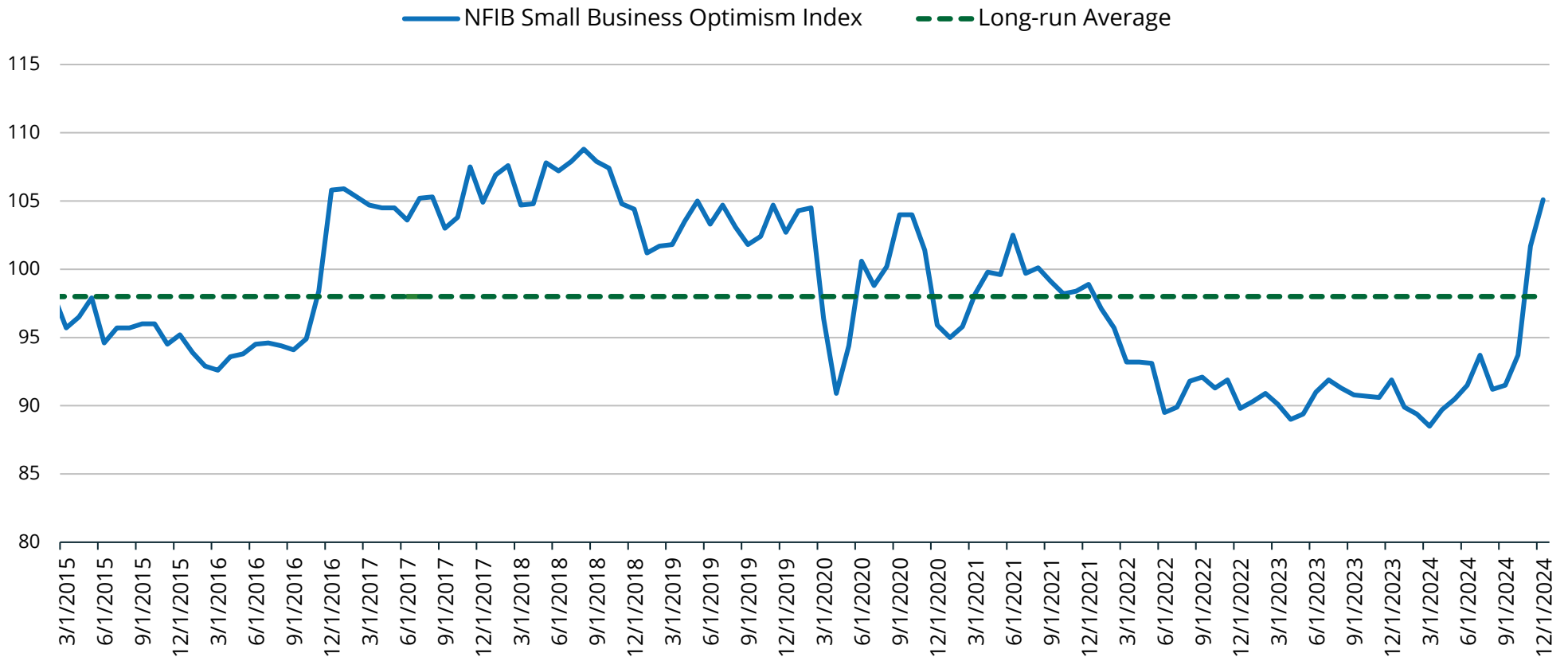
Source: Bloomberg. Data as of 12/31/2024.  
Past performance is not an indicator of future results.

AREA	EXPECTATIONS
 <b>Labor Markets</b>	<ul style="list-style-type: none"><li>• U.S. to track 100k-150k jobs per month</li><li>• Unemployment rate to remain at 4%; US near full employment</li><li>• Average hourly wages remain around 4%</li></ul>
 <b>Manufacturing</b>	<ul style="list-style-type: none"><li>• Manufacturing activity stable but no longer improving</li><li>• Input prices remain consistent</li><li>• Select sectors may be disrupted by new tariff policy in 2025</li></ul>
 <b>Services</b>	<ul style="list-style-type: none"><li>• Services industry remains positive</li><li>• Consumer spending expected to remain resilient</li><li>• Select consumer segments softening</li></ul>
 <b>Inflation</b>	<ul style="list-style-type: none"><li>• Core CPI between 3.0% to 3.5%</li><li>• Headline CPI likely to remain at or below 3%</li><li>• Services sector prices remain sticky given elevated housing and insurance prices</li></ul>
 <b>Equity Markets</b>	<ul style="list-style-type: none"><li>• Volatility may normalize</li><li>• Some technical support at 5,700; Positive scenario &gt; 6,000</li><li>• Market assumes at least one rate cut in 2025</li></ul>
 <b>Fixed Income Markets</b>	<ul style="list-style-type: none"><li>• 10-Yr US Treasury remains rangebound between 3.75% - 4.75%</li><li>• Less uncertainty around Fed policy</li><li>• Pace of quantitative tightening continues to ease</li></ul>

Source: Clearstead, as of 12/31/2024.  
Expectations for 1<sup>st</sup> quarter of calendar year 2025.

# SMALL BUSINESS OPTIMISM INDEX

Small Business Optimism Index



**December Report:**

- The net share of small business owners expecting the economy to improve rose 16 points from November to a net 52% (seasonally adjusted), the highest since the fourth quarter of 1983.
- The percent of small business owners believing it is a good time to expand their business rose six points to 20%, seasonally adjusted. This is the highest reading since February 2020.

Source: Clearstead, NFIB 1/15/2025



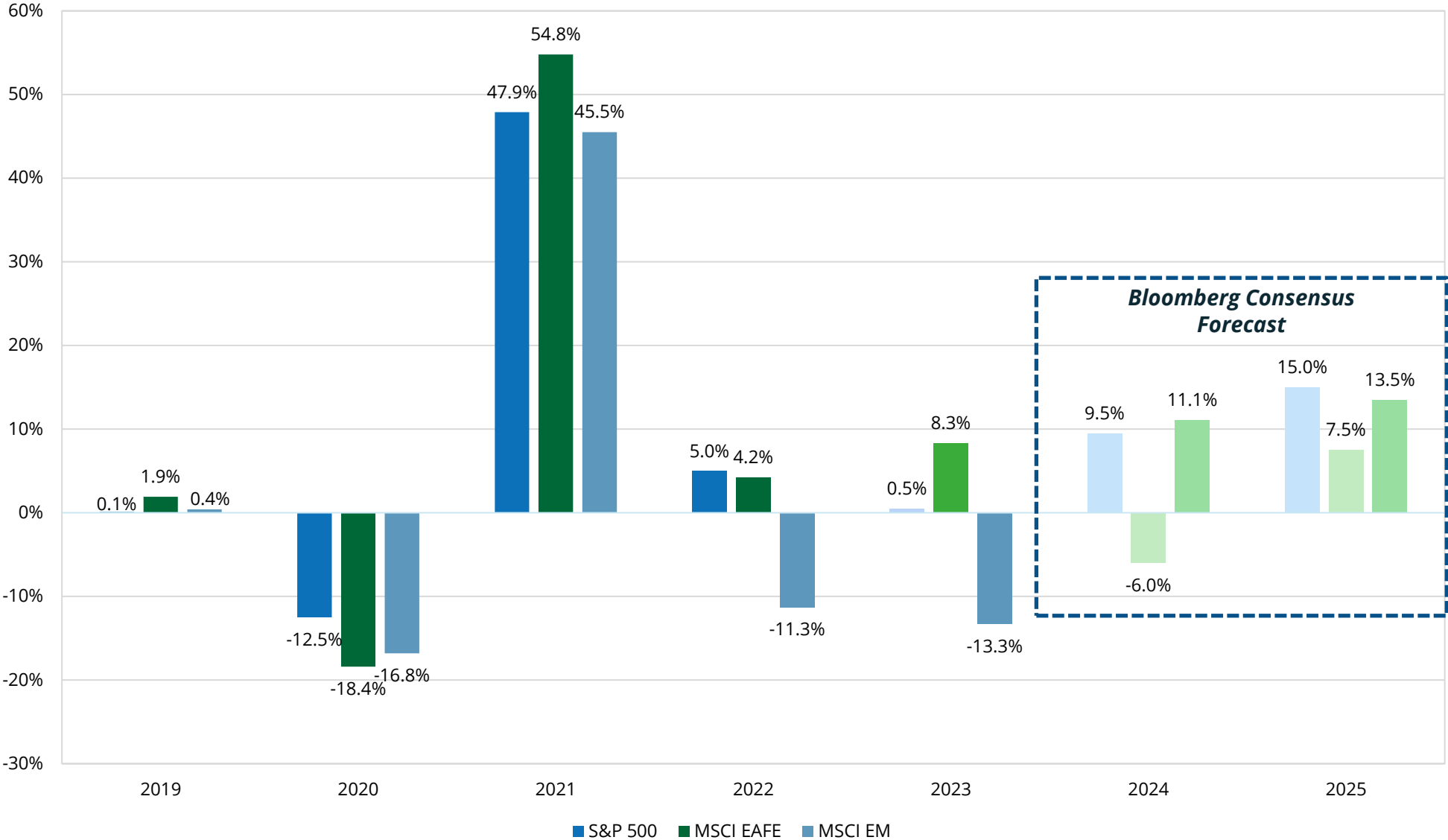
## Real GDP Growth Forecasts

	CY2024	CY2025				CY2026			
	Estimates	IMF	OECD	Bloomberg Consensus	Goldman Sachs	IMF	OECD	Bloomberg Consensus	Goldman Sachs
<b>US</b>	<b>2.7%</b>	2.2%	2.4%	2.1%	2.5%	2.0%	2.1%	2.0%	2.3%
<b>EU*</b>	<b>0.8%</b>	1.2%	1.3%	1.0%	0.8%	1.5%	1.5%	1.2%	1.0%
<b>China</b>	<b>4.8%</b>	4.5%	4.7%	4.5%	4.5%	4.1%	4.4%	4.2%	4.0%
<b>Japan</b>	<b>-0.2%</b>	1.1%	1.5%	1.2%	1.2%	0.8%	0.6%	0.9%	1.1%
<b>UK</b>	<b>0.9%</b>	1.5%	1.7%	1.4%	1.0%	1.5%	1.3%	1.5%	1.3%
<b>India</b>	<b>7.6%</b>	6.5%	6.9%	6.5%	6.3%	6.5%	6.8%	6.5%	6.7%

- Global growth outlook for CY2025 is stable and on par with CY2024 expectations
  - World Real GDP Growth of ~3% continues to trend below pre-covid growth
  - Expectations mixed and outlook is more positive for EU, Japan, and UK
  - Chinese economy expected to slow <5%

Source: Clearstead. Bloomberg. Goldman Sachs. Data as of 1/2/2025.

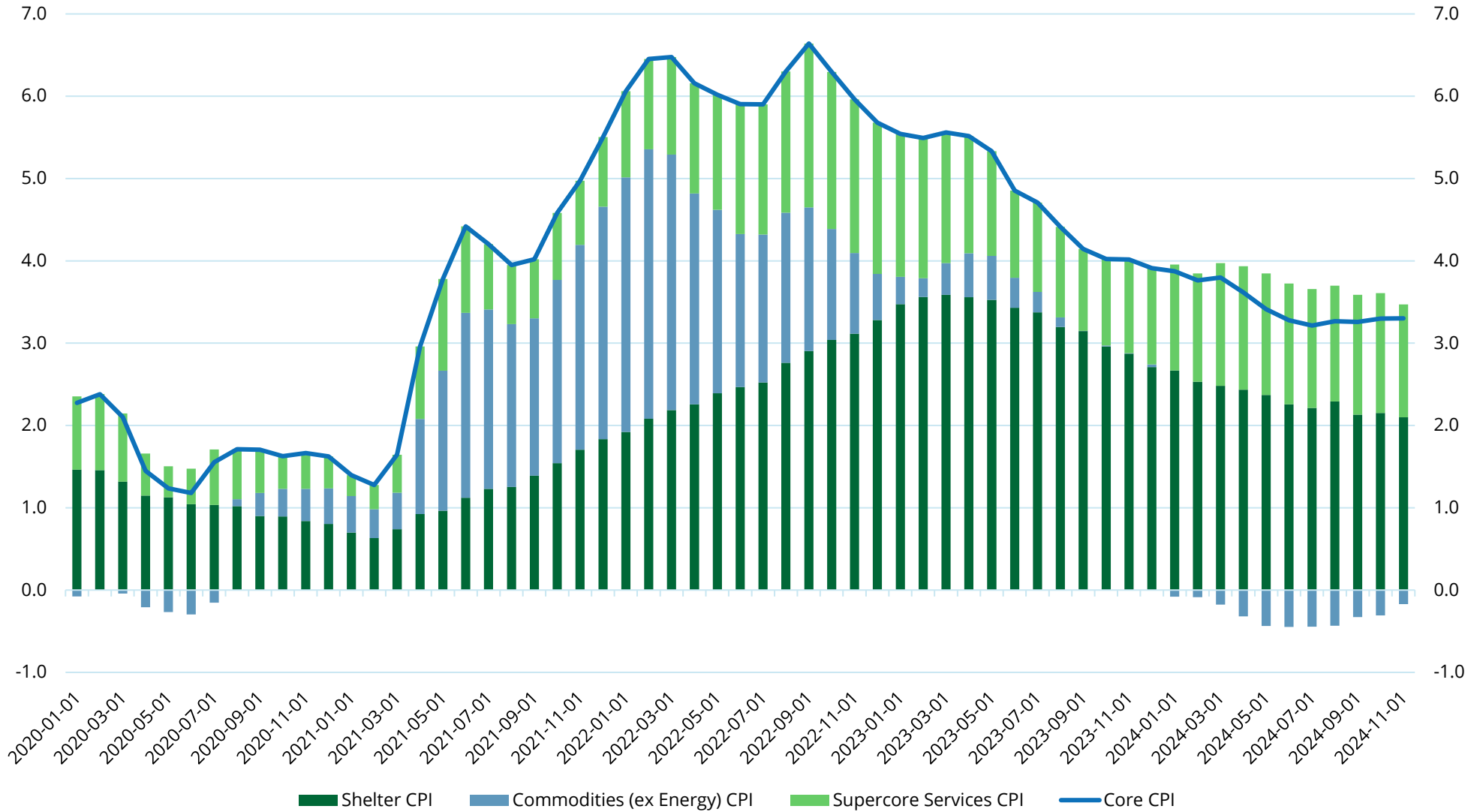
# GLOBAL EARNINGS OUTLOOK



Source: Clearstead, Bloomberg. Data as of 12/31/2024. Past performance is not an indicator of future results.

# STICKY INFLATION – MINIMAL PROGRESS ON SHELTER

## Shelter Inflation Spoiling the Disinflation Party



Source: Clearstead, BLS, Bloomberg, 12/31/2024



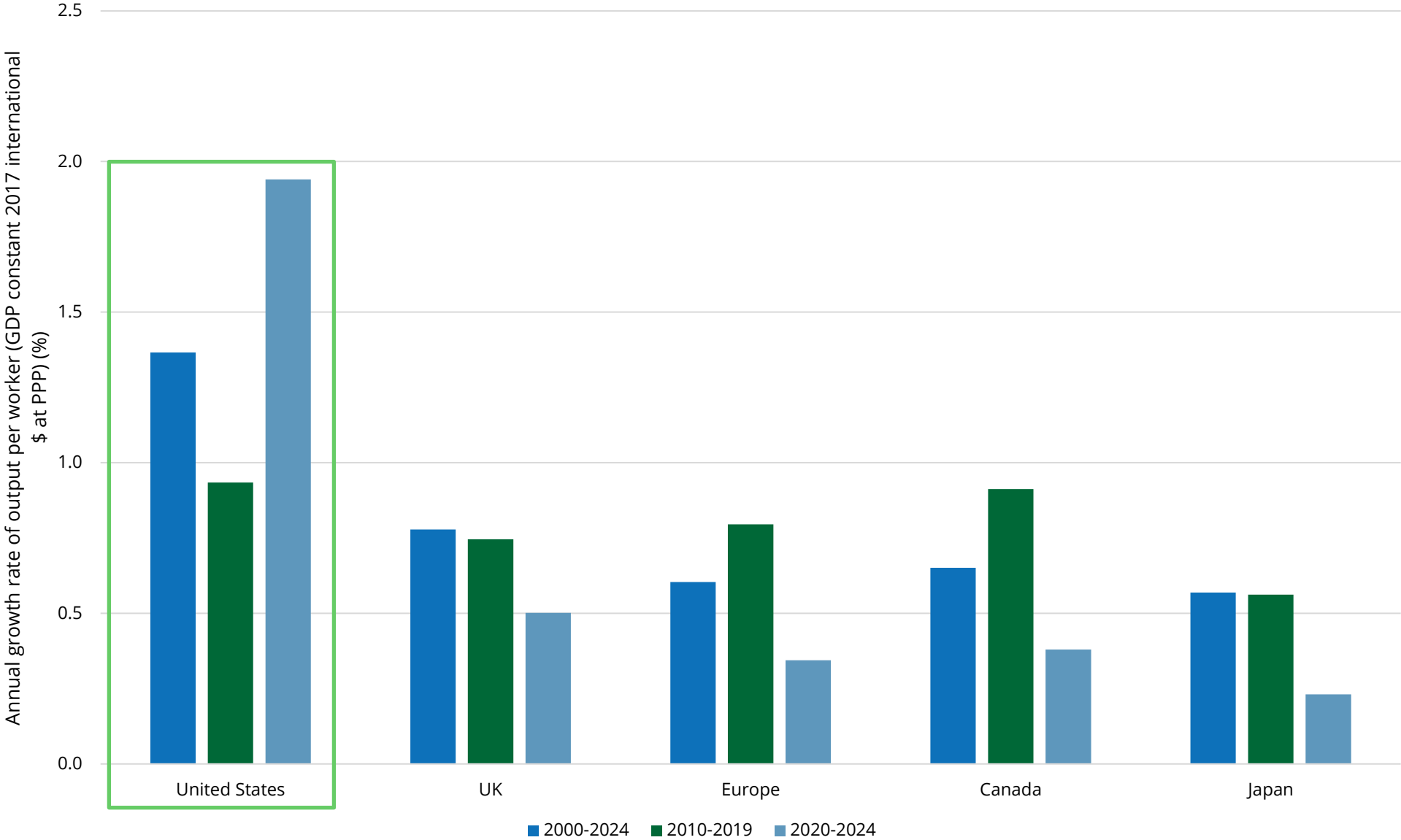
# GLOBAL ECONOMY PMI

		Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	12M Trend
Global	Mfg	50.0	50.3	50.6	50.3	51.0	50.8	49.7	49.6	48.7	49.4	50.0	49.6	
	Serv	52.3	52.4	52.4	52.7	54.0	53.1	53.3	53.8	52.9	53.1	53.1	53.8	
US	Mfg	50.7	52.2	51.9	50.0	51.3	51.6	49.6	47.9	47.3	48.5	49.7	49.4	
	Serv	52.5	52.3	51.7	51.3	54.8	55.3	55.0	55.7	55.2	55.0	56.1	56.8	
Eurozone	Mfg	46.6	46.5	46.1	45.7	47.3	45.8	45.8	45.8	45.0	46.0	45.2	45.1	
	Serv	48.4	50.2	51.5	53.3	53.2	52.8	51.9	52.9	51.4	51.6	49.5	51.6	
UK	Mfg	47.0	47.5	50.3	49.1	51.2	50.9	52.1	52.5	51.5	49.9	48.0	47.0	
	Serv	54.3	53.8	53.1	55.0	52.9	52.1	52.5	53.7	52.4	52.0	50.8	51.1	
Japan	Mfg	48.0	47.2	48.2	49.6	50.4	50.0	49.1	49.8	49.7	49.2	49.0	49.6	
	Serv	53.1	52.9	54.1	54.3	53.8	49.4	53.7	53.7	53.1	49.7	50.5	50.9	
China	Mfg	50.8	50.9	51.1	51.4	51.7	51.8	49.8	50.4	49.3	50.3	51.5	50.5	
	Serv	52.7	52.5	52.7	52.5	54.0	51.2	52.1	51.6	50.3	52.0	51.5	52.2	
India	Mfg	56.5	56.9	59.1	58.8	57.5	58.3	58.1	57.5	56.5	57.5	56.5	56.4	
	Serv	61.8	60.6	61.2	60.8	60.2	60.5	60.3	60.9	57.7	58.5	58.4	59.3	
S. Korea	Mfg	51.2	50.7	49.8	49.4	51.6	52.0	51.4	51.9	48.3	48.3	50.6	49.0	

- Global manufacturing has stagnated, while services PMIs have remained in positive territory
  - PMIs generally suggest little growth, but are not indicative of a decline
  - Global manufacturing PMIs are neutral-to-mildly negative in most economies—except in India
  - Global services PMIs are suggesting stable/modest economic growth in most countries
- India continues to be the one country whose PMIs show universal strength

Source: Bloomberg, Markit/HIS.  
Data as of 12/31/2024.

# LABOR PRODUCTIVITY



Source: Clearstead; UN ILOSTAT 12/31/2024

- Israel-Hezbollah ceasefire largely holding; talks for a ceasefire in Gaza may intensify w/ Trump administration.
  - Israel likely to intensify attacks against Houthis in Yemen—US is actively assisting.
  - Iran is fundamentally weakened, but a push for nuclear deterrence is still in play.
- Ukrainian war largely a stalemate, but Russia is making incremental gains—Ukrainian lines could collapse in select areas.
  - Western aid to Ukraine has been slow and generally insufficient to shift the momentum.
  - Expect a push to begin a process to de-escalate under Trump administration.
- China-US trade war could resume; China continue to pressure Taiwan.
  - China will likely respond to tariffs with some level of retaliation against select US products.
  - December saw largest un-announced Chinese naval operation in decades—simulating Taiwanese blockade.

## Market Impact

*Energy price volatility; increased shipping costs to Europe; disrupted supply chains.*

*Commodity price volatility—oil, gas, grains, and select metals.*

*Increased US-China tension; more negative sentiment on select Chinese assets (equities)*



Source: Clearstead, ISW, 1/2/2025



## **DEFINITIONS & DISCLOSURES**

# DEFINITIONS & DISCLOSURES

Information provided is general in nature, is provided for informational purposes only, and should not be construed as investment advice. Any views expressed are based upon the data available at the time the information was produced and are subject to change at any time based on market or other conditions. Clearstead disclaims any liability for any direct or incidental loss incurred by applying any of the information in this presentation. All investment decisions must be evaluated as to whether it is consistent with their investment objectives, risk tolerance, and financial situation.

Past performance is no guarantee of future results. Investing involves risk, including risk of loss. Diversification does not ensure a profit or guarantee against loss. All indices are unmanaged and performance of the indices includes reinvestment of dividends and interest income, unless otherwise noted. An investment cannot be made in any index.

Although bonds generally present less short-term risk and volatility than stocks, bonds do contain interest rate risk (as interest rates rise, bond prices usually fall and vice versa) and the risk of default, or the risk that an issuer will be unable to make income or principal payments. Additionally, bonds and short-term investments entail greater inflation risk, or the risk that the return of an investment will not keep up with increases in the prices of goods and services, than stocks.

Lower-quality debt securities generally offer higher yields, but also involve greater risk of default or price changes due to potential changes in the credit quality of the issuer. Any fixed income security sold or redeemed prior to maturity may be subject to loss.

The municipal market is volatile and can be significantly affected by adverse tax, legislative, or political changes and by the financial condition of the issuers of municipal securities. Interest rate increases can cause the price of a debt security to decrease. A portion of the dividends you receive may be subject to federal, state, or local income tax or may be subject to the federal alternative minimum tax. Generally, tax-exempt municipal securities are not appropriate holdings for tax advantaged accounts such as IRAs and 401(k)s.

Stock markets, especially foreign markets, are volatile and can decline significantly in response to adverse issuer, political, regulatory, market, or economic developments. Foreign securities are subject to interest-rate, currency-exchange-rate, economic, and political risks, all of which are magnified in emerging markets. The securities of smaller, less well-known companies can be more volatile than those of larger companies. Growth stocks can perform differently from the market as a whole and other types of stocks and can be more volatile than other types of stocks. Value stocks can perform differently than other types of stocks and can continue to be undervalued by the market for long periods of time.

The commodities industry can be significantly affected by commodity prices, world events, import controls, worldwide competition, government regulations, and economic conditions. Changes in real estate values or economic conditions can have a positive or negative effect on issuers in the real estate industry, which may affect your investment.

## Index Definitions:

The **S&P 500 Index** is a broad-based market index, comprised of 500 large-cap companies, generally considered representative of the stock market as a whole. The **S&P 400 Index** is an unmanaged index considered representative of mid-sized U.S. companies. The **S&P 600 Index** is a market-value weighted index that consists of 600 small-cap U.S. stocks chosen for market size, liquidity and industry group representation.

The **Russell 1000 Value Index**, **Russell 1000 Index** and **Russell 2000 Index** are indices that measure the performance of large-capitalization value stocks, large-capitalization growth stocks, and large-capitalization growth stocks, respectively. The **Russell 2000 Value Index**, **Russell 2000 Index** and **Russell 2000 Growth Index** are indices that measure the performance of small-capitalization value stocks, small-capitalization growth stocks, and small-capitalization growth stocks, respectively. The **Russell Midcap Value Index**, **Russell Midcap Index** and **Russell Midcap Growth Index** are indices that measure the performance of mid-capitalization value stocks, mid-capitalization growth stocks, and mid-capitalization growth stocks, respectively. The **Russell 2500 Value Index**, **Russell 2500 Index** and **Russell 2500 Growth Index** measure the performance of small to mid-cap value stocks, small to mid-cap stocks and small to mid-cap growth stocks, respectively, commonly referred to as "smid" cap. The **Russell 3000 Value Index**, **Russell 3000 Index** and **Russell 3000 Growth Index** measure the performance of the 3,000 largest U.S. value stocks, 3,000 largest U.S. stocks and 3,000 largest U.S. growth stocks, respectively, based on total market capitalization.

The **Wilshire 5000 Index** represents the broadest index for the U.S. equity market, measuring the performance of all U.S. equity securities with readily available price data. The **Wilshire Micro Cap Index** is a market capitalization-weighted index comprised of all stocks in the Wilshire 5000 Index below the 2,501<sup>st</sup> rank.

The **MSCI EAFE (Europe, Australasia, Far East) Index** is designed to measure developed market equity performance, excluding the U.S. and Canada. The **MSCI Emerging Markets (EM) Index** is designed to measure global emerging market equity performance. The **MSCI World Index** is designed to measure global developed market equity performance. The **MSCI World Index Ex-U.S. Index** is designed to measure the equity market performance of developed markets and excludes the U.S. The **MSCI Europe Index** is an unmanaged index considered representative of developed European countries. The **MSCI Japan Index** is an unmanaged index considered representative of stocks of Japan. The **MSCI Pacific ex Japan Index** is an unmanaged index considered representative of stocks of Asia Pacific countries excluding Japan.

The **U.S. 10-Year Treasury Yield** is generally considered to be a barometer for long-term interest rates.

**Merrill Lynch 91-day T-bill Index** includes U.S. Treasury bills with a remaining maturity from 1 up to 3 months.

The **Barclays Capital (BC) U.S. Treasury Index** is designed to cover public obligations of the U.S. Treasury with a remaining maturity of one year or more. The **BC Aggregate Bond Index** is an unmanaged, market value-weighted performance benchmark for investment-grade fixed-rate debt issues, including government, corporate, asset-backed, and mortgage-backed securities with maturities of at least one year. The **BC U.S. Credit Bond Index** is designed to cover publicly issued U.S. corporate and specified foreign debentures and secured notes that meet the specified maturity, liquidity, and quality requirements; bonds must be SEC-registered to qualify. The **BC U.S. Agency Index** is designed to cover publicly issued debt of U.S. Government agencies, quasi-federal corporations, and corporate or foreign debt guaranteed by the U.S. Government. The **BC CMBS Index** is designed to mirror commercial mortgage-backed securities of investment-grade quality (Baa3/BBB-/BBB- or above) using Moody's, S&P, and Fitch respectively, with maturity of at least one year. The **BC MBS Index** covers agency mortgage-backed pass-through securities (both fixed-rate and hybrid ARM) issued by Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC). The **BC U.S. Municipal Bond Index** covers the U.S. dollar-denominated, long-term tax-exempt bond market with four main sectors: state and local general obligation bonds, revenue bonds, insured bonds, and pre-refunded bonds. The **BC TIPS Index** is an unmanaged index made up of U.S. Treasury Inflation Linked Index securities. The **BC U.S. Government Bond Index** is a market value-weighted index of U.S. Government fixed-rate debt issues with maturities of one year or more. The **BC ABS Index** is a market value-weighted index that covers fixed-rate asset-backed securities with average lives greater than or equal to one year and that are part of a public deal; the index covers the following collateral types: credit cards, autos, home equity loans, stranded-cost utility (rate-reduction) bonds, and manufactured housing. The **BC Global Aggregate Index** is composed of three sub-indices: the U.S. Aggregate Index, Pan-European Aggregate Index, and the Asian-Pacific Aggregate Index. In aggregate the index is created to be a broad-based measure of the performance of investment grade fixed rate debt on a global scale. The **BC U.S. Corporate Long Aa Index** is an unmanaged index representing public obligations of U.S. corporate and specified foreign debentures and secured notes with a remaining maturity of 10 years or more. The **BC U.S. Corporate High-Yield Index** measures the market of USD-denominated, non-investment grade, fixed-rate, taxable corporate bonds. The **BC Intermediate Corporate Index** includes dollar-denominated debt from U.S. and non-U.S. industrial, utility, and financial institutions issuers with a duration of 1-10 years. The **BC U.S. Treasury Long Index** is an unmanaged index representing public obligations of the U.S. Treasury with a remaining maturity of one year or more. The **BC U.S. Government 10 Year Treasury Index** measures the performance of U.S. Treasury securities that have a remaining maturity of less than 10 years. The **BC BAA Corporate Index** measures the performance of the taxable Baa rated fixed-rate U.S. dollar-denominated corporate bond market. The **BC Global Treasury ex US Index** includes government bonds issued by investment-grade countries outside the United States, in local currencies, that have a remaining maturity of one year or more and are rated investment grade or higher. The **BC ABS Index** is an unmanaged index that total returns for external-currency-denominated debt instruments of the emerging markets. The **BC U.S. Securitized Bond Index** is a composite of asset-backed securities, collateralized mortgage-backed securities (ERISA-eligible) and fixed rate mortgage-backed securities. The **BC Quality Distribution AAA, B, and CC-D indices** measure the respective credit qualities of U.S. corporate and specified foreign debentures and secured notes. The **BC Universal Index** represents the union of the U.S. Aggregate Index, the U.S. High Yield Corporate Index, the 144A Index, the Eurodollar Index, the Emerging Markets Index, and the non-ERISA portion of the CMBS Index. The **BC 1-3 Year Government Credit Index** is an unmanaged index considered representative of performance of short-term U.S. corporate bonds and U.S. government bonds with maturities from one to three years. The **BC Long-term Government Index** is an unmanaged index reflecting performance of the long-term government bond market. The **BC Intermediate Aggregate Index** measures the performance of intermediate-term investment grade bonds. The **BC Intermediate 1-3 Year Government/Credit Index** measures the performance of U.S. Dollar denominated U.S. Treasuries, government-related and investment grade U.S. corporate securities that have a remaining maturity of greater than one year and less than ten years.

The **Bank of America ML U.S. High Yield Index** tracks the performance of below investment grade US Dollar Denominated corporate bonds publicly issued in the US market. Qualifying bonds have at least one year remaining term to maturity, are fixed coupon schedule and minimum outstanding of \$100 million.

The **HFRF Funds of Funds Index (HFRF FOF)** is an equal weighted index designed to measure the performance of hedge fund of fund managers. The more than 800 multi-strategy constituents are required to have at least \$50 million in assets under management and a trading track record spanning at least 12 months. The index includes both on and offshore funds and all returns are reported in USD.

The **NCREIF Property Index (NPI)** represents quarterly time series composite total rate of return measure of a very large pool of individual commercial real estate properties acquired in the private market. The index represents apartments, hotels, industrial properties, office buildings and retail properties which are at least 60% occupied and owned or controlled, at least in part by tax-exempt institutional investors or its designated agent. In addition these properties that are included must be investment grade, non-agricultural and income producing and all development projects are excluded. Constituents included in the NPI be valued at least quarterly, either internally or externally, using standard commercial real estate appraisal methodology. Each property must be independently appraised a minimum of once every three years.

The **FTSE NAREIT All REITs Index** is a market capitalization-weighted index that is designed to measure the performance of all tax-qualified Real Estate Investment Trusts (REITs) that are listed on the New York Stock Exchange, the American Stock Exchange, or the NASDAQ National Market List.

The **Dow Jones U.S. Select Real Estate Securities Index** is a float-adjusted market capitalization-weighted index of publicly traded real estate securities such as real estate investment trusts (REITs) and real estate operating companies (REOCs).

The **Cambridge PE Index** is a representation of returns for over 70% of the total dollars raised by U.S. leveraged buyout, subordinated debt and special situation managers from 1986 to December 2007. Returns are calculated based on the pooled time weighted return and are net of all fees. These pooled means represent the end to end rate of return calculated on the aggregate of all cash flows and market values reported by the general partners of the underlying constituents in the quarterly and annual reports.

The **University of Michigan Consumer Sentiment Index** is a consumer confidence index published monthly by the University of Michigan and Thomson Reuters. The index is normalized to have a value of 100 in December 1964.

**VIX - The CBOE Volatility Index (VIX)** is based on the prices of eight S&P 500 index put and call options.

**Gold** - represented by the dollar spot price of one troy ounce

**WTI Crude** - West Texas Intermediate is a grade of crude oil used as a benchmark in oil pricing.

The **Affordability Index** measures of a population's ability to afford to purchase a particular item, such as a house, indexed to the population's income.

The **Homesownership %** is computed by dividing the number of owner-occupied housing units by the number of occupied housing units or households.

**HFRF Emerging Markets: Asia ex-Japan, Global Index, Latin America Index, Russia/Eastern Europe Index.** The constituents of the HFRF Emerging Markets indices are selected according to their Regional Investment Focus only. There is no Investment Strategy criteria for inclusion in these indices. Funds classified as Emerging Markets have a regional investment focus in one of the following geographic areas: Asia ex-Japan, Russia/Eastern Europe, Latin America, Africa or the Middle East. **HFRF EH: Energy/Basic Materials** strategies which employ investment processes designed to identify opportunities in specific niche areas of the market in which the Manager maintains a level of expertise which exceeds that of a market generalist. **HFRF EH: Equity Market Neutral** strategies employ sophisticated quantitative techniques of analyzing price data to ascertain information about future price movement and relationships between securities, select securities for purchase and sale. **HFRF EH: Quantitative Directional** strategies employ sophisticated quantitative techniques of analyzing price data to ascertain information about future price movement and relationships between securities, select securities for purchase and sale. **HFRF EH: Short-Biased** strategies employ analytical techniques in which the investment thesis is predicated on assessment of the valuation characteristics on the underlying companies with the goal of identifying overvalued companies. **HFRF EH: Technology/Healthcare** strategies employ investment processes designed to identify opportunities in securities in specific niche areas of the market in which the Manager maintains a level of expertise which exceeds that of a market generalist in identifying opportunities in companies engaged in all development, production and application of technology, biotechnology and as related to production of pharmaceuticals and healthcare industry.

**HFRF ED: Distressed Restructuring** strategies which employ an investment process focused on corporate fixed income instruments, primarily on corporate credit instruments of companies trading at significant discounts to their value at issuance or obliged (par value) at maturity as a result of either formal bankruptcy proceeding or financial market perception of near term proceedings. **HFRF ED: Merger Arbitrage** strategies which employ an investment process primarily focused on opportunities in equity and equity related instruments of companies which are currently engaged in a corporate transaction. **HFRF ED: Private Issue/Regulation D** strategies which employ an investment process primarily focused on opportunities in equity and equity related instruments of companies which are primarily private and illiquid in nature. **HFRF Macro: Systematic Diversified** strategies have investment processes typically as function of mathematical, algorithmic and technical models, with little or no influence of individuals over the portfolio positioning. **HFRF RV: Fixed Income - Asset Backed** includes strategies in which the investment thesis is predicated on realization of a spread between related instruments in which one or multiple components of the spread is a fixed income instrument backed physical collateral or other financial obligations (loans, credit cards) other than those of a specific corporation. **HFRF RV: Fixed Income - Convertible Arbitrage** includes strategies in which the investment thesis is predicated on realization of a spread between related instruments in which one or multiple components of the spread is a convertible fixed income instrument. **HFRF RV: Fixed Income - Corporate** includes strategies in which the investment thesis is predicated on realization of a spread between related instruments in which one or multiple components of the spread is a corporate fixed income instrument. **HFRF RV: Multi-Strategies** employ an investment thesis is predicated on realization of a spread between related yield instruments in which one or multiple components of the spread contains a fixed income, derivative, equity, real estate, MLP or combination of these or other instruments. **HFRF RV: Yield Alternatives Index** strategies employ an investment thesis is predicated on realization of a spread between related instruments in which one or multiple components of the spread contains a derivative, equity, real estate, MLP or combination of these or other instruments. Strategies are typically quantitatively driven to measure the existing relationship between instruments and, in some cases, identify attractive positions in which the risk adjusted spread between these instruments represents an attractive opportunity for the investment manager.

The **Consumer Price Index (CPI)** is an inflationary indicator that measures the change in the cost of a fixed basket of products and services, including housing, electricity, food, and transportation. The CPI is published monthly. Unless otherwise noted, the CPI figure is as of the date this report is created.

The **Credit Suisse Leveraged Loan Index** is a market value-weighted index designed to represent the investable universe of the U.S. dollar-denominated leveraged loan market.

The **Dow Jones US Commodity Index** measures the performance of the commodities market. It consists of exchange-traded futures contracts on physical commodities that are weighted to account for the economic significance and market liquidity of each commodity.

The **S&P 500 Value Index**, **Index S&P 500 Growth Index** are a broad-based market indices that measure the performance of large-capitalization value companies, large-capitalization growth companies, and large-capitalization growth companies, respectively. The **S&P 400 MidCap Value Index**, **S&P 400 MidCap Index** and **S&P 400 MidCap Growth Index** are indices that measure the performance of mid-sized value companies, mid-sized companies and mid-sized growth companies, respectively. The **S&P 600 SmallCap Index** is a market-value weighted index that consists of 600 small-cap U.S. stocks chosen for market size, liquidity and industry group representation. The **S&P 900 Index** combines the large-cap S&P 500 and the S&P MidCap 400. **S&P Completion Index TR** is a sub-index of the S&P Total Market Index (TMI), including all stocks eligible for the S&P TMI and excluding all current constituents of the S&P 500. **S&P Global Ex US Property Index** defines and measures the investable universe of publicly traded property companies domiciled in developed and emerging markets excluding the U.S.

The **Russell 1000 Value Index**, **Russell 1000 Index** and **Russell 1000 Growth Index** are indices that measure the performance of large-capitalization value stocks, large-capitalization growth stocks, and large capitalization growth stocks, respectively. The **Russell 2000 Value Index**, **Russell 2000 Index** and **Russell 2000 Growth Index** are indices that measure the performance of small-capitalization value stocks, small-capitalization growth stocks, and small-capitalization growth stocks, respectively. The **Russell Midcap Value Index**, **Russell Midcap Index** and **Russell Midcap Growth Index** are indices that measure the performance of mid-capitalization value stocks, mid-capitalization growth stocks, and mid-capitalization growth stocks, respectively. The **Russell 2500 Value Index**, **Russell 2500 Index** and **Russell 2500 Growth Index** measure the performance of small to mid-cap value stocks, small to mid-cap stocks and small to mid-cap growth stocks, respectively, commonly referred to as "SMID" cap. The **Russell 3000 Value Index**, **Russell 3000 Index** and **Russell 3000 Growth Index** measure the performance of the 3,000 largest U.S. value stocks, 3,000 largest U.S. stocks and 3,000 largest U.S. growth stocks, respectively, based on total market capitalization. The **Russell Microcap Index** measures the performance of the microcap segment of the U.S. equity market. The **Russell Top 200 Value Index** measures the performance of the especially large cap segment of the U.S. equity universe represented by stocks in the largest 200 by market cap that exhibit value characteristics. The **Russell Developed ex-US Large Cap Index** measures the performance of the largest investable securities in developed countries globally, excluding companies assigned to the United States.

# DEFINITIONS & DISCLOSURES

The **Wilshire 5000 Index** represents the broadest index for the U.S. equity market, measuring the performance of all U.S. equity securities with readily available price data. The **Wilshire Micro Cap Index** is a market capitalization-weighted index comprised of all stocks in the Wilshire 5000 Index below the 2,501st rank. The **Wilshire 4500 Index** is comprised of all stocks in the Wilshire 5000 minus the stocks in the S&P 500. The **Wilshire Real Estate Securities Index (RESI)** is comprised of publically traded real estate equity securities.

All MSCI indices are gross, defined as With Gross Dividends; Gross total return indices reinvest as much as possible of a company's dividend distributions. The reinvested amount is equal to the total dividend amount distributed to persons residing in the country of the dividend-paying company. Gross total return indices do not, however, include any tax credits. The **MSCI EAFE (Europe, Australasia, Far East) Gross Index** is designed to measure developed market equity performance, excluding the U.S. and Canada. The **MSCI Emerging Markets (EM) Gross Index** is designed to measure global emerging market equity performance. The **MSCI World Gross Index** is designed to measure global developed market equity performance. The **MSCI World Index Ex-U.S. Gross Index** is designed to measure the equity market performance of developed markets and excludes the U.S. The **MSCI Europe Gross Index** is an unmanaged index considered representative of developed European countries. The **MSCI Japan Gross Index** is an unmanaged index considered representative of stocks of Japan. The **MSCI Pacific ex. Japan Gross Index** is an unmanaged index considered representative of stocks of Asia Pacific countries excluding Japan. The **MSCI AC (All Country) Asia ex Japan Gross Index** is a free float-adjusted market capitalization weighted index that is designed to measure the equity market performance of Asia, excluding Japan. The **MSCI ACWI Gross Index** is a free float-adjusted market capitalization weighted index that is designed to measure the equity market performance of developed and emerging markets, excluding U.S. The **MSCI ACWI ex US Small Cap Growth Gross Index** is a market capitalization weighted total return index measured in U.S. dollars based on share prices and reinvested net dividends that is designed to measure the equity market performance of the small cap growth segments of developed and emerging markets, excluding the U.S. The **MSCI Canada Gross Index** is designed to measure the performance of the large and midcap segments of the Canada market. The **MSCI EAFE Small Cap Gross Index** measures the performance of small cap stocks in European, Australasian, and Far Eastern markets. The **MSCI EAFE Value Gross Index** is a market capitalization-weighted index that monitors the performance of value stocks from Europe, Australasia, and the Far East. The **MSCI EM Latin America Gross Index** is a free float-adjusted market capitalization weighted index that is designed to measure the equity market performance of emerging markets in Latin America. The **MSCI Pacific Free ex Japan Gross Index** measures the performance of the Australian, Hong Kong, New Zealand, and Singapore equity markets. The **MSCI World Small Cap Gross Index** is designed to measure the equity market performance of the small cap segment of developed markets. The **MSCI US Small Cap 1750 Gross Index** represents the universe of small capitalization companies in the U.S. equity market. The **MSCI US Mid Cap 450 Index** represents the universe of medium capitalization companies in the U.S. equity market. The **MSCI US Prime Market 750 Index** represents the growth companies of the MSCI US Prime Market 750 Index. The **MSCI US Prime Market Growth Index** represents the growth companies of the MSCI US Prime Market 750 Index.

The **Barclays Capital® (BC) U.S. Treasury Index** is designed to cover public obligations of the U.S. Treasury with a remaining maturity of one year or more. The **BC Aggregate Bond Index** is an unmanaged, market value-weighted performance benchmark for investment-grade fixed-rate debt issues, including government, corporate, asset-backed, and mortgage-backed securities with maturities of at least one year. The **BC U.S. Credit Bond Index** is designed to cover publicly issued U.S. corporate and specified foreign debentures and secured notes that meet the specified maturity, liquidity, and quality requirements; bonds must be SEC-registered to qualify. The **BC U.S. Agency Index** is designed to cover publicly issued debt of U.S. Government agencies, quasi-federal corporations, and corporate or foreign debt guaranteed by the U.S. Government. The **BC CMBS Index** is designed to mirror commercial mortgage-backed securities of investment-grade quality (Baa3/BBB- or above) using Moody's, S&P, and Fitch respectively, with maturity of at least one year. The **BC MBS Index** covers agency mortgage-backed pass-through securities (both fixed-rate and hybrid ARMs) issued by Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC). The **BC U.S. Municipal Bond Index** covers the U.S. dollar-denominated, long-term tax-exempt bond market with four main sectors: state and local general obligation bonds, revenue bonds, insured bonds, and pre-refunded bonds. The **BC US TIPS Index** is an unmanaged market index made up of U.S. Treasury Inflation Linked Index securities. The **BC U.S. Government Bond Index** is a market value-weighted index of U.S. Government fixed-rate debt issues with maturities of one year or more. The **BC ABS Index** is a market value-weighted index that covers fixed-rate asset backed securities with average lives greater than or equal to one year and that are part of a public deal; the index covers the following collateral types: credit cards, auto, home equity loans, stranded-cost utility (rate-reduction bonds), and manufactured housing. The **BC Global Aggregate Index** is composed of three sub-indices; the U.S. Aggregate Index, Pan-European Aggregate Index, and the Asian-Pacific Aggregate Index. In aggregate the index is created to be a broad-based measure of the performance of investment grade fixed rate debt on a global scale. The **BC US Corporate Long Aa Index** is an unmanaged index representing public obligations of U.S. corporate and specified foreign debentures and secured notes with a remaining maturity of 10 years or more. The **BC U.S. Corporate High-Yield Index** measures the market of US-denominated, non-investment grade, fixed-rate, taxable corporate bonds. The **BC Intermediate Corporate Index** includes dollar-denominated debt from U.S. and non-U.S. industrial, utility, and financial institutions issuers with a duration of 1-10 years. The **BC U.S. Treasury Long Index** is an unmanaged index representing public obligations of the U.S. Treasury with a remaining maturity of one year or more. The **BC U.S. Government 10 Year Treasury Index** measures the performance of U.S. Treasury securities that have a remaining maturity of less than 10 years. The **BC BAA Corporate Index** measures the performance of the taxable Baa rated fixed-rate U.S. dollar-denominated corporate bond market. The **BC Global Treasury ex US Index** includes government bonds issued by investment-grade countries outside the United States, in local currencies, that have a remaining maturity of one year or more and are rated investment grade or higher. The **BC Emerging Market Bond Index** is an unmanaged index that total returns for external-currency-denominated debt instruments of the emerging markets. The **BC U.S. Securitized Bond Index** is a composite of asset-backed securities, collateralized mortgage-backed securities (ERISA-eligible) and fixed rate mortgage-backed securities. The **BC Quality Distribution AAA, B, and CC-D Indices** measure the respective credit qualities of U.S. corporate and specified foreign debentures and secured notes. The **BC Universal Index** represents the union of the U.S. Aggregate Index, the U.S. High Yield Corporate Index, the 144A Index, the Eurodollar Index, the Emerging Markets Index, and the non-ERISA portion of the CMBS Index. The **BC 1-3 Year Government Credit Index** is an unmanaged index considered representative of performance of short-term U.S. corporate bonds and U.S. government bonds with maturities from one to three years. The **BC 1-5 Year Government Credit Index** is an unmanaged index considered representative of performance of short-term U.S. corporate bonds and U.S. government bonds with maturities from one to five years. The **BC Long-term Government Index** is an unmanaged index reflecting performance of the long-term government bond market. The **BC Intermediate Aggregate Index** measures the performance of intermediate-term investment grade bonds. The **BC Intermediate 1-3 Year Government/Credit Index** measures the performance of U.S. Dollar denominated U.S. Treasuries, government-related and investment grade U.S. corporate securities that have a remaining maturity of greater than one year and less than ten years. The **BC U.S. 1-3 Year Government Bond Index** is composed of treasury bond and agency bond and agency bond indices that have maturities of one to five years. The **BC 1-3 Year US Treasury Index** measures the performance of U.S. Treasury securities that have a maturity between 1 to 3 years. The **BC Government Credit**

**Index** measures the performance of U.S. Government and corporate bonds rated investment grade or better, with maturities of at least one year. The **BC High Yield Index** covers the universe of fixed rate, non-investment grade debt. Pay-in-kind (PIK) bonds, Eurobonds, and debt issues from countries designated as emerging markets (e.g., Argentina, Brazil, Venezuela, etc) are excluded, but Canadian and global bonds (SEC registered) of issuers in non-EMG countries are included. Original issue zeroes, step-up coupon structures, and 144-As are also included. The **BC Intermediate Government Index** measures the performance of intermediate U.S. government securities. The **BC Intermediate Government/Credit Bond Index** measures the performance of intermediate term U.S. government and corporate bonds. The **BC U.S. Long Term Corporate Index** measures the performance of investment-grade, fixed-rate, taxable securities issued by industrial, utility, and financial companies, with maturities greater than 10 years. The **BC Global Credit Hedged USD Index** contains investment grade and high yield credit securities from the Multiverse represented in US Dollars on a hedged basis. The **BC Long A+ U.S. Credit Index** measures the performance of investment grade corporate debt and agency bonds that are dollar denominated and have a maturity of greater than 10 years. The **BC U.S. Gov/Credit: 5-10 Year Index** includes all medium and larger issues of U.S. government, investment-grade corporate, and investment-grade international dollar-denominated bonds that have maturities between 5 and 10 years and are publicly issued.

The **Cambridge U.S. Private Equity Index** is a representation of returns for over 70% of the total dollars raised by U.S. leveraged buyout, subordinated debt and special situation managers from 1986 to December 2007. Returns are calculated based on the pooled time weighted return and are net of all fees. These pooled means represent the end to end rate of return calculated on the aggregate of all cash flows and market values reported by the general partners of the underlying constituents in the quarterly and annual reports. Please Note: the performance of this index lags by 1 quarter.

The **Bank of America (BoFA) Merrill Lynch (ML) 91-day-till bill Index** includes U.S. Treasury bills with a remaining maturity from 1 up to 3 months. The **BoFA ML U.S. High Yield Master Index & Bank of America ML U.S. High Yield Master II Indices** track the performance of below investment grade US Dollar Denominated corporate bonds publicly issued in the US market. Qualifying bonds have at least one year remaining term to maturity, are fixed coupon schedule and minimum outstanding of \$100 million. The **BoFA ML All US Convertibles Index** consists of convertible bonds traded in the U.S. dollar denominated investment grade and non investment grade convertible securities sold into the U.S. market and publicly traded in the United States. The **BoFA ML US Corp & Govt 1-3 Yrs Index** tracks the performance of U.S. dollar-denominated investment grade government and corporate public debt issued in the U.S. domestic bond market with at least 1 yr and less than 3yrs remaining to maturity, including U.S. Treasury, U.S. agency, foreign government, supranational and corporate securities. The **BoFA ML U.S. High-Yield BB-B Constrained Index** is a modified market capitalization-weighted index of U.S. dollar-denominated, below-investment-grade corporate debt publicly issued in the U.S. domestic market. The **BoFA Merrill Lynch US Year Treasury 1-3 Year Index** tracks the performance of the direct sovereign debt of the U.S. Government having a maturity of at least one year and less than three years. The **BoFA ML CMBS Fixed Rate AAA Index** is a subset of the BoFA ML U.S. Fixed Rate CMBS Index including all securities rated AAA. The **BoFA ML U.S. Fixed Rate CMBS Index** tracks the performance of U.S. dollar-denominated investment-grade fixed rate commercial mortgage-backed securities publicly issued in the U.S. domestic market. The **BoFA ML U.S. Dollar 3-Month LIBOR Index** represents the London interbank offered rate (LIBOR) with a constant 3-month average maturity.

The **Citi Select MLP Index** is a USD denominated, price return index, comprised of the common units of up to 30 of the most liquid market limited partnerships in the Energy Sector. The **Citigroup World Government Bond Index (WGBI) 1-5 Year Hedged USD Index** is a comprehensive measure of the total return performance of the government bond markets of approximately 22 countries with maturities ranging from one to five years. The **Citigroup WGBI Index** is a market capitalization weighted bond index consisting of the government bond markets of the multiple countries. The **Citigroup WGBI ex US Index** is a market capitalization weighted bond index consisting of the government bond markets of the multiple countries, excluding the U.S. The **Citigroup 3-Month U.S. Treasury Bill Index** performance is an average of the last 3-Month Treasury Bill issues.

The **NCREIF Property Index (NPI)** represents quarterly time series composite total rate of return measure of a very large pool of individual commercial real estate properties acquired in the private market. The index represents apartments, hotels, industrial properties, office buildings and retail properties which are at least 60% occupied and owned or controlled, at least in part by tax-exempt institutional investors or its designated agent. In addition these properties that are included must be investment grade, non-agricultural and income producing and all development projects are excluded. Constituents included in the NPI be valued at least quarterly, either internally or externally, using standard commercial real estate appraisal methodology. Each property must be independently appraised a minimum of once every three years. Please Note: the performance of this index lags by 1 quarter. The **NCREIF Timberland Index** is a quarterly time series composite return measure of investment performance of a large pool of individual timber properties acquired in the private market for investment purposes only.

The **Ibbotson Intermediate Government Bond Index** is measured using a one-bond portfolio with a maturity near 5 years. The **JPMorgan Emerging Markets Bond Index Plus (EMBI+)** Index tracks total returns for traded external debt instruments (external meaning foreign currency denominated fixed income) in the emerging markets. The **JPMorgan GBI Global ex-US Index** represents the total return performance of major non-U.S. bond markets.

The **HFRI Funds of Funds (HFRI FOF)** is an equal weighted index designed to measure the performance of hedge fund of fund managers. The more than 800 multi-strategy constituents are required to have at least \$50 million in assets under management and a trading track record spanning at least 12 months. The index includes both on and offshore funds and all returns are reported in USD. **HFRI Relative Value Index** tracks investment managers who maintain positions in which the investment thesis is predicated on realization of a valuation discrepancy in the relationship between multiple securities. Managers employ a variety of fundamental and quantitative techniques to establish investment theses, and security types range broadly across equity, fixed income, derivative or other security types. Fixed income strategies are typically quantitatively driven to measure the existing relationship between instruments and, in some cases, identify attractive positions in which the risk adjusted spread between these instruments represents an attractive opportunity for the investment manager. RV position may be involved in corporate transactions also, but as opposed to ED exposures, the investment thesis is predicated on realization of a pricing discrepancy between related securities, as opposed to the outcome of the corporate transaction. **HFRI Funds of Funds Conservative Index** is an equal-weighted index representing funds or funds that invest with multiple managers focused on consistent performance and lower volatility via absolute strategies. **HFRI ED: Merger Arbitrage** strategies which employ an investment process primarily focused on opportunities in equity and equity related instruments of companies which are currently engaged in a corporate transaction.

The **FTSE All-World ex US Index** comprises large and midcap stocks providing coverage of developed and emerging markets, excluding the U.S. The **FTSE NAREIT Developed Index** is a global market capitalization weighted index composed of listed real estate securities from developed market countries in North America, Europe, and Asia. The **FTSE NAREIT Developed ex US Index** is a global market capitalization weighted index composed of listed real estate securities from developed market countries in North America, Europe, and Asia, excluding the U.S. The **FTSE High Dividend Yield Index** comprises stocks that are characterized by higher than average dividend yields, and is based on the US component of the FTSE Global Equity Index Series (GEIS). The **FTSE NAREIT All REITs Index** is a market capitalization-weighted index that is designed to measure the performance of all tax-qualified Real Estate Investment Trusts (REITs) that are listed on the New York Stock Exchange, the American Stock Exchange, or the NASDAQ National Market List. The **FTSE NAREIT Equity REIT Index** is an unmanaged index reflecting performance of the U.S. real estate investment trust market.

The **Consumer Price Level Index (CPI)** is an inflationary indicator that measures the change in the cost of a fixed basket of products and services, including housing, electricity, food, and transportation. The CPI is published monthly. Please Note: the performance of this index lags by 1 month. The **Credit Suisse Leveraged Loan Index** is a market value-weighted index designed to represent the investable universe of the U.S. dollar-denominated leveraged loan market. The **Dow Jones (DJ) US Commodity Index** measures the performance of the commodities market. It consists of exchange-traded futures contracts on physical commodities that are weighted to account for the economic significance and market liquidity of each commodity. The **DJ U.S. Total Stock Market Index** is an all-inclusive measure composed of all U.S. equity securities with readily available prices. The **DJ U.S. Completion Total Stock Market Index** is a subset of the DJ U.S. Total Stock Market Index that excludes components of the S&P 500. The **Dow Jones U.S. Select Real Estate Securities Index** is a float-adjusted market capitalization-weighted index of publicly traded real estate securities such as real estate investment trusts (REITs) and real estate operating companies (REOCs).

The **Dow Jones Target Date (Today, 2010, 2015, 2020, 2025, 2030, 2035, 2040, 2045, 2050, 2055) Indices** were created to benchmark portfolios of stocks, bonds and cash. Each index is made up of composite indices representing these three asset classes. The asset class indices are weighted differently within each target date index depending on the time horizon. Each month, the allocations among the asset class indices are rebalanced to reflect an increasingly conservative asset mix.

The **Morningstar Lifetime Allocation Index** series consists of 13 Indices (Income, 2000, 20005, 2010, 2015, 2020, 2025, 2030, 2035, 2040, 2045, 2050, 2055) available in three risk profiles: aggressive, moderate, and conservative. The indexes are built on asset allocation methodologies developed by Ibbotson Associates, a leader in asset allocation research and a Morningstar company since 2006. The Indexes provide pure asset-class exposure to global equities, global fixed-income, commodities, and Treasury Inflation-Protected Securities (TIPS) by using existing Morningstar indexes as allocation building blocks. The portfolio allocations are held in proportions appropriate to the U.S. investor's number of years until retirement. The Conservative, Moderate and Aggressive risk profiles are for investors who are comfortable with below-average exposure to equity market volatility, investors who are comfortable with average exposure to equity market volatility and well-funded investors who are comfortable with above average exposure to equity market volatility, respectively.

These reports are not to be construed as an offer or the solicitation of an offer to buy or sell securities mentioned herein. Information contained in these reports are based on sources and data believed reliable. The information used to construct these reports was received via a variety of sources. These reports are for informational purposes only and are not intended to satisfy any compliance or regulatory conditions set forth by any governing body of the securities industry. These reports do not take the place of any brokerage statements, any fund company statements, or tax forms. You are urged to compare this report with the statement you receive from your custodian covering the same period. Differences in positions may occur due to reporting dates used and whether certain assets are not maintained by your custodian. There may also be differences in the investment values shown due to the use of differing valuation sources and methods. Past performance is no guarantee of future results. Investing involves risk, including risk of loss. Diversification does not ensure a profit or guarantee against loss. This evaluation report has been prepared for the exclusive use of a specific client and no part of it may be used by any investment manager without permission of that client and Clearstead.

Evaluation of investment managers covers both quantitative and qualitative aspects. In addition to the investment performance evaluation, we monitor ownership structure, track key employee information, and hold regular meetings with each investment management organization employed by our clients. The data presented in this report has been calculated on a time-weighted rate of return basis. All returns are net of investment advisory fees, but gross of Clearstead advisory fees and custodian fees, unless otherwise labeled. The deduction of Clearstead advisory fees and custodian fees would have the effect of decreasing the indicated investment performance. The performance data shown represent past performance. Past performance is not indicative of future results. Current performance data may be lower or higher than the performance data presented. Returns for periods longer than one year are annualized. Each number is independently rounded. A current copy of Hartland & Co.'s ADV-Part 2 is available to all clients upon request.



### Disclosure of Relationships with University-Affiliated Financial Institutions

(Updated February 6, 2025)

In accordance with Youngstown State University policy 3356-3-10, *Investment of the University's Non-Endowment and Endowment Funds*, members of the Board of Trustees are required to disclose relationships, beyond the ordinary customer relationships, with the financial institutions involved with the University's non-endowment and endowment funds. Please disclose the nature of any relationships with the institutions listed below.

The financial institutions involved with the Non-Endowment Funds are as follows:

- Apollo \_\_\_\_\_
- Breckenridge \_\_\_\_\_
- Clearstead \_\_\_\_\_
- Cliffwater \_\_\_\_\_
- Dodge & Cox \_\_\_\_\_
- Evanston Capital \_\_\_\_\_
- Federated \_\_\_\_\_
- Fidelity \_\_\_\_\_
- H.I.G. Capital \_\_\_\_\_
- J.P. Morgan \_\_\_\_\_
- Loomis Sayles \_\_\_\_\_
- Lord Abbett \_\_\_\_\_
- PNC \_\_\_\_\_
- Vanguard \_\_\_\_\_
- Victory \_\_\_\_\_
- William Blair \_\_\_\_\_
- I have no business or familial relationship with the above institutions that require disclosure

The Financial Institutions involved with the Endowment Funds are as follows:

- Clearstead \_\_\_\_\_
- Huntington National Bank \_\_\_\_\_
- PNC \_\_\_\_\_
- Vanguard \_\_\_\_\_
- I have no business or familial relationship with the above institutions that require disclosure

Print Name: \_\_\_\_\_

SIGNED: \_\_\_\_\_ DATED: \_\_\_\_\_

*For audit and compliance purposes, please email completed form to [npmcnally@ysu.edu](mailto:npmcnally@ysu.edu), or send to YSU, Tod Hall 223, Office of the Vice President for Finance & Business Operations, by June 30, 2025.*

**Youngstown State University**  
**Quarterly Internal Audit Plan Update**  
**FY25 Q2 October 1, 2024 - December 31, 2024**

Projects									
Project Area	Risk Category	Risk Level*	Status**	Actual Q1 Hours	Actual Q2 Hours	Actual Q3 Hours	Actual Q4 Hours	Actual YTD Hours	Audit Plan Budgeted Hours
<b>Current Year Audits:</b>									
Facilities & Building Access	Financial, Operational, Compliance	High	Completed	15	1			16	0
Inventory Control Audit	Financial, Operational, Compliance	High	Completed	176	29			205	75
International Programs Office	Operational & Compliance	High	In Progress	-	100	-	-	100	250
Athletics Ticket Office	Operational, Financial, & Compliance	High	Planned	-	-	-	-	-	250
Conflict of Interest	Operational & Compliance	High	Planned	-	-	-	-	-	250
KSU-Divisional IT Application Risk Assessment: Student Affairs & Institutional Effectiveness	IT & Compliance	High	In Progress	-	5	-	-	5	25
<b>Consulting &amp; Advisory</b>									
Consulting & Advisory/ERM	Various	Moderate	Ongoing	-	-	-	-	-	100
<b>Continuous Auditing Analytics</b>									
Payroll	Financial, Operational, Compliance	Moderate	Ongoing	20	49	-	-	69	120
Accounts Payable	Financial, Operational, Compliance	Moderate	Ongoing	40	73	-	-	113	120
<b>EthicsPoint Hotline Monitoring</b>	Various	High	Ongoing	3	-	-	-	3	70
<b>Follow-up on Open Audit Recommendations</b>	Various	Various	Ongoing	58	11	-	-	69	70

**Total Project Hours**    312    268    -    -    580    1,330

Non-Project Hours						
Category	Actual Q1 Hours	Actual Q2 Hours	Actual Q3 Hours	Actual Q4 Hours	Actual YTD Hours	Audit Plan Budgeted Hours
<b>Professional Development</b>	5	27			32	50
<b>Administrative:</b>	<b>211</b>	<b>233</b>			<b>444</b>	<b>700</b>

**Total Administrative Hours**    216    260    -    -    476    750

**Total Hours**    528    528    -    -    1,056    2,080

**\*Risk Level**  
 Assessment of potential impact of risks and likelihood of risk events occurring; rating drives Internal Audit plan priorities:  
**High** - significant risk area, high priority for Internal Audit coverage  
**Medium** - moderate risk area, moderate priority for Internal Audit coverage  
**Low** - less significant risk area, low priority for Internal Audit coverage

**\*\*Status Definitions**  
**Planned** - as per audit plan, schedule to start in current FY  
**In Process** - in progress at quarter end  
**Complete** - audit procedures concluded and results communicated  
**Deferred** - moved from current FY plan per updated risk assessment



**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2023-01	Student Bill Presentation	Evaluate developing script to combine charges for more simplified, condensed presentation on student bills.	Discussions have occurred and meetings are scheduled with Kent State to explore opportunities for YSU to utilize and modify existing script used by Kent State. An IT work order has been established to move forward to simplify and condense the presentation of the student bills. The implementation depends on IT resources and the complexity of the script needed.	The Bursar office and IT staff have made changes to the bill presentation but are still in the testing phase. Implementation is still on track for year end.	The Bursar office and IT staff have made changes to the bill presentation but are still in the testing phase. Implementation is expected by Fall 2025
Dated Issued	8/10/2023	Student Billing, Collections, & Accounts Receivable Audit				
Risk Category	Operational					
Risk Level	Medium					
Division	Finance/Business Operations					
Deadline	6/30/2024					
New Deadline	8/31/2025					
Current Status	Deadline Revised					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	KSU 2023-1057	Job Change Report & Annual Review for Banner Access	An annual, centrally facilitated review should be completed by all Data Custodians to confirm access is appropriate.	A new process will be implemented to update Banner access and include a new change job report when a person changes jobs. This process will provide Data Custodians with visibility to identify any inappropriate Banner access. Work will begin in April 2024 and will work towards a defined approach by 6/30/24.	The HR Job Transfer project will start at the end of August (it was delayed in part due to EGCC and maternity leave) and it is expected to be complete Dec -January.	The HR Job Transfer project will start at the end of August and it is expected to be complete by June 2025.
Dated Issued	11/17/2023	Banner Access Audit				
Risk Category	IT					
Risk Level	High					
Division	Division of IT, Application Services					
Deadline	6/30/2024					
New Deadline	6/30/2025					
Current Status	Deadline Revised					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	KSU 2023-1057	SOP for Annual Review of YSU Banner Access	A standard operating procedure for Banner user access review should be created and used by Data Custodians.	An access review process will be identified and formalized over time, as YSU is in the process of forming a new Data Governance/Data Integrity team. Data owners will be identified, standards enforced, and policies will be reviewed by 12/31/24.	An access review process will be identified and formalized over time, as YSU is in the process of forming a new Data Governance/Data Integrity team. Data owners will be identified, standards enforced, and policies will be reviewed by 12/31/24.	IT intends to work on yearly Banner access audits and operation procedures beginning FY26.
Dated Issued	11/17/2023	Banner Access Audit				
Risk Category	IT					
Risk Level	High					
Division	Division of IT, Application Services					
Deadline	12/31/2024					
New Deadline	10/31/2025					
Current Status	Deadline Revised					

**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	KSU 2023-1057	Access for Terminated Users in YSU Banner  Banner Access Audit	Banner access to sensitive transactions should be removed from a user’s account when an employee is terminated to prevent fraudulent activity.	Mitigations are in place at multiple levels to ensure no terminated employee gains access after termination. Removing user’s security classes is another layer of security and YSU will work towards developing a new process where this can be accomplished in an automated way. This approach is to be identified by 12/31/24 by the Director of Infrastructure Services.	Mitigations are in place at multiple levels to ensure no terminated employee gains access after termination. Removing user’s security classes is another layer of security and YSU will work towards developing a new process where this can be accomplished in an automated way.	Mitigations are in place at multiple levels to ensure no terminated employee gains access after termination.
Dated Issued	11/17/2023					
Risk Category	IT					
Risk Level	Medium					
Division	Division of IT, Infrastructure Services					
Deadline	12/31/2024					
New Deadline						
Current Status	CLOSED					

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	KSU 2024-1057	Software & hardware is appropriately safeguarded  ITGC Audit-WEI	Testing of a sample of users showed inappropriate computer safeguards on devices using the application. All devices of users with elevated access should be YSU managed devices and have appropriate computer safeguards. YSU firewall is configured to protect university resources.	Agree. Information Security Engineer will implement appropriate computer safeguards for all YSU managed devices by 12/31/24.	Agree. Information Security Engineer will implement appropriate computer safeguards for all YSU managed devices by 12/31/24.	All users with elevated access to the application now have both endpoint protection and device encryption enabled on their YSU managed device.
Dated Issued	2/26/2024					
Risk Category	IT					
Risk Level	High					
Division	Academic Affairs					
Deadline	12/31/2024					
New Deadline						
Current Status	CLOSED					

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	KSU 2024-1057	Business Continuity Plan  ITGC Audit-WEI	Data backups and data center controls are provided by the vendor. Business Continuity Plan was not completed. Recommend completing a Business Continuity Plan to document steps required to continue business processes in the event of a system failure.	Agree. The application administrator will complete a Business Continuity Plan to ensure proper procedures are in place should a system failure occur by 12/31/24.	Agree. The application administrator will complete a Business Continuity Plan to ensure proper procedures are in place should a system failure occur by 12/31/24.	The application administrator completed a Business Continuity Plan.
Dated Issued	2/26/2024					
Risk Category	IT					
Risk Level	Medium					
Division	Academic Affairs					
Deadline	12/31/2024					
New Deadline						
Current Status	CLOSED					

**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	KSU 2024-1057	Change Management Controls  ITGC Audit-WEI	Upgrades to the application are performed by the vendor. Communication of changes to application users should be implemented. Standard Operation Procedures (SOP) should be developed.	Agree. The application administrator will complete Standard Operating Procedures for the application and will ensure there is proper communication regarding application updates/changes by 12/31/24.	Agree. The application administrator will complete Standard Operating Procedures for the application and will ensure there is proper communication regarding application updates/changes by 12/31/24.	The application administrator completed Standard Operating Procedures for the application and ensured there is proper communication.
Dated Issued	2/26/2024					
Risk Category	IT					
Risk Level	Medium					
Division	Academic Affairs					
Deadline	12/31/2024					
New Deadline						
Current Status	CLOSED					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	Documented Procedures  Workforce Education & Innovation Audit	Develop and implement procedures throughout the department to ensure the transfer of knowledge during staff transitions.	<b>STEM-WEI:</b> Sharepoint folders have been created that contain procedures that pertain to the operations/programs offered in the ETC and ITWA.	Sharepoint folders have been created that contain procedures that pertain to the operations/programs offered in the ETC and ITWA.	Sharepoint folders have been created that contain procedures that pertain to the operations/programs offered in the ETC and ITWA.
Dated Issued	4/17/2024					
Risk Category	Operational					
Risk Level	High					
Division	Academic Affairs			<b>TILT:</b> Development and implementation of written procedures for TILT and timely expense processing is currently underway and will be completed on a monthly basis.	The Tressel Institute has developed written and implemented documented procedures. <b>CLOSED</b>	<b>CLOSED</b>
Deadline	5/1/2024					
New Deadline	6/30/2025					
Current Status	Deadline Revised					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	Reconciliations  Workforce Education & Innovation Audit	Develop and implement a monthly reconciliation process to ensure all revenue is collected and expenditures correspond with Banner.	<b>STEM-WEI:</b> The PI of each grant is the financial manager for their grant. Each financial manager will reconcile their respective grants monthly.	The PI of each grant is the financial manager for their grant. Each financial manager will reconcile their respective grants monthly.	The PI of each grant is the financial manager for their grant. Each financial manager will reconcile their respective grants monthly.
Dated Issued	4/17/2024					
Risk Category	Financial, Operational					
Risk Level	High					
Division	Academic Affairs			<b>TILT:</b> Yes, will implement for expenditures and revenue. Current source of revenue is from gifts made through the YSU Foundation for endowed accounts.	TILT developed and implemented a monthly reconciliation process to ensure all revenue is collected and expenditures correspond with Banner.	TILT developed and implemented a monthly reconciliation process to ensure all revenue is collected and expenditures correspond with Banner. <b>CLOSED</b>
Deadline	5/1/2024					
New Deadline						
Current Status	Pending Validation					

**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Billing Process	Enhance controls over the billing processes to ensure registration fee revenues are billed accurately and timely.	<b>STEM-WEI:</b> Before workforce students take a class, a SOW, MSA, and quote are provided to the company and signed. Personnel at the ETC have always prepared paperwork for non-student billing for the workforce classes taught in the ETC in a timely manner.	Before workforce students take a class, a SOW, MSA, and quote are provided to the company and signed. Personnel at the ETC have always prepared paperwork for non-student billing for the workforce classes taught in the ETC in a timely manner.	WEI billings are processed timely and accurately with appropriate controls.
Dated Issued	4/17/2024					
Risk Category	Financial, Operational					
Risk Level	High					
Division	Academic Affairs					
Deadline	2/1/2024					
New Deadline						
Current Status	CLOSED					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	BOT Financial Reporting	Develop a standard financial report that can effectively communicate crucial financial information.	<b>STEM-WEI:</b> As WEI is part of STEM College, there will be no more direct reporting to the BOT, rather a monthly reporting to the Provost, by the Dean of the STEM College.	WEI will have a quarterly presentation to BOT subcommittee and the Board of Trustees.	WEI will have a quarterly presentation to BOT subcommittee and the Board of Trustees.
Dated Issued	4/17/2024					
Risk Category	Financial, Operational					
Risk Level	High					
Division	Academic Affairs	Workforce Education & Innovation Audit		<b>TILT:</b> Assigned the development of a standard financial report to provide transparency for the financial activities of the TILT.	TILT has developed a standard financial report that will provide ongoing transparency for activities associated with TILT.	TILT has developed a standard financial report that are can be used to demonstrate the financial activities of TILT with transparency. <b>CLOSED</b>
Deadline	5/1/2024					
New Deadline	6/30/2025					
Current Status	Deadline Revised					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	BOT Programmatic Reporting	Continue develop and document the new process to verify KPI's and maintain documented support to verify that the programmatic report to the BOT is accurate.	<b>STEM-WEI:</b> As WEI is part of the STEM College, there will be no more direct reporting to the Board of Trustees, rather, a monthly reporting to the Provost by the Dean of the STEM College.	WEI will have a quarterly presentation to BOT subcommittee and the Board of Trustees.	WEI will have a quarterly presentation to BOT subcommittee and the Board of Trustees.
Dated Issued	4/17/2024					
Risk Category	Operational					
Risk Level	High					
Division	Academic Affairs	Workforce Education & Innovation Audit		<b>TILT:</b> Where applicable, will implement number of users (YSU Students) completing badges and provide reports.	At the conclusion of each semester, TILT will provide the number of YSU students completing TILT badges.	TILT was able to provide the number of students who completed TILT badges, it will be reported to TILT Advisory Board. <b>CLOSED</b>
Deadline	5/1/2024					
New Deadline	6/30/2025					
Current Status	Deadline Revised					

**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	Programmatic Reporting for Grants  Workforce Education & Innovation Audit	Develop and implement a process, to document programmatic data and to maintain the sources of the data.	<b>STEM-WEI:</b> Every PI is responsible for timely programmatic reporting. The PI is notified by the funding agency on what needs to be reported and by when and what format it needs to be in. The PI is also responsible for records management following the BOT policy 3356-9-09.	Every PI is responsible for timely programmatic reporting. The PI is notified by the funding agency on what needs to be reported and by when and what format it needs to be in. The PI is also responsible for records management following the BOT policy 3356-9-09.	Every PI is responsible for timely programmatic reporting. The PI is notified by the funding agency on what needs to be reported and by when and what format it needs to be in. The PI is also responsible for records management following the BOT policy 3356-9-09.
Dated Issued	4/17/2024					
Risk Category	Operational					
Risk Level	High					
Division	Academic Affairs					
Deadline	1/24/2024					
New Deadline						
Current Status	Pending Validation					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	Remote Work  Workforce Education & Innovation Audit	Remote work forms were filled out before the reorganization of DWEI. Remote work arrangements should be reviewed by each employee's current supervisor and updated.	<b>STEM-WEI:</b> Dean of the STEM College reviewed all Remote Work approvals that were on file with HR and discussed it with the involved supervisors.	Dean of the STEM College reviewed all Remote Work approvals that were on file with HR and discussed it with the involved supervisors.	Dean of the STEM College reviewed all Remote Work approvals that were on file with HR and discussed it with the involved supervisors.
Dated Issued	4/17/2024					
Risk Category	Operational					
Risk Level	Medium					
Division	Academic Affairs			<b>TILT:</b> Remote work has been discussed with each employee with approved forms.	No TILT employees are on remote work schedule. The staff decided that remote work is not advantageous for TILT's current stage of development.	<b>CLOSED</b>
Deadline	1/24/2024					
New Deadline						
Current Status	Pending Validation					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	Room Reservation System  Workforce Education & Innovation Audit	Utilize the room reservation system for Workforce Education and Innovation events and classes.	<b>STEM-WEI:</b> Two employees of the ETC are trained in the banner system and consistently schedule classes/events taking place at the ETC.	Two employees have been trained and are using the room reservation system.	Employees have been trained and are utilizing the room reservation system.
Dated Issued	4/17/2024					
Risk Category	Operational					
Risk Level	Medium					
Division	Academic Affairs			<b>TILT:</b> Staff responsible for utilizing the room reservation system are using the system already or are currently securing permission.	TILT is an online program and doesn't have the need to schedule classrooms.	<b>CLOSED</b>
Deadline	5/1/2024					
New Deadline						
Current Status	CLOSED					

**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	Expense Monitoring	Ensure expenses are processed in accordance with university guidelines. Ensure all Financial Managers have completed training for purchasing cards, travel cards, and eCube.	<b>STEM-WEI:</b> All PI's are now also financial managers. All financial managers have to adhere to the YSU procurement policies and are subject to scheduled training sessions related to purchasing cards, travel cards and eCube. All these are mandatory trainings.	All PI's are now also financial managers. All financial managers have to adhere to the YSU procurement policies and are subject to scheduled training sessions related to purchasing cards, travel cards and eCube. All these are mandatory trainings.	Financial Managers in WEI have received training for purchasing cards, travel cards, and eCube.
Dated Issued	4/17/2024					
Risk Category	Financial, Operational					
Risk Level	Low	Workforce Education & Innovation Audit				
Division	Academic Affairs					
Deadline	1/24/2024					
New Deadline						
Current Status	CLOSED					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-01	Policy Awareness	Employees of the WEI are encouraged to take the on-boarding training to become more aware of important policies on campus.	<b>STEM-WEI:</b> Dean Steelant contacted HR to follow-up on offering (or make available) the onboarding training for the remaining WEI personnel.	WEI is working with Human Resources to make sure that all WEI employees have completed campus policy training.	WEI employees have completed policy awareness trainings.
Dated Issued	4/17/2024					
Risk Category	Operational	Workforce Education & Innovation Audit		<b>TILT:</b> Tressel Institute for Leadership & Teamwork staff are current with training associated with campus policies	The Tressel Institute for Leadership & Teamwork staff remain current with training associated with campus policies as reported in March 2024.	<b>CLOSED</b>
Risk Level	Low					
Division	Academic Affairs					
Deadline	3/25/2024					
New Deadline						
Current Status	CLOSED					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Key Control Policy	Re-assess current Key Control Policy. Develop and communicate procedures and guidelines for the university community.	We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by December 2025.		We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by December 2025.
Dated Issued	8/12/2024					
Risk Category	Operational	Facilities & Building Access				
Risk Level	High					
Division	Finance/Business Operations					
Deadline	12/31/2025					
New Deadline						
Current Status	On Schedule					

**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Documented Procedures  Facilities & Building Access	Develop and implement procedures throughout the department.	This recommendation is being considered and will be implemented in conjunction with enhancement of the key/lock database and web based processing.		This recommendation is being considered and will be implemented in conjunction with enhancement of the key/lock database and web based processing.
Dated Issued	8/12/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	12/31/2025					
New Deadline						
Current Status	On Schedule					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Key Issuance & Tracking  Facilities & Building Access	Enhance procedures to ensure effective controls relating to key issuance and tracking.	We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by the December 2025. Also, have reached out to our lock/key system vendor to arrange for additional training.		We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by the December 2025. Also, have reached out to our lock/key system vendor to arrange for additional training.
Dated Issued	8/12/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	12/31/2025					
New Deadline						
Current Status	On Schedule					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Key Returns & Transfers  Facilities & Building Access	Develop and implement procedures related to key returns and transfers.	We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by December 2025.		We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by December 2025.
Dated Issued	8/12/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	12/31/2025					
New Deadline						
Current Status	On Schedule					

**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Lost & Stolen Keys  Facilities & Building Access	Enhance the process and controls for tracking and reissuing keys that have been lost or stolen.	We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by December 2025.		We are exploring development of a web-based solution for the lock shop; planning element expected to be completed by year end with implementation by December 2025.
Dated Issued	8/12/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	12/31/2025					
New Deadline						
Current Status	On Schedule					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Keypad Access  Facilities & Building Access	Develop and implement controls to limit unauthorized individuals from gaining access to these areas. Consider enhancements to monitoring and tracking of access to areas with keypads.	The keypads currently being installed do have the ability to log and track individual access. One keycode is being programmed into each lock as a matter of convenience and practicality.		The keypads currently being installed do have the ability to log and track individual access. One keycode is being programmed into each lock as a matter of convenience and practicality.
Dated Issued	8/12/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	12/31/2025					
New Deadline						
Current Status	On Schedule					
<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-02	Succession Planning  Facilities & Building Access	Develop a succession plan to ensure the transfer of experience-based knowledge.	We do anticipate that our only locksmith will likely retire in the near future. We are in the process of hiring another locksmith to fill this void.	We do anticipate that our only locksmith will likely retire in the near future. We are in the process of hiring another locksmith to fill this void.	Locksmith job has been posted since November with no viable candidates. We are reevaluating our plan and looking into training a locksmith from within. This would involve a combination of inhouse training along with formal off site training.
Dated Issued	8/12/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	3/30/2025					
New Deadline	6/30/2025					
Current Status	Deadline Revised					



**Audit Recommendations Status- FY2025 Q2**

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-03	Issuing Tags  Inventory Control Audit	Issue tags for all capital equipment that is new and for capital equipment that should have been issued a tag at the time of purchase.	Capital equipment accounts are analyzed monthly for new equipment. Once identified, the Controller’s Office can start the process of getting tag imprinted with a unique five-digit ID number assigned to the asset. The Senior Financial Analyst will review each inventory listing for each department and assign asset tags to all items that are currently untagged.		Capital equipment accounts are analyzed monthly for new equipment. Once identified, the Controller’s Office can start the process of getting tag imprinted with a unique five-digit ID number assigned to the asset. The Senior Financial Analyst reviews each inventory listing for departments and assign asset tags to all items that are currently untagged.
Dated Issued	11/13/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	6/30/2026					
New Deadline						
Current Status	On Schedule					

<b>Audit</b>	<b>Info</b>	<b>Recommendation Name</b>	<b>Summary of Recommendation</b>	<b>Summary of Original Response</b>	<b>Prior Status Comment</b>	<b>Current Status Comment</b>
Audit #	2024-03	Policy and Procedure Awareness  Inventory Control Audit	Communicate policies and procedures for capital equipment to the university community. Educate employees on the policies and procedures to ensure compliance.	In addition to meeting with each department to explain the new tagging process and answering any questions, the Controller’s Office will be implementing a new procedure to ensure policy awareness and compliance.	In addition to meeting with each department to explain the new tagging process and answering any questions, the Controller’s Office will be implementing a new procedure to ensure policy awareness and compliance.	A new procedure was implemented to send out an email communication reminding departments to make changes to inventory as they occur and provide inventory control procedures and resources.
Dated Issued	11/13/2024					
Risk Category	Operational					
Risk Level	High					
Division	Finance/Business Operations					
Deadline	12/31/2024					
New Deadline						
Current Status	CLOSED					

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# Youngstown State University

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**Mahoning County**

**Agreed-upon Procedures Report**

**June 30, 2024**

Independent Accountant's Report on Applying Agreed-upon Procedures	1-12
Intercollegiate Athletics Program Statement of Revenue and Expenses	13
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## **Independent Accountant’s Report on Applying Agreed-upon Procedures**

To Bill Johnson, President  
Youngstown State University

We have performed the procedures enumerated below on Youngstown State University’s (the “Institution”) Intercollegiate Athletics Program Statement of Revenue and Expenses (the “Statement”) under National Collegiate Athletic Association (NCAA) Bylaw 20.2.4.17 for the year ended June 30, 2024. The Institution’s management is responsible for the Institution’s Intercollegiate Athletics Program Statement of Revenue and Expenses under NCAA Bylaw 20.2.4.17 for Division I.

The Institution has agreed to the procedures performed and acknowledged that they are appropriate to meet the intended purpose of performing testing on certain intercollegiate athletics activity. Additionally, the required agreed-upon procedures are prescribed by the NCAA annually through published instructions, which is deemed as acknowledgement that the procedures performed are appropriate for their purposes. The procedures below are specified in the NCAA’s 2024 Agreed-Upon Procedures instructions. No other parties have agreed to and acknowledged the appropriateness of the procedures. This report may not be suitable for any other purpose. The procedures performed may not address all items of interest to a user of this report and may not meet the needs of all users of this report; as such, users are responsible for determining whether the procedures performed are appropriate for their purposes. We make no representation regarding the sufficiency of these procedures, either for the purpose intended or for any other purpose.

An agreed-upon procedures engagement involves performing specific procedures that the engaging party has agreed to and acknowledged to be appropriate for the intended purpose of the engagement and reporting on findings based on the procedures performed. As agreed to by the Institution, for purposes of performing these procedures, exceptions are reported in accordance with the NCAA’s 2024 Agreed-Upon Procedures instructions.

### **Agreed-upon Procedures Related to the Intercollegiate Athletics Program Statement of Revenue and Expenses**

The procedures that we performed and our results are as follows:

#### **Internal Control Structure**

A. Related to the Institution’s internal control structure:

- 1) We met with the vice president for finance and business operations to identify areas of significant interest and specific agreed-upon procedures related to both internal controls and other specified areas. The discussion did not identify any areas of significant interest or any other agreed-upon procedures. The discussion concluded on the number of samples for each step included in this report.

To Bill Johnson, President  
 Youngstown State University

- 2) We met with the executive director of intercollegiate athletics and inquired about the general control environment over intercollegiate athletic finances, the level of control consciousness in the Institution, the competence of personnel, and the protection of records and equipment. The discussion did not identify any weaknesses in controls, and the general control environment is thought to be strong, with competent and consistent personnel year-over-year.
- 3) We obtained the audited financial statements for the year ended June 30, 2024 and any additional reports regarding internal controls, if the Institution was audited independent of these agreed-upon procedures, and any corrective action taken in response to comments concerning the internal control structure.
- 4) We obtained any documentation of the accounting systems and procedures unique to the intercollegiate athletics department.
- 5) Cash disbursements and athletic employee payroll are addressed in connection with the audit of the Institution's financial statements. The following control environment and accounting systems are (a) unique to intercollegiate athletics and (b) have not been addressed in connection with the audit of the Institution's financial statements. We performed the following procedures:
  - i. We selected one game and tested the ticket collection receipting process by comparing the total receipts for the game to the reconciliation and documentation of the related cash deposit amount with the bank.

**Result:** We noted no exceptions. We selected one football game during the year and agreed the total receipts for the event on game day to deposit slips of the related cash deposit amount. Since there were minimal gate sales for the game, we selected four additional days of cash deposits made by the Institution's box office and tied general ledger activity to bank statements in order to verify the cash deposit process.

The ticket cash receipt amounts for the transactions were as follows:

<u>Event Date</u>	<u>Sporting Event</u>	<u>Ticket Sales Amount</u>	<u>Deposit Amount</u>	<u>Deposit Date</u>
10/7/2023	Football vs. Southern Illinois University	\$2,302	\$ 2,302	10/7/2023

<u>Date of Revenue</u>	<u>Amount</u>	<u>Deposit Amount</u>	<u>Deposit Date</u>
10/3/2023	\$ 10	\$ 10	10/4/2023
10/4/2023	120	120	10/5/2023
10/5/2023	60	60	10/9/2023
10/6/2023	570	570	10/9/2023

## NCAA Reporting

B. **Procedure:** We obtained the information submitted to the NCAA, including the financial data detailing operating revenues, expenses, and capital related to the Institution's intercollegiate athletics program that was submitted to the NCAA, and agreed the amounts to the Statement included in the agreed-upon procedures for the reporting period.

**Result:** We noted no discrepancies.

C. **Procedure for Grants-in-Aid:** We agreed the sports sponsored reported in the NCAA Membership Financial Reporting System to the Calculation of Revenue Distribution Equivalencies Report (CRDE) from Compliance Assistant (CA) or equivalent supporting equivalency calculations from the Institution. The NCAA Membership Financial Reporting System populates the sports from the NCAA Sports Sponsorship and Demographics Form as they are reported by the Institution between May and August. We compared current year Grants-in-Aid revenue distribution equivalencies to prior year reported equivalencies per the Membership Financial Report submission. We inquired and documented an explanation for any variance greater than +/- 4% in the results.

**Result:** We noted the NCAA Membership Financial Reporting System information provided by management was in draft form, and management represented there would be no changes to the final submission. With the draft provided by management, we noted the following variance greater than +/- 4% and noted the explanation provided by Michael Hackstedde, the associate controller general accounting and director of payroll operations, below:

Grants-in-Aid	2022-2023	2023-2024	%	Explanation of Variance per Management
	Total	Total	Change	
Football	64.25	67.86	5.62%	Increase in roster size
Men's Golf	4.89	4.23	-13.50%	Decrease in roster size
Men's Swimming and Diving	9.55	7.88	-17.49%	Decrease in roster size
Men's Track, Indoor	-	0.93	100.00%	Aid for these athletes has traditionally been included with outdoor track.
Men's Track, Outdoor	14.51	13.79	-4.96%	Aid for MTI athletes has traditionally been included with outdoor track.
Women's Basketball	13.87	12.93	-6.78%	Decrease in roster size
Women's Bowling	5.09	5.47	7.47%	Increase in roster size
Women's Golf	5.57	5.13	-7.90%	Decrease in roster size
Women's Lacrosse	8.27	6.01	-27.33%	Decrease in roster size
Women's Softball	9.87	11.37	15.20%	Increase in roster size
Women's Swimming and Diving	14.23	12.37	-13.07%	Increase in roster size; however, more athletes received less than 0.5 equivalent awards in FY24 than FY23
Women's Track, Indoor	0.67	0.26	-61.19%	Aid for these athletes has traditionally been included with outdoor track.
Women's Track, Outdoor	17.54	19.11	8.95%	Aid for WTI athletes has traditionally been included with outdoor track. Increase in roster size

D. **Procedure for Sports Sponsorship:** We obtained the Institution's Sports Sponsorship and Demographics Form report for the reporting year. We validated that the countable sports reported by the Institution meet the minimum requirements set forth in Bylaw 20.10.6.3 related to the number of contests and the number of participants in each contest that is counted toward meeting the minimum contest requirement. We compared current year number of sports sponsored to prior year reported total per the Membership Financial Report submission. We inquired and documented an explanation for any variance in the results.

To Bill Johnson, President  
Youngstown State University

**Result:** We noted the NCAA Membership Financial Reporting System information provided by management was in draft form, and management represented there would be no changes to the final submission. With the draft provided by management, we noted no discrepancies.

- E. **Procedure for Pell Grants:** We agreed the total number of Division I student-athletes who, during the academic year, received a Pell Grant award (e.g., Pell Grant recipients on full athletic aid, Pell Grant recipients on partial athletic aid, and Pell Grant recipients with no athletic aid) and the total dollar amount of these Pell Grants reported in the NCAA Membership Financial Reporting System to a report, generated out of the Institution's financial aid records, of all student-athlete Pell Grants. We compared current year Pell Grants total to prior year reported total per the Membership Financial Report submission. We inquired and documented an explanation for any variance greater than +/- 20 grants in the results.

**Result:** We noted the NCAA Membership Financial Reporting System information provided by management was in draft form, and management represented there would be no changes to the final submission. We noted the total Pell Grants in 2023 and 2024 were 122 and 121, respectively. We agreed the total number of student-athletes who received a Pell Grant award during the academic year and the total dollar amount of the Pell Grants to be reported in the NCAA Membership Financial Reporting System to the reports generated from the Institution's financial aid records and noted no discrepancies.

#### **Notes, Disclosures, and Other Procedures**

- F. **Athletics-Related Capital Assets and Expenditures Procedure:** We obtained the Institution's policies and procedures for acquiring, approving, depreciating, and disposing of intercollegiate athletics-related assets, as described in Note 2. We obtained a schedule of athletics-related capital expenditures made by athletics, the Institution, and affiliated organizations during the period. We agreed the schedule to the Institution's general ledger. We selected a sample of one transaction to validate existence of the transactions and accuracy of recording and recalculated totals.

**Result:** We selected the Pana View Multi-Sport Scoreboard for \$17,028.00 as a sample and agreed it to the purchase order and the invoice dated July 18, 2023. We agreed total institutional property, plant, and equipment to the Institution's audited financial statements. We noted no exceptions.

- G. **Athletics-Related and Total Institutional Debt Procedure:** We obtained repayment schedules for all outstanding intercollegiate athletics-related debt maintained by the Institution during the reporting period. We recalculated annual maturities (consisting of principal and interest) provided in the schedules obtained and agreed the total annual maturities to supporting documentation and the Institution's general ledger, as applicable. The repayment schedule is disclosed in Note 3. We agreed the total outstanding athletics-related debt and total institutional debt to supporting documentation and the Institution's audited financial statements, if available, or the Institution's general ledger.

**Result:** We agreed all outstanding intercollegiate debt to the repayment schedule in Note 3. We agreed total institutional debt to the Institution's audited financial statements. We noted no exceptions.

- H. **Excess Transfers to Institution Procedure:** Management represented that this step is not applicable, as there were no excess transfers to the Institution during the reporting period.

To Bill Johnson, President  
Youngstown State University

- I. **Conference Realignment Expenses Procedure:** Management represented that this step is not applicable, as there were no conference realignment expenses to the Institution during the reporting period.
- J. **Procedure:** Changes in loan, endowment, or plant funds related to intercollegiate athletics shall not be included in the Statement.
- 1) We obtained and disclosed significant additions to restricted funds related to intercollegiate athletics, as well as significant changes to endowment and plant funds. Significant is defined as exceeding 10 percent of total revenue or expenses in the Statement.
  - 2) We obtained and disclosed the value of endowments at the fiscal year-end that are dedicated to the sole support of athletics. We agreed the fair market value of the schedule to supporting documentation, the general ledger and the audited financial statements, if available. We agreed the total fair market value of athletics dedicated endowments and Institutional endowments to supporting documentation, the Institution's general ledger and/or audited financial statements, if available.
  - 3) We obtained and disclosed the value of all pledges at the fiscal year-end that support athletics.
  - 4) We obtained and disclosed the athletics department fiscal year-end fund balance.

**Result:** We noted no significant contributions to disclose in Note 1 and disclosed all other items in Note 4.

#### **Intercollegiate Athletics Program Statement of Revenue and Expenses**

- K. **Procedure:** We obtained the Statement for the reporting period, prepared by management, and agreed all amounts back to the Institution's general ledger.

**Result:** We noted no exceptions.

- L. **Procedure:** We agreed each revenue and expense amount from the Statement to prior year amounts and budget estimates. We compared each revenue and expense account over 10% of total revenue and expenses, respectively, to prior period amounts and budget estimates. We obtained and documented any variations between prior year revenue or expenses and current year budgeted revenue or expenses exceeding 10%.

**Result:** We noted no variances exceeding 10% of total revenue and expenses.

- M. **Procedure:** We performed additional procedures on the following revenue and expense categories more than 4% of revenue or expenses.

**Result:** See procedures below for revenue and expense categories that are 4% or more of revenue or expenses. The following revenue and expense reporting categories were less than 4% of operating revenue or expenditures, and, therefore, as prescribed in the NCAA Agreed-Upon Procedures Guidelines, no procedures were performed for these categories:

#### **Revenues:**

- i. Ticket sales
- ii. Student fees



To Bill Johnson, President  
Youngstown State University

- iii. Direct state or other governmental support
- iv. Transfers to institution
- v. Indirect institutional support
- vi. In-kind
- vii. Compensation and benefits provided by a third party
- viii. Media rights
- ix. Conference distributions and conference distributions of football bowl generated revenue
- x. Program sales, concessions, novelty sales and parking
- xi. Royalties, licensing, advertisements and sponsorships
- xii. Sports camp revenues
- xiii. Athletics restricted endowment and investment income
- xiv. Football bowl revenues
- xv. Other revenues

**Expenses:**

- i. Guarantees
- ii. Coaching salaries, benefits, and bonuses paid by a third party
- iii. Support staff/administrative compensation, benefits, and bonuses paid by a third party
- iv. Severance payments
- v. Recruiting
- vi. Game expenses
- vii. Fund raising, marketing and promotion
- viii. Sports camp expenses
- ix. Spirit groups
- x. Athletic facility debt service, leases and rental fees
- xi. Direct overhead and administrative expenses
- xii. Indirect institutional support
- xiii. Medical expenses and insurance
- xiv. Memberships and dues
- xv. Student-athlete meals
- xvi. Football bowl expenses

**Revenues**

N. **Procedure:** We agreed each revenue category reported in the Statement during the reporting period to supporting schedules provided by the Institution.

**Result:** The supporting schedules provided by the Institution agreed to the Statement without exception.

1) **Direct Institutional Support Procedure:** We agreed a sample of one direct institutional support recorded by the Institution during the reporting period with the institutional supporting budget transfers documentation and other corroborative supporting documentation and recalculated totals.

**Result:** We agreed the direct institutional support recorded for board-approved transfers to the journal entry recorded and the intercollegiate athletics operating budget. We noted no exceptions.

To Bill Johnson, President  
Youngstown State University

- 2) **Guarantees Procedure:** We selected a sample of one contractual agreement pertaining to revenue derived from guaranteed contests during the reporting period and agreed the selection to the Institution's general ledger and/or the Statement. We recalculated totals.

**Result:** We selected a football game and agreed the amount in the OLA General Contract Entry Form to the general ledger. We agreed the general ledger to the Institution's audited financial statements. We noted no exceptions.

- 3) **Contributions Procedure:** We obtained supporting documentation for each contribution of moneys, goods, or services received directly by an intercollegiate athletics program from any affiliated or outside organization, agency or group of individuals that constitutes 10 percent or more of all contributions received for intercollegiate athletics during the reporting periods. We disclosed the source and dollar value of these contributions in the report.

**Result:** No contributions greater than 10 percent of all contributions were identified.

- 4) **NCAA Distributions Procedure:** We agreed the amounts recorded in the revenue and expense reporting to general ledger detail for NCAA distributions and other corroborative supporting documents and recalculated totals.

**Result:** A listing of NCAA distributions was obtained and agreed to both the general ledger and the Statement. Supporting communications from the Horizon League or NCAA were reviewed, supporting each NCAA distribution. We noted no exceptions.

## **Expenses**

- O. **Procedure:** We agreed each expense category reported in the Statement during the reporting period to supporting schedules provided by the Institution.

**Result:** The supporting schedules provided by the Institution agreed to the Statement without exception.

We performed the following procedures for the indicated expense category:

- 1) **Athletic Student Aid Procedures:** We selected a sample of 40 students from the listing of institutional student aid recipients during the reporting period (no less than 10% of the total student-athletes for institutions who have used the NCAA's CA software to prepare athletic aid detail, with a maximum sample size of 40, and no less than 20% of total student-athletes for institutions who have not, with a maximum sample size of 60).
- a. We obtained individual student account detail for each selection and agreed total aid in the Institution's student system to student detail in CA or the institution report that ties directly to the NCAA Membership Financial Reporting System.
  - b. We performed a check of each student selected to ensure that their information was reported accurately in either the CA software or entered directly into the NCAA Membership Financial Reporting System using the following criteria:
    - i. Grants-in-aid is calculated by using the revenue distribution equivalencies by sport and in aggregate. (Athletic grant amount divided by the full grant amount.)
    - ii. Other expenses related to attendance (also known as cost of attendance) should not be included in grants-in-aid revenue distribution equivalencies. Only tuition,

To Bill Johnson, President  
Youngstown State University

fees, room, board, and course-related books are countable for grants-in-aid revenue distribution per Bylaw 20.02.10.

- iii. Full grant amount should be entered as a full year of tuition, not a semester or quarter.
  - iv. Student-athletes are to be counted once, regardless of multiple sport participation, and should not receive a revenue distribution equivalency greater than 1.00.
  - v. Athletics grants are valid for revenue distribution purposes only in sports in which the NCAA conducts championships competition, emerging sports for women and football bowl subdivision football.
  - vi. Grants-in-aid are valid for revenue distribution purposes in NCAA sports that do not meet the minimum contests and participants' requirements of Bylaw 20.10.6.3.
  - vii. Institutions providing grants to student-athletes listed on the CRDE as "Exhausted Eligibility (fifth year)" or "Medical" receive credit in the grants-in-aid component.
  - viii. The athletics aid equivalency cannot exceed maximum equivalency limits. However, the total revenue distribution equivalency can exceed maximum equivalency limits due to exhausted eligibility and medical equivalencies (reference Bylaw 15.5.3.1).
  - ix. If a sport is discontinued and the athletic aid is still being awarded/honored by the Institution, the athlete aid is countable for revenue distribution purposes.
  - x. All equivalency calculations should be rounded to two decimal places.
  - xi. If a selected student received a Pell Grant, ensure that the value of the grant is not included in the calculation of equivalencies or the total dollar amount of student athletic aid expense for the Institution.
  - xii. If a selected student received a Pell Grant, ensure that the student's grant was included in the total number and total value of Pell Grants reported for revenue distribution purposes in the NCAA Membership Financial Reporting System.
- c. We recalculated totals for each sport and overall.

**Result:** The total amount of the countable aid from the squad list tied to the amount shown on the Statement within an insignificant amount. As the Institution utilizes the CA software, we selected 10%, or 40 students. We noted differences during the recalculation of revenue distribution per student for 1 student and a difference in recalculation of contributable aid for 3 students.

For 2 students tested who received a Pell Grant, the total value of Pell Grant received did not agree to the total value of Pell Grant reported for revenue distribution purposes in the NCAA Membership Financial Reporting System.

For 1 student tested who received a Pell Grant, the total value of Pell Grant received was included in the Athletic Grant Amount on the Squad List.

To Bill Johnson, President  
 Youngstown State University

The student accounts tested are summarized below:

Student Tested	Total Contributable Aid Recalculated	Total Contributable Aid Reported	Difference	Revenue Distribution Recalculation	Revenue Distribution Reported	Difference
1	\$ 8,400	8,400	-	0.37	0.37	-
2	18,000	18,000	-	0.80	0.80	-
3	9,000	9,000	-	0.40	0.40	-
4	27,322	27,322	-	1.00	1.00	-
5	27,840	27,840	-	1.00	1.00	-
6	5,000	5,000	-	0.23	0.23	-
7	19,910	19,910	-	0.95	0.95	-
8	13,666	14,566	(900.00)	0.62	0.60	0.02
9	20,848	21,964	(1,115.40)	1.00	1.00	-
10	20,164	20,164	-	0.93	0.93	-
11	15,485	15,135	350.00	0.70	0.70	-
12	10,000	10,000	-	0.47	0.47	-
13	11,500	11,500	-	0.51	0.51	-
14	13,786	13,786	-	0.63	0.63	-
15	16,250	16,250	-	0.75	0.75	-
16	15,000	15,000	-	0.68	0.68	-
17	8,748	8,748	-	0.42	0.42	-
18	11,032	11,032	-	0.51	0.51	-
19	9,211	9,211	-	0.44	0.44	-
20	2,000	2,000	-	0.09	0.09	-
21	21,014	21,014	-	0.93	0.93	-
22	25,052	25,052	-	1.00	1.00	-
23	13,500	13,500	-	0.61	0.61	-
24	11,365	11,365	-	0.51	0.51	-
25	1,500	1,500	-	0.07	0.07	-
26	20,084	20,084	-	0.90	0.90	-
27	3,969	3,969	-	0.18	0.18	-
28	4,804	4,804	-	0.21	0.21	-
29	10,000	10,000	-	0.45	0.45	-
30	6,000	6,000	-	0.27	0.27	-
31	10,000	10,000	-	0.33	0.33	-
32	8,000	8,000	-	0.35	0.35	-
33	15,000	15,000	-	0.67	0.67	-
34	7,000	7,000	-	0.31	0.31	-
35	23,010	23,010	-	0.94	0.94	-
36	6,000	6,000	-	0.26	0.26	-
37	2,000	2,000	-	0.09	0.09	-
38	4,000	4,000	-	0.18	0.18	-
39	22,653	22,653	-	1.00	1.00	-
40	28,430	28,430	-	1.00	1.00	-

- 2) **Coaching Salaries, Benefits, and Bonuses Paid by the Institution and Related Entities Procedure:** We obtained and inspected a listing of coaches employed by the Institution and related entities during the reporting period. We selected a sample of five coaches' contracts that includes football and men's and women's basketball from the above listing. We agreed the financial terms and conditions of each selection to the related coaching salaries, benefits, and bonuses recorded by the Institution and related entities in the Statement during the reporting period. We obtained and inspected payroll summary registers for each selection. We agreed related payroll summary registers to the related coaching salaries, benefits, and bonuses paid by the Institution and related entities expense recorded by the Institution in the Statement during the reporting period and recalculated totals. We agreed the totals recorded to any employment contracts executed for the sample selected.

**Result:** We selected five coaches' contracts that included football, men's basketball, women's basketball, women's lacrosse, and women's golf. We agreed the financial terms and conditions of each to the related coaching salaries, benefits, and bonuses recorded by the Institution on the payroll detail. We agreed payroll detail totals to the Statement and recalculated totals. We noted no exceptions.

- 3) **Support Staff/Administrative Compensation, Benefits and Bonuses Paid by the Institution and Related Entities Procedure:** We selected a sample of one support staff/administrative personnel employed by the Institution and related entities during the reporting period. We obtained and inspected payroll summary registers for the selection. We agreed related payroll summary registers to the related support staff/administrative salaries, benefits and bonuses paid by the Institution and related entities expense recorded by the Institution in the Statement during the reporting period. We also recalculated totals.

**Result:** We selected one support staff/administrative personnel, a graduate assistant. We noted no exceptions.

- 4) **Team Travel Procedure:** We obtained documentation of the Institution's team travel policies. We agreed to existing institutional- and NCAA-related policies. We obtained general ledger detail and agreed to the total expenses reported. We recalculated totals.

**Result:** We noted no exceptions.

- 5) **Sports Equipment, Uniforms and Supplies Procedure:** We obtained general ledger detail and agreed to the total expenses reported. We selected a sample of one transaction and agreed to supporting documentation. We recalculated totals.

**Result:** We selected a transaction paid on December 8, 2023 for football equipment totaling \$64,474.20 and agreed it to the purchase order, the invoice, and the check. We noted no exceptions.

- 6) **Other Operating Expenses Procedure:** We obtained general ledger detail and compared to the total expenses reported. We selected a sample of one transaction to validate existence of transaction and accuracy of recording and recalculated totals.

**Result:** We selected a transaction paid on February 16, 2024 for team hotel and meal totaling \$12,904.55 and agreed it to the invoice, purchase card detail, and the payment of purchase card statement. We noted no exceptions.

**Related to Affiliated and Outside Organizations not Under the Institution's Accounting Control**

P. In preparation for our procedures related to the Institution's affiliated and outside organizations we:

- 1) Obtained from management a list of any affiliated and outside organizations that meet any of the following criteria:
  - i. Booster organizations established by or on behalf of an intercollegiate athletics program
  - ii. Independent or affiliated foundations or other organizations that have as a principal, or one of their principal purposes, the generating or maintaining of grants-in-aid or scholarships funds, gifts, endowments, or other moneys, goods or services to be used primarily by the intercollegiate athletics program.
  - iii. Alumni organizations that have as a principal, or one of their principal purposes, the generating of moneys, goods or services for or on behalf of an intercollegiate athletics program and that contribute moneys, goods or services directly to an intercollegiate athletics program, booster group, or independent or affiliated foundation as previously noted.
- 2) We obtained and inspected audited financial statements of the organization and any additional reports regarding internal controls and any corrective action taken in response to comments concerning the control environment that were provided to us by management.

**Result:** We inquired of management as to whether they had identified any affiliated or outside organizations that meet the above criteria. Management provided a listing and indicated that the Penguin Club was the only outside organization that had expenses for or on behalf of the Institution's intercollegiate athletics program. Additionally, we noted the Penguin Club does not have audited financial statements, and the control environment is the same as that of the Institution. As a result, no additional procedures were performed on the Penguin Club's activity.

Q. **Procedure:** For expenses on or on behalf of intercollegiate athletics programs by affiliated and outside organizations not under the Institution's accounting control, we obtained each organization's financial statements for the reporting period. We agreed the amounts reported to the organization's general ledger with the responsible official of the organization. We performed the following supplemental procedures:

- 1) We disclosed a summary of revenues and expenses for or on behalf of the organization and included it in the report.
- 2) We selected a sample of one operating revenue category reported in the organization's statement during the reporting period to supporting schedules provided by the organization.
- 3) We selected a sample of one operating revenue receipt obtained from the above operating revenue schedule to supporting documentation.
- 4) We agreed each operating expense category reported in the organization's statement during the reporting period to supporting schedules provided by the organization.

To Bill Johnson, President  
Youngstown State University

- 5) We selected a sample of one operating expense obtained from the above operating expense supporting schedules to supporting documentation.
- 6) We directly confirmed cash balances recorded at the end of the reporting period by the organization and agreed to the related year-end bank reconciliations.
- 7) We obtained and inspected minutes of the organization's governing bodies during the reporting period.
- 8) We selected a sample of one financial transaction discussed in the minutes and agreed each selection to the organization's accounting records, as applicable.
- 9) We obtained and inspected documentation of the internal controls in place surrounding revenue and expenses related to the organization.

**Result:** There were no expenses on behalf of intercollegiate athletics programs by affiliated and outside organizations not under the Institution's accounting control. No additional procedures were performed.

We were engaged by the Institution to perform this agreed-upon procedures engagement and conducted our engagement in accordance with attestation standards established by the American Institute of Certified Public Accountants (AICPA). We were not engaged to, and did not, conduct an examination or review engagement, the objective of which would be the expression of an opinion or conclusion, respectively, on the Institution's Intercollegiate Athletics Program Statement of Revenue and Expenses under National Collegiate Athletic Association Bylaw 20.2.4.17. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

We are required to be independent of the Institution and to meet our other ethical responsibilities in accordance with the relevant ethical requirements related to our agreed-upon procedures engagement.

This report is intended solely for the information and use of Youngstown State University and the National Collegiate Athletic Association and is not intended to be and should not be used by anyone other than those specified parties.

*Plante & Moran, PLLC*

Columbus, Ohio  
December 17, 2024

## Intercollegiate Athletics Program Statement of Revenue and Expenses

**Year Ended June 30, 2024**

	Football	Men's Basketball	Women's Basketball	Other Sports	Non-Program Specific	Total
<b>Operating Revenues</b>						
Ticket Sales	\$ 354,455	\$ 283,823	\$ 6,774	-	-	\$ 645,052
Guarantees	800,000	265,000	20,000	-	-	1,085,000
Contributions	532,198	5,110	125	142,060	794,207	1,473,700
In-Kind Contributions	-	-	-	-	-	-
Direct State or Other Government Support	-	-	-	-	-	-
Direct Institutional Support	-	-	-	-	16,750,770	16,750,770
Less- Transfers to Institution	-	-	-	-	(16,040)	(16,040)
Indirect Institutional Support	-	-	-	-	91,591	91,591
NCAA Distributions	-	-	-	-	1,729,789	1,729,789
Conference Distributions	-	-	-	33,920	5,000	38,920
Broadcast Television, Radio & Internet Rights	-	-	-	-	-	-
Program, Parking & Concessions Sales	273,715	937	75	-	-	274,727
Royalties, Licensing, Advertisements & Sponsorships	354,730	182,405	-	-	169,422	706,557
Endowment and Investment Income	-	-	-	-	3,412	3,412
Other	10,400	-	-	7,244	214,271	231,915
<b>Total Operating Revenues</b>	<b>2,325,498</b>	<b>737,275</b>	<b>26,974</b>	<b>183,224</b>	<b>19,742,422</b>	<b>23,015,393</b>
<b>Operating Expenses</b>						
Athletic Student Aid	1,702,438	401,863	378,125	2,957,575	343,368	5,783,369
Guarantees	280,000	31,662	9,500	-	40,738	361,900
Coaching Salaries, Benefits and Bonuses Paid by the Institution	1,619,033	920,097	561,428	1,873,892	-	4,974,450
Support Staff/Administrative Compensation, Benefits and Bonuses Paid by the Institution	-	-	-	-	3,720,753	3,720,753
Recruiting	105,951	78,374	64,653	83,068	-	332,046
Team Travel	539,311	394,439	214,773	1,267,211	-	2,415,734
Sports Equipment, Uniforms and Supplies	370,148	70,867	48,994	424,918	176,317	1,091,244
Game Expenses	184,821	110,578	86,406	138,560	34,292	554,657
Fund Raising, Marketing and Promotion	-	-	-	-	201,806	201,806
Athletic Facilities Debt Service, Leases and Rental Fees	-	-	-	60,165	98,917	159,082
Direct Overhead and Administrative Expenses	-	-	-	-	279,563	279,563
Spirit Groups	-	-	-	-	76,929	76,929
Medical Expenses and Insurance	-	-	-	-	328,016	328,016
Memberships and Dues	-	-	-	9,394	26,335	35,729
Student-Athlete Meals (non-travel)	137,460	-	-	39,783	-	177,243
Other Operating Expenses	133,162	65,249	37,393	133,489	1,827,833	2,197,126
<b>Total Operating Expenses</b>	<b>5,072,324</b>	<b>2,073,129</b>	<b>1,401,272</b>	<b>6,988,055</b>	<b>7,154,867</b>	<b>22,689,647</b>
<b>Excess of Revenues (Under) Over Expenses</b>	<b>\$ (2,746,826)</b>	<b>\$ (1,335,854)</b>	<b>\$ (1,374,298)</b>	<b>\$ (6,804,831)</b>	<b>\$ 12,587,555</b>	<b>\$ 325,746</b>



**Notes to Intercollegiate Athletics Program  
Statement of Revenue and Expenses**

**Year Ended June 30, 2024**

**Note 1 - Contributions**

The Institution received no individual contributions of moneys, goods, or services received directly by the Institution’s intercollegiate athletics program from any affiliated or outside organization, agency, or individuals (e.g., contributions by corporate sponsors) that constitute 10 percent or more of all contributions received for intercollegiate athletics during the year ended June 30, 2024.

**Note 2 - Intercollegiate Athletics-Related Assets**

Property and equipment are recorded at cost or, if donated, the fair value at the time of donation. Expense for maintenance and repairs is charged to current expense as incurred. Depreciation is computed using the straight-line method. No depreciation is recorded on land. Expenses for major renewals and betterments that extend the useful lives of the assets are capitalized. Estimated service lives range from 5-40 years depending on class.

The current year capitalized additions and deletions to facilities during the year ended June 30, 2024 are as follows:

	Current Year Additions	Current Year Deletions
Construction in Progress	\$ 111,212	\$ -
Equipment	201,319	-
Vehicles	15,975	-
Buildings	-	-
Building Improvements	331,661	-
Improvements - Other	-	-
Total Athletics Facilities	\$ 660,167	\$ -
Other Institutional Facilities	\$ 17,045,458	\$ 13,030,198

The total estimated book values of property, plant, and equipment, net of depreciation, of the Institution as of June 30, 2024 are as follows:

	Estimated Book Value
Athletically Related Property, Plant, and Equipment Balance	\$ 20,760,626
Institution's Total Property, Plant, and Equipment Balance	\$ 228,947,726

**Notes to Intercollegiate Athletics Program  
Statement of Revenue and Expenses**

**Year Ended June 30, 2024**

**Note 3 - Intercollegiate Athletics-Related Debt**

The annual debt service and debt outstanding for the Institution as of June 30, 2024 are as follows:

	Annual Debt Service	Debt Outstanding
Athletically Related Facilities	\$ 98,816	\$ 2,320,121
 Institution's Total	 \$ 5,529,815	 \$ 60,594,664

The repayment schedule for all outstanding intercollegiate athletics debt maintained by the Institution for the years ending June 30 is as follows:

	Total Intercollegiate Athletics Debt
2025	\$ 161,396
2026	204,546
2027	212,429
2028	220,727
2029	229,855
2030-2034	1,291,168
	\$ 2,320,121

**Note 4 - Restricted and Endowment and Plant Funds**

During the year, the Institution had no significant changes in loan, endowment, or plant funds related to intercollegiate athletics.

In addition, at June 30, 2024, the Institution had \$80,706 of endowments and \$0 in pledges receivable dedicated to the sole support of athletics not reported in the Statement. The athletics department's fund balance is \$1,747,998 at June 30, 2024.



**YOUNGSTOWN  
STATE  
UNIVERSITY**



**WYSU-FM  
YOUNGSTOWN STATE UNIVERSITY RADIO  
MAHONING COUNTY  
FINANCIAL STATEMENT AUDIT**

*For the Years Ended*  
**June 30, 2024 and 2023**

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## Independent Auditor's Report

To the Board of Trustees  
WYSU-FM Youngstown State University Radio

### Report on the Audits of the Financial Statements

#### **Opinion**

We have audited the financial statements of the business-type activities of WYSU-FM Youngstown State University Radio (the "Station"), a department of Youngstown State University, as of and for the years ended June 30, 2024 and 2023 and the related notes to the financial statements, which collectively comprise WYSU-FM Youngstown State University Radio's basic financial statements, as listed in the table of contents.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the financial position of the business-type activities of WYSU-FM Youngstown State University Radio as of June 30, 2024 and 2023 and the changes in its financial position and its cash flows thereof for the years then ended in accordance with accounting principles generally accepted in the United States of America.

#### **Basis for Opinion**

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audits of the Financial Statements* section of our report. We are required to be independent of the Station and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### **Emphasis of Matter**

As described in Note 1 to the financial statements, the financial statements of the Station are intended to present the net position, changes in net position, and cash flows of only that portion of Youngstown State University's business-type activities that is attributable to the transactions of the Station. They do not purport to, and do not, present fairly the net position of Youngstown State University as of June 30, 2024 and 2023 or the changes in net position or the changes in cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

#### **Responsibilities of Management for the Financial Statements**

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Station's ability to continue as a going concern for 12 months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

### ***Auditor's Responsibilities for the Audits of the Financial Statements***

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and, therefore, is not a guarantee that audits conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing audits in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audits.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audits in order to design audit procedures that are appropriate in the circumstances but not for the purpose of expressing an opinion on the effectiveness of the Station's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Station's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audits, significant audit findings, and certain internal control-related matters that we identified during the audits.

### ***Required Supplementary Information***

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis and other required supplementary information, as identified in the table of contents, be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, which considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audits of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

To the Board of Trustees  
WYSU-FM Youngstown State University Radio

**Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated November 26, 2024 on our consideration of WYSU-FM Youngstown State University Radio's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements, and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of WYSU-FM Youngstown State University Radio's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering WYSU-FM Youngstown State University Radio's internal control over financial reporting and compliance.

*Plante & Moran, PLLC*

November 26, 2024

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## MANAGEMENT'S DISCUSSION AND ANALYSIS

The Management's Discussion and Analysis section of the WYSU-FM Youngstown State University Radio (WYSU-FM or the Station) Financial Report presents an unaudited discussion and analysis of the financial performance of the Station, a non-commercial public radio station operated by Youngstown State University (the University or YSU), during the fiscal year ended June 30, 2024 with comparative information for the fiscal years ended June 30, 2023 and June 30, 2022. This discussion has been prepared by management and should be read in conjunction with the financial statements and the accompanying notes that follow.

### Introduction

The University operates WYSU-FM, a 50,000-watt radio station that serves the Mahoning and Shenango Valley regions with fine arts, news, and information programming from its studios in Melnick Hall. WYSU-FM functions as a department of the Division of University Relations at the University. The Station broadcasts a mix of news and classical music programs on its main analog channel, HD1 (digital) channel, and an internet stream. WYSU-FM also broadcasts classical music on its HD2 channel and second internet stream. The Station broadcasts at 88.5 MHz in Youngstown, Ohio, 90.1 MHz in Ashtabula, Ohio, and 89.7 MHz in New Wilmington, Pennsylvania.

WYSU-FM is a non-commercial, listener-supported, community-based public radio station committed to being the region's leading source for quality programming. It provides trusted in-depth news, engaging conversation, and music that stimulates the mind and spirit. As one of YSU's most visible daily representatives to the community, WYSU-FM also strives to be a valuable ambassador to the community, providing a forum to promote the artistic and intellectual activities of the University.

Since 1969, public radio WYSU 88.5 FM has been northeast Ohio's and western Pennsylvania's source for the best in news and information programming, music, and entertainment. WYSU-FM is a charter National Public Radio (NPR) affiliate station. Every week thousands of listeners tune to the Station for its eclectic and innovative non-commercial program schedule including engaging news and information, great entertainment, and superb classical, jazz, and folk music – together providing a provocative, culturally rich, and intellectually stimulating journey for WYSU-FM listeners.

### Using the Financial Statements

The Station's financial report includes three basic financial statements: the Statement of Net Position, the Statement of Revenues, Expenses and Changes in Net Position, and the Statement of Cash Flows. These financial statements are prepared in accordance with the financial reporting format required by the Governmental Accounting Standards Board's (GASB) Statements No. 34, *Basic Financial Statements and Management's Discussion and Analysis for State and Local Governments* and No. 35, *Basic Financial Statements and Management's Discussion and Analysis for Public Colleges and Universities*, as amended. These statements establish standards for external financial reporting for public colleges and universities and require that financial



# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

statements be presented on a basis to focus on the financial condition of the Station, the results of operations, and cash flows of the Station as a whole.

During fiscal year 2018, the Station adopted GASB Statement No. 75, *Accounting and Financial Reporting for Postemployment Benefits Other than Pensions (OPEB)* and during fiscal year 2015, the Station adopted GASB Statement No. 68, *Accounting and Financial Reporting for Pensions - an amendment of GASB Statement No. 27*. These statements significantly revised accounting for pension/OPEB costs and assets/liabilities.

Prior to GASBs 68 and 75, the accounting for pension/OPEB costs, was focused on a funding approach, which limited pension/OPEB costs to contributions annually required by law, which may or may not be sufficient to fully fund each pension plan's net pension/OPEB asset/liability.

Under standards required by these statements, the net pension/OPEB asset/liability equals the Station's proportionate share of each pension/OPEB plan's collective present value of estimated future pension/OPEB benefits attributable to employees' past service minus plan assets available to pay these benefits. Pension/OPEB obligations, whether funded or unfunded, are part of the "employment exchange" – that is, the employee is trading his or her labor in exchange for wages, benefits, and the promise of a future pension and OPEB. The unfunded portions of these pension/OPEB promises are a present obligation, part of a bargained-for benefit to the employee, and are reported by the Station as liabilities since the benefit of the exchange was received.

The nature of Ohio's statewide pension systems and state law governing those systems requires additional explanation in order to properly understand the information presented in these statements. The Station is not responsible for certain key factors affecting the balance of these liabilities. In Ohio, the employee shares the obligation of funding pension benefits with the employer. Both employer and employee contribution rates are capped by the State statute. A change in these caps requires action by both Houses of the General Assembly and approval of the Governor. Benefit provisions are also determined by State statute. The employee enters the employment exchange with the knowledge that the employer's promise is limited not by contract but by law. The employer enters the exchange also knowing that there is a specific, legal limit to its contribution to the pension system. In Ohio, there is no legal means to enforce the unfunded liability of the pension system against the public employer. State law operates to mitigate the obligation of the public employer to the employee because all parties enter the employment exchange with notice as to the law. The pension system is responsible for the administration of the plan.

Most long-term liabilities have set repayment schedules or, in the case of compensated absences (i.e. sick and vacation leave), are satisfied through paid time-off or termination payments. There is no repayment schedule for the net pension/OPEB assets/liabilities. Changes in pension/OPEB benefits, contribution rates, and return on investments affect the balances of the net pension/OPEB assets/liabilities, but are outside the control of the public employer. In the event that contributions, investment returns, and other changes are insufficient to keep up with required payments, State statute does not assign/identify the responsible party for the unfunded portion. Due to the unique nature of how the net pension/OPEB assets/liabilities are satisfied, these assets and liabilities are

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

separately identified within the noncurrent asset and long-term liability sections of the Statement of Net Position.

In accordance with GASBs 68 and 75, the Station's statements, prepared on an accrual basis of accounting, include an annual pension/OPEB expense for the proportionate share of each pension plan's change in net pension/OPEB asset/liability.

Overall key presentation elements of the financial statements include:

- Assets and liabilities are categorized as either current or noncurrent. Current assets and liabilities will be consumed or fulfilled within one year.
- Revenues and expenses are categorized as either operating or non-operating. Significant recurring sources of the Station's revenues, including the general appropriation from the University and membership revenue are considered non-operating, as defined by GASB Statement No. 35.
- Capital assets are reported net of accumulated depreciation.

### **The Statement of Net Position**

The Statement of Net Position presents the financial position of the Station at the end of the fiscal year and includes all assets (current and noncurrent), deferred outflows of resources, liabilities (current and noncurrent), deferred inflows of resources, and net position of the Station. Current assets are classified as such if they are available to satisfy current liabilities, which are generally defined as being due within one year of the date of the Statement of Net Position. Net position is one indicator of the financial condition of the Station, while the change in net position is an indicator of whether the overall financial condition has improved or worsened during the year.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

A summarized comparison of the Station's assets, deferred outflows of resources, liabilities, deferred inflows of resources, and net position at June 30, 2024, 2023, and 2022 follows:

	June 30, 2024	June 30, 2023	June 30, 2022
Assets			
Current assets	\$ 1,758,503	\$ 1,817,531	\$ 1,932,895
Noncurrent assets			
Capital assets, net	67,570	85,518	103,465
Other assets	310,251	254,478	309,052
Total Noncurrent assets	<u>377,821</u>	<u>339,996</u>	<u>412,517</u>
Total Assets	<u>2,136,324</u>	<u>2,157,527</u>	<u>2,345,412</u>
Deferred Outflows of Resources	<u>174,938</u>	<u>297,600</u>	<u>67,296</u>
Liabilities			
Current liabilities	53,334	46,517	39,925
Noncurrent liabilities	602,549	715,483	223,708
Total Liabilities	<u>655,883</u>	<u>762,000</u>	<u>263,633</u>
Deferred Inflows of Resources	<u>23,689</u>	<u>5,674</u>	<u>325,410</u>
Net Position			
Net investment in capital assets	67,570	85,518	103,465
Restricted	345,975	286,451	274,847
Unrestricted	1,218,145	1,315,484	1,445,353
Total Net Position	<u>\$ 1,631,690</u>	<u>\$ 1,687,453</u>	<u>\$ 1,823,665</u>

Total assets, consisting primarily of cash and cash equivalents, accounts receivable, pledges receivable, investments, and capital assets, decreased \$21,203 or 1% from fiscal year 2023 to fiscal year 2024. Current assets decreased \$59,028 or 3% between fiscal year 2023 and fiscal year 2024 primarily due to a decrease in cash and cash equivalents. Noncurrent assets increased \$37,825 or 11% from fiscal year 2023 to fiscal year 2024. The increase is attributed to an increase in endowment investments of \$36,208 due to favorable market conditions and recording a net OPEB asset of \$19,565 offset by a decrease in net capital assets of \$17,948 which represents the recording of fiscal year 2024 depreciation.

Total assets, consisting primarily of cash and cash equivalents, accounts receivable, pledges receivable, investments, and capital assets, decreased \$187,885 or 8% from fiscal year 2022 to fiscal year 2023. Current assets decreased \$115,364 or 6% between fiscal year 2022 and fiscal year 2023 primarily due to a decrease in cash and cash equivalents. Noncurrent assets decreased \$72,521 or 18% from fiscal year 2022 to fiscal year 2023. The decrease was attributed to a decrease in the net OPEB asset of \$68,809 and a decrease in net capital assets of \$17,947 which represents the recording of fiscal year 2023 depreciation offset by an increase in endowment investments of \$14,235 due to favorable market conditions.

See Note 2 for additional information on cash and cash equivalents, Note 3 for investments, and Note 4 for capital assets.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

Deferred outflows of resources represent the consumption of resources that are applicable to a future reporting period, but do not require further exchange of goods or services; whereas deferred inflows of resources represent the acquisition of resources that are applicable to a future reporting period. The following table summarizes balances at:

Deferred Outflows of Resources	June 30, 2024	June 30, 2023	June 30, 2022
Related to pension	\$ 158,152	\$ 255,639	\$ 65,605
Related to OPEB	16,786	41,961	1,691
Total Deferred Outflows of Resources	<u>\$ 174,938</u>	<u>\$ 297,600</u>	<u>\$ 67,296</u>

Deferred Inflows of Resources	June 30, 2024	June 30, 2023	June 30, 2022
Related to pension	\$ 10,708	\$ 1,067	\$ 248,059
Related to OPEB	12,981	4,607	77,351
Total Deferred Inflows of Resources	<u>\$ 23,689</u>	<u>\$ 5,674</u>	<u>\$ 325,410</u>

Included in deferred outflows of resources and deferred inflows of resources are items relating to pensions and OPEB. Certain elements impacting the change in the net pension/OPEB assets/liabilities have a longer-term perspective than the current year, therefore, to reduce volatility these elements are amortized over a closed period of specified duration. These include differences between expected and actual experience, changes of assumptions, net differences between projected and actual earnings of investments, changes in proportion and difference between Station contributions and proportionate share of contributions, and Station contributions subsequent to the measurement date. These elements can be reflected as either a deferred outflow of resources or a deferred inflow of resources.

Deferred outflows of resources decreased \$122,662 or 41% from fiscal year 2023 to fiscal year 2024. Deferred outflows of resources related to pension decreased \$97,487 or 38% primarily due to a \$74,615 decrease in the net difference between projected and actual earnings on pension plan investments, a \$12,748 decrease in differences between expected and actual experience and a \$7,156 decrease in changes in assumptions related to the Ohio Public Employees Retirement System (OPERS) plan. Deferred outflows of resources related to OPEB decreased \$25,175 or 60% primarily due to a \$15,985 decrease in the net difference between projected and actual earnings on OPEB investments and a \$8,603 decrease in changes in assumptions related to the OPERS plan.

Deferred inflows of resources increased \$18,015 or 318% from fiscal year 2023 to fiscal year 2024. Deferred inflows of resources related to pension increased \$9,641 or 904% primarily due to a \$9,715 increase in the changes in proportion and differences between Station contributions and proportionate share of contributions related to the OPERS plan. Deferred inflows of resources related to OPEB increased \$8,374 or 182% primarily due to a \$7,288 increase in changes in assumptions on OPEB investments related to the OPERS plan.

Deferred outflows of resources increased \$230,304 or 342% from fiscal year 2022 to fiscal year 2023. Deferred outflows of resources related to pension increased \$190,034 or 290% primarily due a \$192,483 increase in the net difference between projected and actual earnings on pension

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

plan investments related to OPERS plan. Deferred outflows of resources related to OPEB increased \$40,270 or 2,381% primarily due to a \$13,639 increase in the changes in assumptions and a \$27,735 increase in the net difference between projected and actual earnings on OPEB investments related to the OPERS plan.

Deferred inflows of resources decreased \$319,736 or 98% from fiscal year 2022 to fiscal year 2023. Deferred inflows of resources related to pension decreased \$246,992 or 100% primarily due to a \$233,350 decrease in the net difference between projected and actual earnings on pension plan investments related to the OPERS plan. Deferred inflows of resources related to OPEB decreased \$72,744 or 94% primarily due to a \$26,732 decrease in changes in assumptions and a \$32,804 decrease in the net difference between projected and actual earnings on OPEB investments related to the OPERS plan.

See Note 6 for additional information on employee benefit plans.

Total liabilities consisting of accounts payable, payroll liabilities, unearned revenue, compensated absences, net pension liability, and net OPEB liability decreased \$106,117 or 14% from fiscal year 2023 to fiscal year 2024. This was primarily due to a decrease in the net pension liability of \$91,885 or 14% and a decrease in the net OPEB liability of \$13,964.

Total liabilities consisting of accounts payable, payroll liabilities, unearned revenue, compensated absences, net pension liability, and net OPEB liability increased \$498,367 or 189% from fiscal year 2022 to fiscal year 2023. This was due to an increase in the net pension liability of \$478,319 or 260%, an increase in accounts payable of \$10,224 or 274% and recording a net OPEB liability of \$13,964.

See Note 5 for additional information on compensated absences and Note 6 for information on employee benefit plans.

Net position represents the residual interest in the Station's assets after deferred outflows of resources are added, and liabilities and deferred inflows of resources are deducted. The following is a recap of total net position segregating the unrestricted net position relating to the impact of the GASBs 68 and 75.

	June 30, 2024	June 30, 2023	June 30, 2022
Net investment in capital assets	\$ 67,570	\$ 85,518	\$ 103,465
Restricted - nonexpendable	108,153	108,153	108,153
Restricted - expendable	218,257	178,298	166,694
Unrestricted	1,636,988	1,699,499	1,818,316
Total net position without GASBs 68 and 75	2,030,968	2,071,468	2,196,628
GASB 68	(422,648)	(407,405)	(366,112)
GASB 75	23,370	23,390	(6,851)
Total Net Position	\$ 1,631,690	\$ 1,687,453	\$ 1,823,665

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

Overall, the Station's total net position decreased \$55,763 or 3% from \$1,687,453 at June 30, 2023 to \$1,631,690 at June 30, 2024. This was primarily due to a decrease of \$97,339 in unrestricted net position offset by an increase of \$59,524 in restricted expendable net position. Excluding net position attributed to GASBs 68 and 75, net position decreased \$40,500 or 2% from \$2,071,468 at June 30, 2023 to \$2,030,968 at June 30, 2024. The net investment in capital assets consists of equipment net of accumulated depreciation. The \$17,948 or 21% decrease from fiscal year 2023 to fiscal year 2024 was due to current year depreciation expense. Restricted nonexpendable net position consists primarily of endowment funds held by the University in the name of the Station. Changes in this category are driven by additions or deductions to the endowment corpus. During fiscal year 2024, there were no changes. Restricted expendable net position is subject to externally imposed restrictions governing their use. Changes in this category are due to the timing of revenues and expenses in funds provided by donors and grantors. Restricted expendable net position increased \$39,959 or 22% primarily due to the allocation of unrealized investment gains in the Station's endowment fund. Unrestricted net position is not subject to externally imposed restrictions and is designated for future operations. Unrestricted net position decreased \$62,511 or 4% from fiscal year 2023 to fiscal year 2024 primarily due to excess membership and underwriting expenses over revenue.

Overall, the Station's total net position decreased \$136,212 or 8% from \$1,823,665 at June 30, 2022 to \$1,687,453 at June 30, 2023. This was primarily due to a decrease of \$129,869 in unrestricted net position. Excluding net position attributed to GASBs 68 and 75, net position decreased \$125,160 or 6% from \$2,196,628 at June 30, 2022 to \$2,071,468 at June 30, 2023. The \$17,947 or 17% decrease in net investment in capital assets from fiscal year 2022 to fiscal year 2023 was due to current year depreciation expense. Restricted nonexpendable net position remained unchanged from fiscal year 2022 to fiscal year 2023. Restricted expendable net position increased \$11,604 or 7% primarily due to the allocation of unrealized investment gains in the Station's endowment fund. Unrestricted net position decreased \$118,817 or 7% from fiscal year 2022 to fiscal year 2023 primarily due to decreases in revenue from membership receipts, general appropriations from the University and in-kind support from the Broadcast Educational Media Commission (BEMC) coupled with increases in management, broadcasting and fundraising expenses.

### **The Statements of Revenues, Expenses, and Changes in Net Position**

These statements present the operating results and the non-operating revenues and expenses of the Station. Operating revenues are generated by an annual Community Service Grant (a portion of which is restricted) from the Corporation for Public Broadcasting (CPB) and an annual grant from the BEMC, which is administered by the eTech Ohio Commission. In addition, in-kind support is received from BEMC and includes support for transmission of Radio Reading Service Programming. Operating revenues also include contributions from area businesses (program underwriting). Operating expenses are incurred to vendors and employees for providing goods or services for the overall operations of the Station. Net non-operating revenues include the general appropriation from the University, donated facilities and administrative support from the University, membership revenue, net revenue from fund raising, private gifts, and net investment income.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

A summary of the Station's revenues, expenses, and changes in net position follows:

	<u>June 30, 2024</u>	<u>June 30, 2023</u>	<u>June 30, 2022</u>
Total Operating Revenues	\$ 399,134	\$ 378,196	\$ 411,184
Total Operating Expenses	<u>1,391,968</u>	<u>1,404,713</u>	<u>1,069,547</u>
Operating Loss	(992,834)	(1,026,517)	(658,363)
Net Non-operating Revenues	<u>937,071</u>	<u>890,305</u>	<u>838,949</u>
Change in Net Position	(55,763)	(136,212)	180,586
Net Position at Beginning of the Year	<u>1,687,453</u>	<u>1,823,665</u>	<u>1,643,079</u>
Net Position at End of the Year	<u>\$ 1,631,690</u>	<u>\$ 1,687,453</u>	<u>\$ 1,823,665</u>

The Station's total operating revenues increased \$20,938 or 6% from fiscal year 2023 to fiscal year 2024. The increase is primarily the result of an increase of \$15,090 in revenue from in-kind contributions and an increase of \$12,958 in the community service grant revenue received from CPB.

The Station's total operating revenues decreased \$32,988 or 8% from fiscal year 2022 to fiscal year 2023. The decrease was primarily the result of a decrease of \$31,422 in revenue from in-kind contributions.

The following is a recap of total operating expenses with the impact of the GASBs 68 and 75 pension expense accruals segregated.

	<u>June 30, 2024</u>	<u>June 30, 2023</u>	<u>June 30, 2022</u>
Program Services	\$ 784,345	\$ 801,922	\$ 776,940
Support Services	<u>592,360</u>	<u>591,739</u>	<u>526,655</u>
Operating Expenses without GASBs 68 and 75 accruals	1,376,705	1,393,661	1,303,595
GASB 68 pension expense accruals	15,243	41,293	(151,008)
GASB 75 OPEB expense accrual	<u>20</u>	<u>(30,241)</u>	<u>(83,040)</u>
Total Operating Expenses	<u>\$ 1,391,968</u>	<u>\$ 1,404,713</u>	<u>\$ 1,069,547</u>

Excluding the impact of GASBs 68 and 75, total operating expenses decreased \$16,956 or 1% from fiscal year 2023 to fiscal year 2024. Program services decreased \$17,577 or 2% due to a decrease in broadcasting expenses which is attributed one-time software upgrades to the broadcast automation system incurred in fiscal year 2023 that were not incurred in fiscal year 2024. Support services remained relatively flat from fiscal year 2023 to fiscal year 2024.

Pension expense attributed to GASB 68 decreased \$26,050 from \$41,293 in fiscal year 2023 to \$15,243 in fiscal year 2024; whereas OPEB expense attributed to GASB 75 increased \$30,261 from (\$30,241) in fiscal year 2023 to \$20 in fiscal year 2024. These expenses are the result of changes in the deferred outflows/inflows and liabilities/assets related to pension/OPEB. The Station has no control over the factors affecting these changes.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

Excluding the impact of GASBs 68 and 75, total operating expenses increased \$90,066 or 7% from fiscal year 2022 to fiscal year 2023. Program services increased \$24,982 or 3% due to an increase in broadcasting expense attributed to software upgrades to the broadcast automation system. Support services increased \$65,084 or 12% due to an increase in management and general expenses related to the increase in institutional support from the University as well as an increase in fundraising expenses attributed to the billboard campaign.

Pension expense attributed to GASB 68 increased \$192,301 from (\$151,008) in fiscal year 2022 to \$41,293 in fiscal year 2023; whereas OPEB expense attributed to GASB 75 increased \$52,799 from (\$83,040) in fiscal year 2022 to (\$30,241) in fiscal year 2023. These expenses are the result of changes in the deferred outflows/inflows and liabilities/assets related to pension/OPEB. The Station has no control over the factors affecting these changes.

See Note 6 for additional information on pension plans and other post-employment benefits (OPEB).

Total net non-operating revenues increased \$46,766 or 5% from fiscal year 2023 to fiscal year 2024. The general appropriation from the University increased \$16,235 or 4% between fiscal year 2023 and fiscal year 2024, primarily due an increase in payroll expenses supported by the general fund in fiscal year 2024 as compared to fiscal year 2023 due to a redistribution of payroll expenses in fiscal year 2023 to the WYSU-FM Cares Act fund. Investment income, net of investment expense increased \$22,780 or 88% which is attributed to the recognition of realized and unrealized gains in the Station's endowment fund due to favorable market conditions.

Total net non-operating revenues increased \$51,356 or 6% from fiscal year 2022 to fiscal year 2023. The general appropriation from the University decreased \$22,917 or 6% between fiscal year 2022 and fiscal year 2023, primarily due to current year payroll expenses being redistributed to the WYSU-FM Cares Act fund. Donated facilities and administrative support from the University increased \$46,159 or 23% due to an increase in institutional support from the University, the result of an increase in pension and OPEB expenses attributed to GASBs 68 and 75 in fiscal year 2023. Membership income decreased \$30,746 or 11% due to a decline in the number of donors and a decline in the average donation per donor in fiscal year 2023 compared to fiscal year 2022. Investment income, net of investment expense increased \$58,735 or 179% which is attributed to the recognition of realized and unrealized gains in the Station's endowment fund due to favorable market conditions.



# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

### Economic Factors for the Future

As one of Youngstown State University's most visible campus and community entities, WYSU-FM reaches over 25,000 weekly listeners in eight counties in Ohio and three in Pennsylvania, as well as many other listeners throughout the country and around the world through its streaming services and smartphone applications. WYSU remains dedicated to its goals of providing high quality and reliable service, expanding its audience, developing and securing external funding sources and representing the YSU community positively. With the continued support of the University's Board of Trustees, administration, and dedicated staff, as well as the generous loyalty of the Station's listener-members, the support of businesses, non-profit organizations, and foundations, management believes the Station is well positioned to continue its favorable financial position and level of excellence into the future.

Throughout the recent fiscal years, the post-pandemic economic environment has created several operational challenges for the Station including understaffing issues and a slow return to pre-pandemic outreach initiatives. In the current fiscal year, the Station has taken actions to address these ongoing issues to better position itself for a brighter future. This past December, the Station was able to add a newly created assistant director position, which provided needed local program hosting hours and has helped in outreach, broadcast operations, and government relations. The Station has also welcomed several new employees over the past three fiscal years as the result of employee turnover following the pandemic. The additions in staff have bolstered the positive energy and curated innovative ideas at the Station. In addition to staffing issues, the pandemic caused a cessation of membership events, but this fiscal year the staff gave special attention to returning to listener appreciation events and enhancing community involvement. The Station also engaged in reaching younger audiences through presentations at the University's English Festival and providing tours to students on various occasions. In the coming year, the Station plans to continue outreach initiatives by offering more listener appreciation events and expanding its presence at student-related events on campus.

The Station recognizes the need to continuously enhance, upgrade and develop new technologies to provide continuous and reliable service to its audience. In the interest of modernization and enhancing efficiency, the Station is planning a major upgrade to the broadcasting traffic software as well as transitioning to a new membership software which will be compatible with its broadcast automation system. In addition, plans are underway to make greater use of the programming automation options in the Music Master library software. Completion of these endeavors will allow the Station to continue to help listeners in their life-long learning pursuits, satisfy their intellectual curiosity, make more informed decisions, lead more fulfilling lives, become better and more involved citizens, and help make northeast Ohio and western Pennsylvania a better place to live.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## STATEMENTS OF NET POSITION AT JUNE 30, 2024 AND 2023

	<u>June 30, 2024</u>	<u>June 30, 2023</u>
<b>ASSETS</b>		
<b>Current Assets</b>		
Cash and cash equivalents	\$ 1,735,564	\$ 1,803,030
Interest receivable	816	628
Accounts receivable (net of allowance of \$0 in 2024 and \$200 in 2023)	12,005	5,553
Pledges receivable (net of allowance of \$705 in 2024 and \$1,591 in 2023)	10,118	8,320
<b>Total Current Assets</b>	<u>1,758,503</u>	<u>1,817,531</u>
<b>Noncurrent Assets</b>		
Endowment investments	290,686	254,478
Net OPEB asset	19,565	-
Capital assets, net	67,570	85,518
<b>Total Noncurrent Assets</b>	<u>377,821</u>	<u>339,996</u>
<b>Total Assets</b>	<u>2,136,324</u>	<u>2,157,527</u>
<b>DEFERRED OUTFLOWS OF RESOURCES</b>		
Deferred outflows related to pension	158,152	255,639
Deferred outflows related to OPEB	16,786	41,961
<b>Total Deferred Outflows of Resources</b>	<u>174,938</u>	<u>297,600</u>
<b>LIABILITIES</b>		
<b>Current Liabilities</b>		
Accounts payable	5,451	13,950
Payroll liabilities	15,912	15,143
Unearned revenue	24,708	9,171
Compensated absences	7,263	8,253
<b>Total Current Liabilities</b>	<u>53,334</u>	<u>46,517</u>
<b>Noncurrent Liabilities</b>		
Compensated absences	32,457	39,542
Net pension liability	570,092	661,977
Net OPEB liability	-	13,964
<b>Total Noncurrent Liabilities</b>	<u>602,549</u>	<u>715,483</u>
<b>Total Liabilities</b>	<u>655,883</u>	<u>762,000</u>
<b>DEFERRED INFLOWS OF RESOURCES</b>		
Deferred inflows related to pension	10,708	1,067
Deferred inflows related to OPEB	12,981	4,607
<b>Total Deferred Inflows of Resources</b>	<u>23,689</u>	<u>5,674</u>
<b>NET POSITION</b>		
Net investment in capital assets	67,570	85,518
Restricted, nonexpendable	108,153	108,153
Restricted, expendable - grant and endowment	218,257	178,298
Restricted, expendable - Net OPEB Asset	19,565	-
Unrestricted	1,218,145	1,315,484
<b>Total Net Position</b>	<u>\$ 1,631,690</u>	<u>\$ 1,687,453</u>

See accompanying notes to financial statements.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## STATEMENTS OF REVENUES, EXPENSES AND CHANGES IN NET POSITION FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

	June 30, 2024	June 30, 2023
<b>REVENUES</b>		
<b>Operating Revenues</b>		
Corporation for Public Broadcasting grant	\$ 130,063	\$ 117,105
In-kind contributions	157,732	142,642
Broadcast Education Media Commission grant	33,567	33,570
Underwriting revenue	77,772	84,879
<b>Total Operating Revenues</b>	<b>399,134</b>	<b>378,196</b>
<b>EXPENSES</b>		
<b>Operating Expenses</b>		
Program Services		
Programming and production	499,309	484,842
Broadcasting	203,053	223,247
Program information	73,694	78,855
Traffic and continuity	15,814	20,140
Support Services		
Management and general	355,476	346,932
Fund raising and membership development	71,739	79,506
Underwriting	28,810	33,322
Clerical	126,125	119,922
Depreciation	17,948	17,947
<b>Total Operating Expenses</b>	<b>1,391,968</b>	<b>1,404,713</b>
<b>Operating Loss</b>	<b>(992,834)</b>	<b>(1,026,517)</b>
<b>NONOPERATING REVENUES</b>		
General appropriation from the University	394,457	378,222
Donated facilities and administrative support from the University	251,916	244,292
Membership revenue	241,054	240,977
Private gifts	925	875
Investment income, net of investment expense	48,719	25,939
<b>Net Nonoperating Revenues</b>	<b>937,071</b>	<b>890,305</b>
<b>Change in Net Position</b>	<b>(55,763)</b>	<b>(136,212)</b>
<b>NET POSITION</b>		
<b>Net Position at Beginning of the Year</b>	<b>1,687,453</b>	<b>1,823,665</b>
<b>Net Position at End of the Year</b>	<b>\$ 1,631,690</b>	<b>\$ 1,687,453</b>

See accompanying notes to financial statements.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## STATEMENTS OF CASH FLOWS FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

	<b>June 30, 2024</b>	<b>June 30, 2023</b>
<b>Cash Flows from Operating Activities</b>		
Corporation for Public Broadcasting grant	\$ 130,063	\$ 117,105
Broadcast Educational Media Commission grant	33,567	33,570
Underwriting support	90,487	85,421
Payments to suppliers	(390,986)	(462,594)
Payments to employees	(416,553)	(379,680)
Payments for benefits	(157,375)	(141,951)
<b>Total Cash Flows Used in Operating Activities</b>	<b>(710,797)</b>	<b>(748,129)</b>
<b>Cash Flows from Noncapital Financing Activities</b>		
General appropriation from the University	394,457	378,222
Membership receipts	235,626	242,534
Private gifts	925	875
<b>Total Cash Flows Provided by Noncapital Financing Activities</b>	<b>631,008</b>	<b>621,631</b>
<b>Cash Flows from Investing Activities</b>		
Interest on investments	10,802	14,809
Sale (purchase) of investments	1,521	(3,441)
<b>Total Cash Flows Provided by Investing Activities</b>	<b>12,323</b>	<b>11,368</b>
<b>Change in Cash and Cash Equivalents</b>	<b>(67,466)</b>	<b>(115,130)</b>
<b>Cash and Cash Equivalents, Beginning of Year</b>	<b>1,803,030</b>	<b>1,918,160</b>
<b>Cash and Cash Equivalents, End of Year</b>	<b>\$ 1,735,564</b>	<b>\$ 1,803,030</b>
<b>Reconciliation of Operating Loss to Net Cash Used in Operating Activities</b>		
Operating loss	\$ (992,834)	\$ (1,026,517)
Adjustments to reconcile operating loss to net cash used in operating activities:		
Depreciation	17,948	17,947
Donated facilities and administrative support from the University	251,916	244,292
Changes in assets and liabilities:		
Accounts receivable, net`	(2,822)	(987)
Net OPEB asset	(19,565)	68,809
Accounts payable, payroll liabilities, compensated absences, and unearned revenue	(268)	6,084
Net pension/OPEB liability	(105,849)	492,283
Deferred outflows-pension and OPEB	122,662	(230,304)
Deferred inflows-pension and OPEB	18,015	(319,736)
<b>Net Cash Flows Used in Operating Activities</b>	<b>\$ (710,797)</b>	<b>\$ (748,129)</b>

See accompanying notes to financial statements.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## NOTES TO FINANCIAL STATEMENTS FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

### Note 1 – Organization and Summary of Significant Accounting Policies

#### Organization and Basis of Presentation

WYSU-FM Youngstown State University Radio (WYSU-FM or the Station) is operated as a department of the Division of University Relations at Youngstown State University (the University or YSU) and is subject to the policies established by the University's Board of Trustees. The Station reports annually to the Corporation for Public Broadcasting (CPB).

The financial statements of the Station are intended to present the financial position, the changes in financial position and cash flows, of only that portion of the activities of Youngstown State University that is attributable to the transactions of the Station. They do not purport to, and do not present fairly the financial position of Youngstown State University as of June 30, 2024 and 2023, and the changes in its financial position and its cash flows, for the years then ended in accordance with accounting principles generally accepted in the United States of America.

The financial statements of the Station have been prepared in accordance with accounting principles generally accepted in the United States of America as prescribed by the Government Accounting Standards Board (GASB).

As required by the GASB, resources are classified for accounting and reporting purposes into the following four net position categories:

- Net investment in capital assets - Capital assets, net of accumulated depreciation, reduced by outstanding principal balances of debt attributable to the acquisition, construction or improvement of those assets.
- Restricted, nonexpendable - Resources subject to externally imposed stipulations that they be maintained permanently by the Station. Such resources include the Station's permanent endowment funds.
- Restricted, expendable - Resources whose use by the Station is subject to externally imposed stipulations that can be fulfilled by actions of the Station pursuant to those stipulations or that expire by the passage of time. Such resources include the restricted portion of the CPB's Radio Community Service Grant, donations and endowment earnings.
- Unrestricted - Resources that are not subject to externally imposed stipulations. Unrestricted resources may be designated for specific purposes by action of management, Board of Trustees or may otherwise be limited by contractual agreements with outside parties. Substantially all unrestricted resources are designated for Station programs, initiatives and capital projects.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

### Summary of Significant Accounting Policies

The accompanying financial statements have been prepared on the accrual basis. The Station reports as a business type activity, as required by the GASB. Business type activities are those that are financed in whole or in part by fees charged to external parties for goods or services.

Cash and Cash Equivalents - The Station considers all highly liquid investments with an original maturity of three months or less to be cash equivalents. Cash and cash equivalents are stated at cost, which approximates fair value and excludes amounts restricted by board designation or whose use is limited.

Investments - Investments are reported at fair value based on quoted market prices. Changes in unrealized gains (losses) on the carrying value of investments are reported as a component of investment income in the Statement of Revenues, Expenses, and Changes in Net Position. Restricted investments are comprised of endowment corpus and related spending funds.

Endowment Policy – Under Ohio law set forth in the Uniform Prudent Management of Institutional Funds Act (UPMIFA), as adopted in Ohio in 2009, the Board acts in a fiduciary capacity as trustee of its endowment funds. UPMIFA requires that the Board exercise its fiduciary duties prudently and consider both the charitable purposes and needs of the University and the purposes of the specific endowment regarding current expenditures and preservation of the purchasing power of the funds. The University Endowment Fund consists of 90 named funds, which includes the Station's endowment. Each named fund is assigned a number of shares in the University Endowment Fund based on the value of the gifts to that named fund. The University's endowment spending policy states that annual distributions each fiscal year are set to 5% of the twelve-quarter average of the market value for the preceding twelve calendar quarters ended September 30. Distributions greater than the calculated amount require written justification and Board of Trustees' approval.

Accounts Receivable - Accounts receivable consist of underwriting charges for various Station programs and amounts due from private sources in connection with reimbursement of allowable expenses under the applicable Station grants and contracts. Also included are gifts received by the Youngstown State University Foundation (YSUF or Foundation) in the month of June on behalf of the Station, in accordance with a development services agreement between the University and the Foundation. Accounts receivable are recorded net of allowance for uncollectible amounts.

Pledges Receivable – The University has a development services agreement with the Foundation. As part of the agreement, non-fundraising pledges are recorded by the Foundation and payments on those pledges are collected by the Foundation and remitted to the Station on a monthly basis. Pledges receivable consist of transactions relating to fundraising activities. The Station receives pledges of financial support from corporations, foundations and individuals. Revenue is recognized when a pledge representing an unconditional promise to pay is received and all eligibility requirements have been met. In the absence of a conditional pledge, revenue is

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

recognized when the gift is received. Pledges are recorded net of an allowance for uncollectible amounts and are discounted to net present value.

Capital Assets - Capital assets are comprised of equipment and stated at cost or acquisition value at date of gift. The capitalization threshold for equipment is \$5,000. Depreciation is computed using the straight-line method over the estimated useful life of the asset. The estimated useful life for equipment is 3 to 7 years. The antenna and tower are depreciated over 10 years.

When capital assets are sold, or otherwise disposed of, the carrying value of such assets and any accumulated depreciation is removed from asset accounts and net investment in capital assets. The costs of normal maintenance and repairs that do not add to the value of the capital asset or materially extend the capital asset's life are expensed when incurred.

Unearned Revenue - Unearned revenue includes certain underwriting amounts received prior to the end of the fiscal year that relate to the subsequent accounting period. Unearned revenue at June 30, 2024 and June 30, 2023 were \$24,708 and \$9,171, respectively.

Compensated Absences - Accumulated unpaid vacation and sick leave benefits are recorded as required by the GASB. The Station uses the termination method to accrue sick leave compensated absences on the Statement of Net Position. Station employees earn vacation and sick leave benefits based, in part, on length of service. Vacation pay is fully vested when earned. Upon separation from service, employees are paid accumulated vacation and sick pay based upon the nature of the separation (death, retirement, or termination). Certain limitations have been placed on the hours of vacation and sick leave that employees may accumulate and carry over for payment at death, retirement or termination. Unused hours exceeding these limitations are forfeited.

Deferred Outflows of Resources – In addition to assets, the statement of financial position reports a separate section for deferred outflows of resources. This separate financial statement element, deferred outflows of resources, represents a consumption of net position that applies to future periods and so will not be recognized as an outflow of resources (expenses) until then. The Station reports deferred outflows of resources for certain pension-related and OPEB-related amounts, including changes in expected and actual experience, changes in assumptions, change in proportionate share of contribution and certain contributions made to the plan subsequent to the measurement date. See Note 6 for more detailed information on the pension-related and OPEB-related amounts.

Deferred Inflows of Resources - In addition to liabilities, the statement of financial position reports a separate section for deferred inflows of resources. This separate financial statement element, deferred inflows of resources, represents an acquisition of net position that applies to future periods and so will not be recognized as an inflow of resources (revenue) until then. The Station reports deferred inflows of resources for certain pension-related and OPEB-related amounts, including changes in expected and actual experience, changes in assumptions, and the difference between projected and actual earnings of the plan's investments. See Note 6 for more detailed information on the pension-related and OPEB-related amounts.

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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Pensions – For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pension, and pension expense, information about the fiduciary net position of the Ohio Public Employees Retirement System (OPERS) Pension Plan and additions to/deductions from OPERS’ fiduciary net position have been determined on the same basis as they are reported by OPERS. OPERS use the economic resources measurement focus and the full accrual basis of accounting. Contribution revenue is recorded as contributions are due, pursuant to legal requirements. Benefit payments (including refunds of employee contributions) are recognized as expense when due and payable in accordance with the benefit terms. Investments are reported at fair value.

Other Postemployment Benefit Costs – For purposes of measuring the net other postemployment benefit (OPEB) asset/liability, deferred outflows of resources and deferred inflows of resources related to OPEB, and OPEB expense, information about the fiduciary net position of the Pension Plan (OPERS) and additions to/deductions from OPERS’ fiduciary net position have been determined on the same basis as they are reported by OPERS. OPERS uses the economic resources measurement focus and the full accrual basis of accounting. For this purpose, OPERS recognizes benefit payments when due and payable in accordance with the benefit terms. Investments are reported at fair value.

Corporation for Public Broadcasting Community Service Grants - The Corporation for Public Broadcasting is a private, nonprofit grantmaking organization responsible for funding more than 1,000 television and radio stations. CPB distributes annual Community Service Grants (CSGs) to qualifying public broadcasting entities. CSGs are used to augment the financial resources of public broadcasting entities and thereby to enhance the quality of programming and expand the scope of public broadcasting services. Each CSG may be expended over one or two federal fiscal years as described in the Communications Act, 47 United States Code Annotated, Section 396(k)(7). In any event, each grant must be expended within two years of the initial grant authorization. According to the Communications Act, funds may be used at the discretion of recipients for purposes relating primarily to production and acquisition of programming. Also, the grants may be used to sustain activities begun with CSGs awarded in prior years. Certain *General Provisions* must be satisfied in connection with application for and use of the grants to maintain eligibility and meet compliance requirements. These *General Provisions* pertain to the use of grant funds, record keeping, audits, financial reporting, mailing lists, and licensee status with the Federal Communications Commission. The CSGs are reported on the accompanying financial statements as increases in unrestricted net position and restricted, expendable net position.

General Appropriation from the University - The general appropriation represents support from the University for salaries and operating expenses not provided through other sources.

Donated Facilities and Administrative Support - Donated facilities and administrative support represent the Station’s allocated amounts of institutional support and donated facilities and is recorded as non-operating revenue and expenses in the Statement of Revenue, Expenses and Changes in Net Position. Administrative support is based on the Station’s pro-rata share of the



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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

University's total salaries, wages and administrative expenses. Donated facilities are the Station's pro-rata share of the University's total plant expenses along with calculated occupancy costs.

Income Taxes - The Internal Revenue Service has ruled that the University's income is generally exempt from Federal income taxes under Section 115 of the Internal Revenue Code. The University is subject to tax on unrelated business income.

Measurement Focus and Financial Statement Presentation – The accompanying financial statements have been prepared using the economic resource measurement focus, operating revenues and expenses result from providing programming, production and broadcasting support for the Station. The principal operating revenues include two grants, one from the CPB and one from the Broadcast Educational Media Commission (BEMC), along with underwriting revenue from area businesses. Principal operating expenses include programming, production, broadcasting, fundraising and management services and support. The principal non-operating revenues are the general appropriation from the University and membership support.

Release of Restricted Funds - When an expense is incurred for purposes for which both restricted and unrestricted resources are available, it is the Station's policy to apply restricted resources first, then unrestricted resources as needed.

Management's Estimates - The preparation of the financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the amounts reported in the financial statements and disclosures in the notes to financial statements. Actual results could differ from these estimates.

Adoption of New Accounting Pronouncements – In fiscal year 2024, the provisions of the following GASB Statements became effective:

- GASB Statement No. 100, *Accounting Changes and Error Corrections-an amendment of GASB Statement No. 62*, issued June 2022. The requirements of this Statement are effective for fiscal years beginning after June 15, 2023. The primary objective of this Statement is to enhance accounting and financial reporting requirements for accounting changes and error corrections to provide more understandable, reliable, relevant, consistent, and comparable information for making decisions or assessing accountability.

Adoption of above standards had no impact on the statements.

Upcoming Accounting Pronouncements – As of the report date, the GASB issued the following statements not yet implemented by the Station:

- GASB Statement No. 101, *Compensated Absences*, issued June 2022. The requirements of this Statement are effective for fiscal years beginning after December 15, 2023. The objective of

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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

this statement is to better meet the information needs of financial statement users by updating the recognition and measurement guidance for compensated absences.

- GASB Statement No. 102, *Certain Risk Disclosures*, issued December 2023. The requirements of this Statement are effective for fiscal years beginning after June 15, 2024. The objective of this Statement is to provide users of government financial statements with essential information about risks related to a government’s vulnerabilities due to certain concentrations or constraints.
- GABS Statement No. 103, *Financial Reporting Model Improvements*, issued April 2024. The requirements of this Statement are effective for fiscal years beginning after June 15, 2025. The objective of this Statement is to improve key components of the financial reporting model to enhance its effectiveness in providing information that is essential for decision making and assessing a government’s accountability.

The Station has not yet determined the effect these Statements will have on the Station’s financial statements and disclosures.

### **Note 2 – Cash and Cash Equivalents**

For financial statement presentation purposes, the Station’s cash in banks has been combined with the University’s cash equivalents and temporary investments.

Depository funds held in the name of the University are secured by a pool of securities with a value of at least 105% of the total value of monies on deposit at the depository bank. All collateral, both specific and pooled, is held by the Federal Reserve Bank or by a designated trustee as agent for the public depositories used by the University.

The University’s cash and cash equivalents at June 30, 2024 and June 30, 2023 consisted of the following:

	2024	2023
Carrying Amount (Cash and cash equivalents)	<u>\$ 16,869,033</u>	<u>\$ 20,392,242</u>
FDIC Insured	\$ 500,000	\$ 571,114
Uninsured but collateralized by pools of securities pledged by the depository banks	852,237	1,668,881
Uninsured but assets held in name of YSU not pledged as collateral elsewhere	<u>16,562,378</u>	<u>18,274,158</u>
Bank Balance	<u>\$ 17,914,615</u>	<u>\$ 20,514,153</u>

The difference in carrying amount and bank balance is caused by items in transit and outstanding checks. The University’s deposits held in safekeeping by a bank, as trustee or escrow agent,

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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

included in cash totaled \$585 at June 30, 2024 and \$8,808 at June 30, 2023, which approximates market. These deposits, including interest on the investments, are retained in the trust for projects funded by bond proceeds and payment of principal and interest on outstanding indebtedness.

The Station's cash and cash equivalents are included in these totals and were \$1,735,564 and \$1,803,030 at June 30, 2024 and June 30, 2023, respectively.

Credit risk for deposits is the risk that, in the event of a bank failure, the University's deposits may not be returned to the University. At June 30, 2024 and June 30, 2023, all uncollateralized or uninsured deposits of the University are exposed to credit risk. The University's investment policy and asset allocation guidelines facilitate the management and monitoring of credit risk.

### **Note 3 - Investments**

The University's investment policy authorizes the University to invest non-endowed and endowed University funds in compliance with provisions of the Ohio Revised Code including House Bill 524, Section 3345.05 of the Ohio Revised Code, and all other applicable laws and regulations.

In accordance with the Policies of the Board of Trustees of the University, investment types are not specifically limited but shall be made with care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims. Furthermore, investments shall be managed for the use and benefit of the University in a diversified portfolio that focuses, over time, on the preservation of capital, minimization of cost and risk, and maintenance of required levels of liquidity in the overall portfolio to meet cash flow requirements.

The University utilizes an investment advisor and investment managers for endowment funds. University endowment investments were \$16,892,127 as of June 30, 2024 and \$13,620,238 as of June 30, 2023. The Station's restricted investments represent WYSU-FM's endowment fund, which includes endowment corpus and undistributed investment earnings. Investment income is allocated to the Station's endowment fund on a monthly basis based on the value of WYSU-FM's endowment fund in relation to the total value of the University's endowments. The fair value of the Station's endowment investments was \$290,686 as of June 30, 2024 and \$254,478 as of June 30, 2023.

The Station's investments measured and reported at fair value are classified according to the following hierarchy:

Level 1 – Investments reflect prices quoted in active markets.

Level 2 – Investments reflect prices that are based on a similar observable asset either directly or indirectly, which may include inputs in markets that are not considered to be active.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Level 3 – Investments reflect prices based upon unobservable sources.

The categorization of investments within the hierarchy is based upon the pricing transparency of the instrument and should not be perceived as the particular investment’s risk.

Assets classified in Level 1 of the fair value hierarchy are valued directly from a primary external pricing vendor. Level 2 inputs are valued using a matrix pricing model.

As of June 30, 2024, the Station had the following investments measured at fair value:

	Fair Value Measurement			Total
	Level 1	Level 2	Level 3	
U.S. Government Obligations	\$ -	\$ 36,573	\$ -	\$ 36,573
Corporate Bonds	-	24,484	-	24,484
Foreign Bonds	-	5,950	-	5,950
Bond Mutual Funds	6,634	-	-	6,634
Common Stock	181,753	-	-	181,753
Equity Mutual Funds	35,292	-	-	35,292
<b>Totals</b>	<b>\$ 223,679</b>	<b>\$ 67,007</b>	<b>\$ -</b>	<b>\$ 290,686</b>

As of June 30, 2023, the Station had the following investments measured at fair value:

	Fair Value Measurement			Total
	Level 1	Level 2	Level 3	
U.S. Government Obligations	\$ -	\$ 35,760	\$ -	\$ 35,760
Corporate Bonds	-	22,253	-	22,253
Foreign Bonds	-	3,433	-	3,433
Bond Mutual Funds	5,017	-	-	5,017
Common Stock	150,732	-	-	150,732
Equity Mutual Funds	37,283	-	-	37,283
<b>Totals</b>	<b>\$ 193,032</b>	<b>\$ 61,446</b>	<b>\$ -</b>	<b>\$ 254,478</b>

As of June 30, 2024, the Station had the following investments and maturities using the segmented time distribution method:

Investment Type	Fair Value	Investment Maturities (in Years)			
		Less than 1	1-5	6-10	More than 10
U.S. Government Obligations	\$ 36,573	\$ 25,446	\$ 11,127	\$ -	\$ -
Corporate Bonds	24,484	6,754	17,730	-	-
Foreign Bonds	5,950	3,307	2,643	-	-
Bond Mutual Funds	6,634	6,634	-	-	-
Common Stock	181,753	181,753	-	-	-
Equity Mutual Funds	35,292	35,292	-	-	-
<b>Totals</b>	<b>\$ 290,686</b>	<b>\$ 259,186</b>	<b>\$ 31,500</b>	<b>\$ -</b>	<b>\$ -</b>

All callable stocks were assumed to mature in less than one year.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

As of June 30, 2023, the Station had the following investments and maturities using the segmented time distribution method:

Investment Type	Fair Value	Investment Maturities (in Years)			
		Less than 1	1-5	6-10	More than 10
U.S. Government Obligations	\$ 35,760	\$ 31,273	\$ 4,487	\$ -	\$ -
Corporate Bonds	22,253	8,230	14,023	-	-
Foreign Bonds	3,433	-	3,433	-	-
Bond Mutual Funds	5,017	5,017	-	-	-
Common Stock	150,732	150,732	-	-	-
Equity Mutual Funds	37,283	37,283	-	-	-
<b>Totals</b>	<b>\$ 254,478</b>	<b>\$ 232,535</b>	<b>\$ 21,943</b>	<b>\$ -</b>	<b>\$ -</b>

All callable stocks were assumed to mature in less than one year.

As of June 30, 2024, investments had the following quality credit ratings:

Investment Type	Fair Value	Aaa	Aa	A	Baa	Unrated
Corporate Bonds	\$ 24,484	\$ -	\$ 4,299	\$ 16,832	\$ 3,353	\$ -
Foreign Bonds	5,950	-	-	5,950	-	-
Bond Mutual Funds	6,634	319	-	-	6,302	13
<b>Totals</b>	<b>\$ 37,068</b>	<b>\$ 319</b>	<b>\$ 4,299</b>	<b>\$ 22,782</b>	<b>\$ 9,655</b>	<b>\$ 13</b>

As of June 30, 2023, investments had the following quality credit ratings:

Investment Type	Fair Value	Aaa	Aa	A	Baa	Unrated
Corporate Bonds	\$ 22,253	\$ 4,633	\$ -	\$ 10,509	\$ 7,111	\$ -
Foreign Bonds	3,433	-	-	3,433	-	-
Bond Mutual Funds	5,017	171	-	-	4,806	40
<b>Totals</b>	<b>\$ 30,703</b>	<b>\$ 4,804</b>	<b>\$ -</b>	<b>\$ 13,942</b>	<b>\$ 11,917</b>	<b>\$ 40</b>

***Interest Rate Risk*** - Interest rate risk is the risk that changes in interest rates will adversely affect the fair value of an investment. The University's investment policy and asset allocation guidelines facilitate the management and monitoring of its exposure to fair value losses arising from increasing interest rates.

***Credit Risk*** - Credit risk is the risk that an issuer or other counterparty to an investment will not fulfill its obligations. Credit quality, as commonly expressed in terms of credit ratings issued by nationally recognized statistical rating organizations such as Moody's Investors Services, Standard & Poor's or Fitch rating provides a current depiction of potential variable cash flows and credit risk. The University's investment policy and asset allocation guidelines contain provisions to manage credit risk.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

*Custodial Credit Risk* - Custodial credit risk is the risk that in the event of the failure of the counterparty to a transaction, the University will not be able to recover the value of investments or collateral securities that are in the possession of an outside party. Investments that are both unregistered and uninsured are exposed to custodial credit risk if investments are held by the counterparty or are held by the counterparty's trust department or agent but not in the name of the University. At June 30, 2024 and 2023, the University had no exposure to custodial credit risk. The University does not address custodial credit risk in its investment policy and asset allocation guidelines.

*Concentration of Credit Risk* - Concentration of credit risk is the risk of loss attributed to the magnitude of investment in a single issuer. As of June 30, 2024, \$5,251,856 or 6% of the University's portfolio was held in an intermediate bond fund. As of June 30, 2023, \$5,091,372 or 7% was held in an intermediate bond fund and \$6,082,117 or 8% was held in a short-term bond fund.

*Foreign Currency Risk* - Foreign currency risk is the risk that changes in exchange rates will adversely affect the fair value of an investment or deposit. At June 30, 2024 and 2023, the University had no material exposure to foreign currency risk. The University does not address foreign currency risk in its investment policy and asset allocation guidelines.

### **Note 4 – Capital Assets**

Capital assets activity for the year ended June 30, 2024 was as follows:

	Beginning Balance	Additions	Reductions	Ending Balance
Depreciable assets:				
Antenna and tower	\$ 552,979	\$ -	\$ -	\$ 552,979
Studio and broadcast equipment	133,032	-	-	133,032
Total cost	686,011	-	-	686,011
Less: Accumulated depreciation	600,493	17,948	-	618,441
Capital assets, net	<u>\$ 85,518</u>	<u>\$ (17,948)</u>	<u>\$ -</u>	<u>\$ 67,570</u>

Capital assets activity for the year ended June 30, 2023 was as follows:

	Beginning Balance	Additions	Reductions	Ending Balance
Depreciable assets:				
Antenna and tower	\$ 552,979	\$ -	\$ -	\$ 552,979
Studio and broadcast equipment	133,032	-	-	133,032
Total cost	686,011	-	-	686,011
Less: Accumulated depreciation	582,546	17,947	-	600,493
Capital assets, net	<u>\$ 103,465</u>	<u>\$ (17,947)</u>	<u>\$ -</u>	<u>\$ 85,518</u>

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

### **Note 5 – Compensated Absences**

Compensated Absences at June 30, 2024 and June 30, 2023 were as follows:

	2024	2023
Beginning Balance	\$ 47,795	\$ 49,696
Additions	-	-
Reductions	8,075	1,901
Ending Balance	39,720	47,795
Less: current portion	7,263	8,253
Compensated Absences, noncurrent portion	<u>\$ 32,457</u>	<u>\$ 39,542</u>

### **Note 6 – Employee Benefit Plans**

#### **Plan Descriptions**

The Station participates in the Ohio Public Employees Retirement System (OPERS), statewide, cost-sharing, multiple-employer defined benefit public employee retirement system governed by the Ohio Revised Code (ORC) that covers all employees of the Station. The system has multiple retirement plan options available to its members, with three options. The system provides retirement, survivor, and disability benefits to plan members and their beneficiaries. The system also provides post-employment health care benefits (including Medicare B premiums) to retirees and beneficiaries who elect to receive those benefits.

The retirement system issues a publicly available financial report that includes financial statements and required supplementary information for the pension and post-employment health care plans. The report may be obtained by contacting:

Ohio Public Employees Retirement System  
277 East Town Street  
Columbus, Ohio 43215  
(800) 222-7377  
[www.opers.org](http://www.opers.org)

#### **Contributions**

State retirement law requires contributions by covered employees and their employers, and Chapter 3307 of the Ohio Revised Code (ORC) limits the maximum rate of contributions. The retirement board of the system sets contributions rates within the allowable limits. The adequacy of employer contribution rates is determined annually by actuarial valuation using the entry age normal cost method. Under these provisions, the Station's contribution is expected to finance the costs of benefits earned by employees during the year, with an additional amount to finance a portion of the unfunded accrued liability.

Member contributions are set at the maximums authorized by the ORC. The plan's 2024 and 2023 employer and member contribution rates on covered payroll to each system are:

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

	Employer Contribution Rate					Member Contribution Rate
	Pension	Post- Retirement Healthcare	Death Benefits	Medicare B	Total	Total
OPERS-State/Local	14.0%	0.0%	0.0%	0.0%	14.0%	10.0%

The required and actual contributions to the plans are:

	For the years ended June 30,			
	2024		2023	
	Pension	OPEB	Pension	OPEB
OPERS	\$ 57,759	-	\$ 51,671	-

### **Benefits Provided**

#### **OPERS**

Plan benefits are established under Chapter 145 of the ORC, as amended by Substitute Senate Bill 343 in 2012. The requirements to retire depends on years of service (5 to 30 years) and from attaining the age of 48 to 62, depending on when the employee became a member. Members retiring before age 65 with less than 30 years' service credit receive a percentage reduction in benefit. Member retirement benefits are calculated on a formula that considers years of service (5-30 years), age (48-62 years) and final average salary, using a factor ranging from 1% to 2.5%.

A plan member who becomes disabled before age 60 or at any age, depending on when the member entered the plan, and has completed 60 contributing months is eligible for a disability benefit.

A death benefit of \$500 - \$2,500 is determined by the number of years of service credit of the retiree. Benefits may transfer to a beneficiary upon death with 1.5 years of service credits with the plan obtained within the last 2.5 years.

Benefit terms provide for annual cost-of-living adjustments to each employee's retirement allowance subsequent to the employee's retirement date. The annual adjustment, if applicable, is 3%, or an amount based on the average percentage increase in the Consumer Price Index, capped at 3%.

### **Net Pension Liability, Deferrals, and Pension Expense**

At June 30, 2024 and 2023, the Station reported a liability for its proportionate share of the net pension liability of OPERS. For June 30, 2024, the net pension liability was measured as of December 31, 2023. For June 30, 2023, the net pension liability was measured as of December 31, 2022. The total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of those dates. The University's proportion of the net pension liability was based on a projection of its long-term share of contributions to the pension plan relative to the



# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

projected contributions of all participating reporting units, actuarially determined. At June 30, 2024 and 2023, the University's proportionate share of the net pension liability was 0.2284% and 0.2371%, respectively. The amount the University allocated to the Station is based on total retirement contributions for the Station's employees as a percentage of the total retirement contributions for the University. At June 30, 2024 and 2023, the Station's allocation of the University's proportion was 0.9653% and 0.9529%, respectively.

Plan	Measurement Date	Net Pension Liability		Proportionate Share		Change 2023-24	Change 2022-23
		2024	2023	2024	2023		
OPERS	December 31	\$ 570,092	\$ 661,977	0.002204%	0.002260%	-0.000055%	0.000044%

For the years ended June 30, 2024 and 2023, the Station recognized pension expense of \$73,002 and \$92,964, respectively. At June 30, 2024 and 2023, the Station reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	2024		2023	
	Deferred Outflows of Resources	Deferred Inflows of Resources	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ 10,016	\$ 748	\$ 22,764	\$ 821
Changes of assumptions	285	-	7,441	-
Net difference between projected and actual earnings on pension plan investments	117,869	-	192,483	-
Changes in proportion and differences between Station contributions and proportionate share of contributions	1,093	9,960	5,737	246
Station contributions subsequent to the measurement date	28,889	-	27,214	-
<b>Totals</b>	<b>\$ 158,152</b>	<b>\$ 10,708</b>	<b>\$ 255,639</b>	<b>\$ 1,067</b>

Amounts reported as deferred outflows of resources/ (deferred inflows of resources) related to pensions will be recognized in pension expense as follows:

Year Ended June 30,	Amount
2025	\$ 22,928
2026	36,625
2027	75,268
2028	(16,674)
2029	180
Thereafter	226
<b>Totals</b>	<b>\$ 118,553</b>

In addition, the contributions subsequent to the measurement date will be included as a reduction of the net pension liability in the next year.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

### Net OPEB Liability/(Asset), Deferrals, and OPEB Expense

At June 30, 2024, the Station reported an (asset) for its proportionate share of the net OPEB (asset) of OPERS. For June 30, 2024, the net OPEB (asset) was measured as of December 31, 2023. For June 30, 2023, the net OPEB liability was measured as of December 31, 2022. The total OPEB liability/(asset) used to calculate the net OPEB liability/(asset) was determined by an actuarial valuation dated December 31, 2022 and 2021, respectively, rolled forward to the measurement date by incorporating the expected value of health care cost accruals, the actual health care payments, and interest accruals during the year for the defined benefit health care plans.

Typically, the Station's proportion of the net OPEB liability/(asset) would be based on a projection of its long-term share of contributions to the OPEB plan relative to the projected contributions of all participating reporting units, actuarially determined, except as noted below.

For plan years ending December 31, 2023 and 2022, OPERS did not allocate employer contributions to the OPEB plan. Therefore, OPERS's calculation of the employers' proportionate share is based on total contributions to the plan for both pension and OPEB.

At June 30, 2024 and 2023, the University's proportionate share of the net OPEB liability/(asset) was 0.2246% and 0.2324%, respectively. The amount the University allocated to the Station is based on total retirement contributions for the Station's employees as a percentage of the total retirement contributions for the University. At June 30, 2024 and 2023, the Station's allocation of the University's proportion was 0.9653% and 0.9529%, respectively.

Plan	Measurement Date	Net OPEB Liability (Asset)		Proportionate Share		Change	
		2024	2023	2024	2023	2023-24	2022-23
OPERS	December 31	\$ (19,565)	\$ 13,964	0.002168%	0.002215%	-0.000047%	0.000018%

For the years ended June 30, 2024 and 2023, the Station recognized OPEB expense/(income) of \$20 and (\$30,241), respectively. At June 30, 2024 and 2023, the Station reported deferred outflows of resources and deferred inflows of resources related to OPEB from the following sources.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

	2024		2023	
	Deferred Outflows of Resources	Deferred Inflows of Resources	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ -	\$ 2,785	\$ -	\$ 3,483
Changes of assumptions	5,037	8,409	13,639	1,122
Net difference between projected and actual earnings on OPEB investments	11,749	-	27,735	-
Changes in proportion and differences between Station contributions and proportionate share of contributions	-	1,787	587	2
Station contributions subsequent to the measurement date	-	-	-	-
<b>Totals</b>	<u>\$ 16,786</u>	<u>\$ 12,981</u>	<u>\$ 41,961</u>	<u>\$ 4,607</u>

Amounts reported as deferred outflows of resources/ (deferred inflows of resources) related to OPEB will be recognized in OPEB expense as follows:

Year Ended June 30	Amount
2025	\$ (1,645)
2026	272
2027	9,146
2028	(3,967)
2029	-
Thereafter	-
<b>Totals</b>	<u>\$ 3,806</u>

In addition, if applicable, the contributions subsequent to the measurement date will be included as a reduction of the net OPEB liability in the next year.

### **Actuarial Assumptions**

The total pension liability and OPEB liability/(asset) is based on the results of an actuarial valuation and were determined using the following actuarial assumptions for the Station's current year.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

OPERS	
Valuation date - Pension	December 31, 2023
Valuation date - OPEB	December 31, 2022
Actuarial cost method	Individual entry age
Cost of living	2.05% - 3.00%
Salary increases, including inflation	2.75% - 10.75%
Inflation	2.75%
Investment rate of return - Pension	6.90%, net of investment expense, including inflation
Investment rate of return - OBEB	6.00%, net of investment expense, including inflation
Health care cost trend rates	5.50% initial, 3.50% ultimate in 2038
Experience study date	Period of 5 years ended December 31, 2020
Mortality basis	Pre-retirement mortality rates are based on 130% of the Pub-2010 General Employee Mortality tables (males and females) for State and Local Government divisions and 170% of the Pub-2010 Safety Employee Mortality tables (males and females) for the Public Safety and Law Enforcement divisions. Post-retirement mortality rates are based on 115% of the PubG-2010 Retiree Mortality Tables (males and females) for all divisions. Post-retirement mortality rates for disabled retirees are based on the PubNS-2010 Disabled Retiree Mortality Tables (males and females) for all divisions. For all of the previously described tables, the base year is 2010 and mortality rates for a particular calendar year are determined by applying the MP-2020 mortality improvement scales (males and females) to all of these tables.

The following are actuarial assumptions for the University's prior year:

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

OPERS	
Valuation date - Pension	December 31, 2022
Valuation date - OPEB	December 31, 2021
Actuarial cost method	Individual entry age
Cost of living	2.05% - 3.00%
Salary increases, including inflation	2.75% - 10.75%
Inflation	2.75%
Investment rate of return - Pension	6.90%, net of investment expense, including inflation
Investment rate of return - OPEB	6.00%, net of investment expense, including inflation
Health care cost trend rates	5.50% initial, 3.50% ultimate in 2036
Experience study date	Period of 5 years ended December 31, 2020
Mortality basis	Pre-retirement mortality rates are based on 130% of the Pub-2010 General Employee Mortality tables (males and females) for State and Local Government divisions and 170% of the Pub-2010 Safety Employee Mortality tables (males and females) for the Public Safety and Law Enforcement divisions. Post-retirement mortality rates are based on 115% of the PubG-2010 Retiree Mortality Tables (males and females) for all divisions. Post-retirement mortality rates for disabled retirees are based on the PubNS-2010 Disabled Retiree Mortality Tables (males and females) for all divisions. For all of the previously described tables, the base year is 2010 and mortality rates for a particular calendar year are determined by applying the MP-2020 mortality improvement scales (males and females) to all of these tables.

### **Pension Discount Rate**

The projection of cash flows used to determine the discount rate assumed that employee contributions will be made at the current contribution rate and that employer contributions will be made at contractually required rates for all plans. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments for current active and inactive employees. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability. The discount rates used to measure the total pension liability for OPERS were 6.90% for both the plan years ended December 31, 2023 and 2022, respectively.

### **OPEB Discount Rate**

The projection of cash flows used to determine the discount rate assumed that employee contributions will be made at the current contribution rate and that employer contributions will be made at contractually required rates for all plans. Plans that project fiduciary net position to be insufficient to make all projected future benefit payments for current active and inactive employees used a blended discount rate between the long-term expected rate of return on plan investments

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

and a 20-year municipal bond rate applied to all periods of projected benefit payments to determine the total OPEB liability/(asset).

*OPERS OPEB Discount Rate* - The discount rates used to measure the total OPEB liabilities/(assets) were 5.70% and 5.22% for the plan years ended December 31, 2023 and 2022, respectively. At December 31, 2023 the plan's fiduciary net position was projected to become insufficient to make all projected future benefit payments for current active and inactive employees. Therefore, a blended rate was used, which consisted of the long-term expected rate of return on OPEB plan investments (6.00%) for the funded benefit payments and Fidelity Index's 20-Year Municipal GO AA Index of 3.77% as of December 31, 2023. At December 31, 2022, the plan's fiduciary net position was projected to be available to make all projected future benefit payments for current active and inactive employees. Therefore, a blended rate was used, which consisted of the long-term expected rate of return on OPEB plan investments (6.00%) for the funded benefit payments and Fidelity Index's 20-Year Municipal GO AA Index of 4.05% as of December 31, 2022.

The long-term expected rate of return on pension plan and OPEB plan investments was determined using a building-block method in which best-estimate ranges of expected future real rates of return (expected returns, net of plan investment expense and inflation) are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation. OPERS has two different portfolios of investment, a defined benefit portfolio for pension and health care portfolio for OPEB. As a result, there are different target allocations and long-term expected real rates of return disclosed for each portfolio. The target allocation and best estimates of arithmetic real rates of return for each major asset class are summarized in the following table as of the dates listed below:

Investment Category	OPERS as of 12/31/23			
	Pension Portfolio		Health Care Portfolio	
	Target Allocation	Long-Term expected Real Rate of Return	Target Allocation	Long-Term expected Real Rate of Return
Fixed income	24.0%	2.85%	37.0%	2.82%
Domestic Equities	21.0%	4.27%	25.0%	4.27%
Real Estate	13.0%	4.46%	0.0%	0.00%
Private Equity	15.0%	7.52%	0.0%	0.00%
International Equity	20.0%	5.16%	25.0%	5.16%
Risk Parity	2.0%	4.38%	3.0%	4.38%
REITs	0.0%	0.00%	5.0%	4.68%
Other Investments	5.0%	3.46%	5.0%	2.43%
	<u>100.0%</u>		<u>100.0%</u>	

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

OPERS as of 12/31/22					
Investment Category	Pension Portfolio			Health Care Portfolio	
	Target Allocation	Long-Term		Target Allocation	Long-Term
		expected Rate of Return	Real Rate of Return		expected Rate of Return
Fixed income	22.0%	2.62%		34.0%	2.56%
Domestic Equities	22.0%	4.60%		26.0%	4.60%
Real Estate	13.0%	3.27%		0.0%	0.00%
Private Equity	15.0%	7.53%		25.0%	5.51%
International Equity	21.0%	5.51%		2.0%	4.37%
Risk Parity	2.0%	4.37%		6.0%	1.84%
REITs	0.0%	0.00%		7.0%	4.70%
Other Investments	5.0%	3.27%		0.0%	0.00%
	100.0%			100.0%	

**Sensitivity of the net pension liability/(asset) to changes in the discount rate**

The following presents the net pension liability of the Station calculated using the discount rate listed below, as well as what the Station's net pension liability/(asset) would be if it were calculated using a discount rate that is 1.00% lower or 1.00% higher than the current rate.

		2024			
Plan	1% Decrease	Current Discount Rate		1% Increase	
OPERS	5.90%    \$ 904,910	6.90%	\$ 570,092	7.90%	\$ 291,750

		2023			
Plan	1% Decrease	Current Discount Rate		1% Increase	
OPERS	5.90%    \$ 997,297	6.90%	\$ 661,977	7.90%	\$ 383,160

**Sensitivity of the net OPEB liability(asset) to changes in the discount rate**

The following presents the net OPEB liability/(asset) of the Station, calculated using the discount rate listed below, as well as what the Station's net OPEB liability/(asset) would be if it were calculated using a discount rate that is 1.00% lower or 1.00% higher than the current rate:

		2024			
Plan	1% Decrease	Current Discount Rate		1% Increase	
OPERS	4.70%    \$ 10,752	5.70%	\$ (19,565)	6.70%	\$ (44,677)

		2023			
Plan	1% Decrease	Current Discount Rate		1% Increase	
OPERS	4.22%    \$ 47,527	5.22%	\$ 13,964	6.22%	\$ (13,731)

**Sensitivity of the net OPEB liability/(asset) to changes in the health care cost trend rate**

The following presents the net OPEB liability/(asset) of the Station, calculated using the healthcare cost trend rate listed below, as well as what the Station's net OPEB liability/(asset) would be if it

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

were calculated using a health care cost trend rate that is 1.00% lower or 1.00% higher than the current rate:

Plan	1% Decrease	2024	
		Current Trend Rate	1% Increase
OPERS	\$ (20,377)	\$ (19,565)	\$ (18,643)

Plan	1% Decrease	2023	
		Current Trend Rate	1% Increase
OPERS	\$ 13,089	\$ 13,964	\$ 14,949

### **Pension plan and OPEB plan fiduciary net position**

Detailed information about the pension plan's fiduciary net position is available in the separately issued OPERS financial report.

### **Benefit changes**

There were no significant benefit terms changes for the pension or OPEB plan(s) since the prior two measurement dates for OPERS.

### **Assumption changes**

During the measurement period ended December 31, 2023, certain assumption changes were made by the plan. The OPERS OPEB discount rate increased from 5.22% to 5.70%, which impacted the annual actuarial valuation for OPEB prepared as of December 31, 2023.

### **Payable to the Pension Plan and OPEB Plan**

The Station reported a payable of \$10,063 and \$9,617 for the outstanding contributions to the OPERS pension plan required for the years ended June 30, 2024 and June 30, 2023, respectively.

### **Defined Contribution Pension Plan**

The Alternative Retirement Plan (ARP) is a defined contribution pension plan, under IRS Section 401(a), and established by Ohio Amended Substitute House Bill 586 (ORC 3305.02) on March 31, 1998, for public institutions of higher education. The University's Board of Trustees adopted the University's plan on December 11, 1998. Full-time employees are eligible to choose a provider, in lieu of OPERS, from the list of nine providers currently approved by the Ohio Department of Insurance and who hold agreements with the University. Employee and employer contributions equal to those required by OPERS are required for the ARP, less any amounts required to be remitted to the state retirement system in which the employee would otherwise have been enrolled.

Eligible employees have 120 days from their date of hire to make an irrevocable election to participate in the ARP. Under this plan, employees who would have otherwise been required to be in OPERS, and who elect to participate in the ARP, must contribute the employee's share of retirement contributions to one of nine private providers approved by the Ohio Department of Insurance. The legislation mandates that the employer must contribute an amount to the state retirement system to which the employee would have otherwise belonged, based on an independent



# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

actuarial study commissioned by the Ohio Retirement Study Council and submitted to the Ohio Board of Regents. That amount is 2.24% for OPERS for the years ended June 30, 2024 and 2023. If the employee was hired on or after August 2005, the employer contributes 6.00%. The employer also contributes what would have been the employer's contribution under OPERS, less the aforementioned percentages, to the private provider selected by the employee. The University plan provides these employees with immediate plan vesting. The ARP does not provide disability benefits, survivor benefits, or postretirement health care. Benefits are entirely dependent on the sum of contributions and investment returns earned by each participant's choice of investment options. OPERS also offers a defined contribution plan and a combined plan with features of both a defined contribution plan and a defined benefit plan. There were no contributions made to the ARP for the fiscal years ended June 30, 2024 and 2023. Contributions were equal to the required contributions for each year.

### **Note 7 - Related Party**

Youngstown State University Foundation is a legally separate nonprofit organization exempt from federal income tax and classified as a public charity. The Foundation is devoted to the support, expansion, and development of educational programs at the University that are useful and beneficial to the students and the community. During fiscal year 2015, the University entered into a development services agreement with the Foundation, wherein the Foundation raises and maintains donations on behalf of the University. The Foundation remits all related funds received on a monthly basis.

The operations of WYSU-FM are supported by general appropriations from the University. The University's support allocation totaled \$394,457 and \$378,222 in direct support for fiscal years 2024 and 2023, respectively, and \$251,916 and \$244,292 in indirect administrative support and donated facilities.

### **Note 8 – Risk Management**

WYSU-FM is included in the University's insurance programs. The University is exposed to various risks of loss related to torts; theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. The University has joined with other state-assisted universities in Ohio to form an insurance pool for the acquisition of commercial property and casualty insurance. The University pays annual premiums to the pool for its property and casualty insurance coverage based on its percentage of the total insurance value to the pool. Future contributions will be adjusted based upon each university's loss history. The University had no significant reductions in coverage from the prior year. Insurance settlements have not exceeded insurance coverage for each of the past three fiscal years.

### **Note 9 – Nonfederal Financial Support**

The Corporation for Public Broadcasting (CPB) allocates a portion of its funds annually to public broadcasting entities, primarily based on Nonfederal Financial Support (NFFS). NFFS is defined

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

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## NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

as the total value of cash and the fair market value of property and services received as either a contribution or a payment and meeting all of the respective criteria for each.

A contribution is cash, property or services given to a public broadcasting entity for general operational purposes. Support received as a contribution by a public broadcasting entity must meet the following criteria to be includable as NFFS: (1) the source may be an entity except the federal government or any other public broadcasting entity; (2) the contribution may take the form of a gift, grant, bequest, donation or appropriation; (3) the purpose must be for the construction or operation of a noncommercial, educational public broadcast station or for the production, acquisition, distribution or dissemination of educational television or radio program and related activities; and (4) the recipient must be a public broadcasting entity on behalf of a public broadcast station. However, to eliminate distortions in the TV CSG grant program precipitated by extraordinary infusions of new capital investments in DTV, all capital contributions received for purposes of acquiring new equipment or upgrading existing or building new facilities regardless of source or form of the contribution are not included in calculating the fiscal year 2024 or fiscal year 2023 NFFS. This change excludes all revenues received for any capital purchases.

A payment is cash, property or services received by a public broadcasting entity from specific sources in exchange for specific services or materials. Support received as a payment by a public broadcasting entity must meet the following criteria to be includable as NFFS: (1) the source must be a state, any agency or political subdivision of a state, an educational institution or organization or a nonprofit entity; (2) the form of the payment must be appropriations or contract payments in exchange for specific services or materials; (3) the purpose must be for any related activity of the public broadcast station; and (4) the recipient must be a public broadcasting entity on behalf of a public broadcast station.

Reported NFFS for the Station was \$1,163,975 and \$1,132,504 for the radio fund for 2024 and 2023, respectively.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## REQUIRED SUPPLEMENTARY INFORMATION

### Schedule of the Station's Proportionate Share of the Net Pension Liability Plan Years Ended 2014 to 2023

Plan Year	Station's proportion of the net pension liability (asset) as a percentage	Station's proportion of the net pension liability (asset) amount	Station's covered employee payroll	Station's proportionate share of the collective pension liability (amount) as a percentage of the Station's covered employee payroll	Plan fiduciary net position as a percentage of the total pension liability
<b>Ohio Public Employees Retirement System (OPERS)</b>					
2023	0.002204%	\$ 570,092	\$ 382,690	148.97%	79.39%
2022	0.002260%	\$ 661,977	\$ 368,606	179.59%	76.07%
2021	0.002216%	\$ 183,658	\$ 342,580	53.61%	93.01%
2020	0.002413%	\$ 349,841	\$ 362,906	96.40%	87.21%
2019	0.003009%	\$ 588,367	\$ 450,235	130.68%	82.44%
2018	0.003204%	\$ 873,885	\$ 473,020	184.74%	78.00%
2017	0.003238%	\$ 503,458	\$ 464,796	108.32%	79.00%
2016	0.003304%	\$ 748,429	\$ 461,655	162.12%	80.00%
2015	0.003450%	\$ 595,414	\$ 462,132	128.84%	80.00%
2014	0.003470%	\$ 416,913	\$ 445,112	93.66%	84.00%

The plan year ends on December 31 for OPERS.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## REQUIRED SUPPLEMENTARY INFORMATION

### Schedules of the Station's Pension Contributions

Fiscal Year	Statutorily required contribution	Contributions in relation to the actuarially determined contractually required contribution	Contribution deficiency (excess)	Covered employee payroll	Contributions as a percent of covered employee payroll
<b>Ohio Public Employees Retirement System (OPERS)</b>					
2024	\$ 57,759	\$ 57,759	\$ -	\$ 412,561	14.00%
2023	\$ 51,671	\$ 51,671	\$ -	\$ 369,079	14.00%
2022	\$ 50,659	\$ 50,659	\$ -	\$ 361,850	14.00%
2021	\$ 46,172	\$ 46,172	\$ -	\$ 329,801	14.00%
2020	\$ 57,331	\$ 57,331	\$ -	\$ 409,509	14.00%
2019	\$ 65,665	\$ 65,665	\$ -	\$ 472,860	13.89%
2018	\$ 63,928	\$ 63,928	\$ -	\$ 474,256	13.48%
2017	\$ 57,269	\$ 57,269	\$ -	\$ 459,488	12.47%
2016	\$ 55,912	\$ 55,912	\$ -	\$ 465,061	12.02%
2015	\$ 55,579	\$ 55,579	\$ -	\$ 461,406	12.05%

*Changes of benefit terms*

There were no changes in benefit terms affecting the OPERS plan.

*Changes of assumptions*

During the plan year ended December 31, 2023 and 2022, there were no changes to key assumptions.

During the plan year ended December 31, 2021, there were changes to several assumptions for OPERS. The discount rate was reduced from 7.50% to 6.90%. The wage inflation dropped from 3.25% to 2.75%. The projected salary increase range changed from 3.25%-10.75% to 2.75%-10.75%, The experience study changed from the 5-year period ended December 31, 2015 to the 5-year period ended December 31, 2020. The mortality tables used changed from RP2014 to PUB-2010.

During the plan year ended December 31, 2018, the discount rate was reduced from 7.50% to 7.20%.

During the plan year ended December 31, 2016, there were changes to several assumptions for OPERS. The wage inflation dropped from 3.75% to 3.25%. The projected salary increase range changed from 4.25%-10.05% to 3.25%-10.75%. The mortality tables used changed from RP-2000 to RP-2014.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## REQUIRED SUPPLEMENTARY INFORMATION

### Schedules of the Station's Proportionate Share of the Net OPEB Liability/(Asset) Plan Years Ended 2017 to 2023

Plan Year	Stations's proportion of the net OPEB liability/(asset) as a percentage	Station's proportion of the net OPEB liability/(asset) amount	Station's covered payroll	Station's proportionate share of the collective OPEB liability/(asset) amount as a percentage of the	Plan fiduciary net position as a percentage of the total OPEB liability/(asset)
<b>Ohio Public Employees Retirement System (OPERS)</b>					
2023	0.002168%	\$ (19,565)	\$ 382,690	5.11%	107.76%
2022	0.002215%	\$ 13,964	\$ 368,606	3.79%	94.79%
2021	0.002197%	\$ (68,809)	\$ 342,580	20.09%	128.23%
2020	0.002400%	\$ (42,751)	\$ 362,906	11.78%	115.57%
2019	0.002980%	\$ 411,635	\$ 450,235	91.43%	47.80%
2018	0.002325%	\$ 303,125	\$ 473,020	64.09%	46.33%
2017	0.003114%	\$ 338,157	\$ 464,796	72.76%	54.14%

The plan year ends on December 31 for OPERS.

# WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

## REQUIRED SUPPLEMENTARY INFORMATION

### Schedules of the Station's OPEB Contributions

Fiscal Year	Statutorily required contribution	Contributions in relation to the actuarially determined contractually required contribution	Contribution deficiency/(excess)	Covered payroll	Contributions as a percent of covered payroll
<b>Ohio Public Employees Retirement System (OPERS)</b>					
2024	\$ -	\$ -	\$ -	\$ 412,561	0.00%
2023	\$ -	\$ -	\$ -	\$ 369,079	0.00%
2022	\$ -	\$ -	\$ -	\$ 361,850	0.00%
2021	\$ -	\$ -	\$ -	\$ 329,801	0.00%
2020	\$ -	\$ -	\$ -	\$ 409,509	0.00%
2019	\$ -	\$ -	\$ -	\$ 472,860	0.00%
2018	\$ 2,468	\$ 2,468	\$ -	\$ 474,256	0.52%

#### *Changes of benefit terms*

There were no significant changes in benefit terms affecting the OPERS plan for the plan year ended December 31, 2023 and 2022.

#### *Changes of assumptions*

During the plan year ended December 31, 2023, the health care cost trend rate changed to 5.50% initial, 3.50% ultimate in 2038 from 5.50% initial, 3.50% ultimate in 2036 in 2022. In addition, the discount rate was increased from 5.22% to 5.70% and the municipal bond rate was decreased from 4.05% to 3.77%.

During the plan year ended December 31, 2022, the health care cost trend rate changed to 5.50% initial, 3.50% ultimate in 2036 from 5.50% initial, 3.50% ultimate in 2034 in 2021. In addition, the discount rate was reduced from 6.00% to 5.22%.

During the year ended December 2021, there were changes to several assumptions for OPERS. The experience study changed from the 5-year period ended December 31, 2015 to the 5-year period ended December 31, 2020. The municipal bond rate decreased from 2.00% to 1.84%. Wage inflation decreased 3.25% to 2.75%. The projected salary increase range changed from 3.25%-10.75% to 2.75%-10.75%. Health care cost trend rate decreased from 8.50% initial, 3.50% ultimate in 2035 to 5.50% initial, 3.50% ultimate in 2034.

During the plan year ended December 31, 2020, there were changes to several assumptions for OPERS. The health care cost trend rates decreased from 10.5% initial and 3.50% ultimate to 8.50% initial and 3.50% ultimate. The discount rate increased from 3.16% to 6.00%.

During the plan year ended December 31, 2019, there were changes to several assumptions for OPERS. The health care cost trend rates decreased from 10.00% initial and 3.25% ultimate to 10.50% initial and 3.50% ultimate. The discount rate was reduced from 3.96% to 3.16%.

Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*

### Independent Auditor's Report

To Management and the Board of Trustees  
WYSU-FM Youngstown State University Radio

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the business-type activities of WYSU-FM Youngstown State University Radio (the "Station"), a department of Youngstown State University, which comprise the basic statement of net position as of June 30, 2024 and the basic statements of revenues, expenses, and changes in net position and cash flows for the year then ended, and the related notes to the financial statements and have issued our report thereon dated November 26, 2024.

#### Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Station's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Station's internal control. Accordingly, we do not express an opinion on the effectiveness of the Station's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the Station's financial statements will not be prevented, or detected and corrected, on a timely basis. A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that have not been identified.

#### Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Station's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

To Management and the Board of Trustees  
WYSU-FM Youngstown State University Radio

**Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Station's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Station's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

*Plante & Moran, PLLC*

November 26, 2024





Youngstown State University does not discriminate on the basis of race, color, national origin, sex, sexual orientation, gender identity and/or expression, disability, age, religion or veteran/military status in its programs or activities. Please visit [www.yсу.edu/ada-accessibility](http://www.yсу.edu/ada-accessibility) for contact information for persons designated to handle questions about this policy.

**RESOLUTION TO MODIFY  
PURCHASING POLICY, 3356-3-01**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

### 3356-3-01 Purchasing.

Responsible Division/Office: Procurement Services  
Responsible Officer: VP for Finance and Business Operations  
Revision History: June 1998; June 2001; March 2007; May 2010;  
January 2012; December 2016; June 2017;  
June 2022; March 2023; [March 2025](#)  
Board Committee: Finance and Facilities  
**Effective Date:** ~~March 2, 2023~~ [March 2025](#)  
~~Minor Revision: September 20, 2023~~  
Next Review: ~~2028~~ [2030](#)

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- (A) Policy statement. Employees who are delegated signature authority for university accounts are authorized to make purchasing decisions for their respective areas, following applicable university procedures. In all its business practices, the university will adhere fully to all applicable laws, regulations, and rules of the federal, state of Ohio, and local regulatory bodies. Those conducting business for the university will seek to obtain the best value when making purchases, while protecting the interests of ~~Youngstown state university (university)~~ [the university](#).
- (B) Purpose. This policy helps ensure compliance with applicable federal and state purchasing regulations and provides a means for purchasing at a reasonable cost.
- (C) Definitions.
- (1) “Goods” are defined as, but not limited to, equipment, materials, other tangible assets, and insurance, but excluding real property or an interest in real property.
  - (2) “Services” are defined as any deliverable resulting from labor performed specifically for the university, whether from the application of physical or intellectual skills. Services include repair work, consulting, maintenance, data processing, and software design. Services do not include services furnished pursuant to employment agreements.
  - (3) “Professional design services” are defined as, but not limited to,

services within the scope of practice of a state-registered architect, registered engineer, registered surveyor, landscape architect and interior designer. See rule 3356-4-07 of the Administrative Code (university policy 3356-4-07, “Selection of design professionals for university capital projects”).

- (4) “Construction renovation” is defined in rule 3356-4-15 of the Administrative Code (university policy 3356-4-15, “University construction/renovation projects”).

(D) Parameters.

- (1) Accountability for vendor commitment and/or the actual purchase of goods or services rests with the financial manager. All construction/renovation projects must be coordinated through the university’s facilities office.
- (2) Procurement services has the primary responsibility to manage and monitor the purchasing process. Authority is delegated to the Maag library to purchase items to be added to its collection.
- (3) ~~As a commitment to diversity, equity and inclusion, the university provides opportunities for socially and economically disadvantaged businesses and participates~~ The university may participate in the state of Ohio’s minority business enterprise (MBE) and encouraging diversity, growth and equity (EDGE) programs.
- (4) To ensure the best value and compliance with applicable federal and/or state of Ohio regulations, the university requires competitive selection for certain dollar thresholds and participates in competitively awarded governmental and group purchasing agreements.

(E) Procedures.

- (1) Requests for purchases are made by using a university-approved procurement card or the online procurement requisition system.
- (2) An authorized electronic requisition/purchase order for goods or services must be processed through procurement services prior to vendor commitment and/or the actual purchase except for

authorized procurement card purchases. Exceptions may be made in the case of extenuating circumstance or an emergency, such as, but not limited to, unexpected building repairs that could otherwise result in catastrophic structural failure.

- (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. 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. 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 of procurement services, or designee, prior to vendor commitment and/or actual purchase.
- (4) If there is no existing university contract available, procurement services can assist in locating an approved competitively awarded governmental or group purchasing agreement, such as state term schedule, general services administration schedule, inter-university council purchasing group, or others.
- (5) Competitive selection dollar thresholds.
  - (a) Goods or services when an individual transaction/project from a single supplier is fifty thousand dollars or more.
  - (b) Professional design services when an individual transaction is fifty thousand dollars or more.
  - (c) A construction/renovation project when the construction project cost is two hundred ~~fifteen~~ fifty thousand dollars or more or the threshold established by rule 153:1-9-01 of the Administrative Code.
- (6) For purchases below the competitive selection dollar thresholds, the director of procurement services, or designee, may require up to three quotes or a competitive selection process when in the best interest of the university to do so or when regulations require.
- (7) For purchases at or above the competitive selection dollar thresholds, appropriate forms of competitive selection include:

- (a) An invitation to bid (ITB). A formal ITB is drafted and sent to prospective bidders and published in appropriate media when seeking to purchase goods.
  - (b) A request for proposal (RFP). RFPs are managed and distributed through the university's procurement services office. An RFP is drafted and sent to prospective bidders and published in appropriate media when seeking to purchase goods.
  - (c) A request for qualifications (RFQ). With the assistance of procurement services, an RFQ is sent to prospective bidders and may be published in appropriate media when seeking to purchase services. RFQs for professional design services are handled solely through the facilities office.
  - (d) Purchases under an approved competitively awarded governmental or group purchasing agreement, such as state term schedule, general services administration (GSA) schedule, inter-university council purchasing group, or others, some of which can be found on punch out catalogs on the university's online procurement system (eCUBE).
- (8) Exceptions to competitive selection requirements.
- (a) Maintenance contracts purchased from the manufacturer or authorized dealer/supplier of the specific equipment to be serviced.
  - (b) Software/hardware for system upgrades and ongoing maintenance and support on existing systems already in use.
  - (c) Special circumstances, including single source provider, emergency purchases, or economic efficacy. If the purchase is at or above the competitive selection dollar threshold and the nature of the purchase is such that competitive selection would be impractical, the department making the request for a purchase may submit a written request for a waiver of competitive selection. Such

requests must include justification as to why a waiver is warranted, be signed by the appropriate financial manager with signature authority, and be attached electronically to the requisition being submitted for the purchase.

If the director of procurement services, or designee, finds that sufficient justification has been presented, the waiver may be approved. If the director, or designee, feels that a bid waiver should be denied, it will be forwarded to the vice president for finance and business operations, or designee, for a final determination. If the request is denied, procurement services will initiate a competitive selection process at the request of the department end user.

- (9) Bidding thresholds may be adjusted to comply with federal and/or state regulations.
- (10) Contract compliance and administration processes will be conducted in accordance with rule 3356-3-04 of the Administrative Code (university policy 3356-3-04, "Contract compliance and administration").
- (11) The university assumes no obligation for any purchases made outside of the purchasing procedures established herein. Staff who fail to follow approved processes may be subject to personal financial liability and appropriate disciplinary action.
- (12) Purchases must follow established guidelines as delineated on the procurement services website.
- (13) ~~Exceptions to this policy may be considered when consistent with the goals established by rule 3356-01.01 of the Administrative Code (university policy 3356-01.01, "Supplier diversity").~~

**RESOLUTION TO MODIFY  
BUDGET-DEFICIT OPTIONS APPLICABLE TO EXCLUDED EMPLOYEES  
POLICY, 3356-3-11.2**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**



### 3356-3-11.2 Budget-deficit options applicable to excluded employees.

Responsible Division/Office: Finance and Business Operations  
Responsible Officer: VP for Finance and Business Operations  
Revision History: November 2011; June 2016; May 2020; [March 2025](#)  
Board Committee: Finance and Facilities  
**Effective Date:** ~~May 1, 2020~~ [March 13, 2025](#)  
Next Review: ~~2025~~ [2030](#)

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- (A) Policy statement. The university is committed to maintaining a balanced budget and operating efficiently within the confines of such budget. The board of trustees is empowered to do all things necessary for the creation, proper maintenance, and successful continuous operation of the university.
- (B) Purpose. To provide general guidelines for the use of employee cost-sharing measures to be implemented throughout the year in order to achieve spending reductions necessitated by budget deficits. Employee cost-sharing measures include, but are not limited to, furloughs, layoffs, pay reductions, and employee transfers or unit reorganizations that achieve spending reductions. This list does not operate to exclude other cost-saving measures. An operating budget deficit is caused by a loss of state funding, a decline in institutional enrollment, or other actions that affect the operating budget.
- (C) Scope. This policy applies to all excluded employees, including professional and administrative staff, classified, academic department chairpersons and multiple-year contract employees, regardless of FTE or funding.
- (D) Definitions.
- (1) A “furlough” is unpaid leave of absence from work for a specified number of [h](#)ours within a period of time. Employees shall not work when taking furlough leave. Unless otherwise notified by the office of human resources, employees shall not use accrued paid leave during periods of furlough.

- (2) “Layoff” is the temporary or permanent deletion of a position from the organizational structure of the university.
- (3) “Pay reduction” is the reduction in an employee’s salary. A pay reduction may be temporary or permanent and may or may not come with a reduction in responsibilities.
- (4) “Employee transfer” is the movement of an employee from one position to the same position. A transfer may also include other employee cost sharing measures.
- (5) “Unit reorganization” is the reassignment of duties among various positions within a work unit, i.e., combining job duties in an attempt to reduce staffing size while continuing to maintain efficiency without posting positions pursuant to rule ~~3356-7-42, 3356-9-01 and 3356-9-02~~ [3356-7-56](#) of the Administrative Code. ~~(Corresponding university policies 3356-7-42, 3356-9-01 and 3356-9-02 can be found on the [university policies website](#).)~~ A unit reorganization may also include other employee cost sharing measures.

The ~~cost~~[cost](#)-savings measures may be accompanied by suspending leave accruals, suspending university health insurance premium share (offering COBRA coverage only) and other cost savings incidentals.

(E) Procedures.

- (1) If the vice president for finance and business operations determines that it may be necessary to implement any of the employee cost sharing measures identified in this policy, he or she shall meet with the president to discuss the details of the budget. As necessary, the vice president for finance and business operations shall make a report to the appropriate campus constituencies, which shall include the board of trustees and may include (but is not required due to exigency of circumstances) the president’s executive management team and the academic senate.
- (2) If after such consultation, the president has reason to believe that action is required to address an operating budget deficit, the president may immediately institute cost-saving measures.

- (a) This policy supersedes all policies to the contrary.
- (b) Healthcare, dental, and life insurance may be affected by furlough leave, layoff, or other employment reduction options. Employees will be notified of changes.
- (c) Employee healthcare contribution payments may be altered or waived by the university president after consultation with the vice president for finance and business operations.
- (d) Employees will be given at least seven calendar days' notice prior to the start of a required furlough leave or layoff.
- (e) Retirement contributions will be affected by employment reduction options because contributions are calculated based upon actual earnings. Also, in accordance with retirement system rules and university policy, an employee's continuous service credit and review or evaluation date may be affected.
- (f) The implementation of employee cost-sharing measures or any other application of this policy may not be appealed under any other university policy or internal grievance process.

**RESOLUTION TO MODIFY  
SURPLUS PROPERTY POLICY, 3356-4-02**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

### 3356-4-02 Surplus property.

Responsible Division/Office: Finance and Business Operations  
Responsible Officer: VP for Finance and Business Operations  
Revision History: August 1997; June 2010; March 2015;  
March 2020; [March 2025](#)  
Board Committee: Finance and Facilities  
**Effective Date:** ~~March 5, 2020 (no changes)~~ [March 13, 2025](#)  
Next Review: ~~2025~~ [2030](#)

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- (A) Policy statement. Property such as equipment or furnishings which is no longer needed may be declared and disposed of in the best interest of the university.
- (B) Purpose. To establish procedures for the responsible disposal of surplus property.
- (C) Scope. This policy is applicable to university-owned assets.
- (D) Parameters. Proper repurposing or disposal of university-owned assets is permitted in accordance with the following parameters:
  - (1) The office of [facilities maintenance &](#) support services has the responsibility of controlling surplus university property and facilitating its disposition.
  - (2) All dispositions must be in conformance with federal, state, and local laws and regulations, including applicable grant and/or contract guidelines.
  - (3) Only the office of [facilities maintenance &](#) support services is authorized to sell, gift, or dispose of surplus university property, including scrap materials.
- (E) Procedures.
  - (1) When it is determined that departmental property is no longer needed, the chairperson/director shall release it to the office of [facilities maintenance &](#) support services by completing the

appropriate section of the ~~“Inventory Control”~~ [“Capital Inventory Surplus Release & Work Order”](#) form. (These forms may be obtained from the ~~office of support services~~ [YSU Surplus Equipment website](#).)

- (2) Any technology-based component or equipment which is determined to be surplus, such as a central processing unit (“CPU”) contained within a computer, equipment with magnetic or electronic memory (digital cameras, external hard drives, etc.) and/or equipment with components which can perform electronic data storage (printers, scanners, and copies), shall be turned over to the information technology services division.
- (3) Technology services shall either maintain an inventory of the technology-based components or equipment for redeployment within the university or prepare the component or equipment as surplus property for transfer to the office of [facilities maintenance & support services](#). Prior to the transfer as surplus property, the information technology division shall process the property and certify it is cleansed. Information technology services shall be the sole authority for determining and communicating to office of support services the permissible disposition of technology equipment.
- (4) Disposable media for data storage that are not solid state (paper, floppy drives, zip drives, CDs, DVDs, and future such media) are not considered technology-based equipment or components for the purpose of this policy.
- (5) To facilitate the intra-university transfer of surplus property, the office of [facilities maintenance & support services](#) is responsible for maintaining an inventory of such property and periodically notifying the campus community of its availability.
- (6) Requests for surplus property are made through the office of [facilities maintenance & support services](#).
- (7) When it is determined to be in the best interest of the university, the office of [facilities maintenance & support services](#) may dispose of such property by:

- (a) Selling by sealed bid, at auction, or at predetermined price;
- (b) Gifting to other educational, governmental, or 501(c)(3) agency; or
- (c) Discarding.

Proceeds from sales shall be deposited into the appropriate account.



**Explanation to Rescind Policy:**

**3356-3-01.1 Supplier Diversity.**

This policy is being rescinded because it is redundant (with YSU's purchasing policy) and may otherwise compromise YSU's ability to comply with updated guidance from both the state and federal governments regarding diversity, equity and inclusion (DEI) programs. Also, this policy was being administered by the DEI Office, which no longer exists. The University continues to follow current Ohio and federal law as it applies to economically disadvantaged businesses in accordance with 3356-3-01 (Purchasing).



**RESOLUTION TO RESCIND  
SUPPLIER DIVERSITY POLICY, 3356-3-01.1**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby rescind University Policy stated above and attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**

**3356-3-1.01 Supplier diversity.**

Responsible Offices:	Diversity, Equity & Inclusion, and Procurement Services
Responsible Officer:	VP for Finance & Business Operations
Revision History:	December 2022
Board Committee:	Finance and Facilities
<b>Effective Date:</b>	<b>December 9, 2022</b>
Next Review:	2027

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- (A) Policy statement. Youngstown state university (university) strives to enable diverse business to share and grow in economic markets and seeks to form strong bonds with the surrounding communities by strengthening supplier diversity and establishing mutually beneficial relationships with socially and economically disadvantaged businesses by utilizing diverse vendors defined as minority-owned, women-owned and veteran-owned, business enterprises.
- (B) Purpose. The use of diverse vendors is an integral part of the university's procurement procedures and is intended to increase the utilization of diverse suppliers whenever possible. By providing opportunities for diverse suppliers to market and sell goods and services, the university seeks to increase its use of diverse suppliers.
- (C) Parameters.
- (1) The university strives to provide opportunities for socially and economically disadvantaged business enterprises.
  - (2) In order to track diversity spending, suppliers must be certified through one or more of the state of Ohio's diversity programs: minority business enterprise (MBE); encouraging diversity, growth and equity (EDGE); women business enterprise (WBE); and/or veteran-friendly business enterprise (VBE).
  - (3) The university recognizes that diversity has a positive impact on the community and may create a competitive advantage for some suppliers.

- (4) All employees authorized to make purchases with university funds shall comply with this policy to ensure equal opportunities and nondiscrimination.
  - (5) All employees authorized to make purchases with university funds have a responsibility to consider diverse suppliers in order to increase the utilization of diverse suppliers.
  - (6) The office of diversity, equity and inclusion and procurement services are together responsible for identifying and verifying diverse vendors.
  - (7) Procurement services is responsible for ensuring that equal opportunities are available to vendors during competitive selection events.
- (D) Procedures.
- (1) Together, the office of diversity, equity and inclusion and procurement services will work with state, federal and other certification agencies to maintain awareness of diverse suppliers and will encourage eligible uncertified suppliers to apply for certification.
  - (2) Procurement services will regularly search for certified diverse suppliers that can provide competitively priced and high-quality goods and services.
  - (3) Procurement services will provide access to diverse suppliers by maintaining up-to-date vendor diversity information on its [website](#).
  - (4) When subcontractors are utilized, procurement services will ensure that primary vendors demonstrate efforts to subcontract with diverse vendors.
- (E) Related Links.
- (1) [Diversity business information via YSU website](#).
  - (2) [Certified MBE suppliers via Ohio DAS website](#).

- (3) [EDGE suppliers via the DAS website.](#)
- (4) [Certified MBE suppliers via the OSMDC website.](#)
- (5) [Certified MBE suppliers via the NMSDC website.](#)
- (6) [Youngstown business incubator minority business assistance center.](#)

**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, attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**



**YOUNGSTOWN STATE UNIVERSITY**  
**Interfund Transfers Requiring Board Approval**  
**Transfers Outside of the Operating Budget**  
**Requested Transfers for Third Quarter FY2025**

<b>FROM</b>	<b>TO</b>	<b>AMOUNT</b>	<b>REASON</b>
Housing Services Plant Reserve (Auxiliary Plant Fund)	Housing Repairs & Renovations (Auxiliary Plant Fund)	\$1,200,000	To fund furniture replacement for Cafaro House and Lyden House.
Parking Services (Auxiliary Fund)	McDonough Pedestrian Bridge Repairs (Auxiliary Plant Fund)	\$600,000	To fund repairs to the pedestrian bridge from the Wick Parking Deck to McDonough Museum.

**YOUNGSTOWN STATE UNIVERSITY**  
**General Fund and Auxiliary Enterprises**  
**Budget to Actual and Actual to Actual Comparison**  
**2nd Quarter (July 1 thru December 31)**

Revenue	Fiscal Year 2025		Actual as a % of Budget	Business Indicator	Actual Compared to Prior Year
	Budget	Actual			
Tuition and mandatory fees	\$ 95,573,314	\$ 91,617,945	95.9%	●	↑
Other tuition and fees	8,908,600	9,332,910	104.8%	●	↑
Student charges	1,171,500	754,049	64.4%	●	↑
State appropriations	51,206,809	25,507,308	49.8%	●	↑
Recovery of indirect costs	1,978,813	765,055	38.7%	●	↓
Investment income	3,500,264	2,011,322	57.5%	●	↑
Other income	944,700	460,778	48.8%	●	↓
Auxiliary enterprises	19,183,488	17,465,185	91.0%	●	↑
<b>Total</b>	<b>\$ 182,467,488</b>	<b>\$ 147,914,552</b>	<b>81.1%</b>	●	↑

● On/Above target

● Caution

● Warning

Expenses	Fiscal Year 2025		Actual as a % of Budget	Business Indicator	Actual Compared to Prior Year
	Budget	Actual			
Wages	\$ 85,045,126	\$ 39,765,491	46.8%	●	↑
Benefits	31,936,470	17,494,475	54.8%	●	↓
Scholarships	17,008,210	13,174,879	77.5%	●	↑
Operations	23,091,325	18,336,171	79.4%	●	↑
Plant & maintenance	14,773,844	7,603,344	51.5%	●	↑
Fixed asset purchases	1,825,068	428,521	23.5%	●	↔
Transfers	10,720,924	10,703,325	99.8%	●	↑
<b>Total</b>	<b>\$ 184,400,967</b>	<b>\$ 107,506,206</b>	<b>58.3%</b>	●	↑

● On/Below target

● Caution

● Warning

## Projects in Progress:

**Student Center Renovation**  
YSU 2324-22

***\$45M (Capital Funds/Local/Philanthropy) AE Works***  
Bids were received February 10<sup>th</sup>. We are currently in bid evaluations and this project will be at controlling board by the time of this meeting. On-site construction is slated to begin May 5, 2025.

**M30 Parking Deck Maintenance**  
YSU 2526-10

***\$500k (Local Funds) Walker Restoration***  
Yearly maintenance on the M30 parking deck. This project will bid in the next few months for a Summer 2025 construction.

**Bliss Pedestrian Bridge Renovations**  
YSU 2526-9

***\$850k (Local Funds) Walker Restoration***  
Repairs will be made to the pedestrian bridge that leads from the M30 parking deck to Bliss Hall. This will be a Summer 2025 project that will be complete for the start of Fall classes.

**Ward Beecher Hall EIFS and Roof Replacement**  
YSU 2526-6

***\$450k (Local Funds) THP Limited***  
Repairs will be made to the south side of Ward Beecher where storms damaged some of the building exterior. Bids will advertise in February in preparation for a Summer 2025 construction.

**Cushwa Hall Radiologic Technology Lab**  
YSU 2526-3

***\$400k (Local Funds) Strollo Architects***  
This project will be the creation of a radiologic technology lab in Cushwa Hall Room 1119. This project will bid in the next few months for a Summer 2025 construction.

**Cafaro Suite Renovation**  
YSU 2122-26

***\$150k (Local Funds) Alex Downey***  
Renovations to the Cafaro Suite on the 5<sup>th</sup> floor of Cafaro Hall. Work is underway and will be complete late summer 2025.

## Projects Out for Bids:

- None at this time.

## Projects at Controlling Board for Release of Funds:

- Kilcawley Center Renovations, March 24, 2025 Hearing date.

## Request for Architect/Engineer Qualifications Advertisements:

- None at this time.



## **Additional Projects in Development for 2025/26:**

### **Garfield Building Renovations Phase 1**

YSU 2324-15

### ***\$1.5M (Capital Funds) PrimeAE Group***

This project was to replace/rebuild the roof on the Garfield Building, but after careful evaluation by our consultant, the building is structurally deficient and may be cost prohibitive to rebuild. Further evaluation is pending.

### **Emergency Generator Upgrades**

YSU 2324-19

### ***\$1M (Capital Funds) YSU Staff***

This project will upgrade and replace worn and failing emergency generators across campus. A bidding and construction schedule will be developed once YSU Engineering staff complete the bid documents. Start and completion dates have yet to be determined.

### **Building Exterior Door and Windows Phase 2**

### **Rich Center Renovation**

# Information Technology Services Update

March 12, 2025

Finance and Facilities  
Subcommittee Meeting



# Agenda



**PC REFRESH FUND  
SUCCESS / NETWORK  
INFRASTRUCTURE  
REFRESH FUND CREATION**

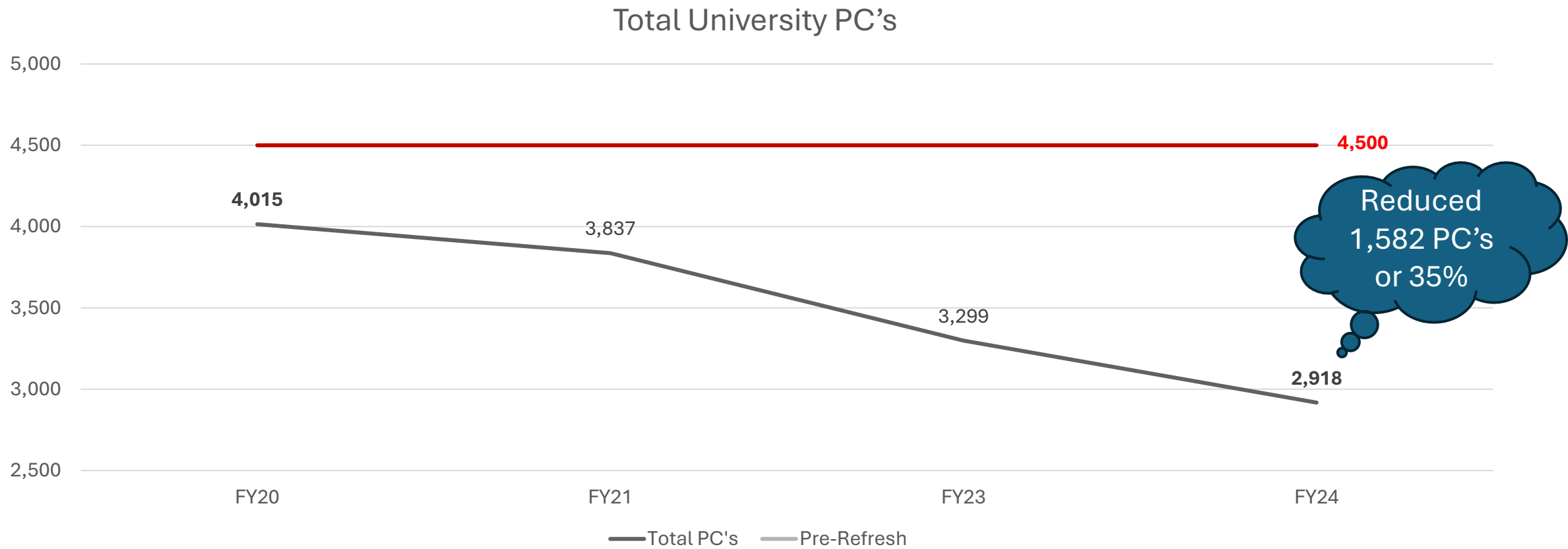


**ERP/SIS MODERNIZATION**



**CYBERSECURITY UPDATE**

# PC Refresh Fund Success



# Creation of Network Infrastructure Fund Benefits

Total Need = \$7.7M over a 7-year Refresh Cycle (or \$1.1M/Year)

Consumption-based Fund modeled after the PC Refresh Fund alleviating fiscal uncertainty and mitigating the risk of unsupported network infrastructure.



**Centralized Management**



**Strategic Investment**



**Financial Planning**



**Flexibility and Responsiveness**



**Cost Efficiency**

# Our SIS/ERP Journey:

## On-premise



Banner 2007-2019  
Installed in YSU Data Center

## Remote/Cloud Hosted



Banner 2019 - ?  
Oracle Cloud Infrastructure

## SaaS



SIS/ERP 2030?  
Vendor Software-as-a-Service

# ERP/SIS Modernization Considerations:

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**Cost Efficiency**

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**Improved Accessibility and Integration**

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**Regular Updates and Innovation**

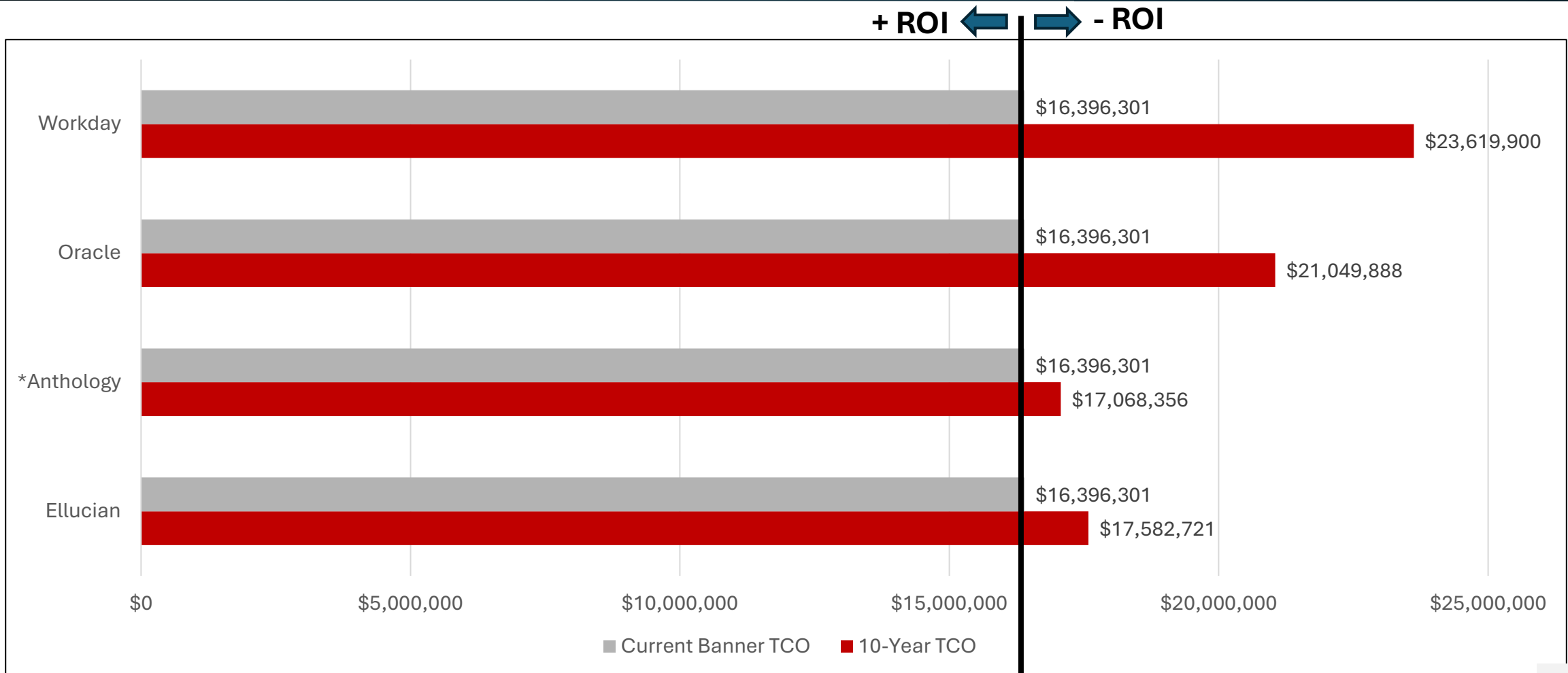
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**Enhanced IT Security and Disaster Recovery Stance**

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**Future-Proofing the University's Technology Infrastructure**

# ERP/SIS Modernization: Cost-to-Change/10-year TCO



*\* Anthology's implementation cost estimate was less than half of Workday's and Oracle's.*



# Cyber Security Update



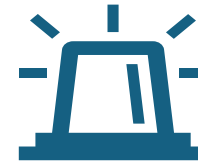
Guardian's  
Program



Security  
Awareness  
Enhancements



Vendor Risk  
Assessment



Red Team /Blue  
Team Cyber  
Defense Drill



Identity and  
Access  
Management  
(IAM) RFP  
Collaboration

**RESOLUTION TO APPROVE  
INTERCOLLEGIATE ATHLETICS  
2026-2030 TITLE IX GENDER EQUITY PLAN**

**WHEREAS**, Youngstown State University is committed to providing athletic opportunities that are funded to insure equal access, participation, and support for men and women alike in compliance with Title IX; and

**WHEREAS**, in 1994 the Youngstown State University Board of Trustees approved its first five-year gender equity plan which committed \$696,000 to fund scholarships, staffing, operating budgets and physical facilities to enhance the women's intercollegiate athletic programs; and

**WHEREAS**, in 1999, 2004, 2010, 2016, and 2021, the Youngstown State University Board of Trustees approved three consecutive gender equity plans that committed total of \$1.6 million to fund scholarships, staffing, operating budgets and physical facilities to enhance women's intercollegiate athletic programs over the past 20 years; and

**WHEREAS**, the University is committed to a continuing practice of increasing opportunities for women;

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees does hereby accept and approve the 2026-30 Gender Equity Plan, totaling \$500,000.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**



**SUMMARY OF PERSONNEL ACTIONS**  
**Athletic Employees**  
**10/16/2024 through 1/15/2025**

**Separations – 6**

- Professional Administrative Excluded – 6

**Appointments – 1**

**Replacement Positions – 1**

- Professional Administrative Externally Funded – 1

**Multi-Year Appointments - 1**

- Professional Administrative Excluded – 1

**YOUNGSTOWN STATE UNIVERSITY**  
**ATHLETICS EMPLOYEES**  
**PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025**  
**SEPARATIONS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>DATE OF SEPARATION</b>	<b>FTE</b>	<b>SALARY</b>	<b>TYPE OF SEPARATION</b>
Berassa, Jelani	Excluded	Assistant Coach	Football	12/31/2024	1.00	\$ 65,524.80	Resignation
Dukes, Christian	Excluded	Assistant Coach	Football	12/31/2024	1.00	\$ 56,161.20	Resignation
Green, Joshua	Excluded	Assistant Coach	Soccer - Women's	1/7/2025	1.00	\$ 49,588.21	Nonrenewal
Larkin, Jeremy	Excluded	Assistant Coach	Football	12/31/2024	1.00	\$ 56,161.20	Resignation
Maryskova, Anita	Excluded	Assistant Coach	Soccer - Women's	1/7/2025	1.00	\$ 31,680.18	Nonrenewal
Shrum, Brian	Excluded	Head Coach	Soccer - Women's	1/7/2025	1.00	\$ 72,848.96	Resignation

**YOUNGSTOWN STATE UNIVERSITY**  
**ATHLETICS EMPLOYEES**  
**PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025**  
**APPOINTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>CONTRACT/ APPOINTMENT DATES</b>	<b>FTE</b>	<b>SALARY</b>
Law, Nicole	Externally Funded	Athletic Academic Coordinator	Athletic Administration	12/2/2024	1.00	\$ 43,947.00

**YOUNGSTOWN STATE UNIVERSITY**  
**ATHLETICS EMPLOYEES**  
**PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025**  
**MULTI-YEAR APPOINTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>CONTRACT/ APPOINTMENT DATES</b>	<b>FTE</b>	<b>SALARY</b>
Wall, Richard	Excluded	Head Coach	Soccer - Women's	1/6/2025 - 6/30/2028	1.00	\$ 75,000.00



## APR and Graduation Rate Overview

### Academic Progress Rate (APR)

- Holds institutions accountable for the academic progress of their student-athletes through a team-based metric that accounts for the eligibility and retention of each student-athlete for each academic term
- Real-time rate, calculated term by term
- Includes all student-athletes on a team in a given year who receive athletic scholarship

How is it calculated?

- Two available points each academic term.
  - o Eligibility "E" point = student-athlete meets academic eligibility standards as of the end of the academic term.
  - o Retention "R" point = student-athlete is enrolled full time as of the census date or the fifth week of classes of the next term.
- Transfer Adjustments – to adjust for the retention point (3/3)
  - o Two-Year Transfers
    - Must enroll immediately for next regular semester
    - Must have a 3.30 GPA upon departure
  - o Four-Year Transfers
    - o Must enroll immediately for next regular semester
    - o Must meet all eligibility requirements upon departure
- Student-Athletes who are pursuing graduate or 2<sup>nd</sup> undergrad degrees
  - o No retention points (or penalties) given

$$\frac{\text{Number of points earned}}{\text{Number of points possible}} \times 1000 = \text{APR}$$



Why does it matter?


- Postseason Eligibility – if multiyear APR is 930 or lower
  - o Not eligible for postseason
- Penalties – if multiyear APR is lower than 930
  - o CARA restrictions,
  - o Loss of non-championship segment, or
  - o 10% competition reduction


### Federal Graduation Rate


- It is the proportion of first-year, full-time student-athletes who entered a school on athletics aid in the fall and graduated from that institution within six years
  - o Does not include transfers (in or out) and considers them nongraduates
- NCAA GSR differs from the federal calculation in two important ways
  - o GSR holds colleges accountable for those student-athletes who transfer to their school
  - o GSR does not penalize colleges whose student-athletes leave the institution in good academic standing.

## Example 1: GSR Calculation for Team (Single Cohort)

	Federal Rate	GSR
<b>First-Year Participants</b> 	$\frac{12}{20}$	$\frac{12}{16}$
<b>Transfers In+ (Only used in GSR calculation)</b> 		$\frac{4}{6}$
<b>Overall</b> <ul style="list-style-type: none"> <li>Federal Rate = (Green) / (Green + White + Red)</li> <li>GSR = (Green) / (Green + Red)</li> </ul>	$\frac{12}{20}$ (60%)	$\frac{16}{22}$ (73%)

 = Graduates

 = Likely transfers (Departed in good academic standing)

 = Likely nongraduates (Departed in poor academic standing)



### NCAA Academic Unit

- One of three rates (FGR, GSR, APR) that can qualify a school for the NCAA's "Academic Unit", an academic-based revenue distribution
- Each school must meet one of the following to qualify for the funds:
  - o **GSR** - Graduation Success Rate for most recently available year is equal to or greater than 90 percent. The average of single-year rates for all teams is used.
  - o **FGR** - Difference between student-athlete and student body percentages in the most recently published Federal Graduation Rate is equal to or greater than 13 percentage points.
  - o **APR** - Academic Progress Rate for previous year is equal to or greater than 985. The average of single-year scores for all teams is used to determine eligibility for this standard.



YOUNGSTOWN STATE UNIVERSITY  
INTERCOLLEGIATE ATHLETICS  
TEN YEAR HISTORY

FOUR-YEAR AVERAGE STUDENT ATHLETES VS. GENERAL STUDENT BODY GRADUATION RATE

<b>ENTERING FRESHMEN CLASS</b>	<u>2024</u> 17-18	<u>2023</u> 16-17	<u>2022</u> 15-16	<u>2021</u> 14-15	<u>2020</u> 13-14	<u>2019</u> 12-13	<u>2018</u> 11-12	<u>2017</u> 10-11	<u>2016</u> 09-10	<u>2015</u> 08-09
<b>YSU STUDENT-ATHLETES</b>	66	64	62	59	62	61	60	63	61	64
<b>YSU GENERAL STUDENTS</b>	50	46	43	40	36	33	33	32	32	34
<b>DIFFERENCE</b>	16	18	19	19	26	28	27	31	29	30

SINGLE YEAR STUDENT ATHLETES VS. GENERAL STUDENT BODY GRADUATION RATE

<b>YSU STUDENT-ATHLETES</b>	73	61	67	63	64	52	54	72	59	49
<b>YSU GENERAL STUDENTS</b>	53	49	47	48	41	37	35	31	31	33
<b>DIFFERENCE</b>	20	12	20	15	23	15	19	41	28	16
<b>ACADEMIC UNIT TARGET OF &gt; 13%</b>	13	13	13	13	13	13	13	13	13	13
<b>DIFFERENCE</b>	7	-1	7	2	10	2	6	28	15	3

NCAA GRADUATION SUCCESS RATE

<b>YSU - GSR</b>	80	80	79	78	80	81	80	79	79	78
<b>ACADEMIC UNIT TARGET OF &gt; 90%</b>	90	90	90	90	90	90	90	90	90	90
<b>DIFFERENCE</b>	-10	-10	-11	-12	-10	-9	-10	-11	-11	-12

FOUR-YEAR AVERAGE STUDENT-ATHLETES GRADUATION RATES  
TEN YEAR HISTORY

<b>ENTERING FRESHMEN CLASS</b>	<u>2024</u> 17-18	<u>2023</u> 16-17	<u>2022</u> 15-16	<u>2021</u> 14-15	<u>2020</u> 13-14	<u>2019</u> 12-13	<u>2018</u> 11-12	<u>2017</u> 10-11	<u>2016</u> 09-10	<u>2015</u> 08-09
<b>HORIZON LEAGUE:</b>										
YOUNGSTOWN STATE	66	64	62	59	62	61	60	63	61	64
HORIZON LEAGUE AVERAGE	69	69	69	68	69	67	66	65	64	64
<i>NCAA DIVISION I</i>	68	69	69	69	69	68	67	67	66	66
<hr/>										
YSU GENERAL STUDENTS	50	46	43	40	36	33	33	32	32	34
HL GENERAL STUDENTS (AVERAGE)	51	51	51	51	48	47	46	45	46	47
<hr/>										
YSU S/A'S ABOVE GENERAL STUDENTS	16	18	19	19	26	28	27	31	29	30
HL S/A'S ABOVE GENERAL STUDENTS	18	18	18	17	21	20	20	20	18	17
<hr/>										
<b>MISSOURI VALLEY FOOTBALL:</b>										
YOUNGSTOWN STATE	66	64	62	59	62	61	60	63	61	64
MISSOURI VALLEY AVERAGE	68	66	68	68	69	67	66	65	64	65
<i>NCAA DIVISION I</i>	68	69	69	69	69	68	67	67	66	66
<i>FCS</i>	67	68	68	69	68	67	66	65	65	64
<hr/>										
YSU GENERAL STUDENTS	50	46	43	40	36	33	33	32	32	34
MVFC GENERAL STUDENTS (AVERAGE)	57	56	55	55	53	53	52	53	52	53
<hr/>										
YSU S/A'S ABOVE GENERAL STUDENTS	16	18	19	19	26	28	27	31	29	30
MVFC S/A'S ABOVE GENERAL STUDENTS	11	10	13	13	16	14	14	12	12	12

YOUNGSTOWN STATE UNIVERSITY  
 INTERCOLLEGIATE ATHLETICS  
 NCAA GRADUATION SUCCESS RATES  
 TEN YEAR HISTORY

<b>ENTERING FRESHMEN CLASS</b>	<u>2024</u> 17-18	<u>2023</u> 16-17	<u>2022</u> 15-16	<u>2021</u> 14-15	<u>2020</u> 13-14	<u>2019</u> 12-13	<u>2018</u> 11-12	<u>2017</u> 10-11	<u>2016</u> 09-10	<u>2015</u> 08-09
<b>HORIZON LEAGUE:</b>										
YOUNGSTOWN STATE	80	80	79	78	80	81	80	79	79	78
HORIZON LEAGUE AVERAGE	90	89	88	87	88	87	85	84	82	81
<i>NCAA DIVISION I</i>	90	92	89	89	90	88	87	86	84	83
<hr style="border: 1px solid gray;"/>										
<b>MISSOURI VALLEY FOOTBALL:</b>										
YOUNGSTOWN STATE	80	80	79	78	80	81	80	79	79	78
MISSOURI VALLEY AVERAGE	89	89	88	87	87	86	85	83	81	79
<i>NCAA DIVISION I</i>	90	92	89	89	90	88	87	86	84	83
<i>FCS</i>	89	79	88	88	88	87	76	74	73	71

YOUNGSTOWN STATE UNIVERSITY  
INTERCOLLEGIATE ATHLETICS  
SPORT BY SPORT  
ACADEMIC PROGRESS RATE (APR)

	2022-23	2023-24				2022-23				2021-22				2020-21			
	<u>NCAA MULTI-YEAR AVERAGE</u>	<u>POINTS EARNED</u>	<u>TOTAL POSSIBLE</u>	<u>ANNUAL APR</u>	<u>MULTI-YEAR APR</u>	<u>POINTS EARNED</u>	<u>TOTAL POSSIBLE</u>	<u>ANNUAL APR</u>	<u>MULTI-YEAR APR</u>	<u>POINTS EARNED</u>	<u>TOTAL POSSIBLE</u>	<u>ANNUAL APR</u>	<u>MULTI-YEAR APR</u>	<u>POINTS EARNED</u>	<u>TOTAL POSSIBLE</u>	<u>ANNUAL APR</u>	<u>MULTI-YEAR APR</u>
BASEBALL	978	91	91	1000	995	100	100	1000	988	95	97	979	983	102	103	990	981
MEN'S BASKETBALL	968	42	45	933	978	38	39	974	969	52	53	981	975	48	48	1000	948
MEN'S CROSS COUNTRY	984	70	70	1000	1000	61	61	1000	972	62	65	954	970	56	56	1000	977
FOOTBALL	957	297	301	987	971	284	294	966	950	270	278	971	944	292	305	957	946
MEN'S GOLF	988	38	38	1000	1000	36	36	1000	1000	38	38	1000	1000	36	36	1000	1007
MEN'S SWIMMING	985	67	67	1000	985	76	76	1000	982	70	72	972	972	54	56	964	972
MEN'S TENNIS	987	28	28	1000	984	32	32	1000	984	36	36	1000	976	28	30	933	958
MEN'S TRACK	974	169	174	971	970	152	153	993	974	148	155	955	964	145	151	960	971
WOMEN'S BASKETBALL	981	41	41	1000	985	47	47	1000	986	55	55	1000	987	53	56	946	982
BOWLING	987	35	35	1000	1000	35	35	1000	1000	36	36	1000	1000	32	32	1000	1000
WOMEN'S CROSS COUNTRY	988	51	51	1000	996	50	50	1000	996	65	65	1000	996	67	68	985	990
WOMEN'S GOLF	993	30	30	1000	1000	36	36	1000	994	43	44	977	988	44	44	1000	979
LACROSSE	993	95	96	990	985	113	117	966	984	112	113	991	995	74	74	1000	1000
SOCCER	989	109	111	982	989	116	117	991	993	115	116	991	986	116	117	991	980
SOFTBALL	988	84	84	1000	997	77	77	1000	988	81	81	1000	988	91	92	989	984
WOMEN'S SWIMMING	992	120	121	992	995	119	119	1000	992	97	98	990	989	93	93	1000	988
WOMEN'S TENNIS	991	30	30	1000	1000	31	31	1000	1000	25	25	1000	991	32	32	1000	991
WOMEN'S TRACK	983	165	165	1000	987	161	163	988	984	177	184	962	982	180	181	994	986
VOLLEYBALL	989	40	40	1000	1000	47	47	1000	1000	46	46	1000	1000	46	46	1000	984
INSTITUTIONAL APR	984			992	990			994	986			985	983			985	980
ACADEMIC UNIT TARGET				985													

YOUNGSTOWN STATE UNIVERSITY  
 INTERCOLLEGIATE ATHLETICS  
 AVERAGE CUMULATIVE GPA'S BY TERM  
 FIVE YEAR HISTORY

SPORT	FIVE YEAR AVERAGE	2024-25		2023-24		2022-23		2021-22		2020-21	
		SPRING	FALL	SPRING	FALL	SPRING	FALL	SPRING	FALL	SPRING	FALL
		2025	2024	2024	2023	2023	2022	2022	2021	2021	2020
BASEBALL	3.34		3.44	3.45	3.44	3.37	3.34	3.20	3.26	3.32	3.27
MEN'S BASKETBALL	3.27		3.35	3.31	3.31	3.16	3.19	3.20	3.40	3.33	3.19
WOMEN'S BASKETBALL	3.76		3.80	3.75	3.73	3.71	3.77	3.74	3.84	3.76	3.76
MEN'S CROSS COUNTRY	3.31		3.59	3.50	3.37	3.27	3.29	3.28	3.13	3.24	3.13
WOMEN'S CROSS COUNTRY	3.47		3.50	3.44	3.42	3.53	3.51	3.46	3.46	3.52	3.41
FOOTBALL	3.18		3.32	3.31	3.21	3.20	3.17	3.17	3.10	3.12	3.06
MEN'S GOLF	3.44		3.41	3.37	3.38	3.34	3.31	3.48	3.59	3.55	3.55
WOMEN'S GOLF	3.72		3.92	3.94	3.94	3.75	3.74	3.54	3.60	3.56	3.54
LACROSSE	3.56		3.54	3.62	3.62	3.60	3.58	3.53	3.50	3.59	3.43
SOCCER	3.62		3.51	3.55	3.66	3.61	3.59	3.61	3.65	3.71	3.71
SOFTBALL	3.46		3.70	3.70	3.61	3.51	3.45	3.38	3.37	3.23	3.18
MEN'S SWIMMING	3.57		3.55	3.62	3.63	3.58	3.53	3.47	3.51	3.62	3.59
WOMEN'S SWIMMING	3.55		3.60	3.61	3.57	3.57	3.57	3.52	3.51	3.52	3.51
MEN'S TENNIS	3.62		3.66	3.50	3.53	3.62	3.65	3.68	3.73	3.61	3.56
WOMEN'S TENNIS	3.71		3.83	3.77	3.76	3.72	3.69	3.66	3.63	3.64	3.70
MEN'S TRACK	3.16		3.33	3.28	3.23	3.20	3.19	3.13	3.16	3.09	2.86
WOMEN'S TRACK	3.44		3.49	3.47	3.45	3.49	3.49	3.41	3.43	3.35	3.34
VOLLEYBALL	3.61		3.69	3.60	3.64	3.60	3.63	3.61	3.62	3.56	3.54
BOWLING	3.78		3.64	3.73	3.75	3.80	3.81	3.84	3.87	3.80	3.78
ALL STUDENT-ATHLETE'S	3.44		3.49	3.49	3.49	3.44	3.42	3.38	3.52	3.38	3.33
GENERAL STUDENTS								3.15		3.25	
NUMBER OF TEAMS ABOVE 3.0	19.00	0	19	19	19	19	19	19	19	19	18
<b>NUMBER OF S/A'S WITH:</b>											
SEMESTER GPA OF 4.00			118	127	144	117	134	92	102	111	114
SEMESTER GPA ABOVE 3.00			374	381	444	398	407	347	381	364	384
% SEMESTER GPA ABOVE 3.00			78%	83%	83%	80%	81%	74%	73%	76%	77%
CUMULATIVE GPA ABOVE 3.00			402	390	446	417	420	368	403	379	389
% CUMULATIVE GPA ABOVE 3.00			84%	85%	84%	83%	84%	79%	77%	80%	78%

YOUNGSTOWN STATE UNIVERSITY  
INTERCOLLEGIATE ATHLETICS  
FIVE YEAR HISTORY OF ACADEMIC MAJORS

MAJOR	COLLEGE	AS OF FALL SEMESTER				
		2024	2023	2022	2021	2020
Accounting	Business Administration	12	11	15	16	8
Advertising and PR	Business Administration				1	
Allied Health	Health and Human Services					
Anthropology	BCLASSE	2		1	1	1
Art Education	BCLASSE					
Art Studio	Creative Arts	2	4	3	3	
Athletic Training	Health and Human Services	2				
Biology	STEM	14	11	11	10	21
BS MD	STEM	7	5			
Business	Business Administration	112	84	87	82	35
Chemical Engineering	STEM	4	3	1	1	1
Chemistry	STEM	1	2	2	2	2
Civil and Construct Eng	STEM	5	5	5	2	
Civil Engineering	STEM	2	4	2	5	3
Clinical Laboratory Sci	Health and Human Services					
Communication Studies	Business Administration	14	15	16	15	13
Computer Information Systems	STEM					
Computer Science	STEM	1	2	4	3	1
Coordinated Program Dietetics	Health and Human Services					
Counseling	BCLASSE	3	3	1		
Criminal Justice	Health and Human Services	19	17	30	33	26
Dental Hygiene	Health and Human Services	7	2	2	2	5
Dietics	Health and Human Services		1	3	2	3
Early Childhood Education	BCLASSE				1	
Economics	BCLASSE	3	1	5	5	4
Electric Utili Tech	STEM					1
Electrical Engineering	STEM	2	4	3	3	2
Engineering	STEM	12	10	11	14	21
English	BCLASSE	2	2	2	1	1
Environmental Studies	STEM	1	2	2	4	5
Exercise Science	Health and Human Services	44	60	46	53	59
Family and Consumer Studies	Health and Human Services					
Finance	Business Administration	21	23	10	7	11
Food and Nutrition	Health and Human Services					
Forensic Science	Health and Human Services	4	3	4	6	5
General Administration	Business Administration	1				19
General Studies	BCLASSE	60	56	53	45	31
Geography	BCLASSE		1	1	1	1
Geology	BCLASSE					
Health and Human Services	Health and Human Services	4	6	5	2	1
Health Education	BCLASSE		1	1	2	
History	BCLASSE	1		1	1	
Hospitality Management	Health and Human Services	2	2	3	5	4
Human Resource Management	Business Administration	2	1			1

YOUNGSTOWN STATE UNIVERSITY  
INTERCOLLEGIATE ATHLETICS  
FIVE YEAR HISTORY OF ACADEMIC MAJORS

MAJOR	COLLEGE	AS OF FALL SEMESTER				
		2024	2023	2022	2021	2020
Individual Curriculum Prog	BCLASSE	1	3		3	2
Industrial and Systems Engr	STEM	1	2	2	3	2
Info & Supply Chain Management	Business Administration					
Information Technology	STEM					1
Information Technology B	STEM	3	2	1	2	3
Integrated Language Arts Educ	BCLASSE	1	2			
Integrated Math Education	BCLASSE			2	1	
Integrated Sciences Education	BCLASSE			1	2	2
Integrated Social Studies Educ	BCLASSE	6	4	3	2	1
Intervention Specialist	BCLASSE	11	9	8	8	8
Journalism	BCLASSE	1	6	5	3	1
Law	BCLASSE			2	1	1
Life Sciences Education	BCLASSE					
Long Term Care Administration	BCLASSE					
Management	Business Administration	4	6	3	4	15
Marketing	Business Administration	23	27	20	5	3
Marketing Management	Business Administration	3	1	1	17	9
Mathematics	STEM	2	4	3	4	3
Mechanical Engineering	STEM	12	10	13	9	10
Medical Lab Science	Health and Human Services	1	2	1		
Merch Fashion and Interior	Health and Human Services		1			3
Middle Childhood Education	BCLASSE	3	3	4	4	4
Music Education	Creative Arts					1
Music Perf Emphasis Music Record	Creative Arts	1	1	2	1	
Natural Science	STEM	4	4	8	5	6
Nursing	Health and Human Services	12	17	19	27	27
Philosophy	BCLASSE					
Physical Education	BCLASSE					2
Physical Sciences Education	BCLASSE					
Physical Therapy	Health and Human Services				1	
Physics	STEM	4	7	5	2	2
Political Science	BCLASSE	6	6	6	4	4
Prof Writing and Editing	BCLASSE		2			3
Psychology	BCLASSE	25	20	20	21	19
Public Health	Health and Human Services	2	5	2	4	3
Religious Studies	BCLASSE					
Respiratory Care	Health and Human Services	1			1	
Science Pre Education	BCLASSE					
Social Services	Health and Human Services					
Social Work	Health and Human Services	1	4	3	2	3
Sociology	BCLASSE	3	5	1		2
Spanish	BCLASSE					
Special Education	BCLASSE	1	2	4	1	2
Technology	STEM	4	3	3	2	2

YOUNGSTOWN STATE UNIVERSITY  
 INTERCOLLEGIATE ATHLETICS  
 FIVE YEAR HISTORY OF ACADEMIC MAJORS

<u>MAJOR</u>	<u>COLLEGE</u>	<u>AS OF FALL SEMESTER</u>				
		<u>2024</u>	<u>2023</u>	<u>2022</u>	<u>2021</u>	<u>2020</u>
Telecommunications	Creative Arts			1	1	6
Telecomm St. Spts Broadcast Tr	Business Administration	6	3	7	5	
Theatre Studies	Creative Arts				1	
Undetermined	Undetermined	13	23	52	47	75
Total		521	525	532	521	510



YOUNGSTOWN STATE UNIVERSITY  
 INTERCOLLEGIATE ATHLETICS  
 FIVE YEAR HISTORY OF ACADEMIC MAJORS

<u>MAJOR</u>	<u>COLLEGE</u>	<u>AS OF FALL SEMESTER</u>				
		<u>2024</u>	<u>2023</u>	<u>2022</u>	<u>2021</u>	<u>2020</u>
Business Administration		198	171	159	152	114
BCLASSE		129	126	121	107	89
Creative Arts		3	5	6	6	7
Health and Human Services		99	120	118	138	139
STEM		79	80	76	71	86
Undetermined		13	23	52	47	75
Total		521	525	532	521	510

**RESOLUTION TO MODIFY  
APPOINTMENT OF GRADUATE ASSISTANTS, GRADUATE RESEARCH  
ASSISTANTS, GRADUATE ASSISTANT INTERNS, AND TEACHING ASSISTANTS  
POLICY, 3356-9-03.1**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

**3356-9-03.1 Appointment of graduate assistants, graduate research assistants, graduate assistant interns, and teaching assistants.**

Responsible Division/Office: ~~College of~~Office of Research Services and Graduate Studies  
Responsible Officer: Provost and VP for Academic Affairs  
Revision History: January 2000; March 2010; June 2015; June 2016; June 2017; March 2020; March 2025  
Board Committee: Academic and Student Affairs  
**Effective Date:** ~~March 5, 2020~~March 13, 2025  
Next Review: ~~2025~~2030

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- (A) Policy statement. While the president has overall responsibility for the management of the university, the responsibility for employment decisions of personnel is delegated to the provost and vice presidents. Each divisional executive officer is responsible for making personnel decisions within the described university procedures.
- (B) Purpose. The graduate assistantship program is predicated upon the concept that given an opportunity to assist the faculty and staff, graduate students provide a service to the university and gain valuable academic experience, which is appropriately supported through the annual institutional budget process. ~~Academics must drive our cost structure.~~ How the assistantship enhances the student’s education must be apparent.
- (C) Parameters.
- (1) A graduate assistant (“GA”) will normally be assigned duties primarily focused on the conduct of research/scholarly activity. A GA may be assigned teaching duties, but should not be the instructor of record. A graduate research assistant (“GRA”) will only be assigned duties focused on the conduct of research/scholarly activity ~~and will typically receive a twelve-month appointment. All other assistantships are typically two-semester appointments.~~ A graduate assistant/intern (“GA/I”) is a special category of graduate assistant designated to provide opportunities for university offices or departments, community companies or agencies, or other appropriate external sponsors to involve graduate students as academic assistants/interns in real

~~life~~professional experiences ~~related to~~ in support of their fields of study. A teaching assistant (“TA”) will ~~only~~ be assigned duties focused on instruction and may be the instructor of record for a regularly scheduled class.

- (2) ~~Additional academic services to the academic program in which the student is enrolled may be appropriate for all assistantship appointments. GA, GRA, GA/I, and TA appointments are covered by this policy.~~ A student appointed as a graduate assistant (GA, GRA, GA/I and TA) will be paid a stipend and ~~instructional fees required to complete a single degree program~~ receive tuition remission (up to eighteen semester hours per semester and up to twelve semester hours for the summer term), ~~student transportation fee, out-of-state surcharge, and music performance fees (if applicable).~~ Parking fee and out-of-state surcharge will be remitted.

~~Assistantship appointments previously providing only a stipend and remission of the transportation fee, and students awarded only the graduate college “Premiere Scholarship” may be renewed until the assistantship/scholarship is terminated.~~

- (3) The ~~graduate dean~~ associate provost is responsible for the administration of the program and appointment of graduate assistants, graduate research assistants, graduate assistant interns, and teaching assistants.
- ~~(4) — The graduate dean may make available the “Graduate College Premiere Scholarship.” The scholarship shall include up to thirty-six semester hours of instructional fees (for graduate courses required to complete a single degree program) for an academic year up to eighteen semester hours for each fall and spring semester. Scholarship awards may be provided for up to twelve semester hours of instructional fees for the summer term. The “Premiere Scholarship” shall include instructional fees, nonresident tuition surcharge, and applicable music performance fees.~~
- ~~(5)~~(4) The total number of graduate assistantships and teaching assistantships shall be allocated annually as a part of the institutional budget development process and will take into account

the needs of new graduate programs as they are developed and implemented and the opportunities to increase enrollment and research through the growth of existing graduate programs. Colleges, departments, or external sources can also provide funds to support additional assistantships.

~~(6)~~(5) Additional assistantship positions may be created by the ~~graduate dean~~ associate provost when external funding has been obtained. In such cases, payment for assistantships may be made at rates higher than normal university rates if the external funding agency has a predetermined payment schedule or allows higher rates of payment.

(6) GA, TA, and GA/I are typically two semester appointments and a GRA is a twelve-month appointment.

(D) Procedures.

(1) The ~~dean of the college of graduate studies~~ associate provost shall allocate graduate assistants approved within the university budget across the institution. ~~Appropriate standing committees of the graduate council shall be consulted as part of the allocation process.~~

(2) An academic department may recommend only full-time graduate students with regular (not provisional) status for an assistantship. Exceptions to this requirement may be granted only prior to appointment by the ~~graduate dean~~ associate provost with sufficient justification from the recommending department. A GA or TA with a teaching assignment may not have any undergraduate academic course deficiencies in any area that will be included in the assistant's teaching assignments.

(3) Recommendation to appoint a GA, GRA, GA/I and/or TA, ~~and recommendations to award a "Graduate College Premiere Scholarship,"~~ must be obtained from the academic dean. Applications with the appropriate recommendations for appointment are forwarded to the ~~graduate dean~~ associate provost, who makes the official appointment. ~~Until the appointment has been made by the graduate dean, no~~ No department is authorized to communicate to any applicant for a graduate or teaching

assistantship that an award will be made. A department is authorized to communicate that they are recommending a student for appointment as a GA, GRA, GA/I, or TA. The college of graduate studies supports the “April 15<sup>th</sup> Resolution” regarding graduate scholars, fellows, trainees and assistants of the council of graduate schools (“CGS”). Appointments and communications regarding appointments will adhere to said resolution as described on the [CGS webpage](#).

- (4) Appointment as a GA, GRA, GA/I, or TA will normally occur for the fall or spring semester and be made prior to the beginning of the fall semester. Graduate research assistant appointments may begin in the summer term. In cases in which an appointment becomes available in the middle of a semester due to the availability of external funding, the stipend will be prorated to accommodate the period of time covered. Regardless of funding source, the stipend may be prorated to accommodate situations where students fail to begin or complete their assistantship as scheduled. ~~Transportation fees, instructional fees, out-of-state surcharge and applicable music performance fees are remitted for the full semester.~~
- (5) Graduate assistants (GA, GRA, GA/I, or TA) shall not hold full-time outside employment. Additional employment within the university is not permitted without the approval of ~~the graduate dean~~ associate provost.
- (6) A faculty member within the department to which the graduate assistant is assigned will be designated to be directly responsible for the supervision of the assistant. A mentor from an academic department who will ensure the appropriate educational experience of the assistantship or internship must be designated. This applies to GA, GRA, GA/I, and TA positions.
- (7) All teaching assistants must participate in a formal mentoring program in the department of instruction prior to being assigned independent teaching activities in that department.
- (8) Additional information about graduate assistants, graduate research assistants, graduate assistant interns, teaching assistants, ~~and the “Graduate College Premiere Scholarship” may be found in the~~

~~“Graduate Catalog,”~~ may be found in the “College of Graduate Studies Policy Book,” and the ~~“Handbook for Graduate Assistants.”~~ or online at: [college of graduate studies assistantships and fellowships webpage](#).

YOUNGSTOWN STATE UNIVERSITY



Office of  
**Academic  
Affairs**

## ACADEMIC MASTER PLAN

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## Appendix A: Timeline of Collaboration

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**JUNE  
2024**

AMP Development Begins

**SUMMER  
2024**

In Summer of 2024, we hosted an all-day retreat with approximately 50 support staff to determine how they perceived their areas as best positioned to contribute to student success.

**FALL  
2024**

During early Fall of 2024, we sent out a series of surveys to determine areas of importance to our faculty members and academic staff.

**LATE FALL  
2024**

In Fall of 2024, we hosted face-to-face meetings open to all faculty from each of the 20 academic departments. We took copious notes to ensure we understood pain and pride points. We listened to needs and categorized them as either readily achievable or longer-term goals (note: these later became our action steps and goals, respectively). We pulled this information together as the first template of the AMP. We had a great turnout to several townhall meetings where this version was first revealed. As a result of input gathered at the townhalls, we adjusted the look and feel of the AMP entirely.

**WINTER  
BREAK  
2024**

During winter break of 2024, we turned our attention to the Academic Program Efficiency and Effectiveness Initiative (APEEI) process. The APEEI framework—which includes Continuous Quality Improvement and Detailed Analysis—reflects a comprehensive approach to evaluating and advancing our academic offerings. Our goal with APEEI is to ensure that every program aligns with best practices, institutional goals, and external standards, such as Ohio Revised Codes regarding low enrolled and duplicative courses and programs (ORC 3345.35).

**SPRING  
2025**

In Spring of 2025, we tackled the qualitative portion of APEEI. Through collaborative discussions that consisted of individual virtual department meetings open to all faculty members, the purpose of the qualitative statements was revised to “program pitches” that would detail the uniqueness of each academic program. After this initial meeting regarding the qualitative statements, each program was asked to review and revise their goals, pitch statements, and action steps (**GPA**'s) with the understanding that these would play a significant role in determining how resources, promotion, and tenure decisions would be made at the university.

## Foreword

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### A Message from the Provost: The Path to Now

In June 2024, the Office of Academic Affairs (OAA) began an ambitious effort to construct the first-ever Academic Master Plan (AMP) at Youngstown State University (YSU). This effort was initiated to better communicate the purpose and rationale behind actions and decisions made within our office. This plan underscores my belief in the importance of transparency, accountability, and collaborative action.

As such, the AMP is a strategic blueprint designed to keep the institution moving forward toward academic excellence, innovation, and sustainable growth by ensuring that all constituents have a full understanding of how and why decisions are being made. Because the AMP was developed through a collaborative effort, this document represents the input from stakeholders across campus who contributed on multiple occasions. The collaboration started in June 2024 when we met with non-academic staff who support the academic core. To develop the heart of the plan, members of the OAA staff and I met with faculty face-to-face (Fall 2024) and virtually (December 2024 and Spring 2025) to discuss pain and pride points, quantitative data, and qualitative data. We also collected feedback from surveys and town halls (Fall 2024). These valuable insights were central to the structure and content of the AMP.

Although the development of the AMP represents a critical milestone in our journey, it by no means represents a final document. The AMP will be a living document, changing continually as we envision new ways to improve student success and outcomes, advance research and scholarship within the disciplines we offer, and strengthen the community and region that we support and that support us. This inaugural version is structured to advance the institution to inspire individuals, enhance futures, and enrich lives. The first section contains relatively static content, detailing the foundational framework that guides how OAA will prioritize the actions outlined within the vision statement (section 1.1), determine the health of our academic programs (section 1.2), detail operating guidelines and policies (section 1.3), and define common terms used on our campus (section 1.4).

The second section represents the dynamic portion of the AMP as it contains the specific program goals, pitches, and action steps (**GPAs**) written by the faculty, chairs, and deans from each of our academic programs (section 2.2). The action steps—and possibly the goals themselves—will likely change annually as we accomplish each item. In addition to containing the program GPAs, section 2.1 also lists the OAA's GPAs. Our office wrote these to align with the feedback provided during the face-to-face and virtual department meetings, town halls, and surveys from the past 12 months.

I believe this level of accountability, transparency, and collaboration will foster student success, empower faculty and staff, create mutually beneficial relationships between all employees, and build strong connections with the community and industry partners. Together we can better address the challenges of today and seize the opportunities of tomorrow as we become the transformative institution of the region.

Thank you for your trust, collaboration, and dedication as we bring this AMP to life together so everyone can “Know Y.”

Sincerely,

*Jennifer Pintar*  
Jennifer Pintar, PhD, MPH

draft

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## 2.1 OAA Pitch Statement, Goals, and Action Steps

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### Pitch Statement

Through collaborative discussions in AMP sessions with academic departments and colleges, the faculty has shaped the vision and priorities of this plan. The Office of Academic Affairs (OAA) has used these insights to develop its own pitch statement and SMART goals, ensuring that the initiatives within the AMP respond to faculty-identified needs and drive meaningful change.

Rather than operating in isolation, OAA's role is to elevate and implement the ideas and priorities of faculty—turning their concerns and aspirations into actionable objectives. The AMP's themes, from student success to program innovation and community engagement, are built on what departments identified as critical to their growth and effectiveness. By integrating faculty input with institutional data and strategic alignment, the AMP ensures that the university's path forward is shaped by our educators and academic leaders who understand its mission best.

Goal	Actions
<b>Accreditation:</b> Provide support and resources for accreditation and assessment.	<ul style="list-style-type: none"><li>• Shared folder that has commonly requested information for accreditation and for data from data mine. Also needs calendar and professional nag to keep people responsible (PT)</li><li>• Qualitative assessments of programs/courses (ENG)</li></ul>
<b>Admissions:</b> Improve the admissions process for graduate programs.	<ul style="list-style-type: none"><li>• Grad school is not allowing students to start in the Spring (can't accept as undecided)</li><li>• Are we going to continue with fee waivers or not?</li><li>• Need to hear from graduate school earlier; After admitted don't reverse I-20 (ENG)</li></ul>

## ACCOUNTING

**PROGRAM PITCH:**

The BSBA in Accounting at the Williamson College of Business Administration prepares students for high-impact careers through real-world experience, industry engagement, and a career-focused curriculum. The Bureau of Labor Statistics estimates a 6% growth rate for accountants through 2033. Designed to meet professional standards and credentialing exam requirements, the program helps develop expertise that students apply in real-world settings. The Volunteer Income Tax Assistance (VITA) program gives students practical experience in tax preparation, while students and alumni play an active role in regional economic development through internships and full-time placements with top CPA firms such as Ernst & Young, Schneider Downs, HBK, Packer Thomas, and Cohen & Co; government offices and agencies including Auditor of State, DFAS, and IRS; and leading companies like Huntington Bank, Progressive Insurance, and Hynes Industries. Bringing extensive industry expertise and nationally recognized research, accounting faculty go beyond teaching—they mentor, connect, and inspire. With one-on-one coaching, guest lectures, and engagement with Beta Alpha Psi and the Institute of Management Accountants (IMA), students gain the professional exposure and career coaching that drive long-term success. Events like Accounting Student Practitioner Day, Accounting Career Day, and partnerships with the Ohio Society of CPAs connect students with industry leaders, providing valuable insights and networking opportunities that accelerate career growth. With strong employer partnerships, applied learning and professional auditing software in the curriculum, and a focus on developing professionals who drive innovation and excellence, graduates leave equipped to make an immediate impact in accounting, auditing, taxation, and beyond. Employers consistently recognize YSU graduates for their technical expertise, professionalism, and work ethic, making them highly sought after in the industry.

### SMART GOALS

2.4 Facilitate Practical Work Experiences and Placements	By Spring 2026, the Accounting program will establish three new employer partnerships to create more internships and job placement opportunities for students.
1.1 Modernize curriculum	By Fall 2026, the Accounting program will conduct a curriculum audit, benchmarking against five peer institutions, identifying at least three trends for incorporation into the program.

## Executive Summary

### The Carnegie Foundation for the Advancement of Teaching

#### Elective Community Engagement Classification – 2026 Application

#### **Achieving the Carnegie Foundation Community Engagement Classification is a goal in Youngstown State University’s strategic plan under GOALS AND STRATEGIC ACTIONS 2023 AND BEYOND**

The Carnegie Elective Classification for Community Engagement is a national recognition awarded to higher education institutions demonstrating strong institutional commitment to community engagement. Unlike the traditional Carnegie classification, this designation is elective and requires institutions to provide clear evidence of deep, pervasive, and integrated community engagement.

Carnegie defines community engagement as “the collaboration between institutions of higher education and their larger communities (local, regional/state, national, global) for the mutually beneficial creation and exchange of knowledge and resources in a context of partnership and reciprocity. The purpose of community engagement is the partnership (of knowledge and resources) between colleges and universities and the public and private sectors to enrich scholarship, research, and creative activity; enhance curriculum, teaching, and learning; prepare educated, engaged citizens; strengthen democratic values and civic responsibility; address critical societal issues; and contribute to the public good.”

#### **Process**

YSU’s pursuit of the Carnegie Elective Classification began with the 2020 Strategic Plan, where CE was embedded into university’s goals and strategies. Key milestones include:

- January 2022 – Established the Community Partner Advisory Council to engage external stakeholders.
- August 2022 – Launched YSU PenguinPulse
- September 2022 – Established the Community Engagement Council
- November 2022 – Launched Community-Engaged Learning (CEL) course designation

As the university was evaluating the progress on the entire Strategic Plan to Take Charge of Our Future, efforts addressing the goal/strategies in the plan related to CE continued and included:

- Spring 2023 – Conducted a self-study through the Community Engagement Council to assess strengths and opportunities.
- Spring 2023 – Established the Office of Community Engagement (Formerly the Center for Human Services Development)
- Summer 2023 – YSU Accepted to the Engagement Scholarship Consortium
- Fall 2023 – Integrated additional engagement-focused strategies into the renewed Strategic Plan (2023 and Beyond) and refined the goal.

January 2024 – the application was released

- March 2024 – Opened a community engagement exhibit in Maag Library.
- April 2024 – Held the 2<sup>nd</sup> annual Community Engagement Symposium
- April/Summer 2024 – visited departments

- A writing team assembled from the Community Engagement Council and began the writing process to ensure that the application maintained one voice. Attended every training session known to us and contracted a consultant.
- Collaborators from across every division and department on campus contributed to providing the content contained in the application.

**Data reported from the following areas in the application:**

- Campus, Community & Community Engagement Context (Section 2)
  - Institutional profile
  - Community context
  - Finance & infrastructure
- Institutional Identity & culture (Section 3)
  - Leadership
  - Brand identity
- Quality of Community Engagement Relationships and Academic Partnerships (Section 4)
  - High-quality community engagement partnerships are mutually beneficial & reciprocal
- Faculty & Staff (Section 5)
  - Community-engaged scholarship & professional activities
  - Policies and practices that support and reward faculty and staff participation
  - Examples of research and creative work (faculty, staff, students) that respond to community needs
  - Assessment
- Curricular Engagement (Section 6)
  - Integration into the curriculum
  - Data
- Cocurricular Engagement (Section 7)
  - Co-curricular programs
  - Student involvement and leadership
- Civic Learning & Life (curricular & cocurricular) (Section 8)
  - Civic learning initiatives
  - Engagement in public life
- Community engagement and Other Institutional Initiatives (Section 9)
- Reflection (Section 10)

Every question in the application was answered and the maximum allowable examples were provided in each section while maintaining word count limits. Responses were given to all optional questions.

Application submission will take place upon completion of the presentation to the YSU Board of Trustees. Fifteen community partners will be contacted as part of the review process. The team will next begin to educate partners on what they can expect. Updates will be made to websites.

Recipients of the classification will be announced in January of 2026.



### **Propel YSU towards the 2028 application cycle or reclassification**

- Continue to work with partners
- Assessment of community engaged learning courses
- Continue to work with tenure promotion
- Identify courses that should have a community engagement component
- Create a certificate for community engaged learning
- Increase collection, coordination, collaboration throughout campus to ensure all CE is documented and partners have ease of access
- Increase funding for community engagement initiatives

Achieving the Carnegie Classification is more than a recognition. It provides a roadmap for deepening engagement, fostering collaboration, and creating long-term societal impact. Moving forward, YSU may leverage this designation to:

- Boost student enrollment & retention. Attract students drawn to institutions with strong civic engagement programs. Differentiators, hands-on learning, deepen connections to attract and retain future workforce.
- Expand faculty engagement & experiential learning. Support new research, course development, and interdisciplinary collaborations.
- Enhance funding opportunities. Increase access to federal, state, and foundation grants that prioritize community engagement.
- Strengthen alumni & employer connections. Leverage partnerships for career pathways and mentorship programs to address workforce needs.
- Deepen community collaboration - Build long-term public-private partnerships to address regional and national challenges.

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# SECTION 1: Applicant's Contact Information

(To be added)

## SECTION 2: Campus, Community, and Community Engagement Context

**2.1 Describe your institution in a way that will help provide a context to understand how community engagement is envisioned and enacted. Include descriptions of the institution and community. If your institution has multiple campuses, please describe each campus for which you are seeking endorsement. (Maximum word count of 1,000 words per response)**

**2.1a. Region; founding and history (of institution); current institutional mission; institutional culture; types of degree programs; and demographics of student, faculty, and staff populations**

Youngstown State University (YSU) is located in Youngstown, Ohio, a city of nearly 60,000 people in Northeast Ohio. As the city's largest employer, YSU employs more than 1500 people and serves more than 11,000 students as an urban public campus.

YSU's origins trace to 1908, when the local branch of the YMCA established a school of law within the Youngstown Association School. Over the next six decades, the school transitioned to the Youngstown Institute of Technology, Youngstown College, Youngstown University, and finally to Youngstown State University in 1967, when it became part of the Ohio state system. As of Fall 2024, YSU bears the Carnegie Classification of Master's Colleges & Universities Larger Programs.

As its surrounding region has emerged from an industrial past, the university today is viewed as a major catalyst for the future, attracting faculty and staff to the area, providing economic stimulus, serving as a leader in workforce education and innovation, and producing energetic, talented, and community-minded graduates.

### Mission

YSU is committed to promoting regional development through academic excellence and partnerships, as stated within its mission: "YSU [...] enriches the region by fostering collaboration and the advancement of civic, scientific, and technological development."

Institutional culture deepens this commitment, emphasizing practical education and experiential learning. Community engagement is at the forefront of these opportunities, as students, faculty, and staff work directly with community partners to identify and meet community needs through community-engaged learning (CEL) courses and cocurricular activities.

### Academics

YSU is accredited through the Higher Learning Commission. This accreditation was affirmed through 2027 following the agency's most recent campus visit in 2018.

Undergraduate and graduate programs are offered through 20 departments in the following seven colleges:

- Beeghly College of Liberal Arts, Social Sciences and Education
- Bitonte College of Health and Human Services
- Cliffe College of Creative Arts
- College of Science Technology, Engineering, and Mathematics (STEM)
- Williamson College of Business Administration
- Sokolov Honors College (SHC)
- College of Graduate Studies

Undergraduate programs include certificates and associate and bachelor's degrees in more than 100 fields of study. Graduate studies include 80 certificates, master's, and doctoral degree programs. Online undergraduate and graduate degrees and post-master's certificates are also offered through the Youngstown State Online.

In the summer of 2024, the university expanded certificate and associate programs to accommodate students who were displaced from the closing of the local Eastern Gateway Community College. Some of the new programs that are meeting community workforce needs include Medical Assistant, Paralegal Studies, Police Academy, and a Flight School. In the fall of 2024, approximately 475 former Eastern Gateway students enrolled in these expanded programs.

“Whether it’s credentials and certifications for early career entry or a full array of associate, bachelor’s, master’s and doctoral degrees, YSU is committed to addressing the varied needs of our students and the full spectrum of trained and skilled workforce needs of the businesses and industries we serve,” said YSU President Bill Johnson.

## Demographics

YSU serves a diverse population of students, many of whom are first-generation college students from working-class backgrounds. The university also attracts a significant number of commuter students from the surrounding region, reflecting its role as an accessible institution for the local community.

The 2023-24 academic year showed an 82% acceptance rate of applicants for a total of approximately 11,000 students. The undergraduate population reflected the following demographics:

- Student-faculty ratio: 14:1
- Female: 57%; male: 43%
- Underrepresented students: 14%
- International students: 3%
- Honors students: 16%

In addition, the on-campus population included approximately 2,300 students residing in university owned and partner apartments situated along the university’s perimeter.

Thirty-eight percent of students received Pell and/or other grants. Scholarship funds dispersed for this period from YSU and the YSU Foundation—an autonomous nonprofit

corporation that obtains and distributes support for scholarships, student initiatives, and university development—totaled \$13,758,388.59.

In Fall 2023, out of the 1,553 undergraduate students employed on campus, 470 received Federal Work-Study (FWS); 72 of the 165 employed graduate students received FWS. In the spring of 2024, 1,608 undergraduate students were employed on campus with 468 receiving FWS. Of the 184 graduate students employed during this semester, 77 received FWS.

The total university workforce comprises leadership, as well as four unions that represent employees and include:

- YSU Association of Professional and Administrative Staff
- YSU Association of Classified Employees
- YSU Fraternal Order of Police
- YSU Ohio Education Association

Each union has a labor agreement that outlines wages, benefits, and other terms and conditions of employment.

YSU's faculty population in Fall 2023 included 316 full-time faculty members and 611 part-time adjunct faculty. In Spring 2024, 319 full-time faculty members and 464 part-time adjunct faculty were employed. Additionally, YSU employed 20 department chairs, who act as administrators with some teaching responsibilities.

The university's classified, professional, and administrative staff included 485 full-time, 91 part-time, 51 occasional service, and 66 intermittent employees in 2023-24.

### **2.1b. Leadership priorities, vision, and strategic plan; initiatives and other features that shape and distinguish the institution, particularly as they relate to community engagement**

YSU emphasizes its commitment to community engagement in its strategic initiatives and academic vision. Through its strategic plan, Plan for Strategic Actions to Take Charge of Our Future, approved in 2020, the university defines the community-engaged campus as one that is “driven by the value that arises from mutually beneficial campus community partnerships which incorporate diverse perspectives that strengthen the collective impact on the region.”

The plan's framework goes on to state that YSU will bring about collective impact in the region when we “create deliberate, mutually beneficial, educational, civic, industry, and philanthropic partnerships that achieve equitable and innovative regional development.”

To achieve mutually beneficial outcomes, the plan specifies the priorities to:

- Listen to community needs.
- Work collaboratively to tackle these needs.
- Actively collaborate with organizations that share in YSU's mission.

Further, YSU's vision and core values promote a community-engaged campus. In its vision statement, YSU is seen as a place “where community engagement is a cornerstone of collaboration” that leads to innovative solutions that benefit both students and the community. Through its core values—Centrality of Students, Collaboration and Public Engagement, Integrity and Human Dignity—the university fosters partnerships that promote civic, scientific, and technological advancement. This synergy drives student success while also strengthening the community and affirming YSU's dedication to shared growth and opportunity.

With the strategic plan in place in 2020, next came an effort to corral several community engagement responsibilities into one role. The position of Associate Provost for Strategy and Engagement was created in 2021 to be accountable for the areas of outreach, engagement, internal collaboration, assessment, and coordination.

In 2022, a newly formed Community Engagement Council (CEC), whose members spanned the institution, initiated a university-wide self-study to explore YSU's strengths and opportunities for growth as a community-engaged campus. As part of the process, the Community Partner Advisory Council (CPAC) was formed to ensure regular engagement with community partners and to listen to their needs.

Also in 2022, YSU developed its University-Wide Learning Outcomes. The fourth section centers on developing a civically engaged mindset by connecting academic work to community impact. Graduates gain knowledge of community needs and build practical skills through discipline-specific engagement experiences. The integration of academics with real-world service prepares YSU graduates to continue making meaningful contributions to society.

Once the self-study was complete, the associate provost presented findings to the YSU Board of Trustees in March of 2023. Based upon these conclusions, the university launched additional initiatives targeting the following opportunities for growth:

- Implementation of the GivePulse platform for collaboration with community partners.
- Development of CEL course characteristics and application process.
- Creation of an Office of Community Engagement (OCE) for centralized coordination.
- Contract with former Executive Director of the Ohio Campus Compact Richard Kinsley to provide input on progress.
- Resources to attend conferences, online trainings, and webinars with recognized experts in the field.

Additionally, the university renewed goals and strategic actions, which were endorsed by the Board in September 2023. The refined goal elevates the importance of and alignment with the community engagement definition and places more responsibility on the university as a whole in this pursuit.

Today, the university is strengthening the role that YSU plays in support of the region under YSU President Bill Johnson's leadership. President Johnson began his position at YSU in January 2024 and has since added an Office of Government Relations.

Provost Jennifer Pintar, who also came into her current role in 2024, has championed the importance of defining and recognizing community-engaged activities through promotion and tenure, awards, and departmental mission statements. At the State of Academic Affairs Address in August 2024, Provost Pintar voiced support to move the institution toward creating deep, pervasive, and integrated community engagement through a commitment of human and monetary resources.

One example of this commitment came with the establishment of the Division of Experiential Learning and Engagement (ELE), which unites various departments engaging in the community to leverage resources and talent. The new division relocated to a building on campus that allowed for better access and visibility by community partners. The move also positioned the division next to the YSU Foundation with over \$321.5 million and the university's designated philanthropic entity. The YSU Foundation provides scholarships, endowed professorships, and support for academic programs and dedicated community-engaged fellows and initiatives.

Additionally, Provost Pintar led the development of the first YSU Academic Master Plan in Fall 2024, which highlights community engagement as one of its three pillars. This plan is a living document utilized by all academic areas, thereby integrating community engagement as a critical component across campus.

Another change under the university's new leadership that strengthen YSU's partnership with the community includes aligning the Excellence Training Center (ETC) with the STEM college to draw upon the expertise of faculty and provide students with experiential learning opportunities. Through partnerships with organizations like America Makes and the Youngstown Business Incubator, the ETC builds career pathways that serve local industries while supporting skill development.

**2.1c. Describe the communities to which the institution is accountable to, including community characteristics, community priorities, and the relationship of the community to the institution.**

The City of Youngstown, once a thriving steel town, is now a resilient city in transition, blending its industrial history with a renewed focus on innovation and community. According to the 2020 Census, Youngstown had a population of 60,068, with a population density of 1,770.5 people per square mile and 28,303 households. The city's racial makeup was 47.8% White, 41.1% African American, 0.3% Native American, 0.7% Asian, 0.0% Pacific Islander, and 7.4% from two or more races. Hispanic or Latino of any race were 10.9% of the population. The median household income was \$30,129.

Youngstown is part of the larger Mahoning Valley, which extends from Northeast Ohio into Western Pennsylvania. The Valley includes five counties: Mahoning, Trumbull, and Columbiana in Ohio, and Mercer and Lawrence in Pennsylvania. Like Youngstown, the Valley has a rich industrial past, but its economy has diversified over time to include health care and education. The region faces challenges in terms of population decline



and economic restructuring but has a strong sense of community pride with recent ongoing efforts to develop infrastructure and attract new businesses.

The Mahoning Valley has faced significant industry loss—first with the closing of the steel mills in the 1970s, and later with the departure of General Motors, two major employers in the region. “Black Monday” is locally referred to as the day Youngstown Sheet and Tube closed Campbell Works in Youngstown in 1977, furloughing 5,000 workers and contributing to a population decline by more than 60%. Lordstown, Ohio, located in Trumbull County, was home to General Motors, which opened an assembly plant in the early 1960s and operated until the plant’s closure in 2019. The region that was once referred to as the Steel Belt of the Midwest is now known as the Rust Belt.

Over the past several years, Youngstown and the surrounding area witnessed revitalization efforts in entrepreneurship, technology, and the arts. Focus has also centered on city neighborhoods through housing and community space improvement. Challenges, however, remain. Current issues in the Mahoning Valley include:

- Childhood poverty
- Literacy/education
- Infrastructure
- Unhoused populations
- Food deserts
- Transportation
- Housing/blight
- Healthcare
- Workforce
- Talent Retention and Attraction
- Environmental and other socioeconomic needs

During the 2023-24 academic year, the Youngstown/Warren Regional Chamber and YSU deepened their partnership to better address community needs. The mission of the Chamber is "to provide economic development, advocacy and business services to promote the growth of our members and Valley." Community partner interest in removing blight, creating affordable housing, upgrading infrastructure, and improving economic opportunities through job creation aligns with the Chamber’s interest in talent retention and attraction of the Mahoning Valley. YSU is partnering with organizations, such as Youngstown Neighborhood Development Corporation and Economic Action Group, to identify ways to collaborate and tackle these issues.

Youngstown and the Mahoning Valley have worked hard to reshape the economic identity by attracting new businesses focused on advanced manufacturing, electric vehicles, and energy. Lake to River Economic Development Region (the newest JobsOhio Region), a nonprofit economic development organization in Northeast Ohio; the Western Reserve Port Authority, which provides development solutions for business, government, and nonprofits; and the Youngstown/Warren Regional Chamber have been key to attracting these companies. YSU has worked with the community to

provide the region with workforce programs to meet the demands of industries. This effort has resulted in numerous collaborative partnerships which include:

#### National Center for Defense Manufacturing and Machining (NCDMM)/America Makes:

The partnership between NCDMM and YSU supports advanced manufacturing research and development. NCDMM gains access to YSU's skilled faculty, students, and facilities at the ETC to advance federal projects like Foundry 4.0 and Hybrid Additive Manufacturing. YSU benefits from federal funding and cutting-edge equipment provided by NCDMM, which enhances YSU's research capacity and allows students and faculty to work on high-impact projects.

#### Mercy Health:

A longstanding partnership with Mercy Health affords students opportunities to gain clinical experience and learn about future health professions while fostering the development of future health providers who physicians aim to retain in the Mahoning Valley. Partnership agreements are in place with multiple programs across different colleges, which address both healthcare and workforce challenges.

#### Mahoning County Career and Technical Center (MCCTC):

YSU's ETC is partnered with MCCTC on the Aspire program, which helps individuals improve basic math, reading, writing, and computer literacy skills; learn English; prepare for entrance exams; and earn their GED or high school equivalence diploma to bolster the local workforce. Space is provided to MCCTC in the Excellence Training Center facilities to offer free adult education and skills training. MCCTC benefits by expanding its reach within the community and utilizing ETC's advanced resources.

#### Mahoning Valley Manufacturers Coalition:

The Mahoning Valley Manufacturers Coalition and the ETC collaborate on programs like the state-approved advanced manufacturing pre-apprenticeship and the WorkAdvance program. The coalition gains access to YSU's modern training facilities, which helps create a skilled workforce pipeline in advanced manufacturing. This partnership connects students to a network of employers that enhances job placement opportunities and provides direct feedback from industry partners to ensure curriculum stays relevant to meeting workforce needs.

#### National Center for Urban Solutions:

Through their collaboration on the WorkAdvance program and the IT Workforce Accelerator's 5G training program, the National Center for Urban Solutions and YSU create accelerated pathways into the workforce. Access to the training infrastructure benefits the center, while increasing student access to industry-specific career opportunities increase workforce readiness.

#### Youngstown Business Incubator:

Youngstown Business Incubator's collaboration with YSU on research projects like Foundry 4.0 allows it to introduce local companies to innovative manufacturing solutions. YSU provides a testing ground and support as well as access to promising young entrepreneurs, while the business incubator offers mentorship expertise by playing a role in YSU student entrepreneurship events, such as the YSU Penguin Shark Tank.

**2.2. Describe the institutionally sanctioned definition of community engagement and related terms. (Maximum word count of 500 words per response)**

**2.2a. List the terms and definitions here that provide the institutional standards for community engagement. Provide context for the creation of the definition and standards of high-quality community engagement, including how it was determined and approved, how it is used, and any evidence of its effectiveness in guiding community engagement on campus. Additionally, upload the document or list the website link where the institution-wide definition of community engagement appears. You may skip "b" below if you answer "a" here. Proceed to "b" if unable to answer "a".**

YSU uses the Carnegie Foundation's definition of community engagement:

Community engagement describes collaboration between institutions of higher education and their larger communities (local, regional/state, national, global) for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity. The purpose of community engagement is the partnership of college and university knowledge and resources with those of the public and private sectors to enrich scholarship, research, and creative activity; enhance curriculum, teaching, and learning; prepare educated, engaged citizens; strengthen democratic values and civic responsibility; address critical societal issues; and contribute to the public good.

This adoption was determined in August 2022 by the university's president, faculty on the subcommittee of the Academic Senate responsible for reviewing CEL courses (hereafter referred to as Senate subcommittee), staff and faculty members of the CEC, and community members of the CPAC. The definition encompasses curricular and cocurricular activities and provides the foundation for developing other related definitions.

Community outreach is defined at YSU as the effort of extending university resources, services, or expertise to meet the needs of the community that is one-directional in nature. Community outreach is described as doing "for" an organization or the community, while community engagement is done "with" an organization for shared ownership and benefit. Examples of community outreach include various university lecture series that are funded by endowments and open to campus members of the community to hear from renowned speakers at no cost.

University service for students is defined as unpaid time helping YSU areas/departments execute programs for the benefit of the YSU community and its

students. Examples include serving on a university committee and meeting with prospective students.

Definitions are shared with students, faculty, and staff via the YSU Office of Community Engagement website (<https://ysu.edu/strategic-planning/community-engagement>), GivePulse training materials, and a monthly OCE newsletter that is delivered to the university community and local partners.

Additionally, department chairs curated definitions for various forms of community-engaged activities in August 2024 as part of the strategic plan. They reviewed definitions from other institutions and gathered input from faculty. Definitions follow.

- **Community-Engaged Teaching/ Learning:** A pedagogical approach that connects students and faculty with activities that address community-identified needs through mutually beneficial partnerships that deepen students' academic and civic learning. Examples are service-learning courses or service-learning clinical practicums.
- **Community-Engaged Research and Creative Activities:** A collaborative process between the researcher and community partner at all stages of the research process that creates and disseminates knowledge and creative expression with the goal of contributing to the discipline and strengthening the well-being of the community. Community-engaged research identifies the assets of all stakeholders and incorporates them in the design and conduct of the different phases of the research and creative activities process.
- **Community-Engaged Service:** The application of one's professional expertise that addresses a community-identified needs and supports the goals and mission of the university and the community partner. Community-engaged service may entail the delivery of expertise, resources and services with or to the community.

**2.2b. If your campus does not have an institutional definition of community engagement, are there definitions and standards provided within a unit or division that are used to define community engagement? If so, list the terms and definitions for high quality community engagement. If you answered “a”, skip.**

Answered 2.2.a.

**2.3. Describe how the institution ensures that students, faculty, staff, and community partners have equitable access and opportunity to community engagement activities and partnerships. Equitable access and opportunity require focused efforts to address systems and structures that create barriers to participation. (Maximum word count of 500 words per response)**

**2.3a. Describe the relevant contexts—both within the institution as well as beyond (local, regional, national)—that shape how equitable access and opportunity in community engagement is defined, discussed, planned, enacted, and held accountable on your campus.**

In the last several years, the university has been building a strong foundation for deepening and expanding faculty's access to community engagement activities and partnerships, which leads to increased access by students and community partners as well.

The rising culture of awareness and support of community-engaged activities at YSU began with the self-study process in 2022 and has continued through the refinement of several large-scale university documents to showcase community engagement at YSU, including:

- The strategic plan, approved by the YSU Board of Trustees
- The Academic Master Plan, developed by the provost in consultation with campus departments
- College-specific strategic plans
- College accreditation documents
- Departmental mission statements
- Tenure and promotion governance documents

The institutional support made possible through this collection of documents helps in creating a solid framework for increasing future access by faculty members and other constituents.

Legislative actions are influencing diversity, equity, and inclusion initiatives at Ohio public universities. The current landscape of DEI efforts in the state is being shaped by regulatory and societal perspectives. To provide a context for how the university is addressing the current climate in Ohio, including community engagement access, the Williamson College of Business Administration states the following in its accreditation report:

The current atmosphere towards diversity, equity, and inclusion (DEI) in Ohio is multifaceted, reflecting both progress and challenges. YSU has made strides in enhancing our efforts in recent years. Our Office of Belonging, Empowerment, and Engagement (BEE; formerly the Office of DEI) is dedicated to building a culture where everyone feels they belong and are empowered to achieve their potential. Part of the Division of Academic Affairs, BEE is the cornerstone of the university's commitment to fostering an inclusive, motivating, and engaging environment. Its activities encompass the effective management of all diversity-related programming, mentoring initiatives, and community engagement efforts. In the college, activities such as hosting the Annual Women in Accounting Celebration, selecting diverse, world-class guest speakers and topics for the Thomas Colloquium, the Nonprofit Leadership Summer Fellowship supported by the Wean Foundation and its embedded values of equity and inclusion, and encouraging faculty and staff participation in BEE initiatives highlight our efforts.

**2.3b. Describe institutional systems and structures that address equitable access and opportunity in community engagement for students, faculty, staff, and community partners. This may include infrastructure, program/initiative, policies,**

**procedures and practices, staffing, office, finance, network or coalition of centers, campus climate survey, hiring/recruitment, etc.).**

The OCE coordinates all community-engaged activities at the university, in support of strategy “Develop and optimize a framework for central communication, coordination, and management of community engagement.” The OCE assists students, faculty, staff, and community partners and maintains systems that support engagement work.

One system is the GivePulse platform, branded YSU PenguinPulse on campus and used by the entire university population and community partners to harness collaboration potential. As of December 2024, 131 approved partners on the platform have direct access to students to communicate their needs. Additionally, 294 YSU divisions, colleges, departments, student organizations, and other groups have pages on the platform with the ability to administer content with training and support. In turn, YSU students, faculty, and staff have one place to find and track all campus and community volunteer opportunities. YSU PenguinPulse makes scheduling and communication easier for all parties. It also gives students the benefits of connecting their engagement to a course or program requirement, verifying their efforts, and aggregating their contributions for future reference.

Roxann Sebest, Vice President of Resource Development for the United Way of Youngstown and the Mahoning Valley, attests to the benefits of using YSU PenguinPulse:

We were lucky enough to be one of the first groups to use YSU PenguinPulse [. . .]. It was a really great experience I think for both ends—for the nonprofit and for the volunteers. YSU students have really been the backbone of our volunteer movement at the United Way. [. . .] It's amazing to see how YSU gets involved in the community and gives back, and I know that United Way is not the only nonprofit that relies on volunteers from YSU, so we're really lucky to have this base here to expand all of our volunteerism.

In addition to YSU PenguinPulse, the OCE offers training, video resources, community partner consultations, and the monthly community engagement newsletter to better engage and inform the campus and community. It also convenes two groups to foster communication about engagement efforts – the CEC, which includes constituents from a cross section of campus, and the CPAC, which includes community partners.

Even with the centralized structure of the OCE on campus, challenges still exist. Equitable access for international students has been an issue with the recent growth of this population. Most international students do not have driver's licenses or transportation, which limits their access to community organizations. To address the challenge, international students have been encouraged to participate in the YSU Transcribing Club, an online community-engaged activity. University vehicles have been used to provide transportation to certain community-engaged activities. Also, within the SHC, a graduate intern curates a newsletter that only includes opportunities on or near campus for ease of access without transportation.

To better understand potential challenges moving forward, the Senate subcommittee added an open-ended question to the CEL course assessment surveys for community partners, students, and faculty: “Were there any barriers for you for community engagement? If yes, please describe.”

**2.3c. Describe how the campus ensures that community partners have “significant voice” and input into institutional or departmental planning and collective goals.**

YSU has more than 130 partners, some of which have been partnering with the university for over 20 years, such as the Rescue Mission of the Mahoning Valley, Second Harvest Food Bank of the Mahoning Valley, and Gleaners Food Bank.

To nurture these relationships and reinforce the necessity of involvement from community partners, the YSU strategic plan details that the institution will:

“Listen to the needs of the community and address these needs collaboratively. Ensure that current and future partnerships are inclusive, equitable, and grounded in accessible systems, practices, and goals.”

To “listen to the needs of the community,” the university invited community partners to provide feedback during the strategic planning renewal process, described in Section 2.1.b. Their input was considered when developing the revised strategies and tactics. One of their suggestions, for example, was to make it clearer that the OCE serves as the centralized unit for engagement efforts. Language changes have since been made in the newsletter and on the OCE website to make this structuring more evident.

Another way the university has sought to address community needs collaboratively is through the formation of the CPAC in 2022, as referenced in Section 2.1.b. The council gives community partners an avenue to provide input on various community projects and systems such as YSU PenguinPulse. One of the group’s initial charges was to provide feedback on the self-study, which led to the adoption of new strategies during the strategic planning refresh initiative. The council also informed the structure of partner engagement with faculty in CEL courses.

Finding opportunities to interact with community partners to leverage strengths is key to ensuring partners have a significant voice in planning and goals. One recent opportunity came in September 2024, when YSU, in partnership with Youngstown City Schools, held a special screening of the impactful documentary, *The Right to Read*. This request was brought to YSU by a group of community members and the Youngstown City School District. Inspired by Ohio Governor Mike DeWine’s initiative regarding literacy, the film itself chronicles the efforts of an NAACP activist, a teacher, and two families to ensure the youngest generation achieves the fundamental skill of reading. Sight for All United was present to provide free vision screenings through the Vision to Learn van to address one of the factors impacting literacy. The Public Library of Youngstown and Mahoning County had a pop-up library on site as well. Following the screening was a panel discussion that included both community partners and YSU faculty.

YSU's partners are also heard when challenges arise. In October 2024, a community partner utilizing the YSU PenguinPulse system identified a concern with students signing up for volunteer shifts but not attending. Through conversations with the partner, YSU PenguinPulse administrators discovered that some international students needed further education to reduce no-show rates. A volunteer expectations form was also developed and piloted for all first-year honors students to sign.

**2.3d. Describe the resources made available to community partners that support community engagement (e.g., professional development, compensation, materials, space, acknowledgement, awards).**

In September 2023, the James Dale Ethics Center at YSU, in partnership with the Community Foundation of the Mahoning Valley, provided free continuing legal education training/credits for area lawyers. This had been a practice for almost 20 years, but prior to the pandemic, the center's resources were more limited. After a lack of programming during the pandemic, the endowment increased to now afford opportunities to sponsor and support more events.

A separate endowment through the Sokolov Honors College supports the hiring of community fellows, who are students who work on behalf of the needs of a community partner. Fellows provide the connection between campus and community and support the needs of the partner. For instance, in 2023-24, the community fellow for the United Way of Youngstown and the Mahoning Valley assisted in the coordination of volunteers for a number of initiatives—the Volunteer Income Tax Assistance Program, Satur-Day of Caring, and the opening of the new Volunteer Center. The SHC has also provided space in Fok Hall on campus to Community Hospice to conduct trainings to student volunteers. When necessary, staff provides time to open the building on Saturdays.

Since 2022-23, the OCE has invited community partners seeking volunteers for their organizations to an on-campus volunteer fair. Partners receive complimentary space, reserved parking, and event marketing at no charge. Twelve partners attended each of two events held during the first year. In Fall 2024, 19 organizations were represented.

The annual YSU Community Engagement Symposium provides many of the same benefits to community partners as the volunteer fair. In addition, partners have a venue to present at the symposium and the opportunity to attend other presentations and professional development sessions. Community partners are involved in the planning of the symposium from the beginning stages and participate in debriefing sessions which inform future planning. Additionally, beginning in 2025, community partners will be recognized through an awards program.

Another community partner, Community Corrections Association, attended a school counselor event at YSU in December 2022 to talk about employment opportunities and needed support in designing a flyer to share information more effectively. YSU provided design services through a compensated student staff member in the SHC. This not only helped the community partner but also the student, who gained practical experience working with the partner.



In Spring 2023, the local YMCA used university facilities and the expertise of university staff to deliver a presentation regarding mental health to their staff. The use of the space and expertise was made available to the partner at no charge.

The YSU PenguinPulse subscription is also offered to community partners in the form of free affiliated group pages, trainings and resources, and volunteer opportunity advertising to the university population. Partners can also obtain free personalized technical assistance on the YSU PenguinPulse platform.

**2.3e. In what ways does the campus collect information from partners to ensure accountability to the community—in particular, reciprocity, mutual benefit, and respect?**

The university has built a culture of respect in relationships with its community partners. The following are examples since the 2023-24 academic year of how the campus has collected information from partners to ensure ongoing reciprocity and collaboration:

- Individual and group meetings with community partners are conducted at the inception and completion of community engagement initiatives. For instance, faculty from the Campus Community Partnership seminar hosted a breakfast for partners participating in the spring 2023 course. The breakfast yielded actionable information to incorporate into the experience, leading to greater accountability to the community with a focus on mutual benefit.
- Penguin Physical Therapy (PPT) Pro Bono clinic located adjacent to the Midlothian Free Health Clinic (MFHC) serves uninsured community members and provides learning opportunities for students. Clinic patients provide feedback on the care they receive from the students, and the faculty member provides feedback to the YSU Physical Therapy department regarding student performance and skills used. The First Presbyterian Church, which has been providing space for both the PPT clinic and MFHC to operate, continues its support for the services YSU provides to meet the needs of the community.
- Also in Fall 2023, the OCE sent out a survey to community partners asking for short responses on the topic of facilities usage. Partners were asked how the availability of space at YSU could benefit their organization and in what ways they could utilize space to help with workforce development, facets of health and wellness, and more in relation to their mission. The survey was intended to gather data to inform a grant application.
- Beginning in Spring 2024, electronic surveys were sent to community partners as part of the assessment process for CEL courses. Thirty partners responded to the survey, with some partners completing multiple surveys when associated with more than one CEL course.
- Community partners utilizing the YSU PenguinPulse system can review student reflections about the experience and verify hours. This level of transparency gives community partners a mechanism for receiving feedback from individuals engaged with their organization better positioning their role as co-educators. It also serves as a source of validation and accountability for students.

- In fall of 2024, the OCE launched an electronic survey in advance of a CPAC meeting to help inform future meeting topics and needs.
- In October 2024, community partners were sent a mid-semester survey to gather feedback on their experiences with YSU volunteers. The survey helped YSU staff better understand and meet the needs of partners in moving forward with the semester.

**2.4. Describe the infrastructure to support and advance community engagement. (Maximum word count of 500 words per response)**

**2.4a. Title of the campus-wide coordinating infrastructure(s) (center, office, network or coalition of centers, etc.) as well as reporting structure, staffing, and purpose and goals to support and advance community engagement. If the campus has more than one center coordinating community engagement, describe each center, staffing, and purpose and indicate how the multiple centers interact with one another to advance institutional community engagement.**

Prior to 2021, centralized coordination of community engagement did not exist at YSU, nor did a position dedicated to overseeing that coordination. After the 2020 renewal of the strategic plan incorporated the goal to focus on community engagement, the Office of Academic Affairs created a position for an Associate Provost for Strategy and Engagement. The position was to be responsible for overseeing the community engagement goal and strategy development. The dean of the SHC filled that position and maintained a dual role.

In the fall of 2024, the position transitioned into the Associate Provost for Experiential Learning and Engagement. This change included realigning other departments into the Division for Experiential Learning and Engagement to allow for the sharing of resources. Additionally, SHC staff, who are all greatly involved with community curricular and cocurricular initiatives, provide knowledge and support for institutional engagement efforts.

The current structure and staffing of the ELE division includes:

- Office of Community Engagement
  - 2.5 full-time, grant-funded employees.
  - Purpose to oversee grant development/evaluation and serve as the one front door for community partners.
- Office of Belonging, Empowerment, and Engagement (formerly the Office of Diversity, Equity, and Inclusion)
  - Two full-time employees, General Fund.
  - Purpose to “build a culture where everyone feels they belong, are empowered to achieve their potential, and are engaged in the life of the university. Through strategic partnerships, innovative and collaborative programs, we aim to foster a dynamic community where every voice is significant and impactful, and heard.”

- Tressel Institute for Leadership and Teamwork
  - One full-time employee, partial general and endowment funding.
  - Purpose is “to provide students with the necessary tools and support to become agents of positive change within their communities and beyond.”

In addition to the those who fall directly under the division are SHC staff members whose roles support the university initiatives. One part-time assistant director for community engagement was appointed in November of 2022 to provide support for the training and monitoring of the YSU PenguinPulse system, the organization of the volunteer fair, and the curation of all community engagement newsletters. Two additional SHC staff members have a percentage of their time dedicated to cultivating community partnerships, as well as organizing the annual Community Engagement Symposium. These two individuals report to the associate provost, who reports to the provost, and collectively serve on the team leading the coordinating infrastructure for community engagement.

All areas, programs, or centers throughout the institution that engage students, faculty, and staff with the community utilize the YSU PenguinPulse system, provide annual reports, and/or have a representative from their area on the CEC. A snapshot of areas include: the Center for Nonprofit Leadership, the Ohio Small Business Development Center, the Center for Historic Preservation, the Center for Working Class Studies, the Poetry Center, the Rigelhaupt Pre-Law Center, the James Dale Ethics Center, Student Experience, the Veterans Resource Center, Alumni Engagement, Athletics, and more. The associate provost engages with the leadership of centers embedded within the disciplinary colleges.

**2.4b. Internal budgetary allocations dedicated to supporting institutional engagement with the community: Describe whether the sources of these funds are permanent or temporary. Describe how budget shortfalls may have impacted funding for community engagement.**

In Fall 2024, departments designated various leadership, faculty, staff, and operating funds from permanent funding sources for community-engaged activities. YSU has also taken steps to dedicate support from the General Fund, such as increased funding for the OCE.

While many institutions in Ohio have experienced funding challenges, YSU has seen an approximate 11% increase in enrollment in Fall 2024, helping to stave off budget shortfalls.

Examples of permanent funds that do not originate from grants or one-time gifts that go to support community-engaged activities follow and continued in Section 10.1.

- YSU Ward Beecher Planetarium and Mineral Museum – general budget to hire student assistants/staff. The planetarium experienced budget cuts in 2020, reducing the full-time planetarium lecturer position to half-time. In August 2022,

the individual in that position departed leaving a vacancy. This affected the number of group tours offered. YSU found funding to bring the lecturer position back in September 2024; public hours and school trips have resumed.

- YSU English Festival (draws 2,000 area school students to campus each spring for literary experiences) – 10% from the General Fund (course release for a faculty member).
- YSU History Day (draws 200-300 area school students to campus each spring to present historical research in a juried event) – The annual budget supports release time and operating expenses. 50% of funds are provided by the General Fund, 50% by registration fees.
- Of the graduate assistantship appointments initiated in Summer/Fall 2024, 30 were reported as community engaged. An investment of \$476,625 has been made to support community engagement for 2024-25.
- Course fees from the General Fund used for the CEL course Community Applications to assist with needed materials.

The following is a sampling of permanent endowments that support community-engaged efforts and are managed by the YSU Foundation, pending a change in the donor agreement. A summary of additional endowments can be found in Section 10.1.

- Samuel A. and Judy B. Roth Endowment for the Mahoning Valley Innovation and Commercialization Center
  - 6/30/24 – MV \$197,206
  - Purpose: To support the center's expenses related to operations, equipment maintenance, technical training and seminars. The center is a shared resource training facility in Youngstown that houses advanced manufacturing equipment for training students.
- Zoldan-Yampolsky Family Executive Fellows Program
  - 6/30/24 – MV \$531,389
  - Purpose: To support students through internships with local and regional nonprofit organizations.
- Williamson Innovation Park Champion Fund
  - 6/30/24 – MV \$3,010,138
  - Purpose: This land fund was created to support YSU and K-12 students within the Mahoning Valley by providing innovative hands-on experiences with various scientific methods, advanced curriculum, and leadership opportunities.
- Schwebel Family Fellows in Business Administration
  - 6/30/24 – MV \$214,858
  - Purpose: To provide work experience opportunities for business students at YSU's Ohio Small Business Development Center. The center

contributes to the local economy by providing consulting/training to companies and start-ups.

- Paul J. Thomas Chair in Economics
  - 6/30/2024 – MV \$1,829,907
  - Purpose: To speak to local, regional, national groups and maintain active involvement in the economics profession at national, regional, local levels.

**2.4c. List any strategic fundraising efforts or external funding (grants) specifically undertaken to support community engagement and identify any specific endowments earmarked for community engagement.**

The breakdown of total funding for community engagement grants per fiscal year at YSU is as follows:

- 2022: \$ 991,822
- 2023: \$3,957,000
- 2024: \$4,679,397
- 2025: \$5,358,083 (as of 12/31/2024)

Some of the notable current grants that support institutional priorities include:

Guin Fit is a comprehensive community health engagement program that includes professional expertise in public health, physical therapy, exercise science, human ecology, athletic training, and counseling services. Funded by the Center for Disease Control, it is designed to prevent childhood obesity by providing nutrition advice, physical activity, and stress and pain self-management to families as well as organizations to manage childhood obesity in their communities. Guin Fit initiatives will offer quarterly family events that focus on the above services plus nutritional cooking demonstrations and activities for each season. These Guin Fit Family Fun Fests will take place in the fall, winter, spring, and summer for parents, family members, students, and friends to attend.

The OCE is partnering with three local school districts to provide Nita M. Lowey 21st Century Community Learning Center grants funded by the Ohio Department of Education. The purpose of the project is to offer enrichment opportunities outside of school hours in the areas of reading and mathematics, youth development, and parent and family engagement to address academic delays and non-academic barriers. After-school programming focuses on non-proficient students in reading and math. The target population demographics are students who qualify for free and reduced lunch.

In 2023-24, the YSU Foundation held the following endowments identified for community-engaged activities:

- David and Patricia Sweet Public Service Internship Endowment with the purpose to provide paid internships with a public or nonprofit organization for an undergraduate student at YSU interested in a public service career.

- Marjorie Hartman Foundation Pre-Veterinary Society Support Endowment with the purpose to support the pre-vet society through operations, support, and projects geared toward animal welfare in the Mahoning Valley.
- Richard and Susan Sokolov Honors College Endowment with the purpose to support community-engaged research and activities to enrich the lives of residents of the Mahoning Valley and beyond.
- Dr. Abdu Pen Pal Program endowment and gift accounts with the purpose to support the partnership between YSU honors students and local elementary schools to increase literacy and a love of learning.

**2.5. Describe how community engagement efforts have been impacted and shaped by recent local, national, and/or global events such as the COVID-19 pandemic, greater attention to racial and social justice, the crisis of decreasing trust in democracy and institutions, and natural disasters. (Maximum word count of 500 words)**

The COVID-19 pandemic significantly shifted how YSU students engaged with the community. While restrictions limited face-to-face service, new virtual opportunities emerged that continue to make an impact.

Honors students embraced virtual community service, including the transcription of historical documents for the Smithsonian Institution and Library of Congress. This work makes historical documents more accessible to researchers, historians, and the public, and it led students to form the YSU Transcribing Club. Meeting online allowed students not only to share their progress but also to connect socially and safely during a period of isolation. The club has since grown, and members have participated in transcribe-a-thons and collaboration with students from a Texas university. Recognized for its efforts, the club's work was featured in a Library of Congress blog (<https://blogs.loc.gov/loc/2022/10/researcher-story-julie-centofanti/>), and its founder, Julie Centofanti, received prestigious awards from the Ohio Campus Compact and the National Collegiate Honors Council. As of October 2024, YSU students have transcribed 54,851 documents for a total of 8,194 hours, representing 6% of the Library of Congress' total.

SHC students also participated in a virtual story time project to support literacy during the pandemic. Each Monday, from October 2020 to May 2021, students read children's books on the college's YouTube channel and created an interactive board game as part of an independent study. Children who completed the game received a certificate and a book.

To improve accessibility for Spanish-speaking residents, students translated the SHC website into Spanish in Spring 2021. This project was initiated by a Peruvian student and reviewed by faculty from diverse Spanish-speaking backgrounds. The university continues to build on these translation efforts.

Students also created a virtual tutoring program, "Honors Helping Future Scholars," in collaboration with schools in Western Pennsylvania and Eastern Ohio. Managed by a

first-year honors leadership team, this initiative provided online tutoring and support to local high school students.

Beyond virtual service, YSU formed partnerships to address local needs that arose during the pandemic. United Way of Youngstown and Mahoning Valley identified food insecurity as a critical issue, prompting the YSU Athletic Department to get involved. Athletes, coaches, and other staff volunteered on Saturdays to pack food that was delivered to more than 450 families across the Mahoning Valley. With donations from local businesses and grocery stores, the initiative has continued every third Saturday of the month for four years. YSU students, faculty, staff, and alumni volunteer to support these “Satur-Day of Caring” events. Volunteers without transportation can opt to participate in a rideshare or access university vans.

Through these initiatives, YSU students adapted to changing circumstances, creatively sustaining and expanding their community engagement and addressing the needs identified by community partners.

**2.6. Describe how the institution tracks and assesses engagement with communities. Be sure to describe: (Maximum word count 500 per response below.)**

**2.6a. How the institution maintains systematic campus-wide tracking of engagement with the community, including the purpose for tracking, what data is collected, what systems are used to track data, who is responsible for collected data, how often data is collected, and how data is used.**

As the university-wide system to collect all forms of community engagement, YSU PenguinPulse tracks both curricular and cocurricular community-engaged activities of students, staff, and part-time faculty. Full-time faculty use the Watermark system to identify their community-engaged activities. Rather than create a duplication of effort on the part of faculty, information from Watermark can be pulled and imported into the YSU PenguinPulse system by OCE staff. Together, the tools work in support of strategy “Inventory and communicate all community engagement activities.”

For example, faculty members enter community engaged activities such as the three that follow.

Professor in the Department of Chemical and Biological Sciences, Ian Renni, who has expertise in Ecology has served on the Poland Municipal Forest Board since 2018. He organizes an annual Garlic Mustard Pull that attracts scout troops, YSU students, and local high school students. Since 2019, he has also been a board member of Friends of Poland Municipal Forest, seeking ways to promote forest science to the community.

Professor of Communication Adam Earnhardt serves as board president and fundraising director for the Liberty Little Leopards Football, a youth football and cheer nonprofit. Additionally, he led efforts to secure the first community engaged learning designation for a first general education course at YSU, Communication 1545.

Assistant Professor in the department of Computer Science, Information, and Engineering Technology, Robert Gilliland, currently serves as Executive Secretary and State Website Director for the Knights of Columbus - State of Ohio.

The Division of Experiential Learning and Engagement, which includes the OCE, is responsible for the collection of this data. The data is collected on an ongoing basis. Before the conclusion of each term and then again within a week after the conclusion, a reminder is sent to students and staff to update their impacts. The data is used to provide reports to the YSU Board of Trustees, identify the locations where students are engaging in the community, assess the experiences of students through reflections, and identify whether the partnership is meeting the needs of the community. The data also is used to identify opportunities for collaboration among partners, which occurred in Fall 2024 with the Right to Read experience, as detailed in Section 2.3.c.

YSU PenguinPulse also serves as a checks-and-balances system to ensure follow-through on commitment, such as with the international student no-show issue described in Section 2.3.c. The problem was identified and confirmed using YSU PenguinPulse data, which allowed for prompt intervention.

**2.6b. Any campus-wide assessments or self-studies of community engagement (not including this application) that have taken place in the last five years, including the purpose for the assessment or self-study, what data were collected, who was responsible for conducting the assessment or self-study, and how the assessments or self-studies were used.**

During the 2022-23 academic year, the CEC undertook a comprehensive campus self-study utilizing the Carnegie Foundation Elective Classification for Community Engagement 2024 framework. The purpose of the self-study was to identify strengths and opportunities for growth, as well as use the framework as a method to evaluate how the university was progressing in the strategic plan. The associate provost convened the group that conducted the self-study, along with a writing team that emerged from the Community Engagement Council.

The CEC worked to identify data that was needed to answer questions in each of their sections. Questions were aggregated into a single survey which was sent to campus. Data collected was used to inform strategies to support the community engagement goal in the strategic plan. As part of this commitment, the university decided to administer the NSSE Civic Engagement topical module in Spring 2023.

During the process, the university hosted a visit with Kinsley to continue to learn and engage the campus and community. The visit included sessions with the writing team, the president and CEO of the Youngstown/Warren Regional Chamber, Institute for Teaching and Learning faculty, the Division of Workforce Education and Innovation, students, community partners, and the interim president.

Results from the self-study included the identified strengths/successes:

- Development of review process to tag CEL courses



- Implementation of the YSU PenguinPulse system
- Utilization of YSU PenguinPulse by community partners
- Centralized coordination with the establishment of the Office of Community Engagement
- Formation of a Community Partner Advisory Council
- Community-engaged learning examples reported from across campus

The opportunities for growth that arose included identifying and cataloging existing initiatives; reviewing governance documents, tenure and promotion criteria, and awards; and establishing professional development opportunities, including information about experiential learning in all first-year student seminars. These findings were used to inform the strategies for the renewal of the strategic plan in 2023.

The self-study allowed YSU to build momentum in its community engagement efforts. Overall, the involvement of leadership, faculty, staff, community partners, and students led to an educational and collaborative experience, revealing the value of the process.

## SECTION 3: Institutional Identity and Culture

### **3.1. Describe how executive leadership of the institution (president, chancellor, provost, chief diversity officer, trustees, etc.) explicitly promotes community engagement as a priority. (Maximum word count of 500 words)**

Community engagement is a clear priority supported by leadership at Youngstown State University. The commitment to becoming a more civically engaged campus through the implementation of practices as defined by the Carnegie Elective Classification was first identified in the 2020 Plan for Strategic Actions to Take Charge of Our Future under former President Jim Tressel. It continued through the renewal of the strategic plan in 2023 and the arrival of current President Bill Johnson in January 2024.

The university articulates in the strategic plan its dedication to “listening to the needs of the community.” Guided by leadership and endorsed by the YSU Board of Trustees, the plan establishes strategies that lead to fostering the exchange of knowledge and resources between campus and community in a way that is mutually beneficial and grounded in a spirit of reciprocity.

In the first ten months of his tenure (academic years 2023-24 and 2024-25), President Johnson focused on strengthening YSU’s commitment to Ohio as a driver of regional economic prosperity. By leveraging his military, business, and congressional experience, he positioned YSU as a leading institution in Northeast Ohio and a hub for innovation. His efforts aim to create and enhance programs and credentials that meet workforce needs, as one of the top concerns in the region, and foster partnerships addressing the community’s highest priorities.

Since arriving at YSU, President Johnson has prioritized integrating YSU’s mission with the economic goals of the Mahoning Valley. One of his first initiatives included creating the Government Relations Office. The office is responsible for establishing a link between local, state, and federal governments and working cooperatively with the Office of Research Services to bring in grants for the university to fund special projects. Additionally, President Johnson has taken a seat on the Youngstown/Warren Regional Chamber Board, which is focused on creating a favorable environment for economic growth.

The Office of Academic Affairs launched support of the strategic plan’s community engagement goal under former Provost Brien Smith and has continued its support under current Provost Jennifer Pintar. Provost Pintar initiated, and later finalized with the president, the creation of the Division of Experiential Learning and Engagement, which serves as the overarching division for community-engaged activities, as addressed in Section 2.1.b.

In August of 2024, Provost Pintar held a retreat for YSU chairs and deans, during which a session was dedicated to the review of governance documents related to promotion and tenure. Institutional definitions of community-engaged activities curated by a group of chairs were shared, and faculty were encouraged to take part in discussions regarding their department’s governance documents for tenure and promotion. Thus far,

twelve departments confirmed the completion of their departmental governance documents, seven more indicated completion in spring 2025. College deans have convened groups of faculty and chairs to assist in the process.

**3.2. Provide a letter from the president/chancellor or provost (vice president for Academic Affairs) that includes the following: (Maximum word count of 500 words.)**

- **Their perception of where community engagement fits into their leadership of the institution**
- **A description of community engagement’s relationship to the institution’s core academic identity, strategic direction, and practices**
- **How community engagement is institutionalized for sustainability in the institution**

**Please either copy and paste the text of the letter in the following textbox or upload a PDF copy of the letter below:**

We are honored to support Youngstown State University’s application. Community engagement is deeply embedded in YSU’s mission, shaping its strategic direction, academic practices, and long-term sustainability. This commitment defines the university’s role as both a hub of academic excellence and a vital partner in Youngstown and the Mahoning Valley, producing socially responsible graduates who are prepared to make meaningful contributions to their communities.

YSU’s mission emphasizes bridging academia with real-world needs, cultivating reciprocal relationships with the community that enhance student learning and address regional challenges. These partnerships underscore a unique value proposition: YSU graduates are not only knowledgeable but also equipped to lead and serve effectively in their communities.

YSU’s strategic direction prioritizes community engagement as a means of enriching experiences and promoting regional development. Community engagement is a goal in the YSU Strategic Plan and is incorporated into the Academic Master Plan, college strategic plans, and departmental governance documents. While these efforts positioned us to gain momentum in 2021, YSU’s history of collaboration has also contributed to the enhancement and development of partnerships. Initiatives like establishing the Office of Community Engagement, the Community Partner Advisory Council, and the Community Engagement Council invite constituents from across campus and the region to the table, creating spaces for meaningful dialogue and joint problem-solving.

The university’s YSU PenguinPulse platform exemplifies an innovative approach to engagement, connecting students with local organizations and enabling over 130 community partners to access the system at no cost.

To ensure community engagement remains sustainable, YSU has institutionalized practices that integrate engagement and experiential learning into academics and cocurricular experiences to support the strategies, such as “Develop community-engaged experiential learning and engaged scholarship to meet needs in arts and culture, education, environment, health, prosperity and security for the public good,” and “Integrate experiential learning into the curriculum as a key component of the YSU educational experience.” Fifty courses are now tagged as community-engaged learning designated courses representing 75% of academic departments. Students can earn recognition for their community-engaged learning, research, and creative activities.

Notable achievements, such as the transcription of 6% of the Library of Congress’ collection by YSU students—an unparalleled contribution—highlight the university’s national impact. Faculty, staff, and students share their work at the YSU Community Engagement Symposium and national conferences, showcasing the broad reach of these efforts.

Additionally, YSU’s strategic plan includes a framework for assessing and enhancing the impact of community engagement, ensuring these initiatives are systematically supported and can adapt to evolving community needs.

Community engagement is woven into the fabric of YSU, reflecting a commitment to mutually beneficial partnerships that address community needs and foster regional development. By aligning ourselves with the Carnegie Foundation’s characteristics of a community-engaged campus, we will continue to move toward impactful and sustainable initiatives. Learning from, leading, and serving the community with our partners as co-educators results in both student development and regional growth, exemplifying YSU’s commitment to serving as an asset to the Mahoning Valley, the State of Ohio, and beyond.

President Bill Johnson

Provost Jennifer Pintar

**3.3. Describe how community engagement is emphasized as part of the institution’s brand message identity or framework. (Maximum word count of 500 words)**

YSU unveiled a new branding campaign in 2023, referred to as the “Know Y” campaign, which encourages others to learn about YSU and why it is a good choice for students.

In a university issued news release, YSU describes its new logo as a visual representation of “the university’s pride, progress and purpose. This reimagined logo reinforces the university’s commitment to the community, forging a stronger bond between YSU and its surroundings.” Both campus and community partners ask: What would the community be without YSU, and what would YSU be without the community?

The branding connects YSU’s educational mission to the surrounding community as the center for advanced learning and a valued community partner. Connecting the brand

back to the strategic plan, the Academic Master Plan, college strategic plans, departmental mission statements and governance documents, serves as evidence that YSU has elevated community engagement as part of its institutional framework.

The integral nature of the partnerships is a testament to the institution's identity. From university news releases to social media posts and marketing materials, websites and news reports, community engagement is celebrated as part of the fabric of the YSU experience. Through "Know Y," YSU affirms its role as a catalyst for both personal and community transformation, reinforcing its foundational purpose as a university for and of the people.

Additionally, an example of branding at the college level that works in tandem with university messaging is a wall inside Fok Hall, the home of the Sokolov Honors College, which bears three words – opportunity, community, and family – and photos of learning in action. This branding emerged through conversations with students and alumni as key words to describe their experiences alongside community partners that increased the value of their education.

The pervasiveness of community engagement is evidenced by its inclusion in the following list of publications:

- YSU Board of Trustees reports
- Higher Learning Commission Assurance Report (<https://ysu.edu/sites/default/files/HLC/2022%20YSU%20Assurance%20Argument%206.28.2022.pdf>)
- University press releases (<https://ysu.edu/news/ysu-wide-receiver-partners-rich-center-autism>)
- Office of Community Engagement newsletter (community partner version: <https://t.e2ma.net/webview/2iz81n/1f90207fe188f753440b160a4eb5b443>; student version: <https://t.e2ma.net/webview/6xx81n/ef842365672256f1d92a1403cc7a15b5>; faculty and staff version: <https://t.e2ma.net/webview/adw81n/0e5c347c4c180780a609af588bb5db9c>)
- This Week @ YSU internal newsletter
- University websites
- Social media
- Community reports – The Business Journal (<https://businessjournaldaily.com/ysu-students-passionate-about-serving-their-community/>)
- “Road to Carnegie” exhibit in YSU’s Maag Library (<https://businessjournaldaily.com/ysu-pursues-carnegie-community-engagement-classification/>)
- Inclusion of community engagement pages in the YSU Catalog
- College Strategic Plans, Accreditation Reports

- Peer-reviewed journal articles
- External publications that highlight the work of YSU faculty, staff, and students engaging in the community (see page 26 of the Mahoning County Prosecutor's Annual Report: <https://prosecutor.mahoningcountyoh.gov/wp-content/uploads/2024/03/2023-Annual-Report.pdf>)

## SECTION 4: Quality of Community Engagement Relationships and Academic Partnerships

**4.1. Describe specific systematic actions, strategies and assessments that are used to ensure the institution, academic units (colleges, departments), and faculty and staff are building partnerships that center mutual benefit, reciprocity, and asset-based partnerships. Be sure to describe: (Maximum word count of 500 words)**

- a. What activities and strategies are used to include community partners reciprocally for mutual benefit and collective action?**
- b. How do these activities and practices encourage authentic collaboration and reciprocity with community partners**
- c. In what ways does the institution collect and share feedback and assessment of academic community partnerships and shared goals to deepen, understand, and improve reciprocity, mutual benefit, and asset-based engagement?**

Following the strategic plan's aim to listen to community needs and address them collaboratively, Youngstown State University faculty and staff meet with Community Partner Advisory Council (CPAC) members regularly. Highlights are shared with campus-community networks through the Office of Community Engagement newsletter and social media.

During early meetings, CPAC members proposed starting a volunteer fair and community engagement conference, both of which have since been adopted as annual events at YSU for four years. The volunteer fair provides partners and students with face-to-face interaction and information-sharing for volunteer opportunities. Partners benefit by reaching several students, and printed QR codes are placed on each organization's table for students to quickly scan and connect on YSU PenguinPulse. For students, the fall event jump-starts their networking experiences and any required volunteer hours.

While the volunteer fair is the opening community engagement event on campus, the conference proposed by CPAC members has become the culminating event. The YSU Community Engagement Symposium brings together students, faculty, staff, and community partners each April to share and hear about community engagement experiences and take part in professional development sessions.

The symposium supports the university strategy, "Conduct and support community-engaged scholarship (research and creative activities) and service to create mutually beneficial experiences for students and community while adding value to the region." Posters from community-engaged learning (CEL) course projects are presented by students and faculty, and break-out sessions bring community voices and ideas together in a unique forum. In 2024, awards were given out for student and faculty

posters. The 2025 symposium is expanding on award categories to include exemplary community partner, YSU alum, YSU student, and K-12 student.

Another activity that encourages authentic collaboration with community partners is the Campus Community Partnership seminar planning breakfast. The seminar requires all first-year honors students to develop and execute a group service project. In Spring 2023, the Sokolov Honors College reached out to United Way and other agencies to determine what community needs could be addressed through the engagement of these 300 students. Community partners were invited to campus the following fall to debrief, learn from each other's experiences, and make adjustments. Partners were given a survey to submit new project needs for Spring 2024. The session was successful and resulted in a second planning breakfast the following year. The meeting will continue as an annual connection point for honors faculty and partners.

In 2024, YSU enacted a new pathway for the feedback of academic partnerships through CEL course assessment surveys. Surveys were sent to all CEL faculty, students, and community partners in May 2024. Analysis of the survey data took place in Summer 2024, and plans to reconnect with survey takers to discuss data were underway as of Fall 2024. Beginning Spring 2025, surveys will be sent earlier in the semester to encourage feedback in a timeframe that better aligns with faculty workflow. Survey results will also be shared with faculty and partners to inform future planning.

**4.2. Describe at least five but no more than eight representative examples of academic-community partnerships (i.e., institutional, centers, departmental, and faculty/staff) that are connected to the academic core of the campus—which includes teaching, learning, and research, and illustrate both the breadth and depth of community engagement during the most recent academic year.**

***Please keep in mind that you will be requested to offer a list of community partners who will receive a partnership survey after submission of the application. Partners from this section can be included in the partner survey specified in section 10.***

**Campus questions for each partnership:**

- **Project/Collaboration Title**
- **Community Partner Name**
- **Community Partner Contact**
- **Name of community organization/group**
- **Campus Partner (person, program, department, center, etc.)**
- **Purpose of the Community–Campus Partnership**
- **Provide one example as to how reciprocity and mutual benefit are enacted through the partnership**
- **Length of Partnership**
- **Number of faculty involved**
- **Number of staff involved**
- **Number of students involved annually**



- **Titles of Courses Linked to Partnership**
- **Grant funding, if relevant**
- **Research projects linked to partnership, if relevant**
- **Impact on the community**
- **Impact on the campus**

(1)

<i>Project/Collaboration Title</i>	Nursing Student Vision Screenings for Mahoning Valley Students in Partnership with United Way
<i>Community Partner Name</i>	The United Way of Youngstown and the Mahoning Valley; Youngstown City Health District
<i>Community Partner Contact</i>	Kielly Rapp, director of Early Learning; Erin Bishop, health commissioner
<i>Name of community organization/group</i>	K-12 schools throughout Mahoning County
<i>Campus Partner (person, program, department, center, etc.)</i>	Amy Weaver, professor, Centofanti School of Nursing
<i>Purpose of the Community–Campus Partnership</i>	For YSU nursing students to conduct vision screenings for Mahoning Valley schools in partnership with the United Way
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	<p>Nursing students conducting vision screenings at local schools provides a service to the schools while helping to relieve the burden on school nurses, who would have to provide thousands of screenings within the first few months of the school year. Further, the K-12 students benefit by having any vision problems identified for further examination. They may also qualify to receive two pairs of free glasses provided by the United Way.</p> <p>YSU students benefit by receiving training from the Youngstown City Health District based on the Ohio Department of Health</p>

	vision screening guidelines. This exposes future nurses to the idea of collaborative efforts from local- and state-level government health entities, as well as the United Way. YSU students can apply knowledge from the classroom into experiential learning for the benefit of the community.
<i>Length of Partnership</i>	8 years
<i>Number of faculty involved</i>	10-12 full- and part-time faculty
<i>Number of staff involved</i>	0
<i>Number of students involved annually</i>	85-95 nursing students
<i>Titles of Courses Linked to Partnership</i>	NURS 3710C: CE Nursing in the Community
<i>Grant funding, if relevant</i>	N/A
<i>Research projects linked to partnership, if relevant</i>	N/A
<i>Impact on the community</i>	Each year thousands of students in the Mahoning Valley are screened by nursing students for vision problems. The United Way, along with the schools, have collected data showing improved academic performance in participating schools. Since 2017, tens of thousands of students have been screened.
<i>Impact on the campus</i>	YSU nursing students' knowledge about community-based nursing is deepened, allowing students to apply knowledge from the classroom into care for the community. This serves to strengthen the nursing curriculum and program. The Centofanti School of Nursing is therefore able to put well-rounded nurses who have a better understanding of the health-care needs of the community into the profession.

(2)

<i>Project/Collaboration Title</i>	Pay It Forward: Student Philanthropy Initiative
<i>Community Partner Name</i>	Potential Development  The community partner changes each year. Past partners included: SWAG Sisters, 2023; Inspiring Minds, 2022; Northeast Ohio Adoption Services (NOAS) and Potential Development, 2021.
<i>Community Partner Contact</i>	Crissi Jenkins, Chief Growth Officer
<i>Name of community organization/group</i>	Potential Development
<i>Campus Partner (person, program, department, center, etc.)</i>	Laura Dewberry, director, Center for Nonprofit Leadership in the department of Management and Marketing; Student Nonprofit Leadership Organization
<i>Purpose of the Community–Campus Partnership</i>	To improve student learning, faculty scholarship, college engagement with the community, nonprofit capacity, and community needs simultaneously.
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	This initiative develops a new generation of philanthropists through hands-on philanthropy and grantmaking. Students identify community needs, establish funding criteria, and engage in group decision-making. Nonprofit organizations apply for the grant, and students chose one nonprofit to award the grant to. The grant helps to support the organization's identified need.
<i>Length of Partnership</i>	14 years
<i>Number of faculty involved</i>	1
<i>Number of staff involved</i>	0
<i>Number of students involved annually</i>	Approximately 20

<i>Titles of Courses Linked to Partnership</i>	BUS 3740C: CE Nonprofit Community Service
<i>Grant funding, if relevant</i>	External funding provided in the past to support the initiative
<i>Research projects linked to partnership, if relevant</i>	N/A
<i>Impact on the community</i>	<p>The initiative addresses critical economic needs in the Mahoning Valley while providing an opportunity for students to experience the grant process, which includes soliciting, reviewing, interviewing, and awarding. Each year, a grant is awarded to a nonprofit organization with a specific mission to create social change. Potential Development is using the \$3,000 award from 2024 to fund its Special Olympics Track Team. Details on projects from the last few years follow:</p> <p>2024: \$3,000 to Potential Development Program, a non-public charter school for children with an autism diagnosis. Potential Development used these funds on their new Special Olympics Track Team. Funds provided new uniforms and other equipment for students.</p> <p>2023: \$2,739 to SWAG Sisters whose mission is to teach girls etiquette and affirmation, so they can “FLY: First Love Yourself.” Their programs create a platform in the Mahoning Valley for young females to have a voice and help them become better leaders and successful women in our community. SWAG Sisters used the funds for a self-care and mental health retreat day. More than 30 at-risk tween and teen girls participated in the summer of 2023 at Camp Frederick in Rogers, Ohio.</p> <p>2022: \$2,000 to Inspiring Minds of Warren, Ohio. Since 2006, Inspiring Minds has provided under-represented</p>

	<p>youth with the opportunities and motivation to overcome the obstacles that stand between them and a lifetime of personal success. Inspiring Minds used the funds on the implementation of the Youth Entrepreneurship and Marketplace Education module during their summer enrichment program for approximately 350 students in grades 3-12 in Warren and Youngstown.</p> <p>2021: \$3,000 to Potential Development and Northeast Ohio Adoption Services (\$1,500 each).</p> <p>NOAS used the funding to support the H.E.E.R.O.™ program (Helping Each Other/Everyone Reach Out) is a program for and led by foster care teens ages 14-17 to establish a lifelong support network to fill their basic need for a sense of belonging, identity, and self-worth. The funds were used to pay Peer Navigator wages and on program implementation.</p> <p>Potential Development used the 2021 funding to remodel their model apartment in the high school. Potential Development purchased furniture and housewares to teach life skills to high school students with a diagnosis of autism.</p>
<i>Impact on the campus</i>	<p>YSU students learn how to be engaged citizens and to understand the role that philanthropy plays in the health of local communities. Students take part in an engagement opportunity to serve as grantors, as well as fundraisers, as they are the ones who raise the funds that they distribute.</p>

(3)

<i>Project/Collaboration Title</i>	Cancer Rehabilitation
<i>Community Partner Name</i>	Mercy Health Oncology

<i>Community Partner Contact</i>	Gilbert Padula, gpadula@mercy.com
<i>Name of community organization/group</i>	Mercy Health Oncology
<i>Campus Partner (person, program, department, center, etc.)</i>	Sara Michaliszyn and Garrett Kellar, Exercise Science
<i>Purpose of the Community–Campus Partnership</i>	YSU exercise science students (KSS 4810 Clinical Exercise Physiology) provide a service to patients who attend Mercy Health for their cancer treatment. Physicians refer their patients to our cancer rehabilitation program, and we conduct a pre-exercise evaluation and develop an individualized exercise program for the patient. Patients do not receive this care anywhere else because insurance does not cover it.
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	We provide a service their patients are not able to receive anywhere else. By referring patients to us, we help improve their patient outcomes and quality of life. Our benefit is our students have the opportunity to learn from the patients by getting hands-on experience. As an example of the benefits, see one of the patient reports here: <a href="https://www.wfmj.com/story/51534823/cancer-rehab-program-at-ysu-sees-full-recovery-from-former-student">https://www.wfmj.com/story/51534823/cancer-rehab-program-at-ysu-sees-full-recovery-from-former-student</a>
<i>Length of Partnership</i>	2.5 years
<i>Number of faculty involved</i>	2
<i>Number of staff involved</i>	0
<i>Number of students involved annually</i>	Approximately 65 plus 2 graduate assistants
<i>Titles of Courses Linked to Partnership</i>	KSS 4810 Clinical Exercise Physiology
<i>Grant funding, if relevant</i>	N/A

<i>Research projects linked to partnership, if relevant</i>	IRB # 2023 -177 Exercise Oncology Program: Implementation of a Physical Activity Program and Referral System
<i>Impact on the community</i>	<p>Individuals who are not referred by Mercy may also participate in our program. This provides community members a location to work with trained professionals that understand exercise oncology.</p> <p>Currently, cancer patients have a doctor, a social worker, a dietitian, a physical therapist but they do not have an exercise physiologist to prescribe physical activity (which is medicinal). The insurance companies do not allow them to bill for that, so oncology has no one to send them to. This program is that liaison to 1) establish the future workforce and 2) provide their care. It is the only place where cancer rehabilitation is occurring in the area.</p>
<i>Impact on the campus</i>	Brings awareness of what exercise physiologists do.

(4)

<i>Project/Collaboration Title</i>	Accelerating Growth in Northeast Ohio through YSU Data Mine
<i>Community Partner Name</i>	Lake to River Economic Development Region, Northeast Ohio Region's economic development partner
<i>Community Partner Contact</i>	Jacob Duritsky, vice president of Strategy, Research, and Talent
<i>Name of community organization/group</i>	Lake to River Economic Development Region
<i>Campus Partner (person, program, department, center, etc.)</i>	Thomas Wakefield, chair and professor, Department of Mathematics and Statistics; YSU Data Mine
<i>Purpose of the Community–Campus Partnership</i>	To provide students the opportunity to work on a data-related project of impact. Students examined data to determine the

	best indicators of economic vibrancy in Northeast Ohio.
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	Students received professional networking experience by meeting weekly with a corporate mentor to discuss the project and direction. The partner benefited by remaining a constant voice within the scope of the project to better communicate their needs.
<i>Length of Partnership</i>	August 2023 through May 2024
<i>Number of faculty involved</i>	2
<i>Number of staff involved</i>	0
<i>Number of students involved annually</i>	10
<i>Titles of Courses Linked to Partnership</i>	DATX 5896C: CE Data Analytics Project; DATX 5895: Topics in Data Analytics
<i>Grant funding, if relevant</i>	N/A
<i>Research projects linked to partnership, if relevant</i>	N/A
<i>Impact on the community</i>	The community partner learned about significant factors affecting Northeast Ohio economic gross domestic product. Education, poverty, housing market dynamics, and business activity were the most significant factors affecting GDP.
<i>Impact on the campus</i>	Students gained valuable experience and presented a poster of the project and their results at the Purdue Data Mine Symposium at Purdue University in April 2024.

(5)

<i>Project/Collaboration Title</i>	Oakwood Cemetery Digitization Project
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<i>Community Partner Name</i>	Trumbull County Historical Society; Oakwood Cemetery Association
<i>Community Partner Contact</i>	Meghan Reed, director; Holly Taylor-Meyer, president
<i>Name of community organization/group</i>	Trumbull County Historical Society; Oakwood Cemetery Association
<i>Campus Partner (person, program, department, center, etc.)</i>	Amy Fluker, associate professor, History
<i>Purpose of the Community–Campus Partnership</i>	To develop a free, online, fully searchable database of cemetery records to fulfill information requests from families, community members, and researchers.
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	The community partners need the assistance of YSU students to complete this project because the services have been frequently requested, but neither partner has staff to fulfill them. YSU students gain important contacts with the Trumbull County Historical Society, resulting in further internships and even employment.
<i>Length of Partnership</i>	3+ years
<i>Number of faculty involved</i>	1
<i>Number of staff involved</i>	0
<i>Number of students involved annually</i>	25
<i>Titles of Courses Linked to Partnership</i>	HIST 3748C: CE History of Ohio
<i>Grant funding, if relevant</i>	N/A
<i>Research projects linked to partnership, if relevant</i>	One student's anthropology capstone paper
<i>Impact on the community</i>	The project fulfills an important community need that the partner

	organizations cannot manage or staff without YSU assistance.
<i>Impact on the campus</i>	Enhances YSU's reputation for academic excellence by providing resources and expertise to assist community members; engages students in a career-oriented, real-world, experiential project.

(6)

<i>Project/Collaboration Title</i>	Trek Coffee House Mural
<i>Community Partner Name</i>	Economic Action Group
<i>Community Partner Contact</i>	Nick Chretien, executive director, nick@eagworks.org
<i>Name of community organization/group</i>	Economic Action Group; Trek Coffee House
<i>Campus Partner (person, program, department, center, etc.)</i>	Dragana Crnjak, professor, Art
<i>Purpose of the Community–Campus Partnership</i>	To develop and install a large-scale (50x15 ft.) public mural project on the exterior side of Trek Coffee House on Mahoning Avenue in Youngstown, to beautify the city space and promote economic development on the Mahoning corridor.
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	The partnership benefited all involved—the students, the owners of Trek, and the Economic Action Group, which facilitated a community meeting and public voting for selection of the final mural sketch presented by YSU art students in September of 2023 (the last time this project was offered through a course). Community residents were integral in the mural process.  The partnership allowed YSU art students to develop strong research, communication, proposal writing, and

	<p>collaborative skills, along with mural painting skills. The mural made an economic and cultural impact for the newly established Trek Coffee House not only through strong visibility and a major visual face-lift of its west-side façade on Mahoning Avenue, but also by establishing a distinct visual identity and branding that continues to attract the community. This revitalization is a key component in the Economic Action Group’s mission. The Trek mural has led to significant investment in the surrounding neighborhood, with several new murals painted, new businesses opening, and dilapidated buildings being demolished.</p>
<i>Length of Partnership</i>	5 months (total length of project)
<i>Number of faculty involved</i>	1
<i>Number of staff involved</i>	0
<i>Number of students involved annually</i>	16
<i>Titles of Courses Linked to Partnership</i>	3748C CE Special Topics Studio Art: Mural and Site-Specific Painting
<i>Grant funding, if relevant</i>	N/A
<i>Research projects linked to partnership, if relevant</i>	N/A
<i>Impact on the community</i>	<p>The Trek mural made a lasting economic and cultural impact on the Youngstown community by initiating a visual transformation of Youngstown’s west side.</p> <p>The vibrant imagery celebrating nature and outdoor adventures in Mill Creek Park brings a new way of valuing the history and resources of the region.</p> <p>The mural also helps attract more individuals and vendors to participate in the public events that Trek holds</p>

	<p>throughout the year, such as the Mahoning Avenue Fall Fest. This, in turn, stimulates and fosters economic growth within the neighborhood.</p> <p>During the project, the neighboring community was actively engaged in the collaborative planning process through a public meeting held at the beginning of the Fall 2023 semester. The Economic Action Group again invited the community into the process to vote on their favorite mural sketch presented by YSU art students in September 2023.</p>
<p><i>Impact on the campus</i></p>	<p>The Trek mural project made a positive impact on YSU students' engagement with a local business and the Economic Action Group. The project was enthusiastically covered by all local news stations, bringing strong visibility to YSU and serving as a positive example of a true collaborative partnership in the local area.</p> <p>Students involved in this project gained valuable skills in developing mural programs in the future, contributing to their professional development, offering them job opportunities after graduation, and EAG to recruit them for future murals.</p>

(7)

<p><i>Project/Collaboration Title</i></p>	<p>Project PASS: Penguin Assistants for Student Success</p>
<p><i>Community Partner Name</i></p>	<p>Youngstown City School District (YCSD)</p>
<p><i>Community Partner Contact</i></p>	<p>Jeremy Batchelor, superintendent</p>
<p><i>Name of community organization/group</i></p>	<p>Youngstown City School District</p>

<i>Campus Partner (person, program, department, center, etc.)</i>	Kristen Italiano, director, Project PASS, Teacher Education and Leadership Studies
<i>Purpose of the Community–Campus Partnership</i>	To assist in improving the overall reading ability for YCSD students through small group tutoring and reading interventions implemented by YSU teacher candidates. The focus is on providing individualized literacy support for 1st through 6th grade students in YCSD.
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	YSU teacher candidates successfully act as a scaffold to bridge YCSD students from prior knowledge to future learning as facilitators of reading interventions. YSU students also serve as role models to the young students while learning successful teaching strategies in a real-world experience.
<i>Length of Partnership</i>	10 years
<i>Number of faculty involved</i>	5-7 each semester
<i>Number of staff involved</i>	2
<i>Number of students involved annually</i>	Approximately 450-500 teacher candidates
<i>Titles of Courses Linked to Partnership</i>	<p>TERG 2605: Reading Foundational Skills Across Content Areas Pre-K – 12</p> <p>TERG 3700C: CE Phonological Awareness and Phonics</p> <p>TERG 3720C: CE Developmental Reading Instruction: Vocabulary, Comprehension, and Writing</p> <p>TERG 3730C: CE Reading Assessment, Instruction, and Intervention</p>
<i>Grant funding, if relevant</i>	Funded in part by the YCSD Project PASS partnership grant—need to seek renewal each year for shared funding. The amount has changed over the years, ranging from \$80,000 to \$135,000.

<p><i>Research projects linked to partnership, if relevant</i></p>	<p>Ohio Education Research Center research evaluation after the start of the partnership. Presentation of research findings at the Ohio Confederation of Teacher Education Organizations, Ohio Dean’s Compact P20, YCSD board meetings, the district-held principal academy, teacher-based teams within each building, and YCSD leadership meetings.</p>
<p><i>Impact on the community</i></p>	<p>Through the strong partnership of Project PASS, YSU and YCSD strive to see long-term effects of the learning communities uniting, ultimately creating better readers; higher scores; and stronger relationships with YCSD teachers, principals, and students.</p> <p>Since 2014, the following has been achieved:</p> <ul style="list-style-type: none"> <li>• 11,000 YCSD students have received literacy tutoring</li> <li>• 130,000+ hours of tutoring have occurred</li> <li>• Approximately 30,000 books have been put in the hands of YCSD students to help build their access to print at home</li> </ul>
<p><i>Impact on the campus</i></p>	<p>More than 4,000 teacher candidates have participated in the program since 2014. YSU students take part in hands-on learning that helps them become more confident and proficient in their field.</p>

(8)

<p><i>Project/Collaboration Title</i></p>	<p>Civic Innovation Transforming Youngstown (CITY) Program / YSU-Youngstown City Collaborative / Community-Engaged Educational Ecosystem Model (C-EEEM)</p>
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<i>Community Partner Name</i>	Economic Action Group
<i>Community Partner Contact</i>	Daniel Bancroft, operations manager, and Nick Chretien, executive director, Economic Action Group
<i>Name of community organization/group</i>	Economic Action Group
<i>Campus Partner (person, program, department, center, etc.)</i>	Hazel Marie; professor; Mechanical, Industrial, and Manufacturing Engineering
<i>Purpose of the Community–Campus Partnership</i>	<p>The CITY project aims to find technical solutions based in STEM to address challenges facing Youngstown, such as food deserts, road condition monitoring, and water quality monitoring. These solutions often bring significant sustainable cost and time savings to the community, which is especially important to the City of Youngstown departments and organizations that face budget challenges and staff capacity gaps.</p> <p>Another core purpose is to provide students with professional development and connect them to the community.</p>
<i>Provide one example as to how reciprocity and mutual benefit are enacted through the partnership</i>	<p>Student interns receive significant professional development and trainings through orientation week activities and in engaging with their mentors and city partners throughout the program. This provides them with job training that prepares them for future positions, and even directly connects students with their future employers, as shown multiple times.</p> <p>Conversely, community mentors receive valuable data, resident engagement, and project deliverables from the interns that can be used to solve problems they are facing in their work. Interns produce tangible solutions, based in research, engagement, and STEM-based tools, that</p>

have been used by mentors to advance their work. This, in turn, benefits the surrounding community by addressing citywide issues.

Past projects include:

- Road condition monitoring – Students were tasked with developing a solution to monitoring citywide roadways for potholes and poor road conditions. Students developed a tool that attaches to a car's suspension that tracks road conditions on a scale and their GPS locations. City departments had a high interest in this tool, which would cost only \$60 to make. Three years after this project, the students are partnering with the city departments again to continue the project development for their senior capstone.
- Healthy food access – Students were tasked with developing solutions to the city's food desert. Students conducted market analyses on different grocery concepts and found the most feasible model and potential partners. Local healthy food access committee members took the students' recommendations, advanced the research, and are currently working to implement the solution.
- Water quality monitoring – Students selected a local stream to conduct water quality monitoring. The stream had not been adequately monitored for decades, and results showed a greater need to address environmental concerns and potential pollutants. City departments directed more resources to this stream than ever



	before and showed the need to address it more in the future.
<i>Length of Partnership</i>	3.5 years
<i>Number of faculty involved</i>	4
<i>Number of staff involved</i>	Approximately 5-8. Minor involvement through presentations to student interns.
<i>Number of students involved annually</i>	Approximately 20
<i>Titles of Courses Linked to Partnership</i>	STEM 3790: STEM Internship Experience STEM 3791: STEM Cooperative Education Experience
<i>Grant funding, if relevant</i>	NSF IUSE grant #2111386, Division of Undergraduate Education
<i>Research projects linked to partnership, if relevant</i>	N/A
<i>Impact on the community</i>	<p>The CITY program directly impacts the community organizations and city government departments that program interns are paired with, as well as the community leaders and residents that the interns partner with through their projects. The nine projects they have conducted over the three years of the program have also had numerous indirect impacts to the community at large through the creative solutions the interns have developed for community challenges.</p> <p>The community also benefits once these projects are implemented by the community partners, bringing positive change to everyday issues like healthy food availability, public space access, and active transportation.</p> <p>Partners in the Mahoning Valley have focused on talent attraction and retention efforts and workforce development in recent years. The CITY program serves as an important tool for these community</p>

	<p>goals. Program activities focus on developing a strong sense of community for CITY interns. Site visits to local companies, parks, and other local amenities show interns the value that this community can bring to them, giving them a viable reason to stay in this community after graduating. These site visits have already resulted in some CITY interns gaining internships at the companies and organizations they have visited. This has significant impacts on retaining young professionals in the community and increasing the capacity of local companies and organizations.</p>
<p><i>Impact on the campus</i></p>	<p>The CITY program has employed 32 interns thus far and has provided them with crucial civic engagement experience, professional development, and personal growth. This program develops interns' sense of community, bridging the gap between YSU and the City of Youngstown. Surveys show that interns' connection to Youngstown and YSU grows significantly during the eight-week internship through site visits, lunches at locally owned restaurants, and exploration of community assets. This helps sustain their enrollment at YSU and their involvement on campus.</p> <p>To track interns' long-term engagement post-internship, the program maintains a LinkedIn community for each internship year. Through this, faculty has seen that CITY interns are more likely to pursue leadership positions in YSU student organizations and internships with local companies.</p> <p>YSU faculty and staff participation in this program has also grown since its inception. In 2024, two YSU professors were engaged in the program as technical mentors, providing important 3D printing and engineering software skills that the interns needed. Another YSU faculty</p>

	<p>assisted interns with GIS mapping and data collection. YSU staff have provided training modules to the interns during their orientation weeks as well. As this program expands, so too will the support network at YSU, furthering the impact to the campus community.</p>
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## SECTION 5: Faculty and Staff

**5.1. Check all of the community-engaged resources and support services for faculty in any employment status (tenured/tenure track, adjunct/clinical/non-tenure track, and part/full time) and/or staff who seek to develop or deepen community engaged approaches and methods. Topics may include but are not limited to the following:**

- **Student teaching assistants, student fellows, and reflection leaders**
- **Community partner research ethics training**
- **Community advisory boards, fellows, and councils**
- **Faculty/staff fellows, mentors, and liaisons**
- **Support and identify potential community academic partners**
- **Funding support for professional development, conference, or travel**
- **Support for peer-reviewed publishing about community engagement**
- **Support for seeking external funding (grants, foundations, contracts)**
- **Internal grants for curriculum development and/or scholarship**
- **Engaged learning website, library, and/or guidebook**
- **Online learning modules that can be embedded into courses and/or programs**
- **Student transportation assistance**
- **Other: Please describe**

**Describe three of the topics that have been checked off above in the text box underneath the selected topic and include the purpose, audience, activities, and results. Include which offices and/or units assume responsibility for these services, how often programs are offered, and how many faculty and staff participate. (Maximum word count of 500 words per topic)**

**Other: Please describe**

The Community Engagement Council (CEC) identified the need for further education of community-engaged methods on campus. To this end, the CEC created a faculty and staff development series in partnership with the YSU Institute for Teaching and Learning (ITL) in support of strategy “provide professional development to support experiential teaching approaches and enhance coordination with community partners.”

The series took place over the 2024-25 winter break to energize and inspire faculty members preparing to return for spring semester. Leveraging the existing annual ITL “Fresh Start” professional development workshop, the training content focused on community engagement in the following areas:

- What is community engagement? With Dr. Susan Short, associate vice president for Engagement at Virginia Tech
- Publishing community-engaged scholarship
- YSU faculty panel on community-engaged learning (CEL) course experiences

The sessions were designed to coincide with calls for CEL course applications. Nearly 40 faculty and staff members attended. Sessions will continue to be held at least yearly and as needed. Faculty feedback was captured in the form of discovery and intention statements. Several faculty members reported a plan to learn more about the journals discussed at the training that publish engagement scholarship. A dean in attendance indicated an intention to work to get several community engagement journals added to the list of what counts for promotion and tenure within her college.

Additional opportunities for faculty professional development are highlighted monthly through the Office of Community Engagement (OCE) newsletter. Examples include offerings from the Engagement Scholarship Consortium (ESC), Campus Compact, and the Ohio-based Community Campus Coalition.

### **Funding support for professional development, conference, or travel**

Funding that can be used for community-engaged research, projects, and professional development comes from various sources:

- The university offers internal funding through the Office of Research Services for research travel, survey research, publication, seed money, and collaborative research, as well as assistance with external funding opportunities.
- ITL's Mini-Grant Program provides funds for small projects to help build a campus culture focused on teaching, learning, and assessment toward student success.
- Professional development funds in the amount of \$1,500 over three years are provided for non-faculty members of the YSU Association of Professional and Administrative Staff bargaining unit for opportunities, such as external conferences, seminars, and continuing education.
- Faculty members belonging to the YSU Ohio Education Association (YSU-OEA) bargaining unit are eligible for \$1,600 of professional development funds per academic year.
- Other funds may be provided through each college.

The university will pay reasonable costs for publication of a peer-reviewed scholarly research article if it carries the university's identification. Typically, the university spends between \$7–\$17 thousand. Reimbursement is also offered for off-campus instruction, and faculty receive up to \$1,000 in supplemental pay per course for international field classes, which encourage teaching and engagement outside of the local community.

YSU supports faculty in community engagement, research, teaching, and service through paid sabbaticals, faculty improvement leaves, and research professorships. Additional support can be obtained through the OCE through grant development, application, and management assistance, as well as facilitation of faculty relationships with community partners to meet the community's needs.

### **Community advisory boards, fellows, and councils**

The Community Engagement Council, as mentioned in sections two and three, formed in the fall of 2022 to undertake the campus-wide self-study and, later, the 2026

Carnegie Elective Classification for Community Engagement application. Through this process, the CEC has grown to become the centralized hub that facilitates communication and collaboration across departments, colleges and divisions. CEC members serve as an identifiable person who educates and supports community engaged efforts while ensuring participation and diverse voices are heard. Members include faculty and staff from across departments and divisions, with recent additions from YSU's new Government Relations Office. The CEC has grown from ten members at inception in Fall 2022 to 31 members as of Fall 2024.

During the CEC's October 2024 meeting, the YSU delegation that attended the Engagement Scholarship Consortium International Conference that month shared takeaways from the experience, including information on utilizing the consortium's professional development opportunities. CEC members plan to increase efforts to promote professional development opportunities. Additionally, a subset of the council intends to participate in the Engagement Scholarship Consortium's 2025 conference.

**5.2. Check all of the community-engaged professional development programs for faculty and staff that are provided. These programs provide educational training to improve community engagement across faculty and staff roles. Topics may include but are not limited to the following:**

- **Syllabus development and implementation planning**
- **Partnership initiation, development, management, and assessment planning**
- **Remote/online community engagement (curricular and/or co-curricular)**
- Inclusion of community engagement in evaluation criteria of student learning outcomes
- **Participation in learning communities, writing retreats, and engaged learning institutes related to community engagement**
- Training to understand ethical engagement practices that ensure equitable access and opportunity related to community engagement
- Documenting and evaluating promotion, tenure, and/or reappointment dossiers for faculty candidates and reviewers
- **Global and intercultural community engagement**
- Climate and sustainable development goals connected to community engagement
- Social innovation, entrepreneurship, and economic engagement
- **Engaged learning webinars and/or workshops**
- Other: Please describe

**Describe three of the topics that have been checked off above in the text box underneath the selected topic, including the purpose, audience, activities, and results. Include which offices and/or unit(s) assume responsibility for these services, how often services and/or programs are offered and how many faculty and staff participate. (Maximum word count of 750 words per topic)**

**Syllabus development and implementation planning**

Initial CEL syllabus development began in early Fall 2022, and a final CEL syllabus statement with criteria was approved by the Academic Senate subcommittee in October 2022. The statement was presented to the full Senate body that November.

Also in Fall 2022, the Senate subcommittee made an initial call for CEL course applications. A reference guide about community-engaged learning was developed and distributed to faculty with this call. Group and individual information sessions were offered virtually and in-person for faculty interested in submitting a course.

Through an iterative process, the Senate subcommittee talked with faculty who submitted courses and found that syllabi could be strengthened in the CEL course criteria areas of reflection and public dissemination. Discussion on ways to strengthen syllabi to more truly reflect course requirements for CEL occurred. Further information about CEL syllabus development was disseminated to faculty via the OCE newsletter and conversations with faculty.

Since 2022, the Senate subcommittee met individually with faculty who had not yet submitted CEL course applications but were known to have community engagement woven within their courses. This interaction involved course development education and encouragement to apply for the CEL course designation, resulting in more than a dozen new CEL courses. These meetings continue to be offered at least yearly and as needed.

Staff from the OCE also conducted meetings across campus with each department to learn about community-engaged work that was happening in courses and projects. Input was gathered about how faculty and staff could be supported, and the team discussed community engagement definitions and the CEL course application process. The talks resulted in an increase in the number of applications, including courses from Dental Hygiene and Communication, two areas new to having CEL designated courses. The team also became more aware of the community-engaged teaching happening in each department. Individualized conversations clarified CEL goals and processes, and the personalization brought out questions that otherwise would not have surfaced.

This feedback was shared internally with the application writing team and helped in determining the need for a formalized syllabus development workshop. The workshop is planned for faculty in Spring 2025.

### **Participation in learning communities, writing retreats, and engaged learning institutes related to community engagement**

The Community Engagement Council creates a space for community partners, staff, and faculty to share their experiences and best practices, thus becoming an informal learning community. Connections are regularly made between partners who have shared objectives at the meetings held every semester.

During Summer 2024, the Beeghly College of Liberal Arts, Social Sciences, and Education (BCLASSE) formed a community engagement committee to explore efforts to deepen community engagement within the college. Members of the CEC were first invited to an all-college meeting so that BCLASSE faculty could learn about existing

community engagement efforts and start to explore how they could strengthen their own within the college. From this meeting, BCLASSE formed a committee to focus on increasing its CEL courses and bolstering additional engagement efforts. Within six months, eleven new CEL courses were approved.

The Bitonte College of Health and Human Services (BCHHS), which has set community engagement as a goal in the college's strategic plan, invited CEC members to speak at the all-college meeting and requested a subsequent workshop on YSU PenguinPulse.

### **Engaged learning webinars and/or workshops**

The 2024 YSU Community Engagement Symposium included a professional development track to include a "What is Community Engagement?" session, grant information, and social media tips for nonprofits. Outcomes from this event included faculty and community partner discovery and sharing, professional development, and the formation of new partnerships. At the Campus Community Partnership seminar planning breakfast in Fall 2024, community partners commented on the successful implementation of past feedback they provided for the 2024 symposium. Additional ideas were discussed for the 2025 symposium, including more hands-on professional development opportunities. Several ideas were implemented.

In 2023-24, YSU was the 12th highest institution to utilize the workshops offered through the Engagement Scholarship Consortium. The 2024 ESC Workshop attended by two YSU delegates was titled, "Leading Engagement Amid Growing Distrust in American Higher Education." The delegation also attended the 2023 pre-conference Carnegie workshop, "Carnegie Elective Classification Deep Dive," at Ohio Wesleyan.

YSU PenguinPulse training for faculty, staff, community partners, and student leaders is scheduled on an ongoing basis online (synchronously and asynchronously) and in person for individuals or groups. Training is announced through emails and the OCE newsletter. In most semesters, approximately 20 individual training sessions occurred. During Fall 2024, six community partners and 16 YSU administrators were provided one-on-one education. Video tutorials through a YouTube channel are also shared with YSU PenguinPulse users, which include general training topics geared toward students and admins, such as finding volunteer opportunities, tracking impacts, managing groups, creating events, and managing impact disputes.

### **5.3. Describe the formal recognitions provided by your institution through campus-wide awards and/or celebrations for faculty/staff that partake in academic community engagement. (Maximum word count of 500 words)**

In March 2024, "The Road to Carnegie" kickoff campaign was held at YSU's Maag Library. This presentation and news conference convened to formally announce the pursuit of the Carnegie Foundation's Elective Classification for Community Engagement. The event highlighted the work of faculty, students, and community partners and was celebrated by elected officials and campus-community partners also in attendance. During the event, the "Road to Carnegie" library exhibit was revealed, featuring photos, information, quotes, and artifacts of student and faculty/staff



volunteerism, community partners, CEL courses, student posters from the Community Engagement Symposium, and a timeline of the Carnegie application process. Media is also part of the exhibit with video snippets of community engagement projects and partner reactions. The exhibit remains on display at Maag Library.

In 2019, YSU held the first annual Volunteerism and Service-Learning Showcase. This event was rebranded in 2023 as the Community Engagement Symposium by the OCE to more accurately reflect the spirit of community engagement happening at the university. The symposium celebrates community engagement through presentations delivered by students, faculty, and community partners, as described in Section 4.1. Local media is invited with the plan to broadly communicate the mutually beneficial experiences occurring through partnerships. At the most recent symposium, a YSU faculty member served as keynote speaker, sharing her community-engaged project with presenters and community partners at a networking luncheon. Also in 2024, poster awards were presented for engaged scholarship, including an outstanding faculty poster award. Judges used a rubric to evaluate the posters, and those with the highest ratings were recognized at a public ceremony. Awards were presented by Anthony Traficanti, a Mahoning County commissioner, and local media covered the event.

In 2023-24, each edition of the OCE monthly newsletter spotlighted a faculty member and their work in community engagement. In 2024-25, community engagement spotlights from the news continue to be featured in the newsletter. This recognition celebrates faculty's good work and raises awareness across campus and in the community.

**5.4. Provide five to 10 examples of staff scholarship (conference presentation, publication, consulting, awards, etc.). A title may not convey how the example is about community engagement, so please provide a short description of how the activity is related to community engagement (Maximum word count of 1,000 words. Web links may be provided as part of the description)**

Mollie Hartup, director, Sokolov Honors College, and Amy Cossentino, associate provost, gave a presentation, "Cultivating collaborative partnerships to maximize community impact and student learning," at the Engagement Scholarship Consortium Conference in Portland, Oregon, in October 2024. The presentation discussed the history of community engagement within the Sokolov Honors College (SHC). Long-standing relationships with community partners have led to enriched student engagement and learning experiences through the Dr. Abdu Pen Pals Program—a donor-funded named engagement opportunity—and intentional community-engaged experiences embedded into CEL courses.

Jim Tressel, special assistant to the Board of Trustees for Philanthropy and Engagement, spoke to students at South Range High School in November 2024. Tressel shared insights on leadership, success, and personal growth with students. He emphasized the importance of gratitude, aligning with positive friends, involvement in extracurricular activities and community, and financial responsibility. He also highlighted the need to handle both success and adversity, stressing the importance of resilience and continuous improvement. Following Tressel's talk, YSU students led activities in

South Range classrooms to bring the discussed concepts to life for the high school students.

Carol Bennett, former assistant provost for Diversity, Equity, and Inclusion, served as moderator for interviews and panel discussions at the professional development symposium on racial justice, mental health awareness, and suicide prevention at the Eastwood Event Center in Niles, Ohio, on February 4, 2022.

Ronald Markowitz, associate director, Operations and Events, was honored in 2023 by the American Red Cross as a "Lifesaving Instructor" at a Northeast Ohio annual Red Cross banquet in Akron, Ohio. He was recognized for teaching a YSU student CPR. The student used the skills taught in that class to successfully save a life.

Elizabeth Cianciola, director, Office of Community Engagement, and Andrea Tharp, assistant director of community engagement, SHC, presented "A Guide to Grant Writing and Social Media" at YSU's 2024 Community Engagement Symposium. This session introduced finding and applying for grants and telling your community engagement story through social media.

Heather Belgin, director, and Allison Bye, assistant director, Alumni Engagement, presented "Pete's Pride: Alumni Volunteering Near and Far" at YSU's 2024 Community Engagement Symposium. This oral presentation discussed how YSU alumni volunteers, both in the area and in our chapter areas all over the United States, contribute to their community on behalf of their alma mater.

The Rich Center for Autism, under Executive Director Mike Latessa, partnered with the Mahoning Valley Scrappers Baseball Team to build a sensory suite at Eastwood Field in Niles, Ohio in spring of 2024. This suite was constructed with the guidance of the Rich Center for individuals on the autism spectrum and their families to enjoy a baseball game with less worry. It is open to the Mahoning Valley public and has been occupied during every 2024 home game.

Amy Cossentino served as 2024 chair of the American Heart Association Go Red for Women Campaign. As part of this role, she led an executive leadership team in support of the American Heart Association, visiting community partners and educating on the importance of Hands Only CPR, infant CPR, and AED devices. She also led the fundraising effort on campus, which raised more than \$130,000 and culminated with a speech at the annual event. At YSU, students participated in fundraising and educational efforts, with all first-year honors students learning Hands Only CPR as part of their curriculum in Fall 2023. A leadership group of pre-medical students created a special social media awareness campaign. Three additional YSU staff/faculty members served on the Executive Leadership Team alongside alumni and community members.

Angie Cameron, associate director, Office of Research, Compliance, and Initiatives, has presented extensively about community engagement and partnerships and delivered three presentations to the Action for Children Organization (2021).

Crystal Bannon, assistant director, Career Exploration and Development, published a children's book, *Caring through Cancer, a Story of Love and Strength*, to educate young

minds and help them understand a family member's diagnosis. She published the book in 2024 after completed her breast cancer journey in 2021. Bannon organizes gift card and care package donations to support others fighting cancer, and she volunteers with the organization Pink Lights the Way, serving as a mentor for patients on a similar journey.

**5.5. Provide five to 10 examples of faculty scholarship from as many different disciplines as possible. A title may not convey how the example is about community engagement, so please provide a short description of how the activity is related to community engagement (Maximum word count of 1,000 words. Web links may be provided as part of the description)**

Dawna Cerny, professor, Geography, received the 2024 Mon Valley Initiative Community Partner of the Year award for her efforts to revitalize and maintain community environments. Her work in Swissvale, Pennsylvania, has contributed to “advancing the recovery of post-industrial communities within the Mon Valley through rebuilding or creating community infrastructure or linking people and employers.” Working with a professor at the University of Pittsburgh, Cerny is developing and supporting community engagement opportunities to create resident cooperation in community development and design planning. Please see <https://ysu.edu/news/ysu-professor-receives-mon-valley-initiative-community-partner-year-award>.

Jake Protivnak, professor and director, Counseling, received the Susan J. Sears Counselor of the Year Award from the Ohio Counseling Association at the 2022 All Ohio Counselors Conference in Columbus. Protivnak also presented at the 2022 American Counseling Association Virtual Conference on the topic, “Preparing Clinical Mental Health Supervisees for Work in a School Mental Health Setting.” Additionally, Protivnak and Tiffany Spisak, clinical mental health counseling intern, co-led online community book discussion groups during National Mental Illness Awareness Week.

YSU's Department of Physics, Astronomy, Geology, and Environmental Science received the FBI Director's Community Leadership Award in 2022. The award recognizes YSU for assisting the FBI Evidence Response Team in several recent criminal investigations. “The academic mission of our program is focused on providing students with exciting real-world applications of geology. Our work with the FBI is directly reflective of that mission,” said Jeff Dick, professor of Geology. Gregory Nelsen, special agent in charge, FBI Cleveland Division, added: “We are proud of the work by the Youngstown State team to bond the fields of science, technology, and investigation that augment the work of the FBI Evidence Response Team. The department's commitment to enrich student learning through real-world engagement and collaboration further solidifies the worthiness of this award.” See <https://ysu.edu/news/fbi-recognizes-ysu-help-criminal-investigations>.

The podcast “Policies and Politics: Views from the Industrial Heartland,” hosted by YSU professors Tim Francisco, English, and Paul Sracic, Politics, International Relations, and Rigelhaupt Pre-Law Center in 2022, examined the issues, ideas, culture, and politics of the Mahoning Valley. Produced by the staff of WYSU-FM, which is the Founding Member of the Ohio Newsroom, the podcast aimed to provide daily statewide

radio and digital news reports. See <https://businessjournaldaily.com/growth-report-1-wysu-fm-adds-podcast-joins-statewide-newsroom/>.

Matthew Mazuroski, past associate professor, Acting/Directing, provided community service and consultation as the 2022 director and scenic designer for The Hopewell Theatre's production of "Steel Magnolias." Hopewell Theatre on Mahoning Avenue in Youngstown was founded in 1890 by Jean Kelty, who converted a church into a small, intimate theater and home of The Victorian Players.

An interdisciplinary team of faculty, including Nicolette Powe, Public Health; Richard Rogers, Criminal Justice; Jeannine Mincher, Dietetics; and Weiquing Ge, Physical Therapy, orally presented "YSU Guin Fit" at YSU's 2024 Community Engagement Symposium. YSU's Consortium of Community Health and Mahoning County Public Health, in collaboration with the Healthy Community Partnership Community Coalition, received funding for the Centers for Disease Control and Prevention Racial and Ethnic Approaches to Community Health, a cooperative agreement to implement the Guin Fit Initiative in Mahoning, Trumbull, and Columbiana counties among faith-based organizations and community-based groups. Guin Fit is a comprehensive interdisciplinary community health engagement program, as detailed in Section 2.4.c. Its efforts are a collaboration with organizations and individuals who share a commitment to a healthier Mahoning Valley and work to create more equitable opportunities for residents to eat healthier and be more active.

Susan Berny, Vivo Center; Nancy Landgraff, chair and professor, Graduate Studies in Health and Rehabilitation Sciences; and Danny Cesene, adjunct Business faculty, orally presented "Strategies to Engage YSU Faculty, Staff, and Students in Intergenerational Learning Opportunities" at YSU's 2024 Community Engagement Symposium. Ohio Living operates the Vivo Center, which has transitioned from a senior center to an intergenerational center focused on exchanges between older adults and YSU students. The overarching goal of these exchanges is to reduce ageism, improve health and well-being in various domains for all ages, and spark interest among YSU students in pursuing a career in working with the aging population. Since Fall 2022, these presenters have worked to create a variety of intergenerational programs that take place in the community, at the Vivo Center, and on the YSU campus. They shared their strategies for engagement and ideas about how to encourage faculty to develop experiential intergenerational learning opportunities for students.

Psychology professors Sharon Stringer and Joy Tang's work on resilience has led to a publication in *Adversity and Resilience Science*, "Multiple stigmas and their dimensions: The mediating role of self-compassion in reduced resilience." Stringer's decades of expertise on stigma and resilience have also led to several invited community talks, including a presentation on digital storytelling in November 2023, at the Fall Summit of Stand, Grow, Thrive, a Mahoning County organization comprised of volunteers dedicated to supporting resiliency and healing while dispelling myths surrounding trauma.

Dessalegn Guyo, assistant professor, Social Work, conducted research to investigate and analyze the welfare of displaced children from rural Oromia, Ethiopia, who have

settled in and around Addis Ababa/Finfinnee, Ethiopia, since 2018. The research identified the challenges they encounter, the coping strategies they adopt, and the support mechanisms available to them. The study intended to provide insights that could inform policies and interventions to enhance the overall well-being and future of displaced children due to violence. This led to the publication "Utilizing Professional Expertise in Post-Conflict Reconstruction: Strategic Interventions Preparation for Crisis Mitigation in Oromia" in the Journal of Oromo Studies.

The National Association of Social work awarded the Lifetime Achievement to Mari Alschuler, associate professor of Social Work. Alschuler was one of the first AIDS social workers globally and specializes in working with transgender and queer people. She has contributed scholarly articles and book chapters, is a poet and fiction writer, and is a trainer of Mindfulness-Based Stress Reduction.

**5.6. Provide five to 10 examples of student scholarship from as many different disciplines as possible. A title may not convey how the example is about community engagement, so please provide a short description of how the activity is related to community engagement. Please clarify if the work highlighted is undergraduate or graduate student scholarship. (Maximum word count of 1,000 words.) Web links may be provided as part of the description.**

Sara Khan, Eastern Ohio Area Health Education Center (EOAHEC) Scholar and Biology Pre-Med student, was a 2024 finalist for YSU's Best in QUEST award. She orally presented her research, "Evaluation of At-Home Autism Support," at YSU's 2024 QUEST: A Forum for Student Scholarship. Khan received a \$5,000 Student Small Grant from YSU's Office of Research Services to assist her research about at-home autism support in the community. She presented "Compassion and Commitment: My Journey with the Rich Center of Autism" at YSU's 2024 Community Engagement Symposium with an interdisciplinary team, including the executive director of the Rich Center for Autism and EOAHEC director. As a part-time class assistant at the Rich Center, Khan created an IRB-approved research study, amplifying parent concerns to inspire change in existing programs. This project allowed her to connect with Rich Center parents, and it opened the door to autism research with Akron Children's Hospital and Dr. Ronald Seese, who later invited Khan to create a new toolkit for families diagnosed with autism. Khan also helped launch the AHEC Scholars Program and held the first Sensory Adventure Day, pairing AHEC student volunteers with Rich Center students and families for sensory-friendly activities.

"Serving through Transcribing: Preserving History while Building Community," was published in peer-reviewed Honors in Practice, 2022, Vol. 18, by Julie Centofanti, Biology Pre-Med student, and Mollie Hartup, SHC director. From the abstract: During the global pandemic, students reimagined ways to build community and serve one another. A virtual collaboration in transcription was formed, where honors students gathered to participate in digital transcribe-a-thons. These informal groupings evolved into a transcribing club that met three times a week and transcribed over 16,000 historical documents. A study of participating transcribers revealed enhanced historical knowledge, skill building, and opportunities for relationships with students of varying interests and backgrounds despite edicts for social distancing. The publication provides

student insight and outcomes as well as detailed instructions for honors practitioners seeking to introduce historical transcription to their students.

A group of 16 students collaborated with Eastgate Regional Council of Governments and the Youngstown-Warren Chamber of Commerce in support of the Mahoning Valley's talent retention and attraction efforts. Under the leadership of Economics professor AJ Sumell, the students presented results from a survey of YSU students' postgraduation plans and preferences, as well as summarized potential strategies intended to increase the retention of young graduates and attract more residents to the Mahoning Valley. Students in the class (11 undergraduate, 5 graduate) represented the following disciplines: Economics, Financial Economics, Political Science, Mathematics, Computer Science, and Marketing. The project was reported in the Business-Journal: <https://businessjournaldaily.com/ysu-students-present-insights-for-valley-repopulation-strategies>, and The Vindicator: <https://www.vindy.com/news/local-news/2023/04/urban-economics-students-at-ysu-seek-to-improve-youngstown/>.

Divya Warriar, Biology Pre-Med student, presented a poster, "Comparative analysis of hospice and palliative care systems from Youngstown, USA, and Thrissur, India," at the 2023 Ohio Campus Compact Annual Meeting. This presentation was a comparison and contrast of palliative care in the United States and India based on research. The goal of this study was to highlight the differences in systems to ultimately provide recommendations on practices that would constructively better the quality of hospice and palliative care in both communities. The exploration was conducted through conversations and education with staff and observations made in the Pain and Palliative Care Society and SOLACE-Care and Support for Children with Long Term Illness in Thrissur, as well as Traditions Health Hospice in Youngstown.

Annabelle Himes, MBA graduate student, was recognized in 2023 as a YSU Shark Tank winner for her established business Heroes and Tiaras. She now mentors young entrepreneurs through her role on the planning team. Her business also engages in the community by volunteering at the Rescue Mission monthly, raising funds throughout the year. Between 2022 and 2023, she donated a combined total of more than \$1,000.

In 2023, Jason Hess, a Mechanical Engineering student, was YSU's first-ever recipient of the prestigious Truman Scholarship, the premier graduate scholarship for students who are committed to pursuing careers in public service. Shortly after his award was announced, Hess returned to his home high school to share his experiences and inspire future students to pursue national scholarships and a future in public service. See <https://ysu.edu/news/youngstown-state-student-earns-prestigious-truman-scholarship>.

Joseph Carlini, biology, spent Summer 2024 conducting research under Chet Cooper, YSU Biology professor, in the microbiology laboratory. He worked on a project regarding a bacteria found in the water at the Newport Boat Launch in Mill Creek Park. His observations were recorded and used for data analysis and deeper understanding of water safety by the community partners that the research team worked with.

Students in the Dana School of Music teach lessons to local students as part of the YSU String Project. Undergraduate and graduate student teachers offer free private

lessons on violin, viola, cello, and bass to children in Youngstown. For 2024-25, 22 third through twelfth grade students are receiving lessons. More than 70 families have been served since 2022. Lessons are offered in English and Spanish to increase access for students.

Raneem Al-Sharif, Janaan Alihassan, and Natasha Salmen presented their poster “Does the Implementation of Vaccination Education and Increased Accessibility Improve Vaccination Rates in Rural Populations Amongst Patients Covered by Medicare?” at YSU’s 2024 Honors Pre-Health Research Symposium. The primary objective of this research project was to determine whether student education that addresses safety concerns, misinformation, and effectiveness as a universal offering to eligible patients improved overall rates of patients who are vaccinated against pneumococcal pneumonia. The implementation of this strategy can improve health outcomes in underserved rural communities.

2022 graduate student Abigail Hollowell presented “Autism Spectrum, Disorder in Females: Inter-Professional Diagnostic, Classification, and Practical Considerations” at YSU’s Diversity of Scholarship event. Her literature review surveyed discussions and scholarship related to females with autism spectrum disorder. Hollowell also recently presented in Boston for the National Association for School Psychologists.

**5.7. Describe how the institution regularly measures and assesses faculty community engagement, particularly as it relates to outputs and outcomes relative to teaching, research/creative activity, and/or service. How is data used to improve programs and outcomes? (Maximum word count of 500 words)**

YSU’s Institute for Teaching and Learning coordinates and supports continuous improvement activities across campus, including academic student learning assessment. The ITL conducts student learning outcomes assessment through the systematic examination of student learning during a degree program.

In Fall 2023, faculty and OCE staff consulted with the ITL for guidance about conducting assessment of community engagement. Faculty and OCE staff then developed a plan for regular assessment of CEL courses. Assessment surveys were created with questions tailored to students, faculty, and community partners about their CEL experiences. These questions were organized based on the university-wide student learning outcome, “YSU graduates are global communicators who curate and disseminate discipline-specific knowledge through appropriate channels, spoken and written, for audiences in a variety of modalities.”

The OCE sent the assessment surveys to students, faculty, and community partners enrolled in 12 CEL courses in Spring 2024. Data was reviewed initially by faculty and OCE staff. Overall, data collected revealed positive results:

- Responses from 96 students indicated that most respondents either strongly agreed or agreed with questions about the positive impact the engagement had on learning.

- Twenty-three faculty responded, and most either strongly agreed or agreed with questions about the benefits of learning for their students as well as the community partners.
- Responses from 42 community partners found most respondents either strongly agreed or agreed with questions about the benefits of community engagement, especially in the areas of engagement and mutual benefit for the students and partners.

Data was shared with CEL faculty; faculty members were asked to share with their community partners. Based on the survey responses, the assessment team refined student, faculty, and community partner questions to more effectively evaluate the CEL experience. This assessment process takes place at the conclusion of each semester.

“Faculty Success by Watermark” (Watermark) is the university’s mechanism for collecting evidence from faculty in all 19 departments for performance, tenure, and promotion as well as data about faculty activities such as teaching, research, and service. The Senate subcommittee made a recommendation to include an indicator for community-engaged activities. This was approved by the administration, and a community engagement check box was added to the activities form in Watermark for use in Summer 2023. In 2023-24, 36% of total full-time faculty submitted examples of community engagement in Watermark, including research, awards, and grants.

As departments address community engagement for the tenure and promotion process in their governance documents, community-engaged Watermark information will be used in that process.

A strategy in the strategic plan is to “pursue and secure regional, state, national, and foundation funding in support of university and community priorities.” Reviewing Watermark data can lead to potential funding opportunities, grants, celebrating faculty achievements, and attracting students to the university who want to participate in community engagement.

**5.8. Indicate the campus approach to faculty promotion and/or tenure: (Check all that apply.)**

- **My campus has a contract or tenure track structure rather than a tenure and promotions structure.**
- **My campus has a tenure and promotion structure defined at the department level.**
- **My campus has a tenure and promotion structure defined at the school level.**
- **My campus has a tenure and promotion structure defined at the institutional level.**

**5.9. Describe policies and practices that support faculty community engagement for faculty at your institution such as search and recruitment, annual review, reappointment, promotion, bonuses, and/or merit pay. Do NOT include promotion and/or tenure policies in this response. Specify if these policies are different for**



**faculty of different employment statuses (tenured/tenure track, adjunct/clinical/full time non-tenure track, and part/full time.) (Maximum word count of 500 words)**

As part of the renewal process for the strategic plan in 2023, the subgroup, consisting of the HR executive director and chief human resources officer, incorporated into the plan the strategy to “Develop, incorporate, and highlight community engagement as part of position postings, processes, and policies.

YSU provides career opportunities that are easily accessed from the YSU website. The Human Resources website states that it is committed to “recruiting, supporting, and retaining employees to achieve excellence as a student-centered, community engaged educational institution [ . . .].”

The HR office also references community engagement activities by including the mission (see 2.1a) in every posting. Several examples follow.

The February 2023 summary of the position for Assistant Professor, Primary Instructor/Primary Intervention Specialist states, “The [education] department has a consistent record of accomplishments in relation to the mission and goals of YSU, [ . . . ] and community engagement activities.”

The January 2023 Dana School of Music Lecturer position posting includes, “YSU inspires individuals [ . . . ] by fostering collaboration and the advancement of civic, scientific, and technological development.”

In November of 2024, YSU began the search for BCHHS dean. The position summary states that the dean will collaborate with others to foster quality academics and community engagement. Additionally, the position, “Facilitates mutually beneficial relationships in the community that contribute to student educational experiences, faculty scholarly and creative activities, and outcomes with identified and quantified impact and influence.” While this is an example of an administrative position, it lays the groundwork to incorporate community engagement verbiage into future faculty postings.

Each department incorporates community engagement as part of the criteria for faculty annual review. Nursing, for example, has an annual review process that considers community-engaged teaching, scholarship, and service.

BCLASSE regularly provides reassigned time, workload, and/or summer stipends for faculty who provide mutually beneficial services for a variety of local service agencies, including museums, schools, a retirement community, and other community agencies. Compensation is available to full- and part-time faculty and to both lecturers and tenure-eligible faculty.

The OEA contract provides an option for faculty members to apply for sabbatical or faculty improvement leave to perform discipline-related community service. The contract further defines faculty service as:

Duty to act as a responsible “citizen” of one’s learned profession, [. . .]. After a period of personal growth and development as a teacher and creative scholar, a faculty member is expectedly to assume increased responsibility, in keeping with the faculty member’s professional interests, for the government of the University, the standards of the faculty member’s discipline, and the welfare of the civic community.

The Distinguished Professorship Award for Excellence in Service is given at the annual Faculty and Staff Awards Dinner each May. Article 4.4 of the OEA Agreement states:

Overall contributions to the University in teaching, scholarship, and service will be considered [. . .]. However, for the purposes of this Article only, service will also include public service, which means discipline-related public service or community-associated professional activities consistent with the University’s mission and goals statement.

**5.10. Describe the policies for faculty promotion (at tenure-granting campuses) from all levels of the institution (campus, college or school, department) that specifically reward faculty community-engaged scholarship. If there are separate policies for tenured/tenure track, full time non-tenure track, part time, research, and/or clinical faculty, please describe those as well. Describe the pervasiveness of the policies outlined in the question. For example, are they practiced across the institution? By most departments? By a few? (Maximum word count of 500 words)**

All full-time lecturers’ and tenure-track faculty members’ applications for promotion (and tenure when applicable) follow the process beginning with the departmental review committee and ending with the college review committee. The college review committee and dean make a recommendation, and a final decision is made by the provost.

There is specific language about community engagement in both an Office of Academic Affairs March 2024 board-approved Faculty Tenure policy, 3356-1-02, and the 2023-26 YSU-OEA Agreement for promotion to Principal Lecturer.

From the 2023-26 YSU-OEA Agreement 29.2:

Principal Lecturer: This type of appointment is issued to a faculty member for the duration of three or more years. The faculty member has expectations for teaching, service, and community engagement. There are two pathways to become a Principal Lecturer:

- A Senior Lecturer with a strong record of teaching who has demonstrated community engagement and service to the University over a period of five or more years. Subject to availability.
- Hired with an equivalent of at least five years of full-time professional experience as well as demonstrated excellence in the area of community engagement and outreach.

Further information is outlined in the agreement; excerpts follow:

Guidelines for Tenure with Promotion and Promotion:

Each Dean's Advisory Committee shall produce a document called Guidelines for Tenure with Promotion and Promotion that shall contain a description of the policies, practices, and criteria to be used in that particular college.

Evaluation for Tenure with Promotion and Promotion: The evaluation of applicants for tenure with promotion and promotion shall be based upon a) the quality of performance in teaching, scholarship (which includes commercialization), and service; b) the length of service in rank; and c) the applicant's workload assignments. The Guidelines for Tenure with Promotion and Promotion will specify promotion criteria (see Article 9.2 and 10.3).

All faculty members receive performance evaluations from their department chair/director, approved and signed by the college dean, annually or every two years, depending on rank. These evaluations focus on teaching, scholarship, and service to the university, profession, and community. The pervasiveness of the promotion policies is evidenced by all departments and schools across campus having governance documents outlining expectations for teaching, scholarship, and service.

**5.11. If your campus rewards community engagement in promotion and tenure policies (at tenure granting institutions) please address the following, where applicable: (Maximum word count of 500 words per response)**

**5.11a. Describe how policies reward faculty for community engaged teaching and learning, research, creative activity, and service. Provide examples of policy descriptions that support community engagement in each of the faculty roles below:**

- **Community engaged teaching and learning**
- **Community engaged research and creative activity**
- **Community engagement as a form of service**

### **Community engaged teaching and learning**

YSU's self-study identified the need for institutional definitions for university service and community engagement. The process to secure definitions began in spring of 2024, and once in place, the colleges used them to shape their promotion and tenure with promotion policies in support of strategy "Update University policies and guidelines for tenure and promotion to reflect the importance of community-engaged research/creative activities, and teaching." Departments also launched into creating their guidelines and rubrics for tenure promotion.

In April 2024, BCLASSE approved the following promotion guidelines:

The college recognizes that community engagement can be reflected in three areas of evaluation: scholarship, service, and teaching. BCLASSE encourages community engagement in the three areas of evaluation. A demonstrated record of community engagement is required for Senior Lecturers applying for promotion to the rank of Principal Lecturer (YSU-OEA article 29.2).

In May 2024, the Cliffe College of Creative Arts affirmed their commitment to community-engaged learning through the approval of Guidelines for Tenure with Promotion and Promotion. The following is an example of a new 2024 policy to reward through job evaluation for community-engaged teaching and learning in the college:

In addition to having a clear and well-organized dossier delineating the candidate's activities in the separate categories of teaching, scholarship and service, candidates for promotion in Cliffe College must also include the following items in their dossier:

#### I. Teaching

[ . . . ]

- Other discipline-related teaching, including community engagement and outreach.
  - Community-engaged teaching: pedagogical approach that connects students and faculty with activities that address community identified needs through mutually beneficial partnerships that deepen students' academic and civic learning.

Plans are in place to have policies established across campus by early 2025.

#### **Community engaged research and creative activity**

Each department is currently working on promotion and evaluation guidelines that align with college-level policies. The college addresses all three areas broadly. Each department has developed or is developing individual policies. Please see Section 5.12.

#### **Community engagement as a form of service**

Each department is currently working on promotion and evaluation guidelines that align with college-level policies. The college addresses all three areas broadly. Each department has developed or is developing individual policies. Please see Section 5.12.

**5.11b. Cite three examples of college/school and/or department-level policies with text taken directly from policy documents that specifically reward faculty for community engagement across teaching, research, creative activity, and service. Describe the pervasiveness of policies outlined. (Maximum word count of 500 words)**

Examples of governance documents containing community engagement language:

From Psychological Sciences and Counseling:

The department recognizes that community engagement can be reflected in the three areas of evaluation: scholarship, service, and teaching. The department encourages community engagement in the three areas of evaluation.

From Graduate Studies in Health and Rehabilitation Sciences:

They should provide documentation of how their individual work supports the institution's emphasis involving "scholarship of teaching, life-long learning and community-based research." Applicants should highlight how their work supported the University's goal for enhancing community engagement initiatives and activities.

From the Math Department:

The Department endorses the "whole faculty" concept and each candidate for tenure will be judged on the candidate's total impact on the Department, the College, the University, and the Community. Community Engagement activities appear as a category in the rubric used to assess tenure and promotion.

**5.11c. If your campus has revised its policies specifically to incorporate community engagement, describe when the revisions occurred and the process that resulted in the revisions. (If policies have not been revised, skip to "D".) (Maximum word count of 500 words)**

Please see response in Section 5.12.

**5.11d. Describe the involvement of the president/chancellor, provost, deans, chairs, faculty leaders, chief diversity officer, human resources, community engagement center director, or other key leaders. (Maximum word count of 500 words)**

Key leaders, including the president, provost, deans, chairs, and faculty leaders, have been part of the process to solidify community engagement as an essential component of the 2020 strategic plan and its renewal in 2023. This spans three YSU presidents. Despite several recent shifts in leadership, a commitment to furthering community engagement has remained.

Other key community leaders, such as the president of the Chamber of Commerce, president and vice president of the United Way of Youngstown and the Mahoning Valley, and the mayor of the City of Youngstown, have been involved in this process.

YSU union leadership, through the YSU-OEA agreement 2023-26, has also supported this movement by adding community engagement into position descriptions for the principal lecturer position. The union agreement includes requirements for teaching, service, and community engagement, delineating for the first time a difference between university service and community engagement. Senior lecturers can also aspire to

become principal lecturers through demonstrated experience in community engagement.

The agreement was a product of negotiations between the YSU and faculty teams. The university team was made up of the following university representatives, which includes high-ranking leadership positions:

- Jennifer Pintar as chief negotiator, vice provost (at time of negotiations)
- Holly Jacobs, vice president and General Counsel
- Kevin Kralj, director, Labor and Employee Relations
- Jeremy Schwartz, chair and associate professor, Lariccia School of Accounting and Finance
- Mike Sherman, vice president for Student Affairs, Institutional Effectiveness; Board Professional
- Kelly Wilkinson, former dean, Williamson College of Business Administration
- Helen Lafferty, former interim president
- George Crisci, external attorney

With each leadership change, the associate provost updated campus on the state of community engagement at YSU. Leadership from all levels was a part of these briefings, and support leading to the OCE budget development was garnered.

The goal within the strategic plan is to align YSU as a community-engaged campus to make it more visible and elevated to individuals from all levels of the institution. The strategic plan led to the formation of the Academic Master Plan by the provost, which includes community engagement as one of its three key pillars. Deans of the colleges are writing or revisiting mission statements that include community engagement as part of the document. Department chairs have been working to update governance documents.

In December 2022, the associate provost presented to chairs about the new GivePulse platform and overall community engagement efforts. This was the beginning of a culture shift that included community engagement at the forefront of the chair's group. Community engagement has remained a standing agenda item since that time.

Amy Weaver, chair of the Senate subcommittee, gave three presentations (2022, 2023, 2024) to the Academic Senate to update and inform them of subcommittee activities, including working with faculty to develop CEL courses and CEL course review and approval.

In September 2024, Provost Pintar delivered a State of Academic Affairs update to campus that discussed the state of community engagement at YSU, underscoring the university-wide commitment to a culture of being an engaged campus.

**5.11e. Describe any products resulting from the revision process (i.e., internal papers, public documents, reports, policy recommendations, etc.). (Maximum word count of 500 words)**

Plans are to incorporate criteria for community-engaged activities into the next YSU-OEA Agreement and in governance documents across campus in all departments.

**5.12. If revisions have not taken place but there is work in progress to revise promotion and tenure guidelines (at tenure granting institutions) to reward faculty scholarly work that uses community engaged approaches and methods, describe the current work in progress, including a description of the process and who is involved. Describe how the president/chancellor, vice presidents/chancellors, provost, vice provosts, deans, chairs, faculty leaders, chief diversity officer, community engagement center director, or other key leaders are involved. Also describe any products resulting from the process (i.e., internal papers, public documents, reports, policy recommendations, etc.). Specify if these policies are different for faculty of different employment statuses (adjunct, full time contract, tenure track, tenured, etc.). (Maximum word count of 500 words)**

The initiative to revise promotion and tenure guidelines to reward faculty for scholarly work that uses community-engaged approaches and methods has not followed a campus-wide timeline. Instead, departments have been revising at their own pace. YSU has had changes and restructuring in departments, so this approach has allowed time for faculty to have input.

Before 2023, faculty were in the process of negotiating their 2023-26 bargaining agreement. The decision was made to wait until ratification of the contract to include community-engaged language as part of the promotion and tenure process. This decision would ensure faculty had an opportunity to talk within their departments to create the language that would support community-engaged activities.

With support from the provost, the Chairs Development Committee convened in January 2024 to develop a framework for departments to consider using when revising their governance documents to include community engagement.

The Chairs Development Committee recommended that departments and colleges include community engagement activities in promotion and tenure guidelines and that these recommendations be documented in the Department Promotion and Tenure sections of governance documents. It is important to recognize that the university values many forms of teaching, research, and service – and not all faculty are required to integrate community engagement into their scholarly activities. However, it is recommended that credit be appropriately given to faculty whose work does meet the criteria of being “community engaged.”

The committee also recommended the following process for departments:

- The wording to be added in the Governance Document will be the purview of each department. The recommended place to add would be as outlined in the YSU-OEA Agreement Article 9.3, letters I and J.
- I: departmental statement of normally expected activities and expectations for progress toward tenure and promotion.
- J: departmental expectations for Tenure and Promotion to Associate Professor.

As reported in Section 3.1, twelve departments include community engagement activities in governance documents and seven departments report completion by spring 2025.



## SECTION 6: Curricular Engagement

*The questions in this section use the term “community engaged courses” to denote academically based community engaged courses. Your campus may use another term such as service-learning, community-based learning, public service courses, etc.*

**6.1. Describe the institution-wide definition and standards used for community engaged courses. Be sure to provide examples of: (Maximum word count of 500 words per response)**

**6.1a. Institutional, departmental, and/or programmatic definitions, learning outcomes, standards, and/or required components**

Youngstown State University has adopted the Carnegie Foundation definition for community engagement (see Section 2.2.a).

Further, at YSU, community engagement is: “The collaboration between YSU and the larger community for the mutually beneficial exchange of knowledge and resources; most often service with a community partner or nonprofit organization.”

YSU uses “community-engaged learning” to indicate academically based community-engaged courses. Approved courses are designated “CEL courses” but are listed with a “CE” attribute in the course catalog due to system limitations.

YSU has four University-Wide Learning Outcomes (UWLOs), one of which focuses on community engagement, as follows:

YSU graduates connect scholarly research, academic inquiry, and/or artistic expression to actions that inspire a civically engaged mindset and contribute to society through service to their community.

4.1. Graduates develop knowledge about community needs through community-based service, scholarly research, academic inquiry, and/or artistic expression.

4.2. Graduates build discipline specific, real-world, relational, and/or cultural awareness skills through service with the community.

4.3. Graduates demonstrate understanding of the value of lifelong civic engagement and how utilizing their knowledge, skills, and values can make a difference in the community.

4.4. Graduates participate in activities of personal and public concern that are both individually life enriching and socially beneficial to the community.

4.5. Graduates recognize the contributions that have been made by members of diverse cultural, racial, ethnic, and gender groups, persons with disabilities, and other historically marginalized people within their own communities and across the world.

All programs have end-of-program student outcomes derived from UWLOs. Individual course outcomes are linked to program outcomes, thus tied to UWLOs.

A survey of graduates revealed that alumni found value in their community engagement at YSU. One respondent stated, “It pushed me to be more active on campus and in the community, introduced me to my best friends, and challenged me academically.”

Others indicated they were still engaged in their community. “The community service aspect [...] has stayed with me to this day, and I volunteer with a couple groups in my local area. I developed leadership skills [...] that I'm not sure I would've developed without having been a part of this.”

The CEL Course Rubric contains four criteria against which courses submitted for CEL designation are evaluated:

- Engagement. Engagement component meets a public good through collaboration between faculty and community partners. Students’ engagement has measurable community impact. Course's purpose for engagement with the community is clear, of value, measurable, and mutually agreed upon.
- Reflection. There is a mechanism for students to link their experiences in the community with course content. There is a chance to reflect on the importance of civic engagement and active citizenship.
- Reciprocity. Reciprocity is evident, and all participants are in the role of teacher and learner, allowing for mutual benefit. Community partners are involved in planning, evaluating, assessing.
- Public Dissemination. Engagement experience is presented to the partner/public or allows for public dialogue.

There are additional criteria on the rubric to determine if the proposed course demonstrates community partner engagement in the development process and assessment/evaluation.

### **6.1b. Processes for ensuring that the standards for community engagement are part of the course design (e.g., course designation, curriculum review)**

In early Fall 2022, the charge of the Honors Academic Senate Committee was expanded to include the development of a process for reviewing and designating CEL courses. This Senate subcommittee is comprised of faculty, staff, and students and is a part of shared governance as a subcommittee of the Academic Senate.

Based on guidance from Kinsley and current best practices, the committee developed a CEL course application and a Community-Engaged Learning Course Rubric. (See Section 6.1.a for rubric contents.) Faculty have access to this rubric to guide them in their application submission.

The Community-Engaged Learning Course Application contains ten narrative questions asking faculty to indicate how their course fulfills the four criteria of a CEL course

according to the Community-Engaged Learning Course Rubric. Faculty must also submit a proposed course syllabus highlighting the criteria.

Courses are evaluated by the committee through review of the application and newly proposed syllabus using the rubric as a guide. If a course does not meet the required criteria on the rubric, the faculty member submitting the course is contacted with feedback and guidance about areas for improving their application. Faculty are asked to make the changes and resubmit for review.

Once courses are approved, faculty are notified of approval and asked to put the following syllabus statement (developed by the Senate subcommittee) in their approved CEL course:

Syllabus statement:

Community-Engaged Learning Course Designation

This course has been designated as a Community Engaged Learning (CEL) course. As a CEL course, we have input from community partners to create a community-engaged experience that is mutually beneficial. The community partners serve as co-educators through shared leadership, open lines of communication, and ongoing continuous feedback.

In mid Fall 2022, the first call for applications for CEL course designation was sent to faculty via the Office of Community Engagement (OCE) newsletter. In-person and virtual open sessions, and one-on-one sessions were held to help faculty develop the course and apply. The first applications were reviewed in late Fall 2022 for Fall 2023 designation in YSU's Banner system.

In Spring 2023, another call for applications was made with an additional round of course submissions, review, and approval. Also in Spring 2023, the Senate subcommittee reflected on any perceived barriers for faculty in developing and submitting CEL courses. This resulted in two modifications:

1. A change in the application submission process from requiring hard deadlines to accepting applications on a rolling basis, and
2. The revision and streamlining of the application by collapsing repetitious questions.

All courses designated as CEL will be reviewed every three years by the Honors Academic Senate Committee using the Community-Engaged Learning Course Rubric. Meetings with individual faculty teaching CEL courses will be held to discuss the course as it aligns with the CEL rubric. Appropriate faculty will be notified about any courses that no longer meet the criteria in the rubric and will be provided guidance as to how to revise their course to ensure continued CEL designation.

**6.1c. How student learning outcomes are assessed. Explain any changes to coursework that occurred as a result of assessment activities**

In Fall 2023, a faculty member and the director of the OCE consulted with the Institute for Teaching and Learning (ITL) for guidance in the development of an assessment process. A primary function of the ITL at YSU is to coordinate and support continuous improvement activities across campus, including academic student learning assessment. Three separate CEL Assessment Tools for students, faculty, and community partners were created. Each tool contains approximately 15 questions, both quantitative and qualitative.

At the end of Spring 2024, the OCE sent out the CEL Assessment Tools in electronic survey form to all faculty members teaching CEL courses, all students enrolled in the courses, and community partners associated with the courses. These tools are organized around the four criteria of the Community-Engaged Learning Course Rubric and include questions that use a Likert scale and two open-ended questions. Questions are mapped to the UWLOs, allowing for assessment of student learning outcomes.

One example, a question under the “reciprocity” criteria from the Community-Engaged Learning Course Rubric asks the student to rate the statement, “I feel I understand the value of lifelong civic engagement and how utilizing my knowledge, skills, and values can make a difference in the community. (UWLO 4.3.)”. A similar statement allowing assessment of student learning outcomes is found on the faculty tool: “Students understand the value of lifelong civic engagement and how utilizing their knowledge, skills, and values can make a difference in the community. (UWLO 4.3.)”

By mapping questions on the CEL Assessment Tool, evaluators can assess student learning outcomes from the student and faculty perspectives. Each semester, student learning outcomes will be assessed through the distribution, completion, and evaluation of the CEL Assessment Tools for students and faculty by the OCE. Courses will be reviewed on a three-year cycle by the Senate subcommittee.

Changes to coursework have occurred as a result of assessment activities. As an example, community partners who serve as co-educators for the Campus Community Partnerships seminar are invited to campus to debrief and assess the experience and recommend changes for the next iteration of the seminar (see Section 4.1). This structure leads to an outcome resulting in deep engagement whereby all parties serve as co-learners. One of the student learning outcomes encompasses student communication in a community-engaged context. Based on partner feedback in Fall 2023, student leaders were selected from each group to take the lead on communicating with partners during the Spring 2024 seminar. After assessing the modified experience during a Fall 2024 feedback session, partners affirmed the positive outcomes from the changes implemented, validating a continuation of practice for Spring 2025. The partners appreciated having one point of contact and recognized the value for students, who gained the experience of taking on a lead communication role.

Additionally, the partners shared that the in-person dialogue had value which had led to the formation of an institutional best practice recommending in person debriefing when possible. This process has been shared with other CEL faculty who may wish to implement it.

**6.2. Describe how community engagement is integrated into traditional curricular structures. These may include, core courses, capstone/senior-level projects, first-year courses/sequences, general education, majors/departments, minors, graduate courses, and medical education, training, or residencies. Provide at least two but not more than four examples. (Maximum word count of 500 words)**

In October 2022, YSU established UWLOs. Community engagement as a learning outcome is embedded in UWLO #4 (as stated in Section 6.1.a).

A community engaged component of the nursing curriculum provides an opportunity for students to assess and address community health needs through direct service to the public. Through a decades long partnership with the local Canfield Fair, attracting 273,000 plus attendees, nursing students take tens of thousands of blood pressures and educate fairgoers about heart disease prevention. They provide access to care for vulnerable populations, including a large rural community, while deepening understanding of social determinants of health to improve and promote population health.

Nursing fosters partnerships that enhance clinical education and civic responsibility. Students engage in clinical learning at over 150 local community agencies and organizations. Each CEL nursing course allows students to identify communities' health-related needs and engage in projects that tackle health inequities, policy advocacy, and preventive care to improve community health outcomes.

These courses are mutually beneficial for students as they provide a community engaged experiential learning opportunity for students to apply knowledge from the classroom in caring for persons in the community. Community needs include understanding social determinants of health, addressing disparities, engaging with underserved populations, or learning about barriers to healthcare and strategies to improve healthcare access and outcomes for underserved populations.

YSU values education as a societal need, as referenced in Section 2.1.c. In Summer 2024, the Community Engagement Council (CEC) worked collaboratively with the Education Department to identify and tag CEL courses; Education became the leader in offering a variety of CEL courses. Students take part in community-engaged experiences in local schools throughout their undergraduate career while gaining a deeper understanding of the needs of local students, including how some of their basic needs are not met. A recent experiential opportunity was the screening of the documentary *The Right to Read* in Fall 2024 (see Section 2.3.c). YSU collaborated with several partners, including Youngstown City Schools, to offer viewings of the documentary to Education majors and students in the Dr. Adbu Pen Pals Program. A community-engaged program, Project Pass, connects Education students with

Youngstown City School students and is integrated across the curriculum through four classes, as detailed in Section 4.2.

Dental Hygiene students not only serve in the campus clinic, which provides free dental services to community members, but those in the CEL-designated Community Clinicals course also develop lesson plans and work in groups to educate students at Wee Care Daycare sites in Trumbull and Mahoning counties on oral health.

YSU's Center for Nonprofit Leadership within the Williamson College of Business Administration (WCBA) offers several courses for students to engage in the community. Collectively, the courses cover nonprofit leadership and serving, including a community engaged internship. The WCBA's commitment to engagement is emphasized by its Dare to Care spring event that connects students with multiple community partners on a single day. The United We Care event in fall brings the college together again in service to United Way.

### **6.3. Describe how community engagement is integrated into the following academic activities offered for credit and/or required by a curricular program.**

**These may include but are not limited to: student research, student leadership, internships, co-ops, career exploration, study abroad/study away, alternative break tied to a course, or a campus scholarship program. Provide one to two examples. (Maximum word count of 500 words)**

PHLT 5893: Public Health Workshop

Nursing, social work, and counseling students travel to Rwanda, Africa, with YSU faculty to provide wellness instruction and health assessments to residents and explore what it means to be global citizens. The CEL experience meets a public good through a collaboration between students, faculty, and Rwandan agencies, including GEI, mHub, Prison Fellowship, Urukundo Learning Center, and the Gisimbi Learning Center.

The course creates a mutually beneficial experience for students, community, faculty, and staff. Social work and counseling students serve as facilitators and provide social and emotional wellness instruction and training to teachers. Students gain facilitation skills and an understanding of international social work and service learning. Nursing students provide medical assessments and get hands-on experience through structured, active engagement for a minimum of 48 hours.

The trip impacts the Rwandan community by providing them with services they would otherwise not be able to access. The training-of-trainers format used by social work and counseling students empowers the clinicians and educational workers with skills to sustain social and emotional wellness programs. Additionally, the health screenings provided by the nursing students benefit vulnerable populations that would not be able to otherwise afford the services.

## ECON 1503: Diversity and Disparity in the U.S. Workplace

Students examine the factors that have affected the distribution of income and the rate of poverty in the United States and partner with Dorothy Day House in Youngstown, which serves the unhoused community within the area. Through direct volunteerism to Dorothy Day House in serving individuals and families meals, students gain a better understanding of the impact of poverty on community members.

This student research and service course includes the following components:

- **Case Study:** Students research current statistics for Youngstown, including poverty rates, estimations on homelessness, median income, and employment rates.
- **Community Partner Research:** Students research the Dorothy Day House, summarize the services provided by this organization, and reflect on how the organization meets the needs of community members.
- **Community Partner Presentation:** Students attend a virtual presentation given by a representative of the Dorothy Day House to gain a deeper understanding and appreciation of the services provided by the organization.
- **Service at Dorothy Day House:** Students sign up to volunteer twice during the semester. Volunteer activities include assisting with meal preparations, meal service, meal clean-up, and other tasks as needed.
- **Final Project:** Students write an essay combining economic theories on the causes of poverty, the research on the local economy and on the Dorothy Day House, and a reflection of their volunteer experiences.

Evaluation of the course shows that students gain a deeper understanding of the causes and consequences of poverty by applying course material to the local economy and immersing themselves in the service component. Community partner evaluations express the positive benefits of having student volunteers at their sites. Faculty also note the personal benefit of “a better way to teach the issues of poverty within the community by providing students actual experience serving those in need.”

### **6.4. Describe how your campus tracks and assesses curricular engagement and how students gain access to and participate in community engaged courses. (Maximum word count of 750 words)**

#### **6.4a How is community engaged course data gathered, by whom, with what frequency, and for what purpose? How is it shared/reported, particularly in student transcripts?**

Each course has a designated YSU PenguinPulse course page where course data is captured each semester. Some CEL courses use the full functionality of the system to direct students to a landing page for the course and allow them to sign up for projects and add impacts directly into the system.

Alternatively, the OCE has created a mechanism that allows faculty members to report student impacts associated with a course by way of a spreadsheet that can then be

uploaded into the YSU PenguinPulse system. To supplement the spreadsheet, faculty members also turn in artifacts from the course to the OCE. This occurs at the conclusion of each semester. Data gathered provides insight into the community-engaged experience and student learning outcomes.

Data is also shared at monthly meetings between the associate provost and provost, at every chairs and deans meeting, at Board of Trustees meetings, in the State of University Address and State of Academics Address, at Community Partner Advisory Council and CEC meetings, and through the OCE newsletters to various constituents.

Community engagement is regularly featured at Board of Trustees meetings from the voices of the students with some meetings having community partners in attendance. Examples include Julie Centofanti presenting about transcribing and Natalie Dando about Dr. Abdu Pen Pals Program, both in December 2023, and Tanya Pai Dhungat presenting on the Clear Eyes on Campus vision van in December 2024 in partnership with Sight for All United. Civic engagement has also been highlighted at Board of Trustees meetings with presentations on both Moot Court and Ethics Bowl at the December 2024 meeting.

**6.4b. Describe how your campus has designed new curricular programs and initiatives or redesigned existing ones to both increase students' access to and participation in community engaged activities (particularly students who are not currently engaged) so that a relatively larger portion of students have the opportunity for developing the cultural competencies, asset-based approaches, and values of reciprocity for engaging with communities.**

Since 2023-24, all CEL classes are noted in the schedule of courses. Students can search for the CE attribute, which will also appear on student transcripts. A new Community Engagement section added to the university catalog under "Academic Initiatives" in 2023-24 provides an overview of community engagement, approved CEL courses, and a section outlining the YSU PenguinPulse platform.

Honors is among those areas adding CEL designations to coursework, and the college has redesigned its first-year experience in recent years to increase students' participation in community-engaged activities. During the first semester, students complete a fundraising project to benefit the American Heart Association in 2023 and the local United Way in 2024 in the Intro to Honors seminar. During the second semester, students work in groups to meet a community partner's need in the Campus Community Partnerships seminar. Projects are disseminated at the YSU Community Engagement Symposium for campus and community to attend.

Honors offers additional optional community-engaged seminars throughout the sophomore and junior years. During the senior year, honors students complete a capstone experience that includes a comprehensive reflection on their own community engagement and a civic engagement master plan that outlines how they will contribute to their community after graduation.



A change to a long-standing program in partnership with the United Way has resulted in increased access and participation. The YSU Lariccia School of Accounting and Finance hosts the Volunteer Income Tax Assistance (VITA) program on campus, offering free tax preparation and electronic filing to the community, including individuals with disabilities, students, and seniors. As part of the Mahoning Valley Economic Opportunity Partners, YSU has provided this service for over 30 years through trained business students and community volunteers, some of whom are YSU graduates. For the last two years, this project has also been embedded in a new CEL course, increasing the number of student participants.

Volunteers undergo 50+ hours of intensive training and IRS certification. WCBA students collaborate with professional alumni, gaining hands-on experience regardless of class standing. YSU students indicate their engagement offering value for the development of practical skills and community impact. The VITA program has consistently served between 400-500 people per year; in 2024, the program assisted 420 community residents.

**6.4c. Reflect on how the data indicates the levels of pervasiveness and depth infused in the curriculum and traditional curricular structures.**

Several CEL courses are upper division, internship, major-specific, and honors. The pervasiveness of the designation exists across more than three-quarters of departments with additional courses slated for approval. As the university goes through a revision of the general education model, additional CEL courses will result.

This comes at a time when the university has demonstrated a commitment to community engagement through the documents and actions referenced in Section 2.3.a. Essentially, YSU is seeing a formalization of resources and recognition to support community-engaged work, which has long been a part of the institution’s culture. For instance, the annual Fresh Start professional development workshop for faculty focuses on community engagement, as referenced in Section 5.1.

**6.5. Complete the table below. Data should be drawn from undergraduate and graduate for-credit courses and be indicated accordingly. Please also indicate what academic year the data represents:**

**What academic year does this data represent? (Select One)**

[Dropdown Menu: 2021–22, 2022–23, 2023–24]

<i>Number of for-credit community engaged designated courses (UG/G)</i>	15 UG / 5 G
<i>Percentage of community engaged designated courses as part of all for-credit courses (UG/G)</i>	1.3% fall, 1.4% spring UG 1.3% fall, 1.3% spring G

<i>Number of faculty teaching for-credit community engaged designated courses</i>	28
<i>Percentage of faculty teaching for-credit community engaged designated courses as part of all faculty</i>	3.0% (fall) 3.6% (spring)
<i>Of the faculty teaching for-credit community engaged designated courses, what percentage are full time?</i>	50%
<i>Of the faculty teaching for-credit community engaged designated courses, what percentage are part time?</i>	50%
<i>Of the faculty teaching for-credit community engaged designated courses, what percentage are tenured or tenure-track?</i>	39.3%
<i>Number of academic departments offering for-credit community engaged designated courses</i>	7
<i>Percentage of academic departments offering for-credit community engaged designated courses as part of all departments</i>	36.8%
<i>Number of students enrolled in for-credit community engaged designated courses (UG/G)</i>	263 UG / 34 G (fall) 612 UG / 24 G (spring)
<i>Percentage of students enrolled in for-credit community engaged designated courses as part of all students (UG/G)</i>	3.1% UG / 1.36% G (fall) 7.6% UG / 0.95% G (spring)

**6.6. Reflect on how the data provided in this section indicate the levels of pervasiveness (across units and departments) and depth (within a unit or department) to which community engagement is infused in the curriculum and traditional curricular structures. (Maximum word count of 500 words)**

The university self-study in 2022-23 brought to light that although YSU courses were having students actively engage with the community across disciplines, there needed to be put into place the infrastructure to officially designate them as community-engaged learning courses.

While the chart in this section indicates that seven academic departments offered CEL courses in 2023-24, YSU now has 15 of 19 departments offering courses with the designation. Thirteen of those departments now have more than one CEL designated course.

Developing a CEL designation, application, and process has only been underway for the last two years. While 50 CEL courses have been approved, community engagement is also still happening in additional courses. Efforts to identify and tag these courses are underway. Additionally, as the number of CEL courses grows, faculty members are championing their colleagues' efforts and mentoring them through the application process.

Throughout the past two and a half years, YSU has found—through faculty, staff, and student conversations; the Community Engagement Symposium; meetings with department chairs; and many other networking conversations—just how pervasive community-engaged learning is throughout campus. Responses on the assessment surveys sent to faculty, students, and community partners highlighted the mutual benefit for all. The opportunity going forward remains continuing to identify community-engaged work that is happening on campus and encouraging faculty members to apply for the CEL designation.

## SECTION 7: Co-Curricular Engagement

7.1. Describe how community engagement is integrated into institutional co-curricular practices by providing two to four examples from the following categories: (Maximum word count of 1,000 words)

- Social innovation/entrepreneurship
- Civic engagement, electoral engagement
- Dialogues
- Community service projects - outside of the campus
- Community service projects - within the campus
- Alternative break - domestic
- Alternative break - international
- Student leadership
- Student internships/co-ops/career exploration
- Student research
- Work-study placements
- Opportunities to meet with employers who demonstrate Corporate Social Responsibility
- Living-learning communities/residence hall/floor
- Student teaching assistants (provided the TAs are not receiving credit)
- Campus scholarship program
- Athletics
- Greek life
- Other: Please describe

### Community service projects – within the campus

Since 1978, the university has been hosting the Youngstown State University English Festival, a unique spring event that reaches approximately 3,000 middle and high school students from five surrounding counties in Ohio and Pennsylvania, their teachers and parents, area librarians, and interested community members.

A committee made up of faculty and community members meets throughout the year to prepare for the festival. Each fall, nearly 200 middle and high schools receive invitations to attend. Students must read seven books, and teachers monitor progress throughout the year. As the festival approaches, hundreds of teachers, parents, and librarians come to campus to learn about sessions they will lead or judge. Current YSU students volunteer to assist with various roles.

The English Festival runs for three days. Separate groups of nearly 1,000 students attend each day. They listen to noted authors of some of the books they have read, write impromptu essays, collaborate in workshops, attend creative performances, and more.

A teacher who has been bringing students to the festival for eight years states:

I love it! It is a positive day for me as an educator to see so many students absorbed in literature and writing. Because the students walk away with attitudes of enjoyment and learning, it makes it worthwhile. I also enjoy judging to have exposure to the writing being completed by these students. I find it to be a heartwarming experience seeing the motivation and effort that is put in preparing to come to the festival.

Another educator who has attended for five years shares the benefits for students:

My students gain a positive and powerful perspective of literature and the arts. They are able to be exposed to a diverse range of views through working with other students from all areas as well as gaining insight from various authors.

In addition to the English Festival, YSU also hosts Lake to River Science Day, MATHCOUNTS, miniature bridge building competition, YSU History Day, Penguin Bowl—events that collectively bring to campus students from local schools.

### **Student leadership**

The newly named Dr. Abdu Pen Pals Program has a rich history at YSU, dating back to 2012. The program connects honors students with local elementary school learners through the exchange of written journals.

Elementary teachers report increased proficiency with spelling and grammar and an excitement for reading and writing. School attendance has also improved.

YSU student leaders organize the journals, ensure students are responding, and transport the journals between YSU and the elementary schools every other week. They share feedback such as, "Being able to communicate with young students is both meaningful and fulfilling for me."

Three area schools—Girard, Harding, and Brookfield—currently participate. As of Fall 2024, 158 YSU pen pals were paired with 300 elementary students (some YSU students have more than one pen pal). Three additional schools were identified for Spring 2025. By the end of the 2024-25 academic year, there will be a projected 3,268 touch points between pen pal pairs over approximately 11 writing weeks.

In 2023, Shell Polymers Monaca, a petrochemical company operating in the region, became the primary financial sponsor of the program, which was named in honor of Dr. Rashid Abdu, a longtime tutor and beloved local surgeon who inspired the idea.

### **Opportunities to meet with employers who demonstrate Corporate Social Responsibility**

The annual pet vaccine clinic provides access to low-cost vaccines and pet care for community members while providing YSU student volunteers with clinical experiences and opportunities to learn from local veterinarians.

Students in the Pre-Vet Club reserve space at YSU and plan the spring clinic. Working with their club advisor, a veterinarian and part-time faculty member, they recruit other local veterinarians to donate their time to provide services at the clinic. Students also manage the marketing and promotion to ensure that community members are aware of the event. During the clinic, pre-vet students prepare vaccines, do blood testing, and assist veterinarians.

Six students took part in the four-hour April 2024 clinic, totaling 34.5 hours of volunteerism. Students reported gaining more hands-on experience and learning new skills, such as different restraint techniques, how to take vitals, and how to run heartworm tests and check for a microchip. They also cited the clinic in reinforcing their career goals in veterinary medicine.

Eight veterinarians staffed the clinic. Reasons they gave for participating were to keep the animal population healthy and to educate the community about the importance of preventative pet health.

Community members brought in approximately 200 pets that received a variety of services. Of the 20 individuals who answered an on-site survey, 16 mentioned affordability as a primary reason for visiting the clinic.

## **Athletics**

YSU Athletics is deeply committed to a culture of giving back. During the 2023-24 academic year, 69 Athletics staff members collectively engaged with the community for a total of 721 hours, while student-athletes served a total of 3,410 hours.

One YSU basketball player, Mady Aulbach, used a portion of her NIL (name, image, likeness) funds to create two community events in partnership with the United Way of Youngstown and Mahoning County.

First, she contributed \$1,500 of her NIL monies to fund a turkey giveaway in November 2023. Three local companies, Boak and Sons, Valley Industrial Trucking, and AllState, also provided funds to make the event possible. A total of \$3,500 provided 100 families with a turkey and sides. Fifteen student-athletes helped with the giveaway at Youngstown Community School.

Aulbach later contributed another \$500 to partially fund a Shop-with-a-Guin event in December 2023, with additional support from United Way. A total of 75 children were able to come to Meijer and each spend up to \$100 on their own holiday presents. A student-athlete was paired with a child to shop together. Nearly 30 athletes participated. The United Way recognized Aulbach at its awards dinner in April 2024 with the

Volunteer Excellence Award. Aulbach continued her involvement with the event after graduation, leading efforts in Fall 2024 that raised \$14,000 and welcomed the participation of four school districts. Each child received a basketball signed by the athletes.

**7.2. Describe how your campus has designed new co-curricular programs and initiatives or redesigned existing ones to both increase students' access to and participation in community engaged activities (particularly students who are not currently engaged) so that a relatively larger portion of students have the opportunity for developing the cultural competencies, asset-based approaches, and values of reciprocity for engaging with communities. (Maximum word count of 500 words)**

All YSU students are introduced to the concept of community engagement through their first-year seminar class, which either takes the form of the YSU 1500: Success Seminar for the majority of first-year students, or HONR 1500: Introduction to Honors for honors students. A module included in the Blackboard Learning Management System for each class includes information about university definitions of community engagement and YSU PenguinPulse. Students learn the basics of YSU PenguinPulse and how to access and log community engagement opportunities within the platform.

One engagement opportunity that has undergone a transformation is a monthly event held in partnership with the United Way of Youngstown and the Mahoning Valley. United Way hosts a Satur-Day of Caring food packing and distribution program on the third Saturday of each month. The event began during the pandemic as a way to meet increasing food insecurity in the local area. Student-athletes and honors students were among the first to regularly serve in this capacity. YSU students, faculty and staff continue to show up consistently to volunteer each month to pack food and, in some cases, also drive to deliver the care packages to local families. Recently, United Way opened its Volunteer Resource Center, which has become the new indoor location for the monthly event. It has also expanded opportunities for students to volunteer with new recurring weekly shifts now open. Students gain a greater understanding of the issue of food insecurity that people in Youngstown face, along with skills such as teamwork and communication as they work together to pack thousands of pounds of food each week.

Anna Morgione, a nursing student who works as a community fellow funded by the Sokolov Honors College (SHC), liaises with United Way to add such opportunities to YSU PenguinPulse and to recruit students to volunteer. Morgione developed leadership skills in this role by also spearheading various aspects of the YSU workplace campaign for United Way, such as speaking to local media and to YSU Academic Senate about her experiences. Additionally, she played a key role in establishing a strong foundation for a collaboration between first-year honors students who conducted fundraising projects to benefit United Way. She liaised with Intro to Honors instructors to coordinate a visit by a United Way speaker to educate students about the organization and what the money they raised can help support. Morgione has developed professional skills while fostering the learning of more than 300 first-year honors students through this role.

**7.3. Describe any co-curricular engagement tracking system used by your institution that can provide a co-curricular transcript or record of community engagement. (Maximum word count of 500 words)**

In 2022, YSU contracted with GivePulse (locally branded YSU PenguinPulse) to establish a university-wide system to connect students, faculty, and staff with opportunities for community engagement and give them a place to track and reflect on their engagement. After extensive internal planning, subgroups were also created in YSU PenguinPulse for student organizations, campus departments, colleges, offices, and other specialized groups as needed within various functional areas. External efforts have led to the onboarding of more than 130 community partners who use the system to find volunteers to meet needs within their organizations.

The SHC, which requires students to complete 60 hours of community engagement each year, was the first group to immerse its students in using the platform. The college created a YSU PenguinPulse module to scale up first-year students in the Introduction to Honors seminar in Fall 2022. Efforts to educate all university freshmen expanded in Fall 2024 to include the module in all YSU 1500 first-year seminar sections, broadening the pervasive usage of the system.

Efforts to ensure widespread utilization of the software have also included departmental, divisional, and college meetings to educate campus areas on the benefits and uses of YSU PenguinPulse. All YSU personnel (students, staff, faculty) have access to YSU PenguinPulse through single sign on, reducing a barrier to access.

Users can also generate a co-curricular transcript by simply clicking “Impact Summary.” The resulting PDF provides a breakdown of their impacts, hours and organizations served, and type of engagement. Students can use this summary for future internships, graduate school applications, resumes, or other professional applications.

Feedback from both campus constituents and community partners has been positive. Nicole Kent-Strollo, YSU Dean of Students, shares, “YSU PenguinPulse has allowed the Office of the Dean of Students to expand volunteer opportunities at the Penguin Pantry. This, alone, has increased our students' cultural competencies, asset-based approaches, and values of reciprocity for engaging with communities.”

Chary Hively, volunteer coordinator for Community Hospice, a YSU community partner, also says that “YSU PenguinPulse has been out of this world helpful in connecting us with volunteers.”

During 2023-24, the system recorded 63,845 verified hours with an economic impact of \$2,138,169.72. Efforts continue to ensure all students are aware of the platform, can find opportunities to serve, and track their engagement.

**7.4. Provide an example of a systematic, campus-wide, mechanism for assessing student learning and development outcomes as they relate to co-curricular**



**community engagement. Describe one key finding. (Maximum word count of 500 words)**

Nearly three years ago, YSU launched YSU PenguinPulse for community engagement centrality across campus. The system afforded the university a mechanism to collect data relating to community engagement across various departments in a way that was not previously possible.

One co-curricular collective that has come to embrace YSU PenguinPulse is the Greek system on campus. Over the past three fall semesters, sororities and fraternities have seen an increase in logged impacts on the platform for their philanthropic activities, with significant increases in the second and third years as compared to the first; years two and three each tripled the number of impacts logged in the first year.

These later impacts also demonstrate deeper reflection on the students' parts, as one member of the Zeta Tau Alpha sorority writes in Fall 2024:

This experience deepened my understanding of the importance of health advocacy and community support, particularly for breast cancer survivors. By volunteering and interacting with survivors and their families, I gained a greater appreciation for the resilience of those impacted by this disease and the value of raising awareness. It also strengthened my passion for promoting health and wellness, while reinforcing the importance of empathy and connection in community engagement. This aligns with my values and the goals of my dental hygiene program, which emphasizes service and education as integral parts of health care.

Another student who participated in the Greek Week Clothing and Food Drive during the same semester made an important observation on the effects of teamwork, reflecting:

Each year, Greek Life never fails to show me how big of an impact we can make when we work together. Greek Life chapters were able to donate over 10,000 clothing items just during this span of a few hours. An individual chapter could never come up with those numbers alone, nor could we have sorted all the clothing items had we not all worked together during the drive.

As the Greek system continues to embrace the platform and learn from service activities, the organizations and philanthropies they serve will continue to benefit from this powerful collective.

## SECTION 8: Civic Learning and Life

**8.1. According to the Carnegie definition of community engagement, one of the purposes of community engagement is to prepare educated, engaged citizens and strengthen democratic values and civic responsibility. Describe at least two examples of practical experiences in the table below, of how your campus prepares students, faculty, staff and community to understand and engage in ways that address critical community issues and contribute to community/public good by providing practical experience with community. Be sure to share how these activities are community engaged. (Maximum word count 750.)**

**Examples of practical experience may include activities such as the following but not limited to:**

- **Electoral education and participation (such as voter information, education, registration, polling site(s); meetings with elected officials; Constitution Day)**
- **Meetings with community members, elders, and community leaders to learn about community issues; land-based learning**
- **Issue awareness and advocacy training (such as Advocacy Days)**
- **Civic focused student organizations: (e.g., voter engagement, Model UN, Model OAS, Peace Corps Prep, or similar programs)**
- **Civic fellows/scholars**
- **Debate team**
- **Civic awards to students, faculty, and staff or the community**

**Campus Questions for each practical experience response above:**

1. **Civic engagement experience overview and purpose**
2. **Campus partner(s) that provide support for mentioned experience (person, program, department, center, etc.)**
3. **Provide one example as to how reciprocity and mutual benefit are enacted through the practical experience**
4. **Number of faculty involved**
5. **Number of staff involved**
6. **Number of students involved**
7. **Community partners involved, if relevant**
8. **Grant funding, if relevant**
9. **Research projects linked to partnership, if relevant**
10. **Impact on the campus**
11. **Impact on the community**

Campus Questions for each practical experience response above:	
Civic engagement experience overview and purpose	Ethics Bowl – Students compete as they consider cases that have ethical importance and on which there can be reasonable disagreement.
Campus partner(s) that provide support for mentioned experience (person, program, department, center, etc.)	James Dale Ethics Center
Provide one example as to how reciprocity and mutual benefit are enacted through the practical experience	<p>Participants develop critical and ethical reasoning skills while learning the value and importance of civil discourse, creating more informed citizens for the benefit of society.</p> <p>Students develop awareness of social issues, work collaboratively to solve problems, and learn the importance of fairness, respect for diverse viewpoints and the pursuit of truth.</p>
Number of faculty involved	2
Number of staff involved	Up to 15 volunteers from campus (can be staff, faculty, or students)
Number of students involved	15-24
Community partners involved, if relevant	Local attorneys and community members who mentor students
Grant funding, if relevant	N/A
Research projects linked to partnership, if relevant	N/A
Impact on the campus	Students gain experience discussing topics such as: youth work laws, censorship of literature in schools, the use of AI in health insurance claims, the ethics of true crime entertainment.

	<p>Successful performance by the ethics bowl creates positive public relations, allowing the media to focus on positive news for the community. In ten seasons, YSU advanced to nationals nine times, clinching a first-place national finish in 2020. YSU will advance to nationals in 2025.</p>
<p>Impact on the community</p>	<p>Participants better understand the cycle of ethical awareness and responsible action for the betterment of the community. By addressing real world problems, they begin to see how they can work to build stronger, more just, and engaged communities. Ethics Bowl encourages ethical leadership and cultivates commitment to civic responsibility.</p>
<p>Campus Questions for each practical experience response above:</p>	
<p>Civic engagement experience overview and purpose</p>	<p>Non-violence parade – Honors students and YSU athletes formed teams to walk in the parade to represent their commitment to addressing and reducing violence in Youngstown, Ohio.</p>
<p>Campus partner(s) that provide support for mentioned experience (person, program, department, center, etc.)</p>	<p>YSU Athletics, Sokolov Honors College</p>
<p>Provide one example as to how reciprocity and mutual benefit are enacted through the practical experience</p>	<p>YSU's participation underscores the university's commitment to standing alongside several community partners for the purpose of speaking</p>

	out against violence. A visual representation of a strong YSU coalition showcases this support in a community forum.
Number of faculty involved	0
Number of staff involved	15
Number of students involved	230
Community partners involved, if relevant	Sojourn to the Past
Grant funding, if relevant	N/A
Research projects linked to partnership, if relevant	N/A
Impact on the campus	Students involved had an opportunity to come together and shine a light on a cause of shared interest.
Impact on the community	<p>YSU supported community partners Ohio Nonviolence Week Committee, Mahoning Valley Sojourn to the Past, City of Youngstown, Youngstown City Schools, Community Initiative to Reduce Violence, YWCA, Youngstown Area Jewish Federation</p> <p>This partnership promoted awareness of nonviolence principles and strengthened community unity while raising the visibility for the involved community organizations. Collectively, the event fostered a culture of peace and reinforced a community commitment to peaceful principles.</p>
Campus Questions for each practical experience response above:	

Civic engagement experience overview and purpose	Mahoning County Prosecutor's Office internship/TA – Student serving as an intern in the Mahoning County Prosecutor's Office (MCPO) gains practical understanding of the work of a public official and serves in a dual role as a teaching assistant to provide additional students with a greater understanding of the work happening in the office.
Campus partner(s) that provide support for mentioned experience (person, program, department, center, etc.)	Sokolov Honors College
Provide one example as to how reciprocity and mutual benefit are enacted through the practical experience	MCPO benefits by having a student TA support the students writing stories about the MCPO work in the community; student TA benefits through the experience of taking on a leadership role in the classroom.
Number of faculty involved	1
Number of staff involved	0
Number of students involved	16
Community partners involved, if relevant	Mahoning County Prosecutor's Office
Grant funding, if relevant	N/A
Research projects linked to partnership, if relevant	N/A
Impact on the campus	Students in class and the student serving as an intern share what they have learned about how an office run by an elected official works. The experience is disseminated to campus through a presentation at the YSU Community Engagement Symposium.
Impact on the community	Students who learn about the expansive work of the MCPO become champions who share that knowledge in their communities. Through the writing process, stories about the

	<p>MCPO are shared more widely in the community.</p> <p>This experience humanizes the justice system while strengthening community trust. By showcasing community initiatives through fresh perspectives, stories may inspire future legal professionals or other public service roles.</p>
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The examples highlighted in this section represent practical ways that students are learning about critical community issues while engaging with their communities.

The first example, Ethics Bowl, involves an opportunity for students to develop problem solving, ethical reasoning, and collaboration skills while considering a case that has ethical importance and on which there can be reasonable disagreement. Participants also learn the value and importance of civil discourse. The teams engage in this discussion with teams from other colleges and universities. Topics are usually real events or situations, such as youth work laws, censorship of literature in schools, the use of AI in health insurance claims, and the ethics of true crime entertainment. Funding is provided by the James Dale Ethics Center.

Students who have participated in Ethics Bowl reflect that they have gained skills in public speaking, consideration of ethical issues, quick thinking, impromptu speaking, and collaborative work/teamwork.

As a co-curricular activity, students shared that Ethics Bowl immerses them in real-world simulations more quickly than they might learn about the same experiences more passively in the classroom. One student shared the following:

Starting with Ethics Bowl my freshman year gave me a greater understanding of philosophy and different ideas before learning about any in a classroom. I also learned how to grow my confidence while public speaking and how to reach out for opportunities I might not have before.

In addition, students reported that Ethics Bowl has enhanced their abilities to consider multiple perspectives on an issue and look for more complex ways to solve problems.

YSU participants have a history of strong performance, winning the national title in 2020 as well as regionals in 2021 and 2022. Students in 2024 won the regional competition and will attend nationals in February 2025.

Faculty leaders attribute their success to faculty support from all disciplinary colleges across campus. Faculty regularly volunteer to serve as guest judges during practices and help prepare students by asking difficult questions from a wide range of perspectives.

Another practical experience connected with the Mahoning County Prosecutor's Office is multifaceted. The MCPO has an internship program that welcomes YSU students into the office to learn about its innerworkings. This experience allows students to better understand how the office seeks to protect the rights and well-being of the citizens of Mahoning County through its work in the Civil Division, Criminal Division, and Community Outreach.

An opportunity emerged to provide an elevated experience to a student serving in the role of MCPO intern. To earn honors credit for the internship course, the student developed an idea to serve as a teaching assistant for the Magazine Editing and Production seminar that has partnered with the MCPO for the last two years. The TA attended the seminar regularly and shared experiences from the MCPO internship. Additionally, the TA assisted MCPO staff in their efforts to equip students with primary source information to write stories about MCPO for their class.

The faculty member on the course shared that the dual role of the TA provided a unique perspective that has enhanced the learning within the classroom. For instance, the class met in 2024 on Election Day, in which the elected prosecutor was up for reelection. The TA shared through class discussion the realities of the current concerns of those working in the office about the outcome of the election and how if their boss lost, what that might mean for their employment. The TA further shared that these first-hand observations stress the importance of voting and encouraged the students to get out and vote.

Additionally, student participation in the local nonviolence parade allowed students to come together publicly in support of a common cause – to address and reduce violence in the Youngstown community. Honors students and athletes from all YSU sports teams participated.

In the week leading up to the parade, participants received daily reading material via email to foster their understanding and awareness of the cause. The experience culminated in the 14th Annual Nonviolence Parade and Rally, which welcomed impactful speakers, including local community members, YSU students, and families affected by gun violence. Their powerful stories highlighted the tragic loss of young lives in our community and reinforced the importance of continuing efforts to create a safer, more peaceful environment for all.

**8.2. Are civic skills incorporated into curricular and/or co-curricular community-engaged activities? If so, describe how civic skills are integrated and how student learning outcomes are applied and assessed. (Maximum word count of 500 words)**

**Examples of civic skills may include the following, but are not limited to:**

- **Critical thinking and evidence-based reasoning**
- **Development of digital data and media literacy**
- **Conveys ideas across difference orally and in writing**
- **Seek out and engage with multiple perspectives**



- **Listen attentively and with patience**
- **Reflexive thinking**
- **Understanding of intersectionality, privilege, and bias**
- **Development of cultural humility, empathy, compassion, and courage to act in service of the greater good**
- **Opportunity to collaborate and participate with multiple forms of culturally based leadership models prevalent in communities of color**

Civic skill formation occurs through a variety of curricular and co-curricular activities.

The Moot Court course in the Political Science department, which prepares students for a debate competition, fosters an understanding of legal writing and argumentation. Students prepare to argue in front of a mock Supreme Court. They read a large selection of court cases, consider multiple perspectives, write a brief on a question, and defend their position. There are also community members who serve as guest judges for the students while preparing. This year's case involves a hypothetical death by suicide and an exploration into controversial communications received by the deceased prior to death.

Through feedback surveys, faculty have learned how certain experiences have aided in a student's civic development. The following student quote provides a snapshot of what one student gained:

Moot court really was the class that opened the door for me in regard to learning about community programs and meeting community leaders, including local judges, lawyers, and prosecutors. Not only that, but it helped me understand the process of justice that our judicial system has, and what the weakness and strengths are of the system.

Students have also self-reported that Moot Court has helped them develop critical thinking and evidence-based reasoning skills, seek out and engage with multiple perspectives, as well as develop cultural humility, empathy, compassion, and courage to act in service of the greater good.

In Fall 2024, one of YSU's Moot Court teams was selected for the national competition, which took place in January 2025. The YSU team ranked 25<sup>th</sup> overall.

A collaborative co-curricular program in partnership with several community organizations started with plans to bring The Right to Read documentary screenings to campus and culminated in an educational event that connected campus and community members with resources relating to both literacy and vision, as detailed in sections 2.3.c and 6.2. The documentary screening was made possible by the Youngstown City School District in response to Governor DeWine's Read Ohio Initiative. A student-moderated panel discussion following the documentary included the YCSD superintendent, a community school board member, and a YSU Education faculty member. The event expanded to involve vision screenings from Sight for All United and a pop-up library from the Public Library of Youngstown and Mahoning County.

Approximately 175 students, faculty, staff, and community members attended between the two screenings.

A feedback survey was shared at the conclusion of each screening. Of the 60 respondents, 57 of them indicated the experience was at least somewhat valuable. Additional questions sought to understand what attendees gained from the experience. The learning ranged from simply gaining an understanding of literacy in America to how schools teach reading and how local community leaders responded to the film. One third of those who shared which aspect of the event was most beneficial cited the local panel of educators from YSU and two local schools. A common theme was an enhanced understanding of the importance of literacy and the varying effectiveness of instructional methods for teaching reading.

**8.3. Civic identity involves the formation and negotiation of personal and group identities as they relate to presence, role, and participation in public life. Civic identity is particularly important and a factor in civic engagement and participation.**

**What are the pathways and opportunities available to students at your institution to develop their civic identity? How are community partnerships incorporated into these pathways? What kind of institutional support is in place to encourage civic identity development? (Maximum word count of 500 words)**

**Examples of civic identity formation may include the following but are not limited to:**

- **Understanding the variety of ways to make change within a community (community organizing, going to the media, activism, etc.)**
- **Coalition building to engage in relationships where trust is formed while recognizing barriers**
- **Examining one's positionality in relation to self and society**
- **Articulating a vision of a just and equitable society**
- **Leveraging passion for social change into actions that benefit the community**
- **Understanding the power of voice to make change and what limits voice for many**
- **Creating a sense of belonging to community and responsibility for the greater good**

Examples of pathways for students to develop their civic identity stem from two areas of campus – Athletics and the Sokolov Honors College.

As discussed in Section 7.1, student-athletes like Mady Aulbach give back to their community by using NIL funds and can do so in partnerships with community organizations. Student-athletes are also encouraged to develop and execute projects with support from their fellow athletes across various sports. During the 2023-24 academic year, student athletes planned a drive, collecting 5,035 canned goods and

personal hygiene products. These items were donated to the YSU Penguin Pantry to support students in need of essential items. This drive not only connected those in need on campus with food and hygiene items but also raised awareness within the student-athlete population of the personal struggles that many of their fellow students face.

Within honors, students learn about the importance of engaging in their communities beginning in the two freshmen seminars, Intro to Honors and Campus Community Partnerships. For the last two years, students in Intro to Honors have worked in groups to conduct fundraising projects in support of community partners. Students have autonomy to plan and execute fundraisers that suit their interests and abilities. They also learn about how their efforts support the community partner's mission. In spring, students in Campus Community Partnerships work in groups to learn about a community partner and execute a service project. As a result of establishing this strong foundation in year one, students often continue to serve with organizations throughout the rest of their undergraduate experience. During senior year, the Honors Capstone seminar gives students the chance to reflect on their community engagement and complete a civic engagement master plan, which allows them to envision the way they hope to engage with the community as they graduate and move on to an advanced degree or the workforce.

Honors also instills the value of giving back to the community in a variety of ways, including philanthropic giving. One student group, the honors trustees, worked to endow a scholarship in 2020 in honor of an honors alum, who continues to serve as an official university volunteer. The scholarship is awarded annually to a sophomore honors student, with preference given to a Western Reserve High School graduate or a Boy Scout.

In Spring 2024, a small group of students had an idea to host a Pre-Health Research Symposium to showcase the research underway by pre-health students. Supported by honors, students planned an event that welcomed a speaker from the local children's hospital, a medical student panel, and two partner medical schools. Community-engaged projects focused on barriers to mammograms and other breast cancer screenings, the process involved with bringing a vision van to campus and connecting dozens of students with eye exams, and vaccine education and accessibility in rural areas. Though hosted by honors, all students were invited to submit a proposal and attend. The inaugural event welcomed 65 students, five faculty members, and four community partners.

#### **8.4. Indicate where civic knowledge development for a diverse democracy is part of the community engaged student learning outcomes inside and outside of the curriculum. (Maximum word count of 500 words)**

**Examples of civic knowledge may include the following but are not limited to:**

- **Community-based participatory research on democracy and civic engagement**
- **Collaborative problem solving**
- **Knowledge of systems (governance and community networks)**

- **Ethical reasoning and critical inquiry**
- **Information literacy and empathy**
- **How to use policy for social change**
- **Compassion and communicating across differences**

YSU's university-wide learning outcomes speak to civic engagement as noted in Section 6.1.a.

A variety of courses and programs are aligned with these learning outcomes and incorporate civic knowledge. For example, the Political Science course African American Politics examines the politics of African Americans within American society in terms of organization, behavior, objectives, relative influence, and power. The course covers many issues, including disenfranchisement in voting.

Additionally, ethics courses across campus aim to stretch students' thinking about issues in their civic lives and/or profession. Some examples of existing ethics courses include professional ethics, business ethics, engineering ethics, biomedical ethics and environmental ethics. Plans are underway to create a bioethics team.

Various student organizations also allow students to develop their civic knowledge. One such organization is the Red Cross Club. In addition to the more traditional club responsibilities of planning and hosting blood drives, students took an interest in learning about the Red Cross International Humanitarian Law (IHL) Campaign, which aims to educate students and faculty on the laws that govern wars and their impact on limiting the impact of an armed conflict. Club members became advocates for sharing this knowledge and reached out to instructors requesting permission to address fellow students during class time. During Spring 2024, honors instructors welcomed seven different trained advocates into 14 sections of Campus Community Partnerships to expose students to this knowledge connected with the four pillars of IHL and how they are challenged in the case of nuclear warfare.

**8.5. How is free speech showing up on your campus? What is your institutional policy on free speech and free expression? What kind of programming, partnerships, and policies for staff, faculty, students, and/or community do you offer or participate in that foster critical thinking, space to engage in deliberative dialogue, civil discourse and communication across differences, and exchange of ideas around contentious issues? Is there training offered to faculty, staff, and/or the community to incorporate these skills into courses and programming? (Maximum word count of 500 words)**

YSU has had a policy relating to free speech on campus in place since 2014 (revised March 2021 and up for review in 2026).

The policy reads:

Youngstown State University values the freedoms of speech, thought, expression and assembly both as constitutionally guaranteed rights and as part of the university's core educational, research, and public service mission and shall not

prohibit any individual from engaging in noncommercial expressive activity on campus, so long as the individual's conduct is lawful and does not materially and substantially disrupt the functioning of the institution. The university also recognizes that the exercise of these freedoms must be balanced with the rights of others to learn, work, and conduct business. Any speech or other expressive activities by persons under this policy should not be considered to be speech made by or on behalf of the university/administrators or to be endorsed by the university/administrators.

There is also a separate policy which provides a mechanism to register a complaint relating to this policy. A new supplemental policy relating to the use of university facilities and grounds for expressive activities was developed and implemented May 1, 2024. The purpose of the most recent policy is to "provide guidance to ensure safety and security provisions as well as ensure free speech rights and responsibilities." One of the policy's parameters is to document zero tolerance for "violence, threats of violence, harassment, or possession of weapons."

The Dean of Students website provides information on this policy to students as well as guidance on common campus scenarios involving freedom of speech, such as social media, speakers in classes, and "the rock." Since 1967, this large rock has been a site of free speech. Students, faculty, and staff can paint messages in support of entities or causes without the university concealing them unless language implies threats or harm.

YSU annually celebrates Constitution Day. Student Government Association, Student Activities, and YSU Moot Court Association have sponsored a panel on free speech with faculty and community partners, and a moot court event simulating a case involving two constitutional issues – whether forcing someone to decrypt a cell phone using facial recognition violates the Fifth Amendment right against self-incrimination and whether convicting someone of involuntary manslaughter for encouraging another person to commit suicide infringes on the First Amendment right to free speech.

Voter registration tables throughout September and October precede election awareness tables to encourage voting in November.

The Youngstown Press Club, which operates through contributions of time from YSU faculty, aims to support First Amendment and press freedom causes and connect the university population with free speech learning opportunities. For instance, when Jacob Schriener-Briggs, a YSU graduate working as a Yale Press Clause Fellow, delivered a talk, "Democracy, the Constitution, and the American Press" in March 2023, the YPC welcomed students to attend at no charge. Schriener-Briggs covered topics such as the structural role a free press plays within democratic societies and obstacles currently faced by the American press. About 30 people attended the event.

**8.6. Describe how your campus tracks and assesses civic engagement. Explain how your campus uses the data to inform programming and enhance student learning. (Maximum word count of 500 words)**

In Spring 2023, YSU administered the NSSE Topical Module on Civic Engagement in addition to the core NSSE survey. Participating first-year students and seniors were

asked to rate their ability to “contribute to the well-being of [their] community” on a scale of 1 (poor) to 5 (excellent). When responses were averaged, students at YSU rate their ability to do this higher than students from other participating institutions. In fact, 76% of Senior respondents rated their ability at either a 4 or 5, while only 67% of Senior respondents from other institutions did so. YSU’s Institute for Teaching and Learning hosted a series in March 2024 designed to create spaces to discuss the 2023 NSSE data and next steps.

To bolster first-year student civic engagement learning, two areas of campus piloted Tressel Institute for Leadership and Teamwork (TILT) badges into the curriculum. The “My Commitment to All” badge connects students with guest servant leaders who share their experiences with civic engagement. Undergraduate TAs who are a part of TILT engaged in the community at a local high school to deepen their own civic engagement experiences.

NLSVE data shows YSU’s 2022 voting rate at 37.3%, down 3% from 2018 but above the 30.6% national average. While 76.9% of eligible students were registered, only 48.5% voted, highlighting the need for education on voting methods beyond registration drives. Turnout spikes in presidential years (68.4% in 2020), but voting rates fluctuate more than registration. Encouraging registered voters to cast ballots could help close this gap.

Developing more data-driven approaches to enhancing voter registration is an area of opportunity. Due to internal administrative transitions, YSU did not initially reauthorize its participation in NSLVE for 2022-33. Upon discovering this, steps were taken to complete the process and gain access to past data through 2022. Data was not obtained until August 2024. Plans are in place to review NSLVE data upon release going forward. Additionally, YSU has joined the All In Campus Democracy Challenge, a nonpartisan organization that works with college campuses to increase voter engagement.

## SECTION 9: Community Engagement and Other Institutional Initiatives

**1. Indicate if community engagement is intentionally and explicitly aligned with or directly contributes to any of the following additional institutional priorities. (In Table-Check all that apply and describe two of the checked examples, in the text box below in question 2). (Maximum word count of 1,000 words)**

- ✓ Anchor institution mission or initiative(s)
- ✓ Campus diversity, inclusion, and equity goals (for students and faculty)
- ✓ Efforts aimed at student retention and success
- ✓ Encouraging and measuring student voter registration and voting
- ✓ Development of skills and competencies to engage in dialogue about controversial social, political, or ethical issues across the curriculum and in co-curricular programming
- ✓ Social innovation or social entrepreneurship that reflects the principles and practices of community engagement
- The campus institutional review board (IRB) provides specific guidance for researchers regarding human subject protections for community engaged research
- Efforts that support federally funded grants for Broader Impacts of Research activities of faculty and students
- ✓ Outreach activities
- ✓ Community and economic development
- ✓ Lifelong learning (non-credit)
- ✓ Campus food security programs (internal and external)

**9.2. Describe at least two examples from question 1, including (how the priority is aligned with community engagement; how it is communicated internally and externally; and lessons learned and improvements made over the past two years.) (Maximum word count of 1,000 words)**

Outreach activities – Hispanic Awareness Month, Center for Working Class Studies, Summer Festival of the Arts, and Silly Science Sunday

The long-standing Hispanic Heritage Month at Youngstown State University aims to introduce the community to all aspects of Hispanic heritage in the Mahoning Valley. A YSU committee—with representatives from Student Experience, Academic Affairs, and Experiential Learning and Engagement, along with community partners—plans and executes the series of events that take place in September and October each year.

The opening ceremony takes place at various locations in Youngstown, from the Mahoning County Courthouse to the public library. The ceremony welcomes an Hispanic speaker, representatives from local government, and YSU leaders.

Students have an opportunity to bear flags to represent the Spanish-speaking country of their heritage. Susan Moorer, associate director of the Office of Belonging, Empowerment, and Engagement and a chief member of the planning team stated, “Students felt a source of pride that their countries are being represented.”

The month culminates in a closing festival featuring nonprofit and for-profit partners, including the local YWCA and SMARTS (Students Motivated by the Arts), tabling alongside YSU departments. Approximately 150 individuals attended the festival in 2024.

Moorer further highlighted the value of the event by stating, “I think that given the impact of the increased and future Hispanic students attending YSU, we are recognizing a significant group of prospective students and reaching out to them as part of community outreach effort.”

YSU’s Center for Working Class Studies was formed in 1995 and is considered the birthplace of the interdisciplinary field of Working Class Studies in the country. The center is comprised of faculty and community affiliates from multiple departments, disciplines, and organizations who support interdisciplinary, community-based, and collaborative projects that tell the story of work, labor, and class in its myriad forms and voices, and advance scholarship in working class studies.

Among its goals are to convene and partner with organizations enacting positive change for working class people. One example of the type of event hosted by the Center for Working Class Studies is a community panel discussion, *State of Ohio: Wages and Unions and Strikes, Oh My! – Food for Thought* (2023). The center partnered with Policy Matter Ohio to sponsor the event, and affiliate YSU Economics faculty member AJ Sumell participated in a free panel discussion on the state of labor and working-class issues in Ohio.

Since 1999, the YSU Summer Festival of the Arts, an arts and crafts festival held historically on campus, has been a favorite event among the local community. In 2021 the event moved off campus to a nearby downtown park. Community member feedback expressed concerns about the move away from YSU, citing concerns about lack of trees to provide shade, lack of seating, and the lack of nostalgia enjoyed when held on campus.

Listening to these concerns, YSU President Johnson championed a move back to campus in 2025 for the 27<sup>th</sup> annual event.

Phyllis Paul, dean of the YSU Cliffe College of Creative Arts, expressed enthusiasm about the return, stating, “This festival is a testament to the Mahoning Valley’s deep appreciation for the arts. We are delighted to continue this tradition at YSU and offer an inspiring and enriching experience for everyone involved.”



The festival will continue to include a range of performing artists, children's activities and contributions from local ethnic, arts, and cultural institutions. As always, the event is free and open to the public, welcoming over 80 artists and drawing more than 15,000 visitors each year.

Two Chemistry faculty members and five students who are part of the American Chemical Society student organization gave hands-on chemistry demonstrations to children at Silly Science Sunday in partnership with OH WOW The Roger & Gloria Jones Children's Center for Science and Technology. The free annual event has welcomed community members downtown Youngstown for the last 14 years.

### Community and economic development

Coinciding with its mission and vision, YSU has recently partnered with the Youngstown/Warren Regional Chamber on an initiative to try to learn more about student goals after graduation—where they want to live and/or work. This initiative is in direct support of the Chamber's population goals of encouraging college graduates to remain in the Youngstown area.

The Chamber was also a community partner for the Magazine Editing and Production honors course. In the course, students worked with the Chamber to learn about the organization and then identify stories in the community that would fit under the broadly defined umbrella of "good news." The Chamber then sought out opportunities to publish the students' stories in its publications.

Through partnership with the Chamber, YSU connected with a local employer who was seeking to hire YSU graduates as part of addressing their workforce needs. YSU produced a video after interviewing current employees of the company talking about positive aspects of their work serving as a recruitment tool.

### Campus food security programs

Community engagement is intentionally aligned with campus food security programs such as the YSU Penguin Pantry and the Hunger Dialogues.

The Penguin Pantry is a food security program open to all YSU students, faculty, and staff who are in need of assistance. This critical resource stocks donations of non-perishable fresh and frozen food items, hygiene products, and cleaning supplies. Campus volunteers, as well as professional staff, manage the pantry, and donations are accepted and promoted through the university website and YSU PenguinPulse. This internal program is successful because of its volunteers and support from the campus community. From Fall 2023 through Summer 2024, the Penguin Pantry had 1,190 student visits.

The university also hosted the 2024 Ohio Hunger Dialogues this fall. The event, titled The Intersection of Academia, Research, and Policy in Addressing Food Insecurity, was open to all stakeholders interested in addressing hunger and food insecurity in Ohio (and bordering states). The speakers engaged attendees in conversations to share

knowledge and insights and to collaborate on best practices and solutions around the systematic issues of hunger and food insecurity in Ohio communities.

## **SECTION 10: Reflection and Additional Information**

**10.1. (Optional) Use this space to elaborate on any question(s) for which you need more space. Please specify the corresponding section and item number(s).**

### **From Section 2.4.b**

Additional permanent funds not from grants include the OCE operating budget, the Rich Center for Autism, and Ohio Council of Criminal Justice Education, Academy of Criminal Justice Sciences, and the American Society of Criminology.

YSU's commitment to sustainable community engagement is further reflected in another \$10 million in funding sources at the YSU Foundation designated to enhance student learning, strengthen faculty engagement and address community needs.

A snapshot of key program endowments includes the John D. Beeghly Fellows Program, the David and Helga Ives English Festival Endowment, which fosters literary engagement, and faculty-driven endowments like Dr. Warren M. Young Chair in Physics & Astronomy to extend YSU's impact by promoting interdisciplinary collaboration and regional outreach. Total market value of identified endowments at the YSU Foundation, excluding the Rich Center for Autism, in June 2024 was \$16,195,458.

**From Section 9.1** YSU played a critical role in supporting the community in the aftermath of two major disasters: February 2023 train derailment in East Palestine, Ohio and the May 2024 downtown Youngstown gas leak explosion.

In response to the East Palestine train derailment in February 2023, YSU's College of Science, Technology, Engineering, and Mathematics (CSTEM) was engaged by the Ohio Attorney General's Office to conduct an independent evaluation of potential environmental contamination. Led by Dr. Jeffrey Dick, Geology and a team of faculty researchers, YSU developed a comprehensive sampling program to assess soil, stream sediment, and stream water for volatile organic compounds (VOCs), semi-volatile organic compounds (SVOCs), and dioxins. The study, conducted in multiple phases from February 2023 through August 2024, was designed to evaluate the long-term environmental impact of the derailment. While the findings remain confidential due to ongoing litigation, the project demonstrates YSU's ability to mobilize scientific expertise in response to environmental crises.

Following the gas leak explosion in May 2024, which resulted in one fatality, seven injuries, and the displacement of physically and mentally challenged individuals residing in a nearby building, YSU leveraged its longstanding partnership with United Way of Youngstown and the Mahoning Valley to assist in the relocation of 169 individuals. Additionally, campus-community partnerships facilitated donations to support temporary and permanent displacement efforts, including sending volunteers to support residents return to the adjacent building.

These efforts underscore YSU's capacity to rapidly deploy university resources both in community support and scientific research to address urgent disaster-related

challenges, reinforcing its commitment to regional resilience and public well-being. YSU's response to these disasters was guided by active listening and collaboration with community partners to address urgent needs. By prioritizing community input and leveraging university expertise, YSU played a vital role in both immediate relief efforts and long-term environmental assessment.

### **From Section 5.5.**

Dr. Laura Beadling hosted a roundtable discussion on the establishment of a National Science Fiction and Fantasy Arts Museum by the Trumbull County Historical Society (TCHS) in Warren, Ohio at the 2024 History across the Humanities Conference. The panel discussed items to include in the collection and next steps in establishing the museum.

### **10.2. (Optional) Is there any information that was not requested that you consider significant evidence of your institution's community engagement? If so, please provide the information in this space.**

The Carnegie Foundation Elective Classification for Community Engagement application process has profoundly shaped both the personal and professional lives of those involved in the process. Our initial Community Engagement Council, which broadened to all who wanted to walk this journey, reported that on a personal level, being part of this initiative has deepened their understanding of the powerful role universities can play in communities. Each reports a sense of being on this journey together with a shared purpose and belonging, recognizing that our work has direct, lasting impacts on the lives of individuals and communities. Professionally, we continue to develop our skills in building partnerships, fostering collaboration, and advocating for the potential of community engagement. By becoming involved in leadership groups within the Engagement Scholarship Consortium, we have made connections with colleagues across the country, which has allowed for sharing and brainstorming with individuals who are also passionate about making an impact in their communities.

Engaging in this process has equipped us with the credibility and knowledge to speak with confidence about community-engaged activities. We are now better able to share the tangible benefits of these efforts and highlight the importance of a university's role in addressing societal challenges in conjunction with the community. This experience has allowed us to advocate for practices that prioritize reciprocal relationships and shared decision-making with community partners.

Our involvement in the Carnegie Classification process has also broadened our network. We've made invaluable connections between partners, linking organizations and individuals who share a common goal of creating a more inclusive and engaged society. For example, a partnership with Youngstown City Schools to show a documentary focused on literacy expanded to involve several external partners who offered vision screenings and access to a pop-up library. These connections have

strengthened our collaborative efforts and deepened our commitment to collective action, demonstrating the strength of a community united in purpose.

The development of our team through this process has been one of the most rewarding aspects. As we've grown, we've embraced a culture of openness, where everyone is welcome to contribute, share their expertise, and take ownership of the work being done. This welcoming approach has allowed for the expansion of the team, bringing in fresh perspectives, ideas, and energy. It has fostered an environment where all voices are heard, ensuring that our efforts are truly representative of the communities we serve.

Ultimately, the Carnegie Classification process has been a catalyst for growth—both for us as individuals and for the wider community. The process truly has been the prize. It has reinforced the importance of collaboration, open dialogue, and shared responsibility in creating lasting change.

### **10.3. (Optional) Reflect on who was around the table, who was missing, representation of the community members, and how these voices might have improved this report.**

Creating an environment in which all voices were welcomed and encouraged to participate was inherent in the process of preparing for the 2026 Carnegie application and was guided by offering to campus multiple modalities to provide perspectives to inform the content and story of community engagement at YSU.

From the strategic plan to the academic master plan along with governance documents, voices from across campus were integrated throughout the journey. Furthermore, the university-wide Community Engagement Council included a representative from each college and university division. CEC members served as the conduit for campus wide information gathering during the self-study and continued to connect the campus community to amplify the value of community engagement leading to transformative change. Capturing the voice of individuals and all campus constituency groups were conducted through multiple communication and conversation modalities including monthly newsletters, electronic surveys, in-person individual, faculty, department, division, and Board of Trustees meetings. The same approach was used to capture the voice of the community through the establishment of the Community Partner Advisory Council, newsletters, off-campus meetings, the Symposium, and debriefing breakfasts to name a few. The self-study inherently supported efforts to cultivate an inclusive process because we were starting from scratch and evolved into a comprehensive state of dialogue to identify all campus community partnerships.

The self-study process informed the approach to the 2026 application and created the foundation of a culture of openness with multiple modalities of participation to include all voices. While a smaller writing team of four led the drafting of the application, multiple

stakeholder groups were consulted throughout to ensure a comprehensive and representative application.

Throughout the process, we leveraged the monthly OCE newsletter with different versions tailored to each stakeholder group. We conducted direct outreach individually, in group meetings as well as electronically to gather input from faculty, staff, students, chairs, deans, university leadership across all divisions, and community partners. From lecturers to coordinators up to the vice president and president, community engagement is practiced, valued, and supported. Additionally, support from leadership encouraged broader participation. As the writing team identified additional areas of need, we actively sought input from individuals across campus, as well as secured feedback from community partners.

The voices we didn't capture are not from a lack of invitation. We could hypothesize about those who did not participate as they inherently did not see how their activities align with community engagement. We recognize that room for improvement always exists and will pursue with a spirit of continuous improvement through reflection, communication, assessment and evaluation to engage both our campus and external communities.

The success of our current and future partnerships depends upon our continued efforts to educate and create an environment of openness to engage. We will continue our efforts in earnest because of the mutual benefit of addressing the public needs as reported by our students, university and community partners.

**10.4. (Optional) What is a question you would like us to ask that was not included in the application?**

How do your community engaged faculty/staff leading this effort engage in continuous learning? How do they share knowledge gained across campus and beyond?

# Aviation Program Plan

## Aviation options

1. To start: Associates of Individualized Studies with Focus on Aviation (60-64 credits). This program will consist of 23 credits of aviation coursework and 37-41 credits of general education/elective coursework.
2. Pending state approval: Associate of Applied Science in Aviation (60-64 credits). Will need to be formalized through the state and accreditation as a degree.
3. Two certificates (9 hours each) including only Aviation courses.

### **Associates of Individualized Studies with Focus on Aviation (60-64 credits)**

#### **1<sup>st</sup> Semester**

YSU 1500	Success Seminar	1 sh
ENGL 1550	Writing 1	3 sh
MATH 1510	College Algebra	4 sh
AVT 1510	Private Pilot Ground	3 sh
AVT 1511	Private Pilot Flight Training 1	3 sh
	-----	
		<b>14 sh</b>

#### **2<sup>nd</sup> Semester**

ENGL 1551	Writing 2	3 sh
GEOG 2630/L	Weather	4 sh
PSYC 1560	General Psychology	3 sh
AVT 2610	Instrument Ground School	3 sh
AVT 1512	Private Pilot Flight Training 2	3 sh
	-----	
		<b>16 sh</b>

#### **3<sup>rd</sup> Semester**

GIS 2611	Introduction to GIS	3 sh
PHIL 1560	Introduction to Philosophy	3 sh
PHYS 1501	Physics	4 sh
AVT 1560	Aviation Laws and Regulation	3 sh
AVT 2611	Instrument Flight Training 1	3 sh
	-----	
		<b>16 sh</b>

#### **4<sup>th</sup> Semester**

ECON 1505	Intro to Personal Financial Literacy	3 sh
STEM 3790	Internship in Aviation Operations	2 sh

ACCT 1503	Essentials of Accounting	3 sh
PHIL 2625	Introduction to Professional Ethics	3 sh
AVT 2612	Instrument Flight Training 2	3 sh
		----
		<b>14 sh</b>

### **ELECTIVES**

AVT 1520	Flight Time Builder (taken as needed)	1 sh
AVT 2620	Advanced Flight Time Builder (taken as needed)	1 sh

## Aviation Certificates

### Aviation Private Pilot Certificate

AVT 1510	Private Pilot Ground	3 s.h.
AVT 1511	Private Pilot Flight Training 1	3 s.h.
AVT 1512	Private Pilot Flight Training 2	3 s.h.

### Aviation Instrument Certificate

AVT 2610	Instrument Ground	3 s.h.
AVT 2611	Instrument Flight Training 1	3 s.h.
AVT 2612	Instrument Flight Training 2	3 s.h.

## Aviation Courses

### **AVT 1510 Private Pilot Ground 3 s.h.**

Study of flight fundamentals, aircraft operations, weather, and regulations required for Private Pilot certification. Special course fees apply.

**Co-Req:** AVT 1511

**Prereq:** None

**Fee:** \$800

### **AVT 1511 Private Pilot Flight Training 1 3 s.h.**

First in a series of three courses that culminate in the attainment of a private pilot certificate with airplane single engine land privileges. FAA medical clearance and TSA approvals required prior to flights. Special course fees apply.

**Co-Req or Prereq:** AVT 1510

**Prereq:** FAA pilot medical third class, first class preferred

**Fee:** \$9990



**AVT 1512 Private Pilot Flight Training 2 3 s.h.**

Second course in a series of three courses that culminate in the attainment of a private pilot certificate with airplane single engine land privileges. FAA medical clearance and TSA approvals required prior to flights. Special course fees apply.

**Prereq:** C or Better in AVT 1511

**Fee:** \$7990

**AVT 1520 Flight Time Builder 1 s.h.**

Time practicing skills and techniques for flying aircraft. Course may be repeated. FAA medical clearance and TSA approvals required prior to flights. Special course fees apply. Grading is S/U.

**Prereq:** C or Better in AVT 1511

**Fee:** \$2490

**AVT 2610 Instrument Ground 3 s.h.**

Study of flight by reference to instruments, IFR regulations, and procedures in the National Airspace System. Special course fees apply.

**Prereq:** C or better in AVT 1510 and AVT 1511

**Fee:** \$800

**AVT 2611 Instrument Flight Training 1 3 s.h.**

Instrument flight operations, navigation, patterns, maneuvers, regulations, approach protocols, and flight planning and execution. FAA medical clearance and TSA approvals required prior to flights. Special course fees apply.

**Prereq:** C or better in AVT 2610

**Fee:** \$6890

**AVT 2612 Instrument Flight Training 2 3 s.h.**

Advanced practice instrument flight operations, navigation, patterns, maneuvers, regulations, approach protocols, and flight planning and execution. FAA medical clearance and TSA approvals required prior to flights. Special course fees apply.

**Prereq:** C or Better in AVT 2611

**Fee:** \$5490

**AVT 2620 Advanced Flight Time Builder 1 s.h.**

Time practicing skills and techniques for flying advanced aircraft. Course may be repeated. FAA medical clearance and TSA approvals required prior to flights. Special course fees apply. Grading is S/U.

**Prereq:** C or Better in AVT 2611

**Fee:** \$2690

## YSU Aviation Fees

Course	Course Name	Credit Hours	Type of Aircraft	Included Hours			Flight Fees
				Aircraft	Simulator	Ground	
AVT 1510	Private Pilot Ground	3	N/A	N/A	N/A	45	\$800
AVT 1511	Private Pilot Flight Training 1	3	C-172	36	3	8	\$9990
AVT 1512	Private Pilot Flight Training 2	3	C-172	24	2	8	\$7990
AVT 1520	Flight Time Builder	1	C-172	10	3	2	\$2490
AVT 2610	Instrument Ground	3	N/A	N/A	N/A	45	\$800
AVT 2611	Instrument Flight Training 1	3	TAA-172	18	9	6	\$6890
AVT 2612	Instrument Flight Training 2	3	TAA-172	12	6	4	\$5490
AVT 2620	Advanced Flight Time Builder	1	TAA-172	10	3	2	\$2690

**YOUNGSTOWN STATE UNIVERSITY**

**Online degree programs\***

Fee Description	AY 2025 Actual	AY 2026		
		Proposed	\$ Change	% Change
<b>Master of Business Administration</b>				
In-state (per credit)	\$450.00	\$473.00	\$23.00	5.1%
Non-resident (per credit)	\$455.00	\$478.00	\$23.00	5.1%
<b>Master of Science in Education</b>				
In-state (per credit)	\$415.00	\$436.00	\$21.00	5.1%
Non-resident (per credit)	\$420.00	\$441.00	\$21.00	5.0%
<b>Master of Science in Education, Educational Administration with Principal Licensure</b>				
In-state (per credit)	\$415.00	\$436.00	\$21.00	5.1%
Non-resident (per credit)	\$420.00	\$441.00	\$21.00	5.0%
<b>Doctor of Education, Education Leadership</b>				
In-state (per credit)	\$415.00	\$428.00	\$13.00	3.1%
Non-resident (per credit)	\$420.00	\$433.00	\$13.00	3.1%
<b>Registered Nurse to Bachelor of Science in Nursing<sup>2</sup></b>				
In-state (per credit)	\$275.00	\$275.00	\$0.00	0.0%
Non-resident (per credit)	\$280.00	\$280.00	\$0.00	0.0%
<b>Master of Family Nurse Practitioner</b>				
In-state (per credit)	\$527.00	\$543.00	\$16.00	3.0%
Non-resident (per credit)	\$532.00	\$548.00	\$16.00	3.0%
<b>Master of Science in Nursing (Nursing Education)</b>				
In-state (per credit)	\$415.00	\$428.00	\$13.00	3.1%
Non-resident (per credit)	\$420.00	\$433.00	\$13.00	3.1%
<b>Master of Adult Gerontology Acute Care</b>				
In-state (per credit)	\$527.00	\$543.00	\$16.00	3.0%
Non-resident (per credit)	\$532.00	\$548.00	\$16.00	3.0%
<b>Adult Gerontology Acute Care Post Masters Certificate</b>				
In-state (per credit)	\$527.00	\$543.00	\$16.00	3.0%
Non-resident (per credit)	\$532.00	\$548.00	\$16.00	3.0%
<b>Family Nurse Practitioner Post Masters Certificate</b>				
In-state (per credit)	\$527.00	\$543.00	\$16.00	3.0%
Non-resident (per credit)	\$532.00	\$548.00	\$16.00	3.0%
<b>Advanced placement FNP Certificate</b>				
In-state (per credit)	\$527.00	\$543.00	\$16.00	3.0%
Non-resident (per credit)	\$532.00	\$548.00	\$16.00	3.0%
<b>Advanced placement AGAC Certificate</b>				
In-state (per credit)	\$527.00	\$543.00	\$16.00	3.0%
Non-resident (per credit)	\$532.00	\$548.00	\$16.00	3.0%
<b>Educational Leadership Certificate</b>				
In-state (per credit)	\$415.00	\$428.00	\$13.00	3.1%
Non-resident (per credit)	\$420.00	\$433.00	\$13.00	3.1%
<b>Undergrad bachelor degree programs</b>				
In-state (per credit)	\$460.00	\$460.00	\$0.00	0.0%
Non-resident (per credit)	\$465.00	\$465.00	\$0.00	0.0%

\*Online Programs offered through YSU's agreement with Risepoint (formerly known as Academic Partnerships). Rates are based on academic year, which begins summer or fall semester, depending on program curriculum. The number of required credit hours varies by program. First Day Ready materials, preceptor and graduation application fees may apply.

2. Up to 19 additional general education credits may be required at \$275 per credit hour.

## Proposed Commencement Speakers/Honorary Degree Recipients

Submitted by Events Committee of the YSU Academic Senate, March 12, 2025

The names of the following persons were submitted for consideration by the Events Committee of the YSU Academic Senate as candidates for Commencement Speakers and possible Honorary Degree recipients. The Events Committee has approved this list of nominees and hereby submits the list for formal approval by the Academic Senate prior to presentation to the University President, Provost, and YSU Board of Trustees.

These nominees are in addition to those that were previously vetted and approved by the Academic Senate and the YSU Board of Trustees. This list is attached at the end of this document.

Where provided, brief biographies for current nominees are included. In addition, as indicated, some nominees were nominated specifically to address graduates of the indicated college.

### **STEM**

Dr. Peyman Givi – BE in Mechanical Engineering, 1980

Dr. Peyman Givi is Distinguished Professor of Mechanical Engineering and the James T. MacLeod Chair in School of Engineering at the University of Pittsburgh. Previously he held the rank of University Distinguished Professor in [Aerospace Engineering](#) at the [State University of New York at Buffalo](#), where he received the Professor of the Year Award by Tau Beta Pi (2002). He also worked as a Research Scientist at the Flow Industries, Inc. in Seattle. Dr. Givi has had frequent visiting appointments at the [NASA Langley & Glenn \(Lewis\)](#) centers, and received the NASA's Public Service Medal (2005). He is amongst the first 15 engineering faculty nationwide who received the White House Presidential Faculty Fellowship from President George Bush. He also received the Young Investigator Award of the Office of Naval Research, and the Presidential Young Investigator Award of the National Science Foundation.

Katie Glass, PhD

2003 BE Mechanical Engineering  
Principal scientist at Proctor and Gamble  
<https://www.linkedin.com/in/katie-kf-glass-ph-d-bb46b927/>

Ben Detwiler

2011 BE Electrical Engineering  
Software Engineer at Apple (since 2014)  
<https://www.linkedin.com/in/bendetwiler/>

Andy Morgan, PhD

2017, Computer Science & Computer Engineering

Research Scientist, Boston Dynamics Institute

Andy brought his AI robot Spot to campus for a recent visit

<https://www.linkedin.com/in/andrewsmorganrobot>

## **BCHHS**

Colonel Sarah Robinson-Evans – B.S. in Nursing, 1998, i

She is currently dual hatted as the Commander and Medical Training Facility

Director of the 82d Medical Group, Sheppard Air Force Base, Texas. As the Group

Commander, Col Evans oversees operations for 335 active duty and civilian

personnel, enabling 45K outpatient appointments to 21K beneficiaries yearly across

two Wings, and 65K trainees annually.

## **BCLASSE**

Mary Beth Messner

2000 BA English & Education

Assistant Provost at Catawba College

Has worked extensively in online learning area of higher ed – passionate about

reducing barriers to education; extremely involved as a student leader at YSU;

engaged in community and continues to serve, instills a value of serving in her

children

<https://www.linkedin.com/in/mbmessner/>

Matt VanSuch, JD

2002 BA Political Science

Partner in local law firm

Howland township trustee

Voice of the Marching Pride (for 9 years, ending in 2023)

<https://www.linkedin.com/in/matthew-vansuch-baa1b149/>

Alyssa Finamore, JD

2002 BE Chemical Engineering

Lead Administrative Patent Judge, USPTO

After a decade of experience in private practice, started with the USPTO in 2015,

becoming lead judge in 2022

Interned at Delphi Packard while at YSU before pursuing career in patent law

<https://www.linkedin.com/in/alyssa-finamore-7523585/>

## CCAC

### Bill Mullane

Bill is an artist, educator, administrator and civic leader, and recipient of the Governor's Award for the Arts in the category of Community Development and Participation in 2022. He has served as adjunct curator and exhibition designer at the Medici Museum of Art in Warren and is on the board of the Community Foundation of the Mahoning Valley; the Raymond John Wean Foundation; the Trumbull Art Gallery; the Fine Arts Council of Trumbull County; Friends of the Fellows Riverside Gardens; the Medici Museum; and the Warren Philharmonic Orchestra. Mullane has worked to connect and inspire collaboration among local organizations and has created partnerships with Warren City Schools, the City of Warren, the Trumbull Neighborhood Partnership and Students Motivated by the Arts. He has co-curated several exhibitions at The Butler Institute of American Art, including multiple Northeast Ohio Scholastic Art Exhibitions and ceremonies.

### Meghan Borsic – BFA in Graphic Design, 2005

Senior Vice President of Design at The Walt Disney Company

Previous management roles at Meta, Salesforce, Amazon, Oracle, and more

Maintains connections with the Cliffe College. Phyllis Paul indicates that she is “one of our shining stars”.

<https://www.linkedin.com/in/meghantrunick/>

Meghan Borsic – Senior Vice President of Design at The Walt Disney Company | Disney Entertainment & ESPN (She is stunning and composed!) She only has her BFA so she is 100% ours.

Ryan Firm -has been very successful with Taylor Swift's Mobile App, among other impressive things as a designer – He has a UX/UI Master from Kent. His BFA is from YSU.

Dan Wegendt- He worked for the Weather Channel for nearly a decade and won an Emmy for his motion graphics. He also has a masters from Savannah and BFA from YSU.

Emily Stump has an MFA in Graphic Design from Herron School of Art and BFA from YSU. She is the program manager for experience design at Indiana University Health, an Indiana University hospital and medical school.

Erik Melvin is a rock star! He is a graduate of the photography program and has gone on to be wildly successful as a professional photographer. He photographed Michelle Obama, just one of the amazingly famous people he has photographed. He has also found his way into high fashion! Here is his website. <http://www.erikmelvin.com/>

## **WCBA**

Catherine Mott – MBA from YSU

President / CEO

<https://www.linkedin.com/in/catherinemott/>

Catherine Mott is the founder of BlueTree Capital Group, BlueTree Allied Angels, and the BlueTree Venture Fund located in Pittsburgh, PA. As of December 2017, the BT entities have invested \$50+ million in several startup companies. Ms. Mott is the past Chairman of the Angel Capital Association (ACA) and the Angel Resource Institute. Ms. Mott is a member of the ACA Public Policy Committee; she also just completed a third term as one of 21 individuals selected for the SEC Advisory Committee on Small and Emerging Companies.

Robert Bole, BSBA, YSU. MBA, New York University

<https://www.linkedin.com/in/robertbole/details/education/>

- Director, SMBC Capital Markets (Sumitomo Mitsui Banking Corporation – SMBC Group New York, New York, United States)
- Vice President, Innovation and New Products, Pagaya (Aug 2021 - Oct 2022)
- Executive Director, NA Head of Fixed Income Products, IHS Markit
- Head of Strategy and Portfolio Management for Sales, Research, and CM, Bank of America Merrill Lynch Bank, New York, United States

Heather Barnett - Chief of Staff in the Antifraud Team, Microsoft (BSBA – Marketing, 2010)

Heather Barnett is the Chief of Staff in the Antifraud team at Microsoft. In her current role, Heather is responsible for strategy and operations for team 200, focused on protecting, detecting, and responding to Nation-state actors, criminal syndicates, and common hackers who wish to cause financial and reputational harm to Microsoft, customers, and partners. As a form of cybercrime, fraud poses a serious threat to the integrity in our digital ecosystem and undermines the security, trust, and reputation of individuals, businesses, and organizations of all sizes and types, in every region and industry.

Andrew DeMaiolo

BSBA 2010

Experience Design Manager for PNC

<https://www.linkedin.com/in/djdemaiolo>

## **Others**

Paul Mogg, YSU 1990 BA History

Lieutenant Colonel-Retired US Marines

School of Advanced Military Studies 2003-2004

Strategic Planner, US Central Command

Deputy Military Advisor, US Mission to the United Nations June 2007-June 2019

Commencement Speakers/Honorary Degree Recipient Nominees – March 12, 2025

Carl James, Ohio Wesleyan, 1970 BA Economics  
Attorney 1979-2016  
CEO BI Canada 1992-present  
President and CEO 2002-present  
Trustee Butler Institute of American Art  
Trustee Oak Hill Collaborative  
Trustee Friends of Fellows Riverside Gardens

Bob Hannon, President, United Way

Dr. Brian Corbin, From Catholic Charities USA (YSU Grad)  
Jeff Magada, Flying High Inc. (<https://flyinghighinc.org/history/>)

Aspasia Lyras-Bernacki and Richard Bernacki, owners of Penguin City Brewing Co.

Lt. Col. Ralph Crum, 91 alum, Arts and Sciences  
Retired Lt. Colonel, US Army  
<https://www.wfmj.com/story/47050202/canfield-native-one-of-the-last-soldiers-out-of-afghanistan-receives-honor>

Penny Wells  
Retired YCS teacher, Founder of Sojourn to the Past, Civil Rights Hall of Fame inductee  
<https://www.wkbn.com/news/local-news/boardman-news/local-leader-to-be-inducted-into-ohio-civil-rights-hall-of-fame/>

Dave Dravecky, non degreed alum  
Former professional baseball player, cancer survivor, motivational speaker  
<https://ysusports.com/honors/hall-of-fame/dave-dravecky/71>

Joseph Caruso, 89 MBA, YSU  
President and CEO, COMPASS Family and Community Services  
<https://spanningtheneed.com/2023/05/24/potw-joseph-caruso-compass-family-and-community-services/>

Barbara Orton, 80 alum, Arts and Sciences  
Former Director of Equal Opportunity at YSU



**Honorary Degree and Commencement Speakers**  
**Approved since June, 2016**

Dr. Amy Acton

Liberty native, was appointed director of health for the Ohio Department of Health by Governor Mike DeWine, and served through the state's initial response to the Covid-19 virus. A licensed physician in preventive medicine with a master's degree in public health. Dr. Acton has more than 30 years of experience in medical practice, government and community service, healthcare policy and advocacy, academic and nonprofit administration, consulting, teaching, and data analysis.

John Asimakopoulos

A YSU alum who retired as the CFO of Apex Paper Box in Cleveland. He was nominated because of his service to YSU and our students. He served as a committee member of the WCBA Dean's Business Advisory Panel for years, and has invited students to visit him at work in Cleveland. When students have shown up, he would spend a good portion of the day giving them a thorough tour of Apex's operations. He is a mensch -- humble, witty, engaged, generous, interested, encouraging, and friendly. He is a role model for a different image of a businessman.

Judge Carla J. Baldwin

Lifelong resident of the Mahoning Valley. She presently serves as the Administrative and Presiding Judge of Youngstown Municipal Court, and was the first African-American female elected as a judge in Mahoning County history. Prior to this appointment she worked for the Mahoning County Prosecutor's Office for eight years serving as an Assistant County Prosecutor in both the Criminal and Juvenile Divisions. Judge Baldwin served on numerous boards which serve the great community of the Valley.

Suzanne Barbati

An YSU Alumna from 1995, she served as the President and Executive Director of the OH WOW! The Rodger & Gloria Jones Children's Center for Science and Technology for 14 years, before taking on the role as their Director of Planned Giving in 2021 until her retirement in March 2023. An active leader in the Youngstown community, Ms. Barbati was instrumental in developing OH WOW! into the landmark institution it is today, which serves children and families across the entire Mahoning Valley.

Eric Bella, PE

YSU Alum from 2002; principal engineer with CJL with many years of experience in power distribution, lighting and safety design, and communications Eric has been involved in many projects in the Mahoning Valley including the Mahoning Valley Hospital, WCBA Leed Certified, and assisted in various electrical upgrades for the YSU campus and buildings.

Dr. Patty Bode

A Youngstown native, artist and educator who has gained national and international recognition for her work addressing civil rights in education Dr Bode has presented extensively on diversity, equity and inclusion.

Laurie Brlas

A Florida native and a YSU alumni, who has received a degree in Accounting in 1993. Worked as the Executive VP and CFO with Newmont Mining Corp. In her employment with Cliffs Natural Resources as Executive VP and CFO she oversaw all of global finance, and at various times oversaw human resources, information technology, business development and corporate strategy.

Sophia Brooks

An 80+ year-old native of Youngstown, she attended the Dana School of Music and the Cleveland Institute of Music. She was the first African American soloist at the First Christian, First Presbyterian and Saint John's Episcopal churches. She traveled across the nation as a vocalist as well as appeared with the Youngstown Symphony Orchestra. For over a decade, she was the first local female African American to host a television show, called "Expressions" with WKBN.

Dr. Barbara Brothers

Dr. Brothers earned her bachelor's degree in English from Youngstown University in 1958, a master's degree from Western Reserve University in 1962, and a Ph.D. in English from Kent State University in 1973. She taught English at Austintown High School and began her career at YSU as an adjunct instructor in 1960. While at YSU, Dr. Brothers' accomplishments were vast; she held various roles and spearheaded initiatives across campus, including state and federal grants for working with the public schools. Dr. Brothers was promoted to full professor in 1983, and from 1974-1992 chaired the Department of English. Examples of programs she significantly helped form include Professional Writing and Editing (now Professional and Technical Writing), Peace and Conflict Studies, Women's Studies and American Studies. After serving as the acting graduate dean in 1993, Dr. Brothers became the dean of the College of Arts and Sciences (now the Beeghly College of Liberal Arts, Social Sciences, and Education). In 2001, Dr. Brothers retired from YSU. In 2015 she received the University's Heritage award for professional accomplishments and community service. She continues to remain active in civic causes and to serve on the boards of the YWCA of Mahoning Valley, Youngstown Rotary, League of Women Voters of Greater Youngstown, WYSU, Garden Club of Youngstown, Lit Youngstown, and AAUW. SMARTS was the recipient of a naming gift and Sojourn to the Past is another organization serving the youth of our community to which she has a particular commitment.

William E. Brown

A Youngstown native, William Brown entered the U.S. Air Force in 1968 and began his distinguished career providing rescue and emergency medical services to downed pilots during the Vietnam war as a Pararescueman in the U.S. Air Force Special Operations Forces. He was awarded the Distinguished Flying Cross for "heroism" for the rescue of two pilots shot down behind enemy lines in North Vietnam in 1971. In addition, he was awarded an Air Medal with 3 oak leaf clusters, Vietnam Service Medal, Expeditionary Forces Medal, Good Conduct Medal, and Expert Rifleman Medal. Following his military service, he earned an AAS in nursing and political science, and a BSAS in Nursing and Law Enforcement Administration. He served as

President of Student Government and was recognized as Best-All-Around student. He earned a Master of Science degree in Health and Safety Education in 1979. He worked at Wishard Memorial Hospital Emergency Department, returned to YSU to serve as the Paramedic Program Director in the Department of Allied Health, completed two years of post-graduate education at the University of Akron and was appointed the Executive Director and CEO of the national EMS (Emergency Medical Services) certification agency, where he served for 25 years. During his service, he was appointed by the U.S. Department of Transportation to serve on many committees and lectured and presented in all 50 states. He was awarded many prestigious awards including the 2009 Rocco V. Morando Lifetime Achievement Award in EMS, the highest national recognition awarded to an EMS professional. In recognition of his service to YSU, the YSU EMS Paramedic program instituted the William E. Brown, Jr. Academic Excellence Award, given to students with the highest GPAs in the program.

Paul Brubaker

Paul Brubaker is a graduate of YSU in Political Science and Government. He has an MPA degree in Public Administration from Kent State University. He has extensive leadership experience in the private sector and government. He was nominated by President George W. Bush to serve as Administrator of the U.S. Department of Transportation's (DOT) Research and Innovative Technology Administration (RITA). Mr. Brubaker previously served as CEO of Procentrix; a firm that helps organizations plan, manage and achieve measurable performance improvement through the effective use of process and technology. Prior to this role, Mr. Brubaker served as Executive Vice President and Chief Marketing Officer of SI International, one of the nation's fastest growing government contractors. Mr. Brubaker previously served as Deputy Assistant Secretary and Deputy Chief Information Officer at the U.S. Department of Defense (DoD) where he was the Department's second highest-ranking technology official and supervised DoD's \$50 billion annual Information Technology expenditure. Before serving at DoD, Mr. Brubaker held various executive positions within the public and private sectors, including Vice President of Strategic Programs for Litton PRC, Vice President of Business Development for Federal Data Corporation, and in senior positions within the U.S. Senate and General Accounting Office. He has also won numerous awards including the Association for Information Resource Management's (AFFIRM) Government Executive Leadership Award in 2000. He was named to Federal Computer Week's Federal 100 in 1996 and 2002, and was appointed to the board of the Virginia Innovative Technology Authority in 1998 where he served as chairman from 2001 to 2003. He recently ended terms as chairman of the technical committee of the Armed Force Communications and Electronics Association (AFCEA) and president of its D.C. Chapter. He lives with his family in Oakton, Virginia.

Atty. Bonnie Deutsch Burdman

An attorney, has served the Youngstown Area Jewish Federation as Director, and now Executive Director of Community Relations/Government Affairs for the past 26 years. In this capacity, Bonnie leads the Federation's interfaith and inter-group activities, as well as its social action agenda. She directs the Federation's efforts to combat antisemitism, to promote strong support for Israel, and to encourage broad-based Holocaust and anti-genocide education. Bonnie also maintains strong relationships with public officials locally, in Columbus, and nationally in support of issues of importance to the Jewish community, and currently oversees the Federation's security work.

Gary Daichendt

Gary Daichendt is the founder and Chairman of the commercial real estate firm, Theory R Properties. Gary is best known for his work at Cisco Systems, Inc. during its period of highest and record achieving growth. He served as Executive Vice President of Worldwide Operations, Cisco's second highest ranking executive. His career also includes the position President and Chief Operating Officer of Nortel Networks Corporation in 2005. Gary has extensive public company board experience. He has served on the Board of Directors for Juniper Networks as its Lead Independent Director, Polycom as its Chairman, NCR Corporation, ShoreTel, Inc. and Emulex Corporation. He continues to advise multiple high-tech start-ups in the software and SaaS business. He has also served on the boards of multiple Christian organizations including Azusa Pacific University, Walk Thru the Bible, Living on the Edge, and NAEN Ministries. Gary joined Cisco in 1994 as Vice President of Intercontinental Operations and soon became Senior Vice President of Worldwide Operations. In 1998, Gary was promoted to Executive Vice President of Worldwide Operations with worldwide responsibility for sales, support, distribution, manufacturing, and strategic alliances. He led a team of 12,000 employees in over 100 countries, increasing operational revenues and profits by over 50% per annum. Prior to joining Cisco, he spent 10 years at IBM in various engineering, sales, marketing, and management positions and 8 years at Wang Laboratories serving as Vice President of Central Operations and Vice President of Marketing. He is co-author of the book, I-Operations. He holds a M.S. in Mathematics from Ohio State University and a B.A. from Youngstown State University. He and his wife, Cathy, reside in California.

Denise DeBartolo-York

Denise DeBartolo York began her business career working at the customer service counter at the Southern Park Mall during summer breaks while attending St. Mary's College. A lifelong resident of the Mahoning Valley, she continued to work for The DeBartolo Corporation, founded by her father, and worked her way up to become Chairman. Denise has been an integral part of four decades of 49ers football, including five Super Bowl victories. She is also an active member of the Pro Football Hall of Fame. Earlier in her career, Denise served as President of the Pittsburgh Penguins hockey team. Under her leadership, the Penguins won the team's first Stanley Cup. She is passionate about many philanthropic causes including the United Way of Youngstown and Mahoning Valley, Mercy Health, Boys & Girls Club of Youngstown, YSU, local veterans' groups and many others. Denise continues her parents' legacy of helping local youth to continue their education with the Edward J. DeBartolo Memorial Scholarship Foundation, which has awarded over \$1.6M in scholarships over the last 25 years. (Taken from The Business Journal)

Governor Mike DeWine

Governor DeWine has demonstrated fact-based decision making, prudent, forward-thinking leadership, and informative and honest (yet empathetic) communication. Raised in Yellow Springs, Ohio, Mike DeWine and Fran (Struewing) met in the first grade and married while students at Miami University. They've been blessed with eight children and 27 grandchildren.

Family is at the core of everything Mike DeWine does, and that's why he has devoted his life to fighting for Ohio's families. He knows when families are strong, Ohio communities are stronger, and our future is bright. Mike DeWine loves Ohio and cares passionately about our state's future. He will fight for an Ohio that works for everyone – every person and every family in every corner of our state. From world class cities to some of the best small towns in America, Mike DeWine knows that to build our state into an economic powerhouse, we must have strong schools, a great quality of life, and compassion for those who need our help. Mike DeWine's family started a seed company in Yellow Springs. Working alongside his parents and grandparents, Mike learned early the value of hard work, strong leadership, and fiscal responsibility.

Growing up, he loaded seed bags onto trucks and boxcars, shoveled wheat out of trucks during harvest, worked in wheat fields to help ensure the purity of the seed, and basically did whatever it took to get the job done for their customers. Inseparable to the end, his parents were married for 65 years and died within four days of each other. The values he learned from them still live within him today. On November 6, 2018, Mike DeWine was elected to serve as the 70th Governor of the State of Ohio. The Governor has had a long and distinguished career in public service, focusing on protecting Ohio children and families. He was previously the 50th Attorney General of Ohio and has previously been elected to serve as Greene County Prosecutor, Ohio State Senator, U.S. Congressman, Ohio Lt. Governor, U.S. Senator.

#### Dave Grohl

Native of Warren, Ohio, is an American musician, singer, songwriter, and documentary filmmaker. He was the drummer for rock band Nirvana and founded the band Foo Fighters, for whom he is the singer, guitarist, and primary songwriter. He has a long history of advocacy and philanthropy, using his platform to speak against drug misuse, including work on anti-drug films and documentaries, and also to advocate for the promotion of civil rights for LGBTQ people.

#### Joseph Hamrock

Former President and CEO of NiSource Inc. He previously served as executive VP and Group CEO for NiSource's Gas Distribution segment, which included local gas distribution companies in Kentucky, Maryland, Massachusetts, Ohio, Pennsylvania and Virginia. Hamrock joined NiSource in May 2012 after serving in a variety of senior executive positions with American Electric Power (AEP), including president and chief operating officer of AEP Ohio, and roles in engineering, transmission and distribution operations, customer service, marketing and information technology. He began his energy industry career as an electrical engineer in transmission and distribution planning at AEP in Steubenville, Ohio. He went on to work in commercial and industrial customer services, and held leadership roles in commercial marketing and customer services, strategic development and other executive roles. Prior to becoming president of AEP Ohio, Hamrock was senior vice president and chief information officer in AEP's Shared Services organization from 2003-2007, and from 2002-2003 was senior vice president - General Services. Hamrock received a bachelor's degree in electrical engineering from Youngstown State University and a master's degree in business administration from the Massachusetts Institute of Technology, where he was a Sloan fellow.

#### Phil Hirsch

Formerly at YSU as the Executive Director of Administrative Services, but is better known to most people as the long-time Director of Kilcawley Center. After retiring from YSU, he took a leadership position on the YSURA Board. Mr. Hirsch has a lasting and notable legacy of service to the University, including the Hirsch-Satrum Leadership Scholarship.

Ron Jaworski

Ronald Vincent Jaworski (born March 23, 1951), nicknamed "Jaws", is a former American football quarterback who played in the National Football League (NFL) for 17 seasons. He played college football at Youngstown State and was selected by the Los Angeles Rams in the second round of the 1973 Draft. After spending four seasons mostly as a backup for the Rams, Jaworski was traded to the Philadelphia Eagles in 1977, where he would lead the Eagles to four consecutive playoff appearances, including a division title and the franchise's first Super Bowl appearance in 1980. After ten seasons with the Eagles, Jaworski signed with the Miami Dolphins, where he would spend two seasons as a backup. He then spent one season with the Kansas City Chiefs as a backup before retiring after the 1989 season. After his playing career, Jaworski worked as an NFL analyst on ESPN from 1990 to 2017. From 2004 to 2019, he served as an executive of the Philadelphia Soul franchise of the Arena Football League, where he also briefly served as the league's Executive Committee Chair from 2018 to 2019. He is also the founder and CEO of Ron Jaworski Golf, which owns and manages several golf courses across the Delaware Valley region.

Nils P. Johnson

Johnson, of Canfield, graduated with honors from Dartmouth College and in 1976 graduated from Boston University Law School. Nils has served as a local Bar Association Trustee, as a member of the Ohio Supreme Court's Board of Grievances and Discipline, and as a member of the Ohio Supreme Court's Board of Bar Examiners. In addition to his legal career, Mr. Johnson is something of a renaissance man - he is an active session musician in local ensembles and has recently been commissioned to create a large-scale mural for the Ohio Supreme Court.

Brenda Kimble

Recently completed her bachelors at YSU and is a community nominee, in recognition of the difficult journey she took to achieve her education. To quote, "achieving her degree is representative of the resilience of so many YSU students, of YSU itself, and of Youngstown and the region around it." Ms. Kimble's education was placed on hold due to the tragic loss of her husband. As a widowed mother, she put her children through school, served as an elected school board member, worked, and completed her own degree.

Rex Lee

Warren native, born to immigrant Korean parents. He has gone on to start in numerous series, including Entourage, Suburgatory, and Young & Hungry.

Shirley M. Martin

Received a degree from YSU in Home Economics in 1973. Vice President of Grants U.S. Soldiers Foundation, Served 12 years in the active Army as an enlisted soldier and an officer and 24 years in the Army Reserve, She was deployed to Germany to support contingency ops in Bosnia and mobilized for 14 months for Operation Iraqi Freedom. She is currently the Louisiana

Department President of the Reserve Officer Association to advise legislative officials on military issues. Lives in New Orleans, LA.

Maria Mitchell-Cichon

Received her degree in Criminal Justice from YSU in 1981. She worked as a professor/director at Thomas M. Cooley Law School. She was director of the Cooley Innocence Project which works to secure the release of factually innocent Michigan prisoners through the use of post-conviction DNA testing. She also works closely with the Access to Justice Clinic to assist individuals with the collateral consequences related to their involvement with the criminal justice system and family courts. She has received the Justice for All Award from the Criminal Defense Attorneys of Michigan in 2014.

Melissa O'Connor

Graduated with a Bachelor of Science degree in Biology and Bachelor of Applied Science degree in Forensic Science in August 2012 from YSU. After achieving her masters and engaging in cutting-edge research, Ms. O'Connor took on a position as a forensic scientist with the Philadelphia police department. While there, she has engaged in community outreach with grade-school children, created science webinars, and represented her new city as Miss Philadelphia in 2020.

Austin Pendleton

Warren native, is an American actor, playwright, theatre director and instructor. His work on and off Broadway has netted critical acclaim, including a Tony Award nominee and multiple Drama Desk and Obie Awards. His six-decade spanning career also includes work in film (Short Circuit, My Cousin Vinny, Amistad, et al), television (Oz, Homicide: Life on the Street), and new media. his role in A Beautiful Mind earned him a Screen Actors Guild Award for Outstanding Performance by a Cast in a Motion Picture nomination.

Marc Routh

This theatrical producer, entrepreneur, and professor from Girard cut his teeth at the Youngstown Playhouse before going on to success on Broadway and London's West End. He was the producer for such notable, award-winning hits as the original Broadway productions of The Band's Visit, Amelie, and Anastasia. These shows are only part of his extensive and successful resume. Mr. Routh holds two Tony Awards, and is the founder of Broadway Asia and the R/F/B/V group.

Heather Saniskowski, Ph.D.

YSU Alum. Received a Ph.D. in statistics from Duke University with an emphasis on health and environmental studies. As an Assistant Professor at Clemson University, she continued her research on the application of prediction and normalization methods in life sciences and health care. In 1998, she co-founded INCOGEN, where she served as the principal statistician, concentrating her research on clinical applications of gene expression microarray and protein mass spectrometry data toward diagnosis and prognosis of breast, prostate, and renal cancers; heart disease; and diabetic retinopathy. In addition to her background in statistics, Dr. Saniskowski holds a Master of Science in Operations Research from The College of William and Mary and served as INCOGEN's COO, running the company's day-to-day operations. Dr.

Saniskowski has served on numerous boards, including the Center for Excellence in Aging and Geriatric Health in Williamsburg, VA. In 2015, she co-founded VIRUS Health, a non-profit organization to inspire healthy living in the U.S.

Maciek Saniskowski

YSU Alum, Author, physician-scientist, educator and entrepreneur with over 20 years of experience in: bioinformatics; clinical and basic research, algorithm development; establishing and leading multi-institutional, interdisciplinary teams; software engineering and commercialization; clinical diagnostics; HEOR; clinical affairs; business development; and grantsmanship.

Neida Sims

Graduate from Youngstown City Schools, then went on to pursue a Bachelor of Science in Education. She graduated from YSU Cum Laude in 1998 and later went on to become a special education teacher and earn a Master of Education. She became the only black female high school principal in Howard County Public School System, one of the top performing school systems in the USA. Nelda eventually retired from the school system in 2020 and became an author. She is one of ten authors in a book titled "Discovering Strength, Hidden in Sight - An Educators Perspective". Her chapter, "Unlimited Possibilities" shares her journey as an educator. In honor of her parents, she also established the TJ and Annie Ruth Rushton Legacy Scholarship, awarded to minority students at YSU majoring in Education. Nelda attributes much of her success to adhering to her parents' principles and strong foundation. Now, Nelda is a travel agent and enjoys traveling and spending time with her family and friends. Her goal in life is to be a positive role model, encourage, inspire, and motivate others.

Sue Thomas

From Boardman, Ohio, is an author and former FBI agent. Profoundly deaf from the age of 18 months, she used her skills in lip-reading to work as part of an undercover surveillance team. Her career inspired a television show (Sue Thomas: F.B.Eye) and she has published two memoirs on her experiences.

John Paul Vincent “Sonny” Vaccaro

A former sports marketing executive. Vaccaro is best known for his tenure with Nike, Inc, where he signed Michael Jordan to his first sneaker deal. Vaccaro left Nike for Adidas, then Reebok. He founded the ABCD Camp, an elite showcase of high school basketball standouts, which ran from 1984 to 2007. It featured future stars Kobe Bryant, Dwight Howard, and LeBron James. Vaccaro cofounded the first national high school All-Star game, The Dapper Dan roundball Classic, with concern promoter and boyhood friend Pat DiCesare in Pittsburgh in 1965. The game endured for 43 years and its alumni includes such greats as Calvin Murphy, Shaquille O'Neal, Kobe Bryant, Chris Webber, Alonso Mourning, Kevin Garnett, Vince Carter, Tracy McGrady, Patrick Ewing, Rasheed Wallace and Stephon Marbury. Vaccaro's story is featured in the film "Air," where he will be portrayed by Matt Damon.

Gary Wagner



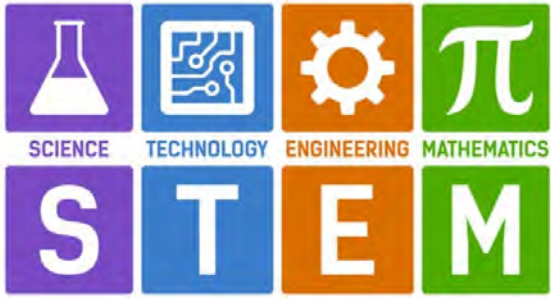
Gary Wagner is the vice president and senior regional officer of the Cincinnati branch of the Federal Reserve Bank of Cleveland. Wagner serves as the bank's senior official in the Cincinnati region, with responsibility for managing relationships with regional stakeholders, monitoring the region's economic environment, and conducting economic research and analysis. "Gary brings with him significant expertise on issues such as regional economics, state tax structures, and municipal pension systems, expertise gained through his work at the Federal Reserve Bank of Philadelphia and in academia," says Mark Schweitzer, senior vice president of the Cleveland Fed's External Outreach and Regional Analytics Department. "Gary's appointment is part of our ongoing commitment to outreach and engagement in the region, allowing the bank to gather information regarding economic developments in the Cincinnati region and to better inform our decision making." Since 2015, Wagner has served as the Philadelphia Fed's regional economic advisor, conducting applied research on regional and public finance issues. Prior to his work at the Philadelphia Fed, Wagner was a professor of economics for 15 years, most recently at Old Dominion University in Norfolk, Virginia. During his tenure there, he served as associate director of Old Dominion's Economic Forecasting Project and as co-editor of the State of the Region Report (2013–2014). Wagner has been a visiting scholar in the research department of the Federal Reserve Bank of St. Louis, as well as a member of the Governor's Council of Economic Advisors in Arkansas from 2008 to 2011 while serving as professor of economics at the University of Arkansas. Wagner holds a doctorate and a master's in economics from West Virginia University and a bachelor's in economics and political science from Youngstown State University.

#### Mel Watkins

Born in Memphis but raised in Youngstown, was the first African-American editor of the NYTimes book review. He has a notable career as an author, historian, and essayist. Some of his notable books include *Stepin Fetchit: The Life and Times of Lincoln Perry*; *Dancing with Strangers*, a Literary Guild Selection; and the highly acclaimed *On the Real Side: A History of African American Comedy*.

#### Kelly Ziccardi

Is an engineer at Honda of American Mfg., Inc. (HAM), and currently serves as a New Model Project Leaders in the New Model Department at Honda's Marysville Auto Plant (MAP). Born and raised in Ohio, Ziccardi grew up in Mineral Ridge and attended YSU on a valedictorian scholarship. She was named YSU's Engineering Woman of the Year for the graduating class of 2007, based on scholarship, service, and engineering achievement.



# ***STEM & Workforce Education & Innovation***

## ***Key Performance Indicators and Initiatives***



***Wim Steelant, March 12, 2025***

**YOUNGSTOWN STATE UNIVERSITY**



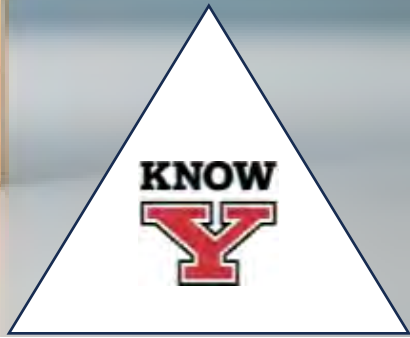
***College of  
Science, Technology,  
Engineering &  
Mathematics***



**Workforce  
Education & Innovation**  
Youngstown State University



# *Key Performance Indicators*



YOUNGSTOWN  
STATE  
UNIVERSITY

YOUNGSTOWN STATE UNIVERSITY



College of  
Science, Technology,  
Engineering &  
Mathematics



Workforce Education  
& Innovation  
Youngstown State University

January 24, 2024



YOUNGSTOWN STATE UNIVERSITY



College of  
Science, Technology,  
Engineering &  
Mathematics



Workforce Education  
& Innovation  
Youngstown State University

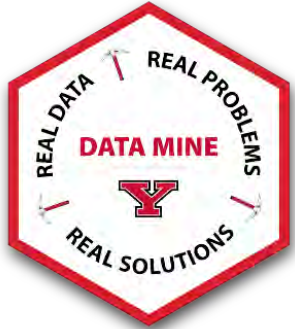
January 24, 2025



YOUNGSTOWN  
STATE  
UNIVERSITY

# KPI's of Success

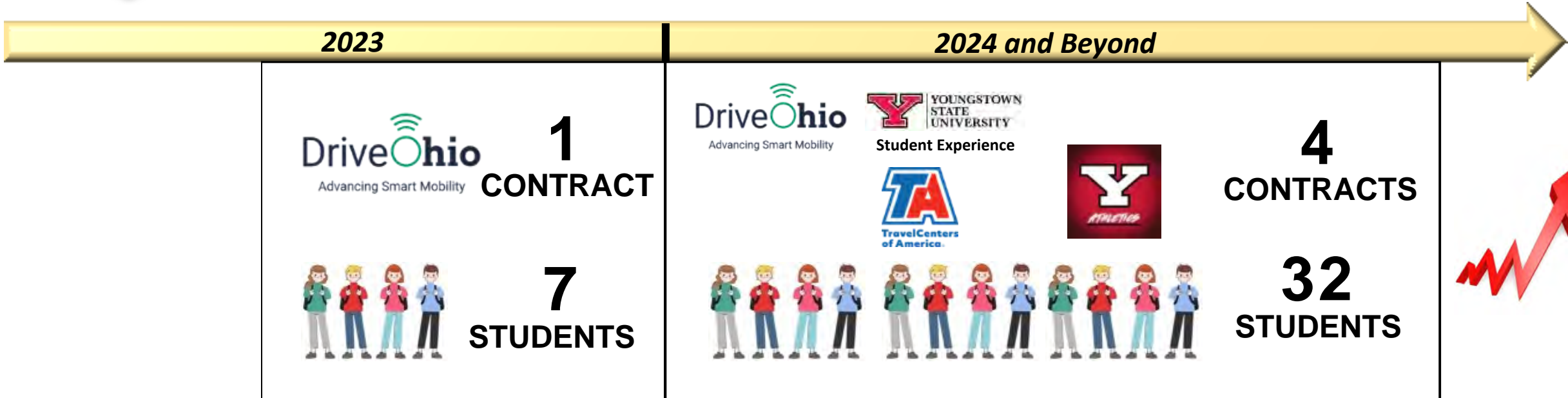
WEI Synchronized with  
YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond



**GOAL: IMPLEMENT BEST PRACTICES THAT ADDRESS STUDENT NEEDS THROUGHOUT THE STUDENT LIFE CYCLE TO INCREASE PERSISTENCE, COMPLETION AND POSTGRADUATE SUCCESS**

**Strategy:** Enhance student experiences through implementation of specific initiatives designed to actively engage them in co-curricular and extra-curricular activities

*YSU DataMine partners student teams (teams consist of students pursuing different majors) with corporate mentors to work on real-world data analytics projects. This partnership continues to expand with increased student participation.*



# KPI's of Success

WEI Synchronized with  
YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond

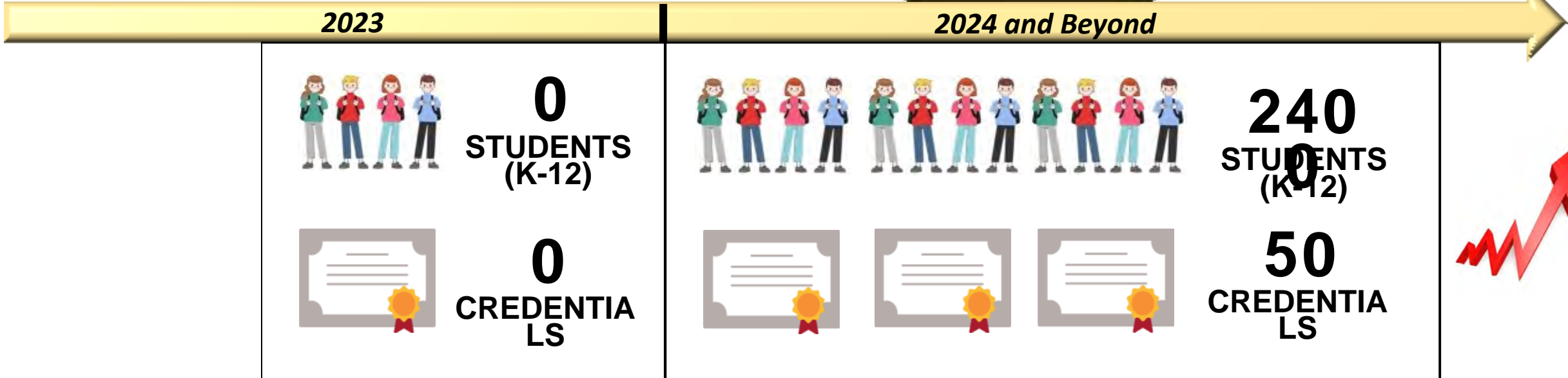


**GOAL:** DEVELOP A RECRUITMENT AND ENROLLMENT STRATEGY THAT ALLIGNS WITH A COMPLETION STRATEGY

**Strategy:** Expand and Enhance outreach and engagement with students prior to enrollment

*The Williamson Innovation Park will allow YSU Students, K-12 and workforce students to be engaged in hands-on experiences and credentialing. STEM roughly converts about 30% of all K-12 students that have engaged with us into attending YSU students.*

January 24, 2024





**WILLI MSON**  
 INNOVATION PARK  
 YOUNGSTOWN STATE UNIVERSITY

Grand opening!



**January 24, 2025**

**April 26, 2025**

**April 29, 2025**

**May 3, 2025**



**Lab/Educational Building**



**K8YSU Amateur Radio  
 SHOWCASE**  
 20-25 K5-8 participants



**Drone Flying Show Case  
 YSU - ESC**  
 150 High school participants



**Boy Scouts  
 Merrit Badge**  
 20 -30 participants

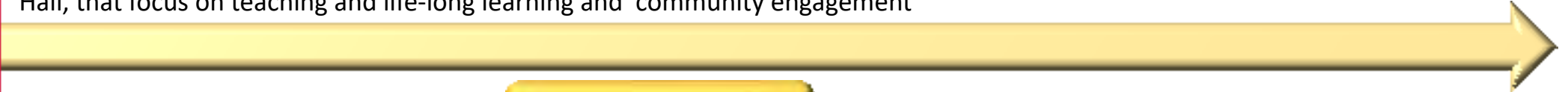


# KPI's of Success

WEI Synchronized with  
YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond

**GOAL: CONDUCT AND SUPPORT RESEARCH THAT PROVIDES RELEVANT AND MEANINGFUL EDUCATIONAL EXPERIENCES FOR STUDENTS AND FACULTY THAT ADDS VALUE TO AREA CITIZENS AND REGIONAL PARTNERS**

**Strategy:** Identify areas of research, service, and scholarship, in alignment with the Excellence Training Center (ETC) at Kohli Hall, that focus on teaching and life-long learning and community engagement



January, 2024

**6467**  
PEOPLE



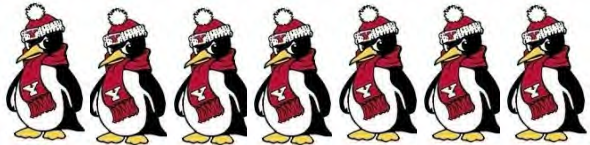
The Excellence Training Center has hosted 125 different events that have brought in more than 6000 people since the Grand Opening



**304**  
COMPANIES


Throughout the Mahoning, Trumbull, Columbiana and multiple neighboring counties, over 300 unique companies have come through the facility.

**2019+**  
YSU Students have taken classes at the




The ETC has hosted 89 for-credit classes including STEM First Year Engineering, FANUC Robotics and

**470**  
WORKFORCE  
CE  
CREDENTIALS  
LS



Issued at the ETC  
154 K-12 Certificates of Participation  
Totaling 624 credentials since July 2021



**2041**  
K-12  
STUDENTS

More than 400 students from area schools have toured the ETC exploring STEM degree opportunities and alternative educational pathways in 2023

# KPI's of Success

WEI Synchronized with  
YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond



**GOAL: CONDUCT AND SUPPORT RESEARCH THAT PROVIDES RELEVANT AND MEANINGFUL EDUCATIONAL EXPERIENCES FOR STUDENTS AND FACULTY THAT ADDS VALUE TO AREA CITIZENS AND REGIONAL PARTNERS**

**Strategy:** Identify areas of research, service, and scholarship, in alignment with the Excellence Training Center (ETC) at Kohli Hall, that focus on teaching and life-long learning and community engagement

## 2025 and Beyond

**7884+**  
PEOPLE



The Excellence Training Center has hosted 163 different events that have brought in more than 7000 people since the Grand Opening.

**205**  
Online Classes



The Excellence Training Center has had over 200 Advanced Manufacturing

online classes

**YOUNGSTOWN STATE UNIVERSITY**



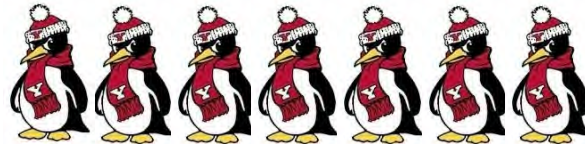
**332**  
COMPANIES

Throughout the Mahoning, Trumbull, Columbiana and multiple neighboring counties, over 300 unique companies have come through

the facility.

**2172+**

YSU Students have taken classes at the



The ETC has hosted 100 for-credit classes including STEM First Year Engineering, FANUC Robotics and Machining.

**13**  
SCHOOL DISTRICTS



Bridge the GAP between K-12 and STEM<sup>4.0</sup>

January, 2025

**1183**  
WORKFORCE  
CE  
CREDENTIALS



Issued at the ETC  
178 K-12 Certificates of Participation  
Totaling 1361 credentials since July 2021



**2463**  
K-12  
STUDENTS

More than 2000 students from area schools have toured the ETC exploring STEM degree opportunities and alternative educational pathways.

# Goals 6-6-2024 (BOT)

**Title:** Continued education (Revenue Producing)

**FOAP:** 112013-140601-XXXXXX-12 (ETC)

Most of this funding had to be used for financial cleanups

Units	Role	Return on Investment	FY 23	FY 24	FY 25-28
Commercial     	Low volume productions, prototyping, testing, regional manufacturing support	Produces revenue generated dollars supporting ETC operations	<u>\$457,388</u>	<u>\$433,539</u>	<u>\$1,500,000</u>

Predictions made 6-6-24

Available Balance as of 12-31-2024: \$485,679



Goal: \$1,000,000 by the end of FY 25



**Important reminder: WEI needs to be self sustaining!**

# KPI's of Success

WEI Synchronized with  
YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond

**GOAL: CONDUCT AND SUPPORT RESEARCH THAT PROVIDES RELEVANT AND MEANINGFUL EDUCATIONAL EXPERIENCES FOR STUDENTS AND FACULTY THAT ADDS VALUE TO AREA CITIZENS AND REGIONAL PARTNERS**

**Strategy:** Identify areas of research, service, and scholarship, in alignment with the Excellence Training Center (ETC) at Kohli Hall, that focus on teaching and life-long learning and community engagement



January, 2024

## Overview

As we wrap up 2023, YSU's IT Workforce Accelerator has been officially launched and is settling into Silvestri Hall. We have begun to lay the foundation for growth and impact. Our focus has been on establishing a sustainable model, expanding credentialing opportunities, and aligning with regional workforce demands. These efforts set the stage for even greater expansion and innovation in 2024 as we continue to strengthen our role in workforce development.



**417**  
CREDENTIALS  
ISSUED

Through ITWA

*\*Formally IT, Business, and Professional Skill focused areas.*



**0**  
COMPANIES

We look forward to welcoming companies from Mahoning, Trumbull, Columbiana, and other neighboring counties.



**0**  
VISITORS

The IT Workforce Accelerator moved into Silvestri Hall in October 2023.



**0**  
CREDENTIALS  
ISSUED

through ITWA/WCBA Ohio EIP collaboration  
*\*In planning phase.  
Class to start Spring 2024*



YOUNGSTOWN  
STATE  
UNIVERSITY

# KPI's of Success

**WEI Synchronized with**  
**YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond**

**GOAL: CONDUCT AND SUPPORT RESEARCH THAT PROVIDES RELEVANT AND MEANINGFUL EDUCATIONAL EXPERIENCES FOR STUDENTS AND FACULTY THAT ADDS VALUE TO AREA CITIZENS AND REGIONAL PARTNERS**

**Strategy:** Identify areas of research, service, and scholarship, in alignment with the Excellence Training Center (ETC) at Kohli Hall, that focus on teaching and life-long learning and community engagement



**2025 and Beyond**  
**January, 2025**

## Current Overview

YSU's IT Workforce Accelerator (ITWA) has made significant strides compared to where we stood at the end of 2023. Over the past year, we have streamlined our programs, strengthened partnerships within industry and the community, and enhanced our efforts in building clear pathways from training to high-quality jobs, ensuring individuals gain the skills needed to succeed in today's workforce. We remain committed to driving innovation and workforce readiness in the evolving tech landscape.

As we look ahead, ITWA is evolving into the Advanced Technology Workforce Accelerator (ATWA) to better align with the integration of IT, operational technology (OT), and advanced wireless technologies. This transformation reflects a broader vision of preparing a workforce for Industry 4.0 by offering training in areas like IoT, industrial cybersecurity, and 5G-enabled smart factories. ATWA distinguishes itself by merging IT, OT, and connectivity solutions into a cohesive learning experience driven by industry needs. Through innovative curriculum and strategic employer partnerships, ATWA aims to help position YSU as a leader in advanced technology workforce development, fostering economic growth and career opportunities.



**604**  
**CREDENTIALS**  
**ISSUED**

through ITWA



**34**  
**YSU STUDENTS**  
**CERTIFIED**

79 Industry-Recognized  
Credentials Issued

*\*Count included in total # of  
credentials issued*



**32**  
**COMPANIES**

Over 30 unique companies  
have visited from Mahoning,  
Trumbull, Columbiana, and other  
neighboring counties.



**371**  
**VISITORS**

The IT Workforce Accelerator  
has hosted 5 different events that  
have brought in more than 350 people.



**90**  
**CREDENTIALS**  
**ISSUED**

through ITWA/WCBA  
Ohio EIP collaboration  
*\*Next class to start Spring 2025*



**YOUNGSTOWN**  
**STATE**  
**UNIVERSITY**

# KPI's of Success

*WEI Synchronized with  
YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond*

**GOAL: CONDUCT AND SUPPORT RESEARCH THAT PROVIDES RELEVANT AND MEANINGFUL EDUCATIONAL EXPERIENCES FOR STUDENTS AND FACULTY THAT ADDS VALUE TO AREA CITIZENS AND REGIONAL PARTNERS**

**Strategy:** Identify areas of research, service, and scholarship, in alignment with the Excellence Training Center (ETC) at Kohli Hall, that focus on teaching and life-long learning and community engagement



*January, 2025*

*2025 and beyond*

**New**

ITWA is driven by grant funding

ITWA will offer training modules on 'NT'

**Important reminder: WEI needs to be self sustaining!**



# KPI's of Success

WEI Synchronized with  
YSU Strategic Plan: Taking Charge of our Future: 2020 and Beyond



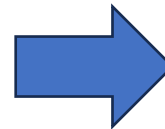
Workforce  
Education & Innovation  
Youngstown State University

**GOAL: DEVELOP A CULTURE OF ASSESSMENT THAT ENSURES THE QUALITY OF ACADEMIC PROGRAM MAJORS, MINORS, AND OTHER CREDENTIALS**

**Strategy:** Develop a mechanism to continually identify, assess, and implement new academic programs, badges, credentials, certifications or coursework integration

**GOAL: ESTABLISH UNIVERSAL LEARNING OUTCOMES TO ENHANCE THE VALUE OF A YSU DEGREE**

**Strategy:** *Revise General Education Requirements to reflect the learning outcomes approved by Academic Senate*



**Industry-Recognized Credentials**



**College Credit**

Credential	Credential Name	YSU Appr Course	YSU Course Name
ITIR001	Industrial Robotics	MET 4860+L (3Cr)	Robotics Technology
ITEET022	PLCs and automation	EET 3712+L (3 Cr)	Programmable Logic Controllers
ITMET005	Computer Aided Design	CCET 1503, 1504 (3 Cr)	CAD Technology & Drafting and Plan Reading
ITITN017	IT Networking	CSIS 3782 (3 Cr)	Cisco Academy Networking 1
ITITN018	IT Networking	CSIS 3783 (3 Cr)	Cisco Academy Networking 2
ITITN002	CompTia Network+	CSIS 3723 (3 Cr)	Networking concepts and administration

To be submitted

In Progress



# UPDATE NEW PROJECTS



YOUNGSTOWN  
STATE  
UNIVERSITY



**STEM 5.0**

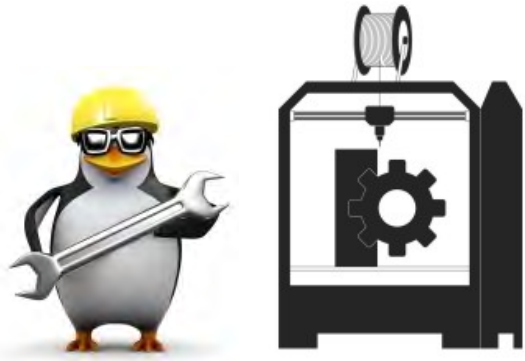


- ➔ *Director of Driving School: Brian Beckett*
- ➔ *Homebase is Youngstown, with offerings in Steubenville*
- ➔ *We have two trucks donated (tanker trailer)*
- ➔ *Working out the details for fuel donation and truck maintenance*
- ➔ *Hoping to start Summer 2025*



- ➔ *AAS Aviation Curriculum to the State/HLC*
- ➔ *Youngstown-Warren Regional Airport - Jets*
- ➔ *Hoping to start late Spring Semester 2026*



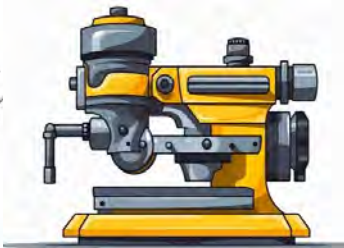
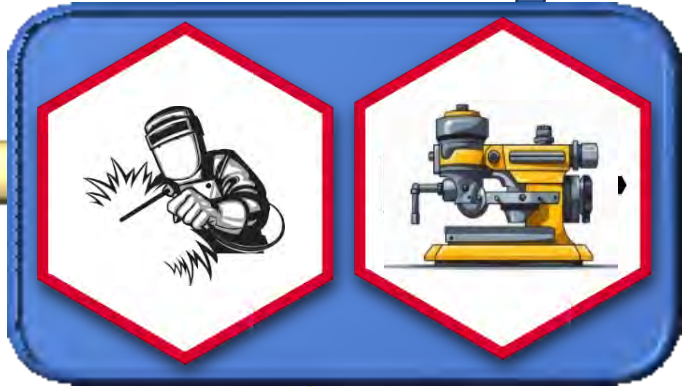


- ➔ *\$2,000,000 3D-printing material at EGCC – Youngstown Campus*
- ➔ *Transferred successfully to WEI and located at the ETC*
- ➔ *Integrated in STEM Programs/Courses*
- ➔ *Training*
- ➔ *K-12 Summer camps*



YOUNGSTOWN  
STATE  
UNIVERSITY

OAA support



➔ *AAS Welding approved by HLC and ODHE*

➔ *We do not have access to the equipment at EGCC*

➔ *We obtained the funding via Rapids 7, still missing PPE*

➔ *Working out the details for a location*

➔ *Hoping to start late Fall Semester 2025*

➔ *AAS Machining approved by HLC and ODHE*

➔ *We do not have access to the equipment in ETC or Steubenville*

➔ *Similar situation for Industrial Maintenance Equipment*





YOUNGSTOWN  
STATE  
UNIVERSITY



**RESOLUTION TO AMEND  
THE BYLAWS OF THE  
BOARD OF TRUSTEES OF YOUNGSTOWN STATE UNIVERSITY**

**WHEREAS**, the Board of Trustees of Youngstown State University is a self-governing body established under Chapter 3356 of the *Ohio Revised Code*;

**WHEREAS**, the Board of Trustees has adopted *Bylaws of the Board of Trustees of Youngstown State University* (the "*Bylaws*") regarding its governance and policies regarding its procedures;

**WHEREAS**, a motion was made and seconded at the December 11, 2024 meeting of the Governance Committee of the Board to amend the Bylaws to:

- Permit exceptions to the Guidelines related to global/national trustee

**WHEREAS**, this is the second reading of the proposed adjustments to the Bylaws.

**NOW, THEREFORE, BE IT RESOLVED**, that effective immediately, the Board of Trustees of Youngstown State University does hereby amend its *Bylaws* as shown attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025 -**

**3356-1-01 Bylaws.**

(A) Article I. Definitions.

- (1) "Board" means the board of trustees of Youngstown state university.
- (2) "University" means Youngstown state university.
- (3) "Chairperson" means the chairperson of the board of trustees of Youngstown state university.
- (4) "Vice chairperson" means the vice chairperson of the board of trustees of Youngstown state university.
- (5) "Trustee" means a member of the board appointed for a term of nine years, or for the remainder of such a term, by the governor of the state of Ohio pursuant to section 3356.01 of the Revised Code.
- (6) "Student trustee" means a student member of the board appointed by the governor of the state of Ohio pursuant to section 3356.01 of the Revised Code.
- (7) "President" means the president of Youngstown state university.
- (8) "Secretary" means the secretary to the board of trustees of Youngstown state university.
- (9) "Designee" means a member of the university's administrative office(s).

(B) Article II. Meetings.

- (1) Regular meetings.
  - (a) The board shall meet no less than four times each year, and at such other times as may be necessary for the best interests of the university. Meetings shall be called at such times as the board prescribes, provided, however, that meetings will usually be held in the months of September, December, March, and June. At the time of the

adjournment of each meeting, the board shall provide, by resolution, the date, time, and place for holding the board's next regular meeting. No less than five days prior to the date of a regular meeting, the secretary, or designee, shall provide written notice of said meeting to every member of the board. Notices may be hand-delivered or sent via facsimile, electronic mail, or by first class mail to the residence or business address of a board member.

- (b) Any board member may waive notice of a regular meeting. Attendance of a board member at a regular meeting shall constitute a waiver of notice of the regular meeting.
- (2) Special meetings.
- (a) Special meetings of the board may be called by written request (the "Call") signed by the chairperson, the president, or by three trustees, and delivered to the secretary. The "Call" for a special meeting shall specify the date, time, place, and purposes thereof, although other business than that specified in the "Call" may be considered at any such meeting. Upon receipt of a call for a special meeting, and no less than forty-eight hours prior to the time of commencement of the special meeting, the secretary, or designee, shall provide notice of the special meeting to every member of the board and to the president. Notice of a special meeting shall include the date, time, place, and purposes thereof, as set forth in the "Call." Notice of a special meeting may be given in oral or written form and may be given directly to the board member by telephone or direct conversation, or by facsimile, hand delivery, electronic or first-class mail sent to the board member's residence or place of business.
  - (b) Any board member may waive notice of a special meeting. Attendance of a board member at a special meeting shall constitute a waiver of notice of the special meeting.
- (3) Emergency meetings. In the event of an emergency wherein the best interests of the university require immediate official action by



the board, the chairperson (or in his or her absence or disability, the vice chairperson) or the president (or in his or her absence, the provost of the university) may call an emergency meeting of the board. In such event, all reasonable effort shall be made to schedule the emergency meeting in order to permit all of the members of the board to attend the emergency meeting. In such event, all reasonable effort shall be made to notify all of the members of the board of the date, time, place, and nature of the emergency requiring immediate official action.

- (4) Place of meetings.
  - (a) All regular and special meetings of the board shall be held on university property or through YSU supported technology as provided by law, or on rare occasions off-campus, but with easy access to the public, if circumstances warrant as determined by the chairperson and the president and as provided by law. The place of all board meetings shall be specified in the notice of the meeting.
  - (b) Emergency meetings of the board shall be held on university property unless, in the judgment of the person or persons making the "Call," the circumstances creating the emergency render a meeting on university property either physically impractical or infeasible.
- (5) Quorum.
  - (a) A majority of the trustees, when duly convened pursuant to university bylaws, shall constitute a quorum for the transaction of business at any meeting of the board. Student trustees shall not be considered in the determination of a quorum. If less than a majority of the trustees are present at, or at any time during said meeting, a majority of the trustees present may adjourn the meeting from time to time without further notice. When, upon reconvening any such adjourned meeting, and with a quorum present, any business may be transacted which might have been transacted at the meeting as originally notified.

- (b) At any meeting where a quorum is present, a majority vote of those present and voting shall be required for any official action by the board, except as otherwise permitted by law or by the bylaws contained in this rule.
  - (c) A trustee may abstain from voting on a matter. A trustee that abstains from voting shall be counted in the determination of a quorum but shall not be counted as voting in favor or against the matter upon which the vote is taken. Trustees having a direct personal or pecuniary interest in a matter that is not common to other members of the board should declare that interest and refrain from discussing and voting on that matter.
- (6) Organization of meetings.
- (a) At each meeting of the board, the chairperson, or in the chairperson's absence, the vice chairperson, or in the absence of both, a chairperson pro tempore, chosen by a majority of the trustees present, shall preside. The secretary, or in the secretary's absence, any person appointed by the chairperson, shall keep the minutes of the meeting, and otherwise perform the duties of secretary of the meeting.
    - (i) The minutes shall be developed as prescribed by law and include information that provides perspectives regarding decisions made by the board as well as demonstrate the board is proactive in its responsibilities to both the state of Ohio and in consideration of the continuing accreditation of the university.
    - (ii) The minutes shall be maintained on the university's board of trustees website in addition to those also maintained via the Maag library in accordance with laws and/or policies associated with records retention.
    - (iii) Minutes shall be prepared and provided to the board as soon as practicable after each board meeting in

order that members may appropriately review and approve the minutes.

- (7) Order of business. The order of business at all regular and special meetings of the board shall be as follows:
  - (a) Roll call.
  - (b) Proof of notice of meeting.
  - (c) Disposition of minutes.
  - (d) Presentation(s) from the university community (optional).
  - (e) Report of the president.
  - (f) Report of the committees of the board.
  - (g) Communications and memorials.
  - (h) Unfinished business.
  - (i) New business.
  - (j) Chairperson's remarks and requested additional president's remarks as chosen to be offered.
  - (k) Election of board officers (as pertinent).
  - (l) Time and place of next regular meeting of the board.
  - (m) Adjournment.
- (8) Parliamentary procedure. Questions of parliamentary procedure shall be resolved in accordance with "Robert's Rules of Order." The secretary, or designee, shall serve as the board's parliamentarian.

- (9) Procedures for presentation of items to be considered.
- (a) Any proposed action introduced by a board member which would substantially affect university policy shall be presented to the chairperson prior to the meeting at which the matter is to be considered by the board. The proposed action shall be submitted in sufficient time to allow the chairperson to assign the proposed action to an appropriate board committee to review such action and to make whatever recommendations to the full board the committee deems to be appropriate.
  - (b) The annual budget and all other major questions of university policy recommended by the president shall be presented to each member of the board prior to the meeting at which the matter is to be considered by the board. The proposed action shall be submitted in sufficient time to allow the appropriate board committee to review such action and to make whatever recommendations to the full board it deems to be appropriate.
  - (c) Any business to be presented to the board by other than a board member or the president shall be submitted in writing to the chairperson, who shall refer it to the appropriate board committee for consideration and possible action. The chairperson may direct that such business be placed on the agenda.
- (10) Public notice of meetings.
- (a) Public notice of all board meetings shall meet or exceed that required by Ohio law, section 121.22 of the Revised Code.
  - (b) Any person or news medium may ascertain the time and place of all regularly scheduled board meetings and the time, place, and purpose of all special board meetings by contacting university communications or on the internet at [board of trustees website](#). The local media, and other interested parties, will be made aware of upcoming

meetings of the board when requesting such notification by contacting the office of communications.

(C) Article III. Officers and organizations.

- (1) Powers of the board. The board shall have the power, not inconsistent with law or university bylaws, to do all things necessary for the proper maintenance and successful and continuous operation of the university. No individual trustee, student trustee, or committee of the board shall have authority to commit or bind the board or the university to any policy, action, or agreement unless specifically authorized by action of the board.
- (2) Officers of the board. The officers of the board shall be the chairperson, the vice chairperson, and the secretary. The board may appoint such other officers or employees as the interests of the university require. Such officers and employees shall have such authorities, and shall perform such duties, as may be prescribed by the board.
- (3) Qualifications, election, and term of office. The chairperson and vice chairperson shall be trustees. The qualifications of all other officers shall be determined by the board. The officers of the board shall be annually elected by the trustees at the board's last regular meeting of the university's fiscal year. Newly elected officers shall take office immediately following adjournment of the meeting at which they are elected and shall hold their offices until their successors are elected.
- (4) Chairperson. The chairperson, when present, shall preside at all meetings of the board and perform generally all duties incident to the office of the chairperson and such other duties as may be assigned to the chairperson by the board. Unless contrary to board policy or the bylaws contained in this rule, the chairperson may assign any of the chairperson's duties to another trustee.
- (5) Vice chairperson. In the event of a temporary vacancy in the office of the chairperson or at the request of the chairperson, or in the event of temporary absence or disability of the chairperson, the vice chairperson shall perform all the duties of the chairperson and,

while so acting, shall have all the power and authority of, and be subject to the restrictions upon, the chairperson.

- (6) Secretary. The secretary, or designee, shall prepare minutes of all meetings and proceedings of the board. The secretary, or designee, shall give notice of all meetings of the board, when required by the provisions of Article II and the appropriate sections. The secretary, or designee, shall serve as the board's parliamentarian. At the last regular meeting of the university's fiscal year, the secretary shall submit a written report of board member attendance at board and committee meetings for the preceding year. The secretary shall perform such other duties as from time to time may be assigned to the secretary by the board or the chairperson.
- (7) Attorney general. The attorney general of the state of Ohio shall be the legal advisor to, and represent, the university and/or the board in all matters civil or criminal involving the university of the board.

The general counsel of the university is a member of the Ohio attorney general's office and represents the board of trustees on behalf of the state of Ohio.
- (8) Removal of board officers. Any officer of the board may be removed as such officer at any time, either with or without cause, by resolution adopted by not less than six trustees at any regular meeting of the board. Any officer may be removed as such officer, either with or without cause, by resolution adopted by not less than six trustees at any special meeting of the board, provided that such removal action was indicated on the notices of such special meeting.
- (9) Student trustees. Section 3356.01 of the Revised Code provides for appointments of two students to the board but provides that student trustees shall have no voting power on the board, that student trustees shall not be considered as members of the board in determination of a quorum, and that student trustees shall not be entitled to attend executive sessions of the board.
- (10) Permanent vacancies. In the event of a permanent vacancy in the office of the chairperson or vice chairperson, the remaining

trustees may elect a successor to fill such permanent vacancy. What constitutes a “permanent vacancy” shall be determined by the board.

- (11) Board orientation.
- (a) There shall be at least annually a board orientation developed specifically for onboarding new members of the board but will be open to all board members to attend.
  - (b) The orientation shall include the chair, vice chair, secretary, and president and the executive officers of the university as well as any other individual invited to present at and/or attend the orientation.
  - (c) The orientation should be constructed in such a fashion that new board members in particular can more easily and rapidly engage themselves fully in all matters before the board as specified in university bylaws and otherwise specified by law.
  - (d) Orientation may be comprised of various types and levels of engagement and interactions that optimally served the purpose of the orientation session(s).
- (12) Ethics training. The board, executive officers of the university and other invited members of the administration’s leadership will annually engage in ethics training.

(D) Article IV. Board committees.

- (1) Membership. All trustees and student trustees shall be voting members of all board standing committees, unless otherwise provided by university bylaws.
- (2) National/global trustees. In order to take advantage of the diverse talents, resources, and experiences of friends and alumni of the university who can contribute to the current and future success of the university, the position of national/global trustees has been established in accordance with the following guidelines, **to which exceptions can be made:**

Formatted: Highlight

- (a) The board may nominate and appoint persons to the position of national/global trustee. National/global trustees shall be nominated and appointed by the board of trustees on the basis of one or more of the following criteria: success in chosen field or business; state or national prominence; ability to serve as an advocate for higher education; ability and willingness to offer advice to the board and university president and/or demonstrated support for Youngstown state university.
- (b) There shall be no more than three persons serving in the position of national/global trustee at any one time. National/global trustees shall serve staggered terms such that no more than one such position expires in a calendar year.
- (c) Each national/global trustee shall be appointed for a three-year term and shall be eligible for reappointment for additional terms as determined by the board.
- (d) National/global trustees shall have no voting privileges on the board, shall not be considered in determining whether a quorum is present and shall not be eligible to be an officer of the board, but may otherwise participate in all activities of the board.
- (e) National/global trustees shall not be compensated for their service but shall be paid their reasonable and necessary expenses in the same manner that applies to trustees.
- (f) National/global trustees shall follow the Ohio ethics laws, including those set forth in Chapter 102. and sections 2921.42 and 2932.43 of the Revised Code, the board's bylaws and university policy.
- (g) National/global trustees shall be appointed by board action after nomination by the governance committee of the board in accordance with the process described for the



nomination and election of board officers set forth in the bylaws contained in paragraph (D)(6)(i) of this rule.

- (h) National/global trustees may be removed by a majority vote of the board.
  - (i) A trustee may serve as a national/global trustee, but cannot be appointed to serve as a national/global trustee until at least one year after the board member's term as a trustee has ended.
  - (j) An employee or former employee of the university may serve as a national/global trustee but cannot be appointed to serve as a national/global trustee until at least one year after that person's compensated service to the university has ended.
  - (k) National/global trustees shall be entitled to legal defense and indemnification against claims and liabilities that might arise from the performance of their duties on behalf of the board to the fullest extent permitted by Ohio law. In addition, the national/global trustees will be considered a "volunteer" for purposes of coverage under the university's liability insurance.
- (3) Committee chairperson and vice chairperson. The chairperson shall appoint the chairperson and vice chairperson of each standing committee, and members of such committees that are not otherwise composed of all of the trustees or as otherwise set forth herein, subject to the approval of the board. Committee chairpersons and vice chairpersons shall be trustees.
- (4) Quorum and conduct of committee meetings.
- (a) Five members of a standing committee shall constitute a quorum, unless otherwise provided. A majority of the members of subcommittee of a standing committee shall constitute a quorum, unless otherwise provided. The act of a majority of the members present and voting at a meeting at which a quorum is present shall be the act of the

committee or subcommittee. However, regardless of the existence of a quorum in number, at least one of the following four persons must be present at a committee or subcommittee meeting in order for the committee to conduct business:

- (i) The chairperson;
- (ii) The vice chairperson;
- (iii) The (sub)committee chairperson; or
- (iv) The (sub)committee vice chairperson.

A committee member may abstain from voting on a matter. A committee member that abstains from voting shall be counted in the determination of a quorum but shall not be counted as voting in favor or against the matter upon which the vote is taken. Committee members having a direct personal or pecuniary interest in a matter that is not common to other members of the board should declare that interest and refrain from discussing and voting on that matter.

- (b) A majority of the members of a special or ad hoc committee, including any student trustees, shall constitute a quorum. The act of a majority of the members present and voting at a meeting at which a quorum is present shall be the act of the special or ad hoc committee.
  - (c) The board and university administration will mutually develop committee agendas, with the chairperson having authority to approve all final agendas.
- (5) Rules. Each committee may adopt rules for its own governance not inconsistent with university bylaws or any rule adopted by the board.

- (6) Standing committees. The board's standing committees, and their respective duties and areas of responsibility, shall be as follows:
- (a) Academic excellence and student success committee.
    - (i) To consider those matters that warrant board attention or require board action relating to:
      - (a) Academic policies which provide for and govern faculty teaching, research, and service;
      - (b) Establishment of new academic programs, changes in or deletions of existing academic programs, and the issuing of certificates or the granting of degrees;
      - (c) Policies which provide for and govern retention, persistence, progress, and graduation, including but not limited to, diversity issues and general education requirements;
      - (d) Policies which provide for and govern student housing and student life;
      - (e) Institutional mission, strategic and master-plans, or relevant parts thereof, dealing with matters within the purview of the committee;
      - (f) Policies that provide for the acquisition, development, access, and use of electronic technology within the purview of the committee.
    - (ii) To assist the board in the exercise of its oversight responsibilities relating to those academic and

administrative departments within the purview of the committee.

- (iii) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(a)(ii) of this rule, or as assigned by the board or its executive committee.
  - (iv) Provided that he or she is a member of the university faculty, the chair of the YSU academic senate shall be a nonvoting member of the committee. In the event that the chair of the YSU academic senate is not a member of the university's faculty, then the faculty member holding the highest-ranking position within the YSU academic senate leadership shall hold this position. This position shall not count toward the determination of a quorum of the committee.
- (b) Institutional engagement committee.
- (i) To consider those matters that warrant board attention or require board action relating to:
    - (a) Policies that provide for and govern student recruitment, financial aid, orientation and enrollment, including but not limited to, integrated marketing, yield, scholarship optimization, and career success;
    - (b) Policies that provide for and govern the external relationships established by or required of the University, excluding matters assigned to other of the board's standing committees;
    - (c) Policies that provide for and govern university fundraising, including but not limited to, institutional advancement

through the YSU foundation, the YSU research foundation, the annual fund, capital campaigns, special projects and solicitations;

- (d) The Youngstown state university development agreement between the university and the YSU foundation.
- (e) Policies that provide for and govern continuing university relations with its graduates, including but not limited to, alumni associational activity;
- (f) Policies that provide for and govern university operations directed toward effective communications, public relations, marketing, and the enhancement of community goodwill;
- (g) Policies that provide for and govern university public service in, and partnerships with, the larger community, or segments thereof, including but not limited to, those relationships which are contractual; policies which provide for and govern University intergovernmental relationships, including but not limited to, those with the city of Youngstown, Mahoning county, as well as with agencies and departments of state and federal governments;
- (h) Institutional mission, strategic and master plans, or relevant parts thereof, dealing with matters within the purview of the committee; and
- (i) Policies that provide for the acquisition, development, access, and use of electronic

technology within the purview of the committee.

- (ii) To assist the board in the exercise of its oversight responsibilities relating to those administrative departments and functions within the purview of the committee.
  - (iii) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(b)(ii) of this rule, or as assigned by the board or its executive committee.
- (c) Finance and facilities committee.
- (i) To consider those matters that warrant board attention or require board action relating to:
    - (a) Financial and budgetary policies, including but not limited to, the annual operating budget, and the capital improvement budget;
    - (b) Policies governing debt instruments issued by the university;
    - (c) The financial and budgetary impact of major agreements, contracts, programs, plans or initiatives to be recommended to the board by any standing, ad hoc, or special committee, including but not limited to, recommendations regarding university personnel, insurance, and donations;
    - (d) The acquisition of real property by purchase, gift, or otherwise; the disposition of real property; the acquisition or disposition of significant property broadly classified as technology;

- (e)* Major projects, including but not limited to, the construction, demolition, or remodeling of facilities, and, as appropriate, the selection of architects and engineers;
  - (f)* Institutional mission, strategic and master plans, or relevant parts thereof, dealing with matters within the purview of the finance and facilities committee;
  - (g)* Policies as related to the health of the campus community particularly related to current or emerging health crises; and
  - (h)* Policies that provide for the acquisition, development, access, and use of electronic technology within the purview of the committee.
- (ii)* To assist the board in the exercise of its oversight responsibilities relating to those administrative departments and functions within the purview of the finance and facilities committee, including but not limited to, the conduct, and scrutiny of the auditor's work product, of the annual audit, as well as any special audits, undertaken by:
- (a)* The university's internal auditor;
  - (b)* External auditors; and
  - (c)* State auditor.

Auditor's work product includes findings, management letters, and all other relevant documentation.

- (iii)* To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in

paragraph (D)(6)(c)(ii) of this rule, or as assigned by the board or its executive committee.

- (iv) The finance and facilities committee will include the following subcommittee:
  - (a) Audit subcommittee.
    - (i) The audit subcommittee, chaired by the chairperson of the finance and facilities committee, will be composed of the chairperson and four additional trustees who will be appointed annually by the chairperson of the board. As appropriate, when receiving and considering certain audit reports, the president may be excused from the subcommittee proceedings.
    - (ii) The audit subcommittee will meet at least once annually and perform those duties as assigned by the finance and facilities committee relative to the bylaws contained in paragraph (D)(6)(c)(ii) of this rule.
    - (iii) The subcommittee will report its findings and recommendations to the finance and facilities committee.
  - (d) Investment committee.
    - (i) To consider those matters that warrant board attention or require board action relating to:  
  
Section 3345.05 of the Revised Code, to exercise the authority and responsibility provided by law including but not limited to:





- (e) Policies that assure the effectiveness of implementing the committee's endorsed budget;
  - (f) Academic performance and progress of student-athletes annually;
  - (g) Governance policies related to intercollegiate athletics;
  - (h) The president's proposed approach to the selection of and term of service of the NCAA faculty representative(s);
  - (i) Comparison of benchmarks that have been mutually agreed upon by the president and the director of intercollegiate athletics and endorsed by the committee; and
  - (j) The faculty NCAA athletics representative(s) in serving as a liaison between the academic enterprise and the intercollegiate athletics department and receives the yearly update provided to the academic senate.
- (ii) The faculty representative(s), as specified in rules 3356-6-02 and 3356-6-03 of the Administrative Code (university policies 3356-6-02 and 3356-6-03), shall be a nonvoting member(s) of the committee. This (these) position(s) shall not count toward the determination of a quorum of the committee.
- (iii) To assist the board in the exercise of its oversight responsibilities relating to those administrative departments and functions within the purview of the committee.

- (iv) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(e)(iii) of this rule, or as assigned by the board or its executive committee.
- (f) University affairs committee.
  - (i) To consider those matters that warrant board attention or require board action relating to:
    - (a) Policies that provide for and govern the internal administrative operations of the university, excluding matters assigned to other of the board's standing committees;
    - (b) Policies that provide for and govern university employment where collective bargaining agreements apply, including but not limited to, oversight of the collective bargaining process and labor negotiations with unions representing university employees;
    - (c) Policies that provide for and govern university employment exempt from collective bargaining agreements, including but not limited to, oversight of contractual arrangements with exempt personnel;
    - (d) Policies that provide for equal opportunity standards and govern equal opportunity practices in university employment and operations, including but not limited to, implementation of affirmative action initiatives;
    - (e) Policies that provide for the acquisition, development, access, and use of electronic technology; and





action; for purposes of this consideration, the president may be excused from the committee's proceedings;

- (b) Matters relative to the employment, assessment and compensation of the secretary, if determined by the board to be necessary, with recommendation to the board, as appropriate, for its attention or action; for purposes of this consideration, the secretary may be excused from the committee's proceedings;
  - (c) Matters not within the assigned purview of any board standing, ad hoc, or special committee; the executive committee will report on such matters, as appropriate, to the board for its attention or action;
  - (d) Special assignments of particular matters, not clearly within the purview of any board committee, to one of the board's standing, ad hoc, or special committees; the designated committee will be instructed to report either to the executive committee or to the board;
  - (e) Resolution of jurisdictional ambiguities between or among the board's standing, ad hoc, or special committees; and
  - (f) Other matters as appropriate to an executive committee, or as assigned by the board.
- (i) Governance committee.
- (i) The governance committee shall be chaired by the chairperson, except as otherwise provided herein, and will meet on an as-needed basis to:

- (a) Consider proposed changes in the bylaws of the board, with recommendation to the board, as appropriate, for its attention or action;
- (b) Consider proposed changes in board and committee procedures, in full or in part, not stipulated in the bylaws, including but not limited to, scheduling, administrative staff participation or assistance, etc., with recommendation to the board, as appropriate, for its attention or action;
- (c) Any institutional mission statement, strategic or master plans, with recommendation to the Board, as appropriate, for its attention or action;
- (d) Develop and schedule board advances, workshops, seminars, orientation programs, and other special events, with recommendation to the board, as appropriate, for its attention or action;
- (e) Provide for periodic board self-evaluation and assessment;
- (f) Elect officers annually through a nomination process at its next to last regularly scheduled quarterly meeting of the university's fiscal year.
- (g) The next elected chair will annually survey the trustees regarding their interest, willingness and qualifications to serve in leadership roles in the forthcoming term. The chair will determine the committee assignments that will be in place at the first meeting of the new fiscal year; and





As may be necessary, the budget may be revised from time to time by the board. After approval by the board, the budget shall govern financial transactions. The president shall establish procedures for the expenditure of all budgeted funds in accordance with the policies of the board. In administering the budget, the president may make or authorize transfers or adjustments in individual budget accounts or in local unrestricted accounts provided that no such action shall increase the total of budgeted expenditures. Whenever income fails to meet budgeted income, the president shall present to the board for its review and approval a plan to address any anticipated shortfalls. The status of the budget shall be reported to the board at each of its regularly scheduled meetings.

- (b) Revisions of fees and other charges. From time to time, but no less than annually, the president shall recommend to the board for its approval a continuation or revision of the instructional fees, tuition, general fees, and other uniform charges.
- (c) Service charges. The president may fix and announce other fees, fines, and rental or service charges. No such other fees or charges shall be imposed until authorized by the president.
- (d) Purchase of insurance.
  - (i) The president shall cause to have prepared and submitted to the board, at or before its first regular meeting after January first of each year, a report that tabulates all insurance policies in force, including coverage, current premiums and premiums paid during the previous two years, and agents servicing these policies. This report shall include, but is not limited to: general, fire, liability, bonds, property, automobile, comprehensive, officers and directors' liability, medical and hospitalization contracts, or any other policy for the protection of Youngstown state university's personnel and property.

- (ii) All insurance shall be purchased through the president or his or her designee.
- (e) Inventory of real property. At the close of each fiscal year, the president shall cause to be prepared and submitted to the board, at or before its first regular meeting after September first of each year, an inventory of all real property managed, owned, leased, rented, or under option to the university. This report shall include acreage held, an estimate of land and building values, a general statement on the condition of the physical plant, and such other details as may be directed by the board or the president.
- (f) Obligation of the university. At the close of each fiscal year the president shall cause to be prepared and submitted to the board a report describing the obligations of the university, financial and otherwise, the terms and conditions of repayment or satisfaction of such obligations and any security given by the university toward such obligations.
- (g) Annual financial report. At the end of each fiscal year, the president shall cause to be prepared and submitted to the board, at its first regular meeting after the audit of the university has been released by the auditor of state, a comprehensive financial report. The report should summarize all financial transactions, note changes in fund balances, and tabulate expenditures in accordance with generally accepted accounting principles for state agencies.
- (h) Youngstown state university development service agreement. At the end of each fiscal year the president shall cause to be prepared and submitted to the board a report pertaining to the university's development functions. Said report shall include detailed information regarding the university's relationship with the YSU foundation and activities performed by the Youngstown state university development service agreement entered into between the university and the YSU foundation.

- (4) Purchasing practice. All purchases by the university shall be made in accordance with the policies of the board and the laws of the state of Ohio.
- (F) Article VI. University organizations.
  - (1) Auxiliary agencies.
    - (a) As recommended by the president and approved by the board, certain university operations, whose income includes substantial amounts of other than imposed fees or appropriated revenue, shall be designated as auxiliary services. For budgeting purposes, an auxiliary service is a fiscal entity. The president shall cause to be prepared and submitted to the finance and facilities committee, at or before its first meeting after September first of each year, an annual report including an itemization of income and expenditures and a résumé of the operation for the year.
    - (b) Except for those auxiliary activity accounts otherwise restricted, there may be a transfer of balances among them or to other university purposes as directed by the president with the approval of the finance and facilities committee.
    - (c) The rental policies of the university as approved by the board also apply to all auxiliary activity facilities.
- (G) Article VII. Instruction and degrees.
  - (1) Degrees and certificates.
    - (a) Degrees, titles, and certificates shall be awarded by the board upon recommendation of the university faculty and transmitted to the board by the president. All diplomas issued to those receiving degrees and titles from the university shall be signed by the chairperson and the president.
    - (b) Honorary degrees. The board will consider the conferral of honorary degrees given the recommendations to the provost

by the academic senate as stipulated in its charter and the provost to the president as recommended to the board.

- (c) Commencement speakers. The board will consider the selection of a commencement speaker given the recommendations to the provost by the academic senate as stipulated in its charter and the provost to the president as recommended to the board.

(H) Article VIII. Miscellaneous.

- (1) Appearances before governmental offices. Subject to specific control by the board, the preparation and presentation of requests for appropriations from the state of Ohio, and all appearances, communications, and representations made on behalf of the university with all federal, state, and local government offices, boards, and agencies, shall be under the direction of the president. Unauthorized appearances, communications, and representations before federal, state, and local government offices, boards, and agencies are hereby prohibited.
- (2) Use of university facilities. The use of university facilities shall be governed by such rules and regulations as may be promulgated by the president.
- (3) Protocol for requests to address the board and/or its committees.
  - (a) Any and all persons desiring to address the board shall submit in writing a request for permission to address the board. Such request shall be submitted not less than three weeks prior to the meeting of the board at which the party requests to be heard.
  - (b) All such requests shall be submitted to the board chairperson through the secretary to the board of trustees, by submission either directly to the secretary or through the office of the president of the university.
  - (c) All such requests shall state the subject of the matter to be addressed to board, the identity or identities of the person(s) who will speak to the subject matter before the

board, the relationship(s) of such person(s) to the university and the matter being brought to the attention of the board, the postal and electronic mail addresses and daytime telephone number of the person(s) requesting permission to address the board.

- (d) As the standing committees of the board are composed of all of the board's trustees, the board chairperson may in his or her discretion, refer any request to address the board to such committee of the board as the chairperson deems appropriate.
- (e) Any presentation to the board or a committee thereof contemplated under this procedure shall not be longer than five minutes in total length. The board chairperson and/or the chair of the board committee before which such presentation is to be delivered may at any time, in his or her discretion, increase or decrease the number of persons addressing the board or committee, and/or lengthen, shorten, or cancel the time permitted for any address or presentation.
- (f) The format and substance of any address or presentation to the board or its committees shall at all times remain within the bounds of relevance, civility, and decorum as shall be determined in the sole discretion of the chairperson of the body before which the matter is addressed or presented. The chairperson of that body shall at all times possess the authority to lengthen, short, or cancel, without notice or action of the body, the time allotted to any address or presentation.
- (g) No request to address the board or any of its committees shall knowingly be permitted or permitted to proceed if the substance or purpose of such address is or may be a subject of litigation, collective bargaining, employment relations involving the university, its employees, and/or students, or any other matter which is not properly within the public interest or the interest of the university.

- (4) Protocol for handling letters, petitions, or other such forms of communication submitted to the board.
  - (a) Any such communication of a personnel nature will be considered by the appropriate committee of the board at the next regularly scheduled meeting.
  - (b) Communications other than personnel matters will be considered for appropriate disposition at the next agenda setting meeting for the upcoming regular meeting of the board.

If considered to be an urgent matter by the president, the board chair will be consulted to determine the appropriate next steps regarding the matter.

- (I) Article IX. Bylaws, rules, and policies (promulgation, amendment, and repeal).
  - (1) Statement of purpose. University bylaws, including additions or amendments, outline the major administrative and governing functions of the board. Detailed rules, policies, and ordinances for the operation of the university may be enacted or amended by action of the board or may be promulgated by the president, provided such shall not conflict with policies or bylaws of the board.
  - (2) Rules and policies: promulgation, amendment, and repeal. Detailed rules and policies for the organization, administration, and operation of the university may be promulgated, amended, and repealed by the board, in consideration of recommendations of the president.
  - (3) Amendments to bylaws.
    - (a) Bylaws may be altered, amended, or repealed, and new bylaws may be adopted, by affirmative vote of not less than five trustees at any regular meeting or special meeting of the board. Any proposed alteration, amendment, repeal, or adoption of all or any part of the bylaws shall first be announced at a meeting of the board (regular or special).

Action on the proposal may not be taken until the next meeting of the board (regular or special).

- (b) Amendments to the bylaws shall be effective upon adoption by an affirmative vote of not less than five members of the board.

**3356-1-01 Bylaws.**

(A) Article I. Definitions.

- (1) “Board” means the board of trustees of Youngstown state university.
- (2) “University” means Youngstown state university.
- (3) “Chairperson” means the chairperson of the board of trustees of Youngstown state university.
- (4) “Vice chairperson” means the vice chairperson of the board of trustees of Youngstown state university.
- (5) “Trustee” means a member of the board appointed for a term of nine years, or for the remainder of such a term, by the governor of the state of Ohio pursuant to section 3356.01 of the Revised Code.
- (6) “Student trustee” means a student member of the board appointed by the governor of the state of Ohio pursuant to section 3356.01 of the Revised Code.
- (7) “President” means the president of Youngstown state university.
- (8) “Secretary” means the secretary to the board of trustees of Youngstown state university.
- (9) “Designee” means a member of the university’s administrative office(s).

(B) Article II. Meetings.

- (1) Regular meetings.
  - (a) The board shall meet no less than four times each year, and at such other times as may be necessary for the best interests of the university. Meetings shall be called at such times as the board prescribes, provided, however, that meetings will usually be held in the months of September, December, March, and June. At the time of the



adjournment of each meeting, the board shall provide, by resolution, the date, time, and place for holding the board's next regular meeting. No less than five days prior to the date of a regular meeting, the secretary, or designee, shall provide written notice of said meeting to every member of the board. Notices may be hand-delivered or sent via facsimile, electronic mail, or by first class mail to the residence or business address of a board member.

- (b) Any board member may waive notice of a regular meeting. Attendance of a board member at a regular meeting shall constitute a waiver of notice of the regular meeting.

(2) Special meetings.

- (a) Special meetings of the board may be called by written request (the "Call") signed by the chairperson, the president, or by three trustees, and delivered to the secretary. The "Call" for a special meeting shall specify the date, time, place, and purposes thereof, although other business than that specified in the "Call" may be considered at any such meeting. Upon receipt of a call for a special meeting, and no less than forty-eight hours prior to the time of commencement of the special meeting, the secretary, or designee, shall provide notice of the special meeting to every member of the board and to the president. Notice of a special meeting shall include the date, time, place, and purposes thereof, as set forth in the "Call." Notice of a special meeting may be given in oral or written form and may be given directly to the board member by telephone or direct conversation, or by facsimile, hand delivery, electronic or first-class mail sent to the board member's residence or place of business.

- (b) Any board member may waive notice of a special meeting. Attendance of a board member at a special meeting shall constitute a waiver of notice of the special meeting.

(3) Emergency meetings. In the event of an emergency wherein the best interests of the university require immediate official action by

the board, the chairperson (or in his or her absence or disability, the vice chairperson) or the president (or in his or her absence, the provost of the university) may call an emergency meeting of the board. In such event, all reasonable effort shall be made to schedule the emergency meeting in order to permit all of the members of the board to attend the emergency meeting. In such event, all reasonable effort shall be made to notify all of the members of the board of the date, time, place, and nature of the emergency requiring immediate official action.

- (4) Place of meetings.
  - (a) All regular and special meetings of the board shall be held on university property or through YSU supported technology as provided by law, or on rare occasions off-campus, but with easy access to the public, if circumstances warrant as determined by the chairperson and the president and as provided by law. The place of all board meetings shall be specified in the notice of the meeting.
  - (b) Emergency meetings of the board shall be held on university property unless, in the judgment of the person or persons making the "Call," the circumstances creating the emergency render a meeting on university property either physically impractical or infeasible.
- (5) Quorum.
  - (a) A majority of the trustees, when duly convened pursuant to university bylaws, shall constitute a quorum for the transaction of business at any meeting of the board. Student trustees shall not be considered in the determination of a quorum. If less than a majority of the trustees are present at, or at any time during said meeting, a majority of the trustees present may adjourn the meeting from time to time without further notice. When, upon reconvening any such adjourned meeting, and with a quorum present, any business may be transacted which might have been transacted at the meeting as originally notified.

- (b) At any meeting where a quorum is present, a majority vote of those present and voting shall be required for any official action by the board, except as otherwise permitted by law or by the bylaws contained in this rule.
  - (c) A trustee may abstain from voting on a matter. A trustee that abstains from voting shall be counted in the determination of a quorum but shall not be counted as voting in favor or against the matter upon which the vote is taken. Trustees having a direct personal or pecuniary interest in a matter that is not common to other members of the board should declare that interest and refrain from discussing and voting on that matter.
- (6) Organization of meetings.
- (a) At each meeting of the board, the chairperson, or in the chairperson's absence, the vice chairperson, or in the absence of both, a chairperson pro tempore, chosen by a majority of the trustees present, shall preside. The secretary, or in the secretary's absence, any person appointed by the chairperson, shall keep the minutes of the meeting, and otherwise perform the duties of secretary of the meeting.
    - (i) The minutes shall be developed as prescribed by law and include information that provides perspectives regarding decisions made by the board as well as demonstrate the board is proactive in its responsibilities to both the state of Ohio and in consideration of the continuing accreditation of the university.
    - (ii) The minutes shall be maintained on the university's board of trustees website in addition to those also maintained via the Maag library in accordance with laws and/or policies associated with records retention.
    - (iii) Minutes shall be prepared and provided to the board as soon as practicable after each board meeting in

order that members may appropriately review and approve the minutes.

- (7) Order of business. The order of business at all regular and special meetings of the board shall be as follows:
  - (a) Roll call.
  - (b) Proof of notice of meeting.
  - (c) Disposition of minutes.
  - (d) Presentation(s) from the university community (optional).
  - (e) Report of the president.
  - (f) Report of the committees of the board.
  - (g) Communications and memorials.
  - (h) Unfinished business.
  - (i) New business.
  - (j) Chairperson's remarks and requested additional president's remarks as chosen to be offered.
  - (k) Election of board officers (as pertinent).
  - (l) Time and place of next regular meeting of the board.
  - (m) Adjournment.
- (8) Parliamentary procedure. Questions of parliamentary procedure shall be resolved in accordance with "Robert's Rules of Order." The secretary, or designee, shall serve as the board's parliamentarian.

- (9) Procedures for presentation of items to be considered.
- (a) Any proposed action introduced by a board member which would substantially affect university policy shall be presented to the chairperson prior to the meeting at which the matter is to be considered by the board. The proposed action shall be submitted in sufficient time to allow the chairperson to assign the proposed action to an appropriate board committee to review such action and to make whatever recommendations to the full board the committee deems to be appropriate.
  - (b) The annual budget and all other major questions of university policy recommended by the president shall be presented to each member of the board prior to the meeting at which the matter is to be considered by the board. The proposed action shall be submitted in sufficient time to allow the appropriate board committee to review such action and to make whatever recommendations to the full board it deems to be appropriate.
  - (c) Any business to be presented to the board by other than a board member or the president shall be submitted in writing to the chairperson, who shall refer it to the appropriate board committee for consideration and possible action. The chairperson may direct that such business be placed on the agenda.
- (10) Public notice of meetings.
- (a) Public notice of all board meetings shall meet or exceed that required by Ohio law, section 121.22 of the Revised Code.
  - (b) Any person or news medium may ascertain the time and place of all regularly scheduled board meetings and the time, place, and purpose of all special board meetings by contacting university communications or on the internet at [board of trustees website](#). The local media, and other interested parties, will be made aware of upcoming

meetings of the board when requesting such notification by contacting the office of communications.

(C) Article III. Officers and organizations.

- (1) Powers of the board. The board shall have the power, not inconsistent with law or university bylaws, to do all things necessary for the proper maintenance and successful and continuous operation of the university. No individual trustee, student trustee, or committee of the board shall have authority to commit or bind the board or the university to any policy, action, or agreement unless specifically authorized by action of the board.
- (2) Officers of the board. The officers of the board shall be the chairperson, the vice chairperson, and the secretary. The board may appoint such other officers or employees as the interests of the university require. Such officers and employees shall have such authorities, and shall perform such duties, as may be prescribed by the board.
- (3) Qualifications, election, and term of office. The chairperson and vice chairperson shall be trustees. The qualifications of all other officers shall be determined by the board. The officers of the board shall be annually elected by the trustees at the board's last regular meeting of the university's fiscal year. Newly elected officers shall take office immediately following adjournment of the meeting at which they are elected and shall hold their offices until their successors are elected.
- (4) Chairperson. The chairperson, when present, shall preside at all meetings of the board and perform generally all duties incident to the office of the chairperson and such other duties as may be assigned to the chairperson by the board. Unless contrary to board policy or the bylaws contained in this rule, the chairperson may assign any of the chairperson's duties to another trustee.
- (5) Vice chairperson. In the event of a temporary vacancy in the office of the chairperson or at the request of the chairperson, or in the event of temporary absence or disability of the chairperson, the vice chairperson shall perform all the duties of the chairperson and,

while so acting, shall have all the power and authority of, and be subject to the restrictions upon, the chairperson.

- (6) **Secretary.** The secretary, or designee, shall prepare minutes of all meetings and proceedings of the board. The secretary, or designee, shall give notice of all meetings of the board, when required by the provisions of Article II and the appropriate sections. The secretary, or designee, shall serve as the board's parliamentarian. At the last regular meeting of the university's fiscal year, the secretary shall submit a written report of board member attendance at board and committee meetings for the preceding year. The secretary shall perform such other duties as from time to time may be assigned to the secretary by the board or the chairperson.
- (7) **Attorney general.** The attorney general of the state of Ohio shall be the legal advisor to, and represent, the university and/or the board in all matters civil or criminal involving the university of the board.  
  
The general counsel of the university is a member of the Ohio attorney general's office and represents the board of trustees on behalf of the state of Ohio.
- (8) **Removal of board officers.** Any officer of the board may be removed as such officer at any time, either with or without cause, by resolution adopted by not less than six trustees at any regular meeting of the board. Any officer may be removed as such officer, either with or without cause, by resolution adopted by not less than six trustees at any special meeting of the board, provided that such removal action was indicated on the notices of such special meeting.
- (9) **Student trustees.** Section 3356.01 of the Revised Code provides for appointments of two students to the board but provides that student trustees shall have no voting power on the board, that student trustees shall not be considered as members of the board in determination of a quorum, and that student trustees shall not be entitled to attend executive sessions of the board.
- (10) **Permanent vacancies.** In the event of a permanent vacancy in the office of the chairperson or vice chairperson, the remaining

trustees may elect a successor to fill such permanent vacancy. What constitutes a “permanent vacancy” shall be determined by the board.

- (11) Board orientation.
    - (a) There shall be at least annually a board orientation developed specifically for onboarding new members of the board but will be open to all board members to attend.
    - (b) The orientation shall include the chair, vice chair, secretary, and president and the executive officers of the university as well as any other individual invited to present at and/or attend the orientation.
    - (c) The orientation should be constructed in such a fashion that new board members in particular can more easily and rapidly engage themselves fully in all matters before the board as specified in university bylaws and otherwise specified by law.
    - (d) Orientation may be comprised of various types and levels of engagement and interactions that optimally served the purpose of the orientation session(s).
  - (12) Ethics training. The board, executive officers of the university and other invited members of the administration’s leadership will annually engage in ethics training.
- (D) Article IV. Board committees.
- (1) Membership. All trustees and student trustees shall be voting members of all board standing committees, unless otherwise provided by university bylaws.
  - (2) National/global trustees. In order to take advantage of the diverse talents, resources, and experiences of friends and alumni of the university who can contribute to the current and future success of the university, the position of national/global trustees has been established in accordance with the following guidelines, to which exceptions can be made:



- (a) The board may nominate and appoint persons to the position of national/global trustee. National/global trustees shall be nominated and appointed by the board of trustees on the basis of one or more of the following criteria: success in chosen field or business; state or national prominence; ability to serve as an advocate for higher education; ability and willingness to offer advice to the board and university president and/or demonstrated support for Youngstown state university.
- (b) There shall be no more than three persons serving in the position of national/global trustee at any one time. National/global trustees shall serve staggered terms such that no more than one such position expires in a calendar year.
- (c) Each national/global trustee shall be appointed for a three-year term and shall be eligible for reappointment for additional terms as determined by the board.
- (d) National/global trustees shall have no voting privileges on the board, shall not be considered in determining whether a quorum is present and shall not be eligible to be an officer of the board, but may otherwise participate in all activities of the board.
- (e) National/global trustees shall not be compensated for their service but shall be paid their reasonable and necessary expenses in the same manner that applies to trustees.
- (f) National/global trustees shall follow the Ohio ethics laws, including those set forth in Chapter 102. and sections 2921.42 and 2932.43 of the Revised Code, the board's bylaws and university policy.
- (g) National/global trustees shall be appointed by board action after nomination by the governance committee of the board in accordance with the process described for the

nomination and election of board officers set forth in the bylaws contained in paragraph (D)(6)(i) of this rule.

- (h) National/global trustees may be removed by a majority vote of the board.
  - (i) A trustee may serve as a national/global trustee, but cannot be appointed to serve as a national/global trustee until at least one year after the board member's term as a trustee has ended.
  - (j) An employee or former employee of the university may serve as a national/global trustee but cannot be appointed to serve as a national/global trustee until at least one year after that person's compensated service to the university has ended.
  - (k) National/global trustees shall be entitled to legal defense and indemnification against claims and liabilities that might arise from the performance of their duties on behalf of the board to the fullest extent permitted by Ohio law. In addition, the national/global trustees will be considered a "volunteer" for purposes of coverage under the university's liability insurance.
- (3) Committee chairperson and vice chairperson. The chairperson shall appoint the chairperson and vice chairperson of each standing committee, and members of such committees that are not otherwise composed of all of the trustees or as otherwise set forth herein, subject to the approval of the board. Committee chairpersons and vice chairpersons shall be trustees.
- (4) Quorum and conduct of committee meetings.
- (a) Five members of a standing committee shall constitute a quorum, unless otherwise provided. A majority of the members of subcommittee of a standing committee shall constitute a quorum, unless otherwise provided. The act of a majority of the members present and voting at a meeting at which a quorum is present shall be the act of the

committee or subcommittee. However, regardless of the existence of a quorum in number, at least one of the following four persons must be present at a committee or subcommittee meeting in order for the committee to conduct business:

- (i) The chairperson;
- (ii) The vice chairperson;
- (iii) The (sub)committee chairperson; or
- (iv) The (sub)committee vice chairperson.

A committee member may abstain from voting on a matter. A committee member that abstains from voting shall be counted in the determination of a quorum but shall not be counted as voting in favor or against the matter upon which the vote is taken. Committee members having a direct personal or pecuniary interest in a matter that is not common to other members of the board should declare that interest and refrain from discussing and voting on that matter.

- (b) A majority of the members of a special or ad hoc committee, including any student trustees, shall constitute a quorum. The act of a majority of the members present and voting at a meeting at which a quorum is present shall be the act of the special or ad hoc committee.
  - (c) The board and university administration will mutually develop committee agendas, with the chairperson having authority to approve all final agendas.
- (5) Rules. Each committee may adopt rules for its own governance not inconsistent with university bylaws or any rule adopted by the board.

- (6) Standing committees. The board's standing committees, and their respective duties and areas of responsibility, shall be as follows:
- (a) Academic excellence and student success committee.
    - (i) To consider those matters that warrant board attention or require board action relating to:
      - (a) Academic policies which provide for and govern faculty teaching, research, and service;
      - (b) Establishment of new academic programs, changes in or deletions of existing academic programs, and the issuing of certificates or the granting of degrees;
      - (c) Policies which provide for and govern retention, persistence, progress, and graduation, including but not limited to, diversity issues and general education requirements;
      - (d) Policies which provide for and govern student housing and student life;
      - (e) Institutional mission, strategic and master-plans, or relevant parts thereof, dealing with matters within the purview of the committee;
      - (f) Policies that provide for the acquisition, development, access, and use of electronic technology within the purview of the committee.
    - (ii) To assist the board in the exercise of its oversight responsibilities relating to those academic and

administrative departments within the purview of the committee.

- (iii) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(a)(ii) of this rule, or as assigned by the board or its executive committee.
- (iv) Provided that he or she is a member of the university faculty, the chair of the YSU academic senate shall be a nonvoting member of the committee. In the event that the chair of the YSU academic senate is not a member of the university's faculty, then the faculty member holding the highest-ranking position within the YSU academic senate leadership shall hold this position. This position shall not count toward the determination of a quorum of the committee.

(b) Institutional engagement committee.

- (i) To consider those matters that warrant board attention or require board action relating to:
  - (a) Policies that provide for and govern student recruitment, financial aid, orientation and enrollment, including but not limited to, integrated marketing, yield, scholarship optimization, and career success;
  - (b) Policies that provide for and govern the external relationships established by or required of the University, excluding matters assigned to other of the board's standing committees;
  - (c) Policies that provide for and govern university fundraising, including but not limited to, institutional advancement

through the YSU foundation, the YSU research foundation, the annual fund, capital campaigns, special projects and solicitations;

- (d) The Youngstown state university development agreement between the university and the YSU foundation.
- (e) Policies that provide for and govern continuing university relations with its graduates, including but not limited to, alumni associational activity;
- (f) Policies that provide for and govern university operations directed toward effective communications, public relations, marketing, and the enhancement of community goodwill;
- (g) Policies that provide for and govern university public service in, and partnerships with, the larger community, or segments thereof, including but not limited to, those relationships which are contractual; policies which provide for and govern University intergovernmental relationships, including but not limited to, those with the city of Youngstown, Mahoning county, as well as with agencies and departments of state and federal governments;
- (h) Institutional mission, strategic and master plans, or relevant parts thereof, dealing with matters within the purview of the committee; and
- (i) Policies that provide for the acquisition, development, access, and use of electronic

technology within the purview of the committee.

- (ii) To assist the board in the exercise of its oversight responsibilities relating to those administrative departments and functions within the purview of the committee.
  - (iii) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(b)(ii) of this rule, or as assigned by the board or its executive committee.
- (c) Finance and facilities committee.
- (i) To consider those matters that warrant board attention or require board action relating to:
    - (a) Financial and budgetary policies, including but not limited to, the annual operating budget, and the capital improvement budget;
    - (b) Policies governing debt instruments issued by the university;
    - (c) The financial and budgetary impact of major agreements, contracts, programs, plans or initiatives to be recommended to the board by any standing, ad hoc, or special committee, including but not limited to, recommendations regarding university personnel, insurance, and donations;
    - (d) The acquisition of real property by purchase, gift, or otherwise; the disposition of real property; the acquisition or disposition of significant property broadly classified as technology;





paragraph (D)(6)(c)(ii) of this rule, or as assigned by the board or its executive committee.

- (iv) The finance and facilities committee will include the following subcommittee:
  - (a) Audit subcommittee.
    - (i) The audit subcommittee, chaired by the chairperson of the finance and facilities committee, will be composed of the chairperson and four additional trustees who will be appointed annually by the chairperson of the board. As appropriate, when receiving and considering certain audit reports, the president may be excused from the subcommittee proceedings.
    - (ii) The audit subcommittee will meet at least once annually and perform those duties as assigned by the finance and facilities committee relative to the bylaws contained in paragraph (D)(6)(c)(ii) of this rule.
    - (iii) The subcommittee will report its findings and recommendations to the finance and facilities committee.
  - (d) Investment committee.
    - (i) To consider those matters that warrant board attention or require board action relating to:  
  
Section 3345.05 of the Revised Code, to exercise the authority and responsibility provided by law including but not limited to:

- (a) Policies governing investments issued by the university;
      - (b) Custody and investment of any funds which are now under or may in the future come under control of the board of trustees.
    - (ii) To assist the board in the exercise of its oversight responsibilities relating to those administrative departments and functions within the purview of the committee.
    - (iii) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(d)(ii) of this rule, or as assigned by the board or its executive committee.
  - (e) Intercollegiate athletics committee.
    - (i) To consider those matters that warrant board attention or require board action relating to:
      - (a) Policies that provide for and govern the university's participation in intercollegiate athletics;
      - (b) Personnel matters; however, approval of personnel actions will occur in the university affairs committee;
      - (c) Policies that provide for the effectiveness of the NCAA compliance program;
      - (d) Policies that provide for the effectiveness of ensuring and promoting the academic, health, and social welfare of student-athletes;

- (e) Policies that assure the effectiveness of implementing the committee's endorsed budget;
  - (f) Academic performance and progress of student-athletes annually;
  - (g) Governance policies related to intercollegiate athletics;
  - (h) The president's proposed approach to the selection of and term of service of the NCAA faculty representative(s);
  - (i) Comparison of benchmarks that have been mutually agreed upon by the president and the director of intercollegiate athletics and endorsed by the committee; and
  - (j) The faculty NCAA athletics representative(s) in serving as a liaison between the academic enterprise and the intercollegiate athletics department and receives the yearly update provided to the academic senate.
- (ii) The faculty representative(s), as specified in rules 3356-6-02 and 3356-6-03 of the Administrative Code (university policies 3356-6-02 and 3356-6-03), shall be a nonvoting member(s) of the committee. This (these) position(s) shall not count toward the determination of a quorum of the committee.
  - (iii) To assist the board in the exercise of its oversight responsibilities relating to those administrative departments and functions within the purview of the committee.

- (iv) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(e)(iii) of this rule, or as assigned by the board or its executive committee.
- (f) University affairs committee.
  - (i) To consider those matters that warrant board attention or require board action relating to:
    - (a) Policies that provide for and govern the internal administrative operations of the university, excluding matters assigned to other of the board's standing committees;
    - (b) Policies that provide for and govern university employment where collective bargaining agreements apply, including but not limited to, oversight of the collective bargaining process and labor negotiations with unions representing university employees;
    - (c) Policies that provide for and govern university employment exempt from collective bargaining agreements, including but not limited to, oversight of contractual arrangements with exempt personnel;
    - (d) Policies that provide for equal opportunity standards and govern equal opportunity practices in university employment and operations, including but not limited to, implementation of affirmative action initiatives;
    - (e) Policies that provide for the acquisition, development, access, and use of electronic technology; and

- (f) Institutional mission, strategic and master plans, or relevant parts thereof, dealing with matters within the purview of the committee.
- (ii) To assist the board in the exercise of its oversight responsibilities relating to those administrative departments within the purview of the committee.
- (iii) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(f)(ii) of this rule, or as assigned by the board or its executive committee.
- (g) Workforce education and innovation committee.
  - (i) To consider those matters that warrant board attention or require board action relating to:
    - (a) Policies that provide for the optimal utilization and effectiveness of all areas pertaining to workforce education and innovation;
    - (b) Policies that provide for optimal alignment of initiatives and activities associated with job entry and career advancement;
    - (c) Policies that optimize institutional engagement with local, regional, statewide and national workforce education and innovation initiatives;
    - (d) Policies that optimize the potential to monetize activities and initiatives across the education for workforce entry and career advancement spectrum;

- (e) Policies that provide for and govern the university's participation in initiatives related to education for career entry and work advancement;
  - (f) Personnel matters; however, approval of personnel actions will occur in the university affairs committee; and
  - (g) Annual financial report to the full board of trustees.
- (ii) To assist the board in the exercise of its oversight responsibilities relating to those administrative departments and functions within the purview of the committee.
  - (iii) To exercise on behalf of the board ancillary jurisdiction as related to the bylaws contained in paragraph (D)(6)(g)(ii) of this rule, or as assigned by the board or its executive committee.
- (h) Executive committee.
    - (i) The membership of the executive committee shall consist of the chairperson (presiding), the vice chairperson, and the chairpersons of the academic excellence and student success committee, the institutional engagement committee, the finance and facilities committee, the investment committee, the intercollegiate athletics committee, and the university affairs committee. The executive committee will consider those matters that warrant board attention or require board action relating to:
      - (a) Matters relevant to the employment, assessment and compensation of the president, with recommendation to the board, as appropriate, for its attention or

action; for purposes of this consideration, the president may be excused from the committee's proceedings;

- (b) Matters relative to the employment, assessment and compensation of the secretary, if determined by the board to be necessary, with recommendation to the board, as appropriate, for its attention or action; for purposes of this consideration, the secretary may be excused from the committee's proceedings;
- (c) Matters not within the assigned purview of any board standing, ad hoc, or special committee; the executive committee will report on such matters, as appropriate, to the board for its attention or action;
- (d) Special assignments of particular matters, not clearly within the purview of any board committee, to one of the board's standing, ad hoc, or special committees; the designated committee will be instructed to report either to the executive committee or to the board;
- (e) Resolution of jurisdictional ambiguities between or among the board's standing, ad hoc, or special committees; and
- (f) Other matters as appropriate to an executive committee, or as assigned by the board.

(i) Governance committee.

- (i) The governance committee shall be chaired by the chairperson, except as otherwise provided herein, and will meet on an as-needed basis to:

- (a) Consider proposed changes in the bylaws of the board, with recommendation to the board, as appropriate, for its attention or action;
- (b) Consider proposed changes in board and committee procedures, in full or in part, not stipulated in the bylaws, including but not limited to, scheduling, administrative staff participation or assistance, etc., with recommendation to the board, as appropriate, for its attention or action;
- (c) Any institutional mission statement, strategic or master plans, with recommendation to the Board, as appropriate, for its attention or action;
- (d) Develop and schedule board advances, workshops, seminars, orientation programs, and other special events, with recommendation to the board, as appropriate, for its attention or action;
- (e) Provide for periodic board self-evaluation and assessment;
- (f) Elect officers annually through a nomination process at its next to last regularly scheduled quarterly meeting of the university's fiscal year.
- (g) The next elected chair will annually survey the trustees regarding their interest, willingness and qualifications to serve in leadership roles in the forthcoming term. The chair will determine the committee assignments that will be in place at the first meeting of the new fiscal year; and



(h) Consider other matters as appropriate to a governance committee, or as assigned by the executive committee of the board.

(7) Ad hoc committees. The chairperson may appoint from time to time such ad hoc committees as may be required for the proper and continuous operation of the university; however, an ad hoc committee shall not be appointed to consider matters which lie entirely within the purview of a standing committee. The chairperson shall determine the membership of the ad hoc committee and when the work of the ad hoc committee is completed.

(E) Article V. Administration of the university.

- (1) President of the university, faculty, and staff. The board shall employ the president of the university; and shall employ, fix the compensation of, and remove employees as may be necessary. The board shall do all things necessary for the proper maintenance and successful continuous operation of the university and may act under such policies and bylaws as it may approve.
- (2) Other personnel. The employment, classification, wage scales, and dismissal of all personnel, not otherwise under contract to the board of trustees, shall follow the policies established by the board and the laws of the state of Ohio.
- (3) Reports to the board.
  - (a) Budget. At a meeting of the finance and facilities committee prior to the board's last regular meeting of the university's fiscal year, the president shall present to the board the draft budget for the ensuing fiscal year. The budget shall be presented in a form showing estimated income and the allocations for the university's major areas of expenditure in accordance with general account classifications of the state of Ohio and shall be accompanied by a review describing the major changes.

As may be necessary, the budget may be revised from time to time by the board. After approval by the board, the budget shall govern financial transactions. The president shall establish procedures for the expenditure of all budgeted funds in accordance with the policies of the board. In administering the budget, the president may make or authorize transfers or adjustments in individual budget accounts or in local unrestricted accounts provided that no such action shall increase the total of budgeted expenditures. Whenever income fails to meet budgeted income, the president shall present to the board for its review and approval a plan to address any anticipated shortfalls. The status of the budget shall be reported to the board at each of its regularly scheduled meetings.

- (b) Revisions of fees and other charges. From time to time, but no less than annually, the president shall recommend to the board for its approval a continuation or revision of the instructional fees, tuition, general fees, and other uniform charges.
- (c) Service charges. The president may fix and announce other fees, fines, and rental or service charges. No such other fees or charges shall be imposed until authorized by the president.
- (d) Purchase of insurance.
  - (i) The president shall cause to have prepared and submitted to the board, at or before its first regular meeting after January first of each year, a report that tabulates all insurance policies in force, including coverage, current premiums and premiums paid during the previous two years, and agents servicing these policies. This report shall include, but is not limited to: general, fire, liability, bonds, property, automobile, comprehensive, officers and directors' liability, medical and hospitalization contracts, or any other policy for the protection of Youngstown state university's personnel and property.

- (ii) All insurance shall be purchased through the president or his or her designee.
- (e) Inventory of real property. At the close of each fiscal year, the president shall cause to be prepared and submitted to the board, at or before its first regular meeting after September first of each year, an inventory of all real property managed, owned, leased, rented, or under option to the university. This report shall include acreage held, an estimate of land and building values, a general statement on the condition of the physical plant, and such other details as may be directed by the board or the president.
- (f) Obligation of the university. At the close of each fiscal year the president shall cause to be prepared and submitted to the board a report describing the obligations of the university, financial and otherwise, the terms and conditions of repayment or satisfaction of such obligations and any security given by the university toward such obligations.
- (g) Annual financial report. At the end of each fiscal year, the president shall cause to be prepared and submitted to the board, at its first regular meeting after the audit of the university has been released by the auditor of state, a comprehensive financial report. The report should summarize all financial transactions, note changes in fund balances, and tabulate expenditures in accordance with generally accepted accounting principles for state agencies.
- (h) Youngstown state university development service agreement. At the end of each fiscal year the president shall cause to be prepared and submitted to the board a report pertaining to the university's development functions. Said report shall include detailed information regarding the university's relationship with the YSU foundation and activities performed by the Youngstown state university development service agreement entered into between the university and the YSU foundation.

- (4) Purchasing practice. All purchases by the university shall be made in accordance with the policies of the board and the laws of the state of Ohio.

(F) Article VI. University organizations.

(1) Auxiliary agencies.

- (a) As recommended by the president and approved by the board, certain university operations, whose income includes substantial amounts of other than imposed fees or appropriated revenue, shall be designated as auxiliary services. For budgeting purposes, an auxiliary service is a fiscal entity. The president shall cause to be prepared and submitted to the finance and facilities committee, at or before its first meeting after September first of each year, an annual report including an itemization of income and expenditures and a résumé of the operation for the year.
- (b) Except for those auxiliary activity accounts otherwise restricted, there may be a transfer of balances among them or to other university purposes as directed by the president with the approval of the finance and facilities committee.
- (c) The rental policies of the university as approved by the board also apply to all auxiliary activity facilities.

(G) Article VII. Instruction and degrees.

(1) Degrees and certificates.

- (a) Degrees, titles, and certificates shall be awarded by the board upon recommendation of the university faculty and transmitted to the board by the president. All diplomas issued to those receiving degrees and titles from the university shall be signed by the chairperson and the president.
- (b) Honorary degrees. The board will consider the conferral of honorary degrees given the recommendations to the provost

by the academic senate as stipulated in its charter and the provost to the president as recommended to the board.

- (c) Commencement speakers. The board will consider the selection of a commencement speaker given the recommendations to the provost by the academic senate as stipulated in its charter and the provost to the president as recommended to the board.

(H) Article VIII. Miscellaneous.

- (1) Appearances before governmental offices. Subject to specific control by the board, the preparation and presentation of requests for appropriations from the state of Ohio, and all appearances, communications, and representations made on behalf of the university with all federal, state, and local government offices, boards, and agencies, shall be under the direction of the president. Unauthorized appearances, communications, and representations before federal, state, and local government offices, boards, and agencies are hereby prohibited.
- (2) Use of university facilities. The use of university facilities shall be governed by such rules and regulations as may be promulgated by the president.
- (3) Protocol for requests to address the board and/or its committees.
  - (a) Any and all persons desiring to address the board shall submit in writing a request for permission to address the board. Such request shall be submitted not less than three weeks prior to the meeting of the board at which the party requests to be heard.
  - (b) All such requests shall be submitted to the board chairperson through the secretary to the board of trustees, by submission either directly to the secretary or through the office of the president of the university.
  - (c) All such requests shall state the subject of the matter to be addressed to board, the identity or identities of the person(s) who will speak to the subject matter before the

board, the relationship(s) of such person(s) to the university and the matter being brought to the attention of the board, the postal and electronic mail addresses and daytime telephone number of the person(s) requesting permission to address the board.

- (d) As the standing committees of the board are composed of all of the board's trustees, the board chairperson may in his or her discretion, refer any request to address the board to such committee of the board as the chairperson deems appropriate.
- (e) Any presentation to the board or a committee thereof contemplated under this procedure shall not be longer than five minutes in total length. The board chairperson and/or the chair of the board committee before which such presentation is to be delivered may at any time, in his or her discretion, increase or decrease the number of persons addressing the board or committee, and/or lengthen, shorten, or cancel the time permitted for any address or presentation.
- (f) The format and substance of any address or presentation to the board or its committees shall at all times remain within the bounds of relevance, civility, and decorum as shall be determined in the sole discretion of the chairperson of the body before which the matter is addressed or presented. The chairperson of that body shall at all times possess the authority to lengthen, short, or cancel, without notice or action of the body, the time allotted to any address or presentation.
- (g) No request to address the board or any of its committees shall knowingly be permitted or permitted to proceed if the substance or purpose of such address is or may be a subject of litigation, collective bargaining, employment relations involving the university, its employees, and/or students, or any other matter which is not properly within the public interest or the interest of the university.

- (4) Protocol for handling letters, petitions, or other such forms of communication submitted to the board.
  - (a) Any such communication of a personnel nature will be considered by the appropriate committee of the board at the next regularly scheduled meeting.
  - (b) Communications other than personnel matters will be considered for appropriate disposition at the next agenda setting meeting for the upcoming regular meeting of the board.

If considered to be an urgent matter by the president, the board chair will be consulted to determine the appropriate next steps regarding the matter.

- (I) Article IX. Bylaws, rules, and policies (promulgation, amendment, and repeal).
  - (1) Statement of purpose. University bylaws, including additions or amendments, outline the major administrative and governing functions of the board. Detailed rules, policies, and ordinances for the operation of the university may be enacted or amended by action of the board or may be promulgated by the president, provided such shall not conflict with policies or bylaws of the board.
  - (2) Rules and policies: promulgation, amendment, and repeal. Detailed rules and policies for the organization, administration, and operation of the university may be promulgated, amended, and repealed by the board, in consideration of recommendations of the president.
  - (3) Amendments to bylaws.
    - (a) Bylaws may be altered, amended, or repealed, and new bylaws may be adopted, by affirmative vote of not less than five trustees at any regular meeting or special meeting of the board. Any proposed alteration, amendment, repeal, or adoption of all or any part of the bylaws shall first be announced at a meeting of the board (regular or special).

Action on the proposal may not be taken until the next meeting of the board (regular or special).

- (b) Amendments to the bylaws shall be effective upon adoption by an affirmative vote of not less than five members of the board.



# Youngstown State University

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Ruffalo Noel Levitz (RNL)  
Strategic Enrollment Plan (SEP) + Student Success (SS) Update

Board of Trustee's Meeting  
March 12, 2025

## Introduction

The partnership with RNL has successfully completed the fifth and final Student Success visit, marking the completion of Phase 1 of the Strategic Enrollment Planning strategy. This visit brought together key enrollment support areas, including undergraduate and graduate admissions, financial aid, the registrar's office, international programs, student success, marketing and communications, online education, and the Office of Academic Affairs.

As a result, key focus strategies have been identified and categorized into four areas: Quick Wins, Low-Hanging Fruit, Strategic Investment, and Time Investment. Each strategy has also been assessed based on its projected return on investment (ROI), categorized as either high or low.

# Strategic Investment

Academic Master Plan (AMP) | Strategic Enrollment Plan (SEP) | Student Success (SS)

<div data-bbox="128 224 583 289" style="border: 1px solid black; background-color: #f8d7da; padding: 5px; text-align: center;">Higher Time Commitment</div> <div data-bbox="128 302 583 367" style="border: 1px solid black; background-color: #d4edda; padding: 5px; text-align: center;">Lower Financial Cost</div> <ul style="list-style-type: none"> <li>Implement a Student Success Taskforce to complete annual goals and metrics (SS)</li> <li>Implement a Strategic Enrollment Planning Taskforce (SEP) to complete annual goals and metrics (SEP)</li> <li>Design a framework to support individual success plans (SS)</li> <li>Design Year 2, Year 3, Year 4+ intervention and continuing enrollment plans for degree completion (SS)</li> <li>Design customized advising plans for CCP/YREC, UG online, Associate seeking and transfer populations (SS)</li> <li>Develop pathway plans for 3+1, 4+1 academic programs (AMP/SEP)</li> <li>Develop progression curriculum paths through the AMP (SEP)</li> <li>Review financial aid budget and align with SEP strategies (AMP/SEP)</li> <li>Adopt a comprehensive early alert policy and procedure (SS)</li> <li>Deploy a C/D/F/W grade intervention plan</li> <li>Redesign first year undergraduate transition plan</li> <li>Continue Focus+ KPIs and strategies for identified programs</li> <li>Establish accessible monitoring dashboards to assess enrollment, retention, graduation and market trends (AMP/SEP)</li> </ul>	<div data-bbox="1522 224 1978 289" style="border: 1px solid black; background-color: #d4edda; padding: 5px; text-align: center;">Lower Time Commitment</div> <div data-bbox="1522 302 1978 367" style="border: 1px solid black; background-color: #d4edda; padding: 5px; text-align: center;">Lower Financial Cost</div> <ul style="list-style-type: none"> <li>Assess pricing and cost analysis for international recruiting and attendance (SEP)</li> <li>Educate campus on at-risk level for all students to build intervention support (SS)</li> <li>Design communication, marketing and recruitment strategies for all student types: CCP/YREC, Associate, Bachelor, Transfer, International and Graduate (AMP/SEP)</li> <li>Create a direct admission CCP/YREC strategy aligned with academic department strategies (SEP)</li> <li>Align AMP Program Pitch Statements with SEP Strategies (AMP/SEP)</li> <li>Continue reviewing FAFSA completion rates, financial literacy initiatives and identify gaps (AMP/SEP/SS)</li> <li>Redesign of orientation and on-boarding support materials for all student types (SS)</li> </ul>
<ul style="list-style-type: none"> <li>Redesign advising roles, strategies, standards, training and professional development to support all student types at the undergraduate and graduate levels (AMP/SEP/SS)</li> <li>Design marketing strategies for all programs (AMP/SEP/SS)</li> <li>Identify program market shifts and enrollment trends (AMP/SEP/SS)</li> <li>Review and prioritize student-centric tasks; automate where possible (AMP/SEP/SS)</li> </ul> <div data-bbox="128 1406 583 1471" style="border: 1px solid black; background-color: #f8d7da; padding: 5px; text-align: center;">Higher Time Commitment</div> <div data-bbox="128 1484 583 1549" style="border: 1px solid black; background-color: #f8d7da; padding: 5px; text-align: center;">Higher Financial Cost</div>	<ul style="list-style-type: none"> <li>Develop academic preparedness interventions for identified at-risk incoming students (SS)</li> </ul> <div data-bbox="1522 1406 1978 1471" style="border: 1px solid black; background-color: #d4edda; padding: 5px; text-align: center;">Lower Time Commitment</div> <div data-bbox="1522 1484 1978 1549" style="border: 1px solid black; background-color: #f8d7da; padding: 5px; text-align: center;">Higher Financial Cost</div>

## Academic Master Plan (AMP) Integration with Strategic Enrollment Planning (SEP)

The alignment between the Academic Master Plan (AMP) and Strategic Enrollment Planning (SEP) is essential for sustainable growth and long-term student success. This crosswalk ensures that academic programs are strategically positioned to meet enrollment goals, market demands, and institutional priorities. By integrating academic planning with enrollment strategies, YSU can develop data-driven approaches that enhance recruitment, retention, and program viability.

### Key Areas of Focus:

- Strengthen program recruitment and marketing strategies.
- Expand the Focus+ initiative, defining Key Performance Indicators (KPIs) and forming a dedicated task force.
- Identify enrollment trends, program shifts, and market dynamics.
- Align AMP program “Pitch Statements” with SEP strategies for consistent messaging.
- Integrate academic planning with College Credit Plus (CCP) direct admit strategies.
- Define faculty and professional support roles across the student journey (from admission to outcomes).
- Develop interventions and bridge programs to enhance academic preparedness.
- Redesign degree maps to improve course sequencing, resolve scheduling conflicts, and eliminate bottlenecks.

## New Student Enrollment Strategies

A comprehensive enrollment strategy is essential for attracting and retaining diverse student populations, including graduate, international, first-time, transfer, and associate degree students. This focus area examines recruitment, admissions processes, financial aid alignment, and student support systems to optimize enrollment outcomes.

### Graduate Enrollment

Graduate programs require targeted strategies to enhance visibility, streamline admissions, and improve student experiences.

- Develop a comprehensive graduate marketing and enrollment strategy.
- Assess and expand articulation agreements for 3+1 and 4+1 pathways.
- Implement graduate coordinator training aligned with SEP best practices.
- Document the graduate student journey and advising processes.
- Analyze graduate enrollment and retention at the program level.

## International Enrollment

Maintaining international student enrollment stability is critical for campus diversity and financial sustainability.

- Stabilize enrollment at 1,300 students.
- Evaluate international pricing and cost structures for recruitment, admissions, and education.
- Conduct a situational analysis on housing, community integration, co-curricular support, academic programs, Optional Practical Training (OPT), and transfer patterns.

## First-Time (Direct from High School) Enrollment

A streamlined, targeted approach is necessary to enhance direct-from-high-school recruitment efforts.

- Assess and optimize the high school enrollment funnel.
- Design a strategic communication plan for first-time student recruitment.

## Transfer Enrollment

Transfer students require specialized pathways to ensure smooth transitions and academic success.

- Conduct a situational analysis of transfer student recruitment, admission processes, financial aid, and credit evaluation.

## Associate Degree Enrollment

Associate degree programs should be positioned as gateways for continued educational attainment.

- Develop a tailored recruitment, communication, and retention strategy.
- Align curriculum pathways within the AMP to facilitate seamless progression from associate to bachelor's and graduate programs.

## Financial Aid Alignment

Financial aid plays a crucial role in enrollment decisions and student retention.

- Review the financial aid budget and align it with SEP strategies.
- Analyze FAFSA completion rates, financial literacy initiatives, and gaps in financial support.

## Student Success and Retention Strategies

Student success efforts must go beyond traditional support services to create a proactive, data-driven approach that improves persistence and graduation rates. The development of a Student Success Task Force will ensure a coordinated effort to implement best practices in advising, academic support, and student engagement.

### Task Force Recommendations:

- Establish a transition plan for the incoming Associate Provost for Student Success.
- Ensure every student receives a personalized navigation chart to track their academic progress.
- Implement structured training and professional development for student success roles.
- Adopt an "all students are at risk" philosophy, emphasizing proactive interventions.
- Prioritize and categorize student-centric tasks into transactional, mentoring, and proactive activities.
- Automate administrative processes where possible to free up resources for student engagement.
- Expand student success roles beyond course registration to include holistic support.

### Retention and Academic Support Initiatives:

- Design an intrusive, analytics-driven continuing enrollment strategy for year two through graduation, incorporating multiple engagement points and a structured communication plan.
- Strengthen advising and faculty mentoring for customized student support.
- Develop individual student success plans with predictive tracking and early notifications.
- Improve course scheduling by aligning offerings with student demand and program requirements.
- Expand Early Alert Systems to identify and support at-risk students.
- Conduct in-depth analysis and intervention strategies for students receiving grades of C, D, F, and W.
- Enhance academic support structures, including tutoring, supplemental instruction, learning communities, and first-year transition programs.
- Develop targeted onboarding strategies for associate, CCP, and transfer students.
- Implement intentional interventions from the second year through graduation to sustain student engagement.

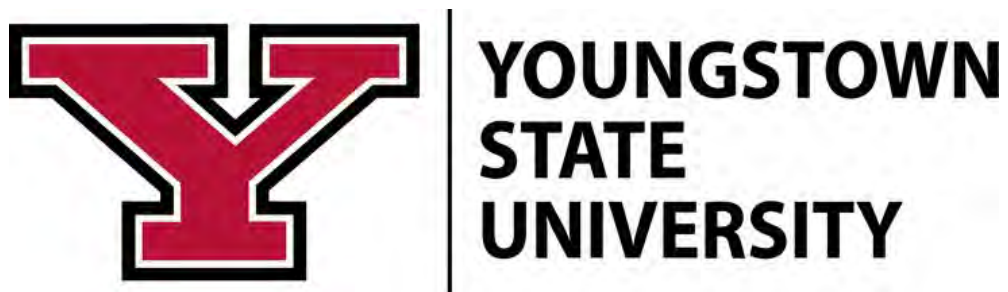
#### Career and Advising Integration:

- Strengthen connections between academic programs and Career Services to improve career readiness.
- Customize advising models for undergraduate online students, associate degree seekers, and transfer students.
- Improve persistence strategies from year two through graduation.
- Align financial aid compliance with advising strategies for retention.
- Standardize advising processes for consistency and efficiency.
- Establish clear roles and expectations across student support units.

#### Hyper-Focused Support for Key Student Populations:

- Undeclared Majors – Provide structured exploration programs and career alignment tools.
- Conditional Bachelor Admits – Implement intensive advising and academic coaching.
- Default Associate Admits – Strengthen pathways for transition into bachelor’s programs.

# **2024 Board-Level Key Performance Indicators (KPI)**



Prepared March 2025



The following variables are those chosen by the Board of Trustees upon adoption of the *Plan for Strategic Actions to Take Charge of Our Future*. Observations and actions steps as a narrative are included following the Key Performance Indicator illustrations.

These “lag” indicators attest to overall institutional performance across selected variables. Available in On Board Resources are the variables identified as “lead” indicators that YSU tracks that more directly influence actions on a day-to-day and operational basis.

It is intended that TAKING ACTION associated with the Goals of the Plan will positively influence the “lead” indicators producing consequential improvement in the “lag” indicators.

This is not withstanding the many other typical measures that indicate additional aspects of institutional well-being, such as the annual Audited Financial Statement, HLC annual data feed, legislatively required and/or Ohio Department of Education implemented assessment outcomes, etc.

# Youngstown State University

## Board-Level KPIs

Prepared March 2025

### How to Read the KPI

#### Metric Label

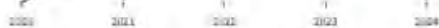
Current Year Value

Current Year/Prior Year  
Change %

Increase

Decrease

5-Year  
Trend Chart



Note: Report excludes College Credit Plus (CCP) and Early College headcount and credit hours, unless otherwise indicated.

### Fall Headcount and Full-Time Equivalent (FTE) Enrollment

#### Headcount

10,733 +8%



#### FTE

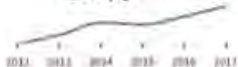
8,832 +6%



### 2017 Bachelor's Cohort Graduate Rate

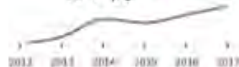
#### 4-Year Grad. Rate

32% +16%



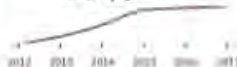
#### 6-Year Grad. Rate

51% +6%



#### 4-Year Grad. Rate: Minority

20% +1%



#### 6-Year Grad. Rate: Minority

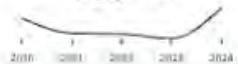
35% +3%



### Annual Degrees Awarded

#### Associate

139 +42%



#### Bachelor's

2,001 +15%



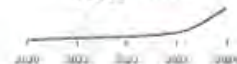
#### Master's

1,061 +27%

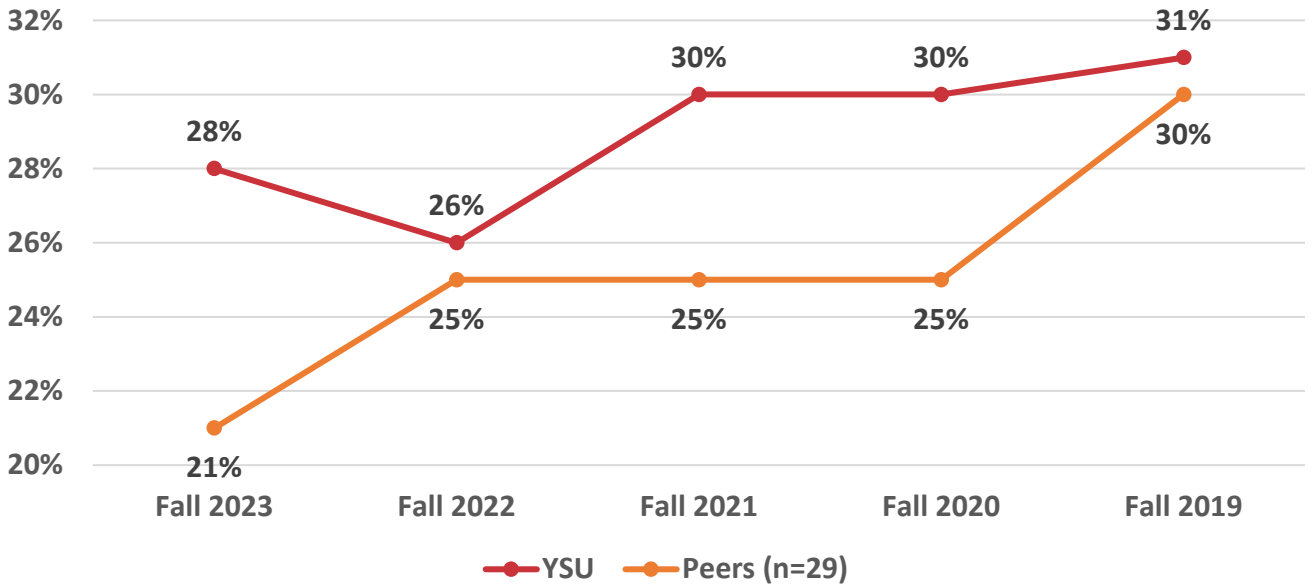


#### Doctoral

128 +113%



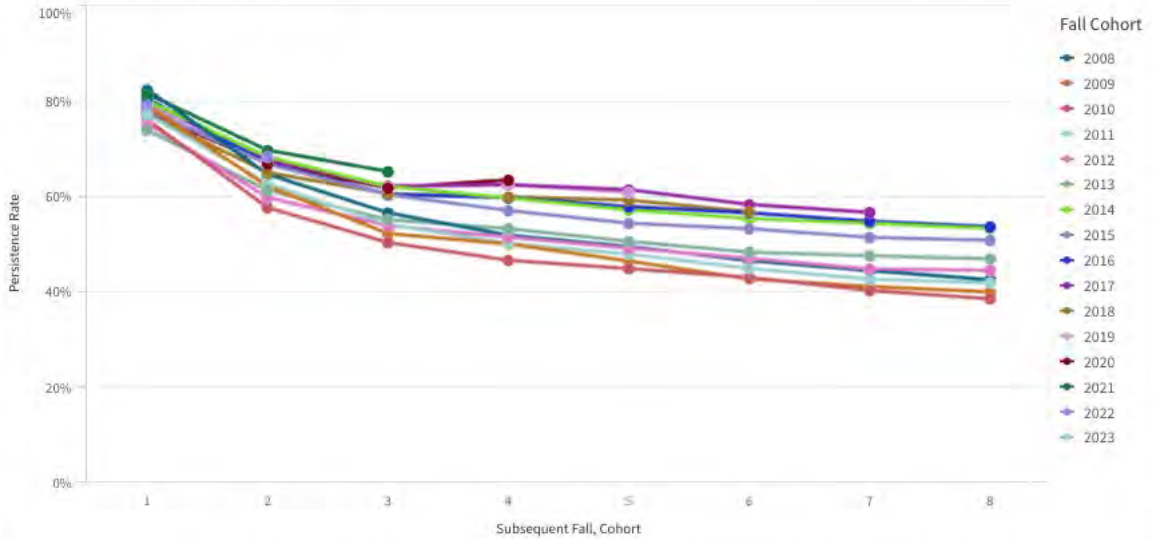
### Percent of First-time Undergraduate Students Admitted Who Enrolled (Full-time & Part-time)



# Persistence through Eight Years after Entrance

## YSU's Persistence Rate

First-Time Full-Time Bachelor's Degree-Seeking



Source: YSU IR Datasets and ODS\_ST\_ACADEMIC\_OUTCOMES. Persistence means graduated or retained by the University to the next subsequent fall term. It does NOT indicate a continuation in the entering college or major.

## Persistence Rate: First-Time Full-Time Bachelor's Degree-Seeking

Fall Cohort	Subsequent Fall							
	1	2	3	4	5	6	7	8
2008	82.3%	64.6%	56.5%	51.8%	49.4%	46.5%	44.4%	42.5%
2009	78.9%	62.0%	52.2%	50.0%	46.4%	42.7%	41.1%	40.0%
2010	76.0%	57.6%	50.3%	46.6%	44.8%	43.0%	40.3%	38.5%
2011	77.1%	62.6%	54.1%	50.1%	47.9%	44.9%	42.6%	41.8%
2012	75.2%	59.7%	53.8%	51.4%	49.1%	47.0%	44.8%	44.5%
2013	73.9%	61.2%	55.1%	53.2%	50.5%	48.3%	47.5%	46.9%
2014	80.0%	68.2%	62.0%	59.6%	57.1%	55.3%	54.3%	53.2%
2015	78.0%	66.7%	60.3%	57.0%	54.3%	53.2%	51.4%	50.7%
2016	80.3%	66.8%	60.4%	59.6%	57.8%	56.5%	54.7%	53.6%
2017	77.6%	67.5%	62.1%	62.4%	61.3%	58.2%	56.6%	-
2018	77.1%	64.9%	60.5%	59.8%	59.1%	56.7%	-	-
2019	78.9%	67.7%	61.9%	62.4%	60.8%	-	-	-
2020	77.4%	66.7%	61.7%	63.4%	-	-	-	-
2021	81.3%	69.6%	65.1%	-	-	-	-	-
2022	79.0%	68.2%	-	-	-	-	-	-
2023	77.1%	-	-	-	-	-	-	-

# GRADUATE OUTCOME REPORT FOR ACADEMIC YEAR 2023-2024

## EXECUTIVE SUMMARY

The Graduate Outcome Report is a summary of employment and continuing education decisions made by Youngstown State University graduates who completed degrees during the 2023-2024 academic year. They are collectively referred to as the Class of 2024.

**Who had the opportunity to take the survey:** The survey was distributed through Handshake (the university's career management system) to 2,813 individuals who received degrees in August 2023, December 2023, and May 2024.

**How the data was collected:** Students who did not respond to the survey mentioned above, were sent multiple emails over a period of six months after graduation. In addition, staff gathered student knowledge rate data (defined by the national Association of Colleges and Employers) via current social media profiles, information reported by the Alumni Office and faculty, and pre-graduation exit interviews.

**Knowledge Rate:** The YSU total knowledge rate is **54.25%**. Out of 2,813 graduates, there were 1,526 reported student outcomes.

**“Career” Outcomes Definition:** Respondents that are working as an employee, freelancer, or contract worker; accepted into a program of additional education; in the military; started a business; or in a service position (AmeriCorps, Peace Corps, etc.).

**Career Outcomes Rate:** The YSU total career outcome rate is **90.62%**. Out of the 1,526 respondents, 1,383 had outcomes related to a career. (Of those respondents, approximately 72% are working or in the military and 18% are continuing their education.)

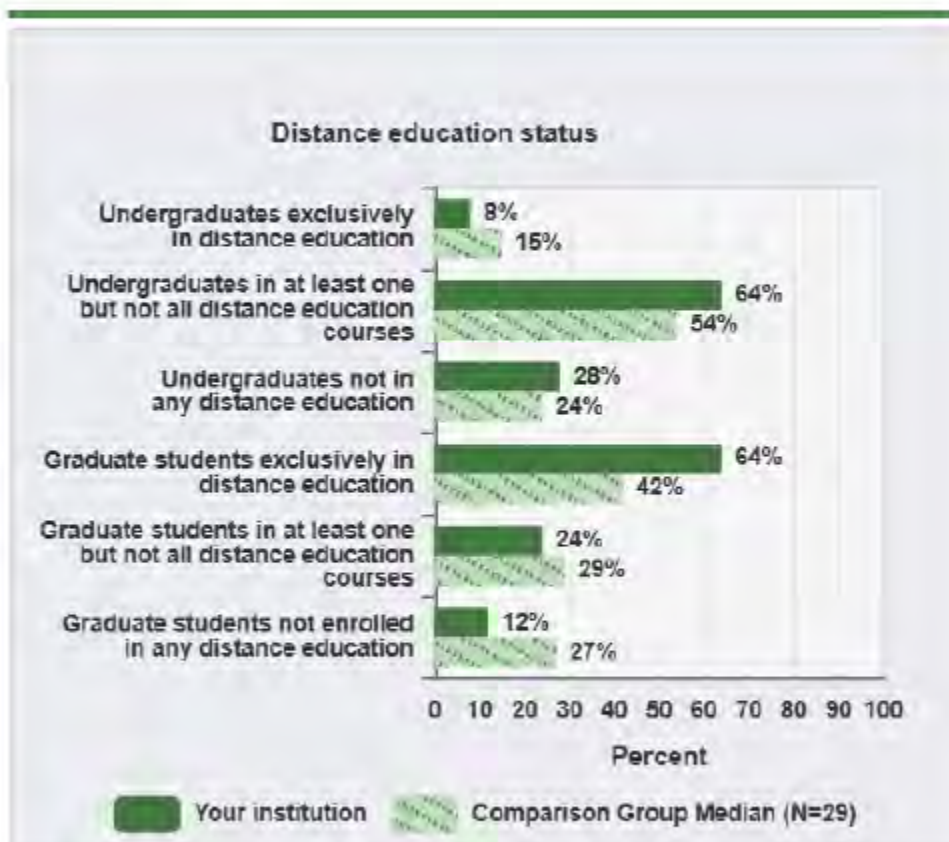
**Ohio Retention Rate:** **79.83%** of respondents remained in Ohio.

### Reported Salaries by Degree Type:

<u>Associate</u>	<u>Bachelor</u>	<u>Master</u>	<u>Doctorate</u>
Responses = 7	Responses =169	Responses = 88	Responses = 4
Mean: \$39,094	Mean: \$57,078	Mean: \$75,465	Mean: \$188,700
Median: \$36,400	Median: \$60,000	Median: \$65,500	Median: \$193,900

Prepared January 2025

**Figure 15. Percent of students enrolled in distance education courses, by distance education status and student level: 2022-23**



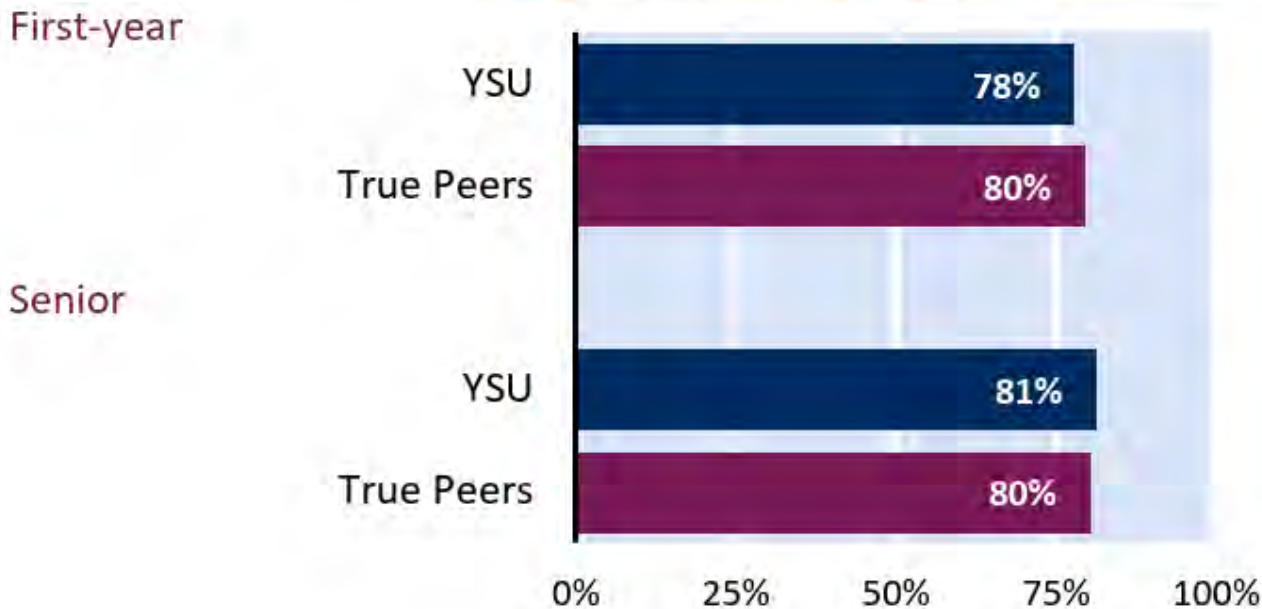
NOTE: N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2023, 12-month Enrollment survey component.

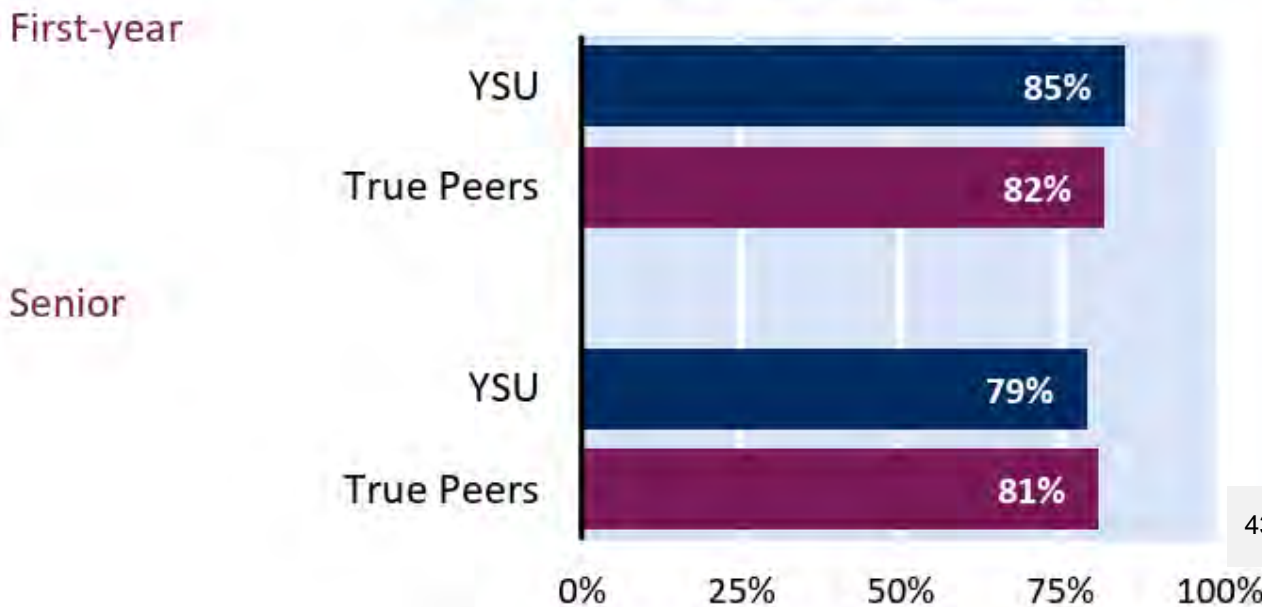
# Satisfaction with YSU

Students rated their overall experience at the institution, and whether or not they would choose it again.

### Percentage Rating Their Overall Experience as "Excellent" or "Good"



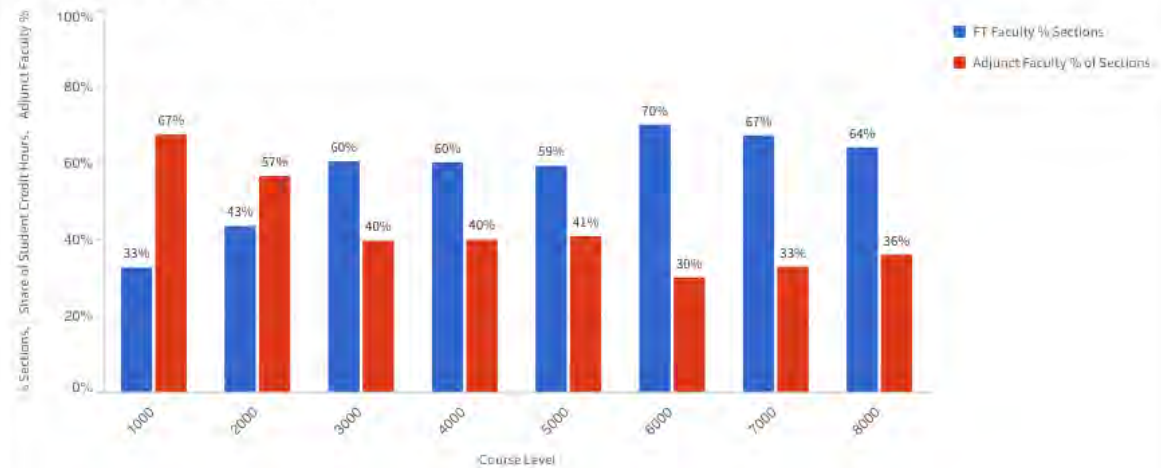
### Percentage Who Would "Definitely" or "Probably" Attend This Institution Again



# SHARE OF FULL-TIME FACULTY TEACHING

## Full-Time Faculty Instruction by Course Level (2023-24)

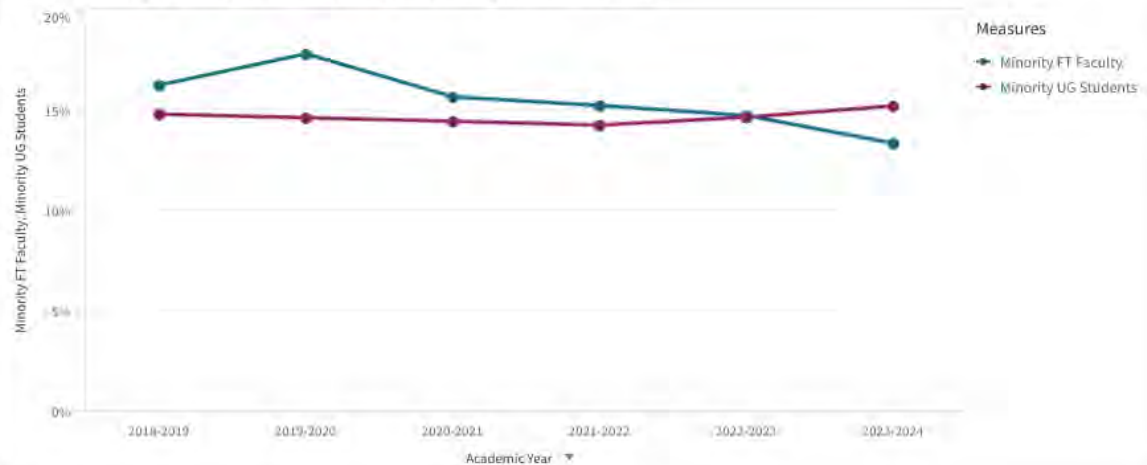
YSU's Share of Full-Time Instruction



# DIVERSITY OF INSTRUCTION

## Percentage Minority: Full-Time Faculty and Undergraduate Students

YSU's Percentage Minority Full-Time Faculty and Undergraduate Students



Source: YSU Banner data reported via IPEDS Human Resources Survey.

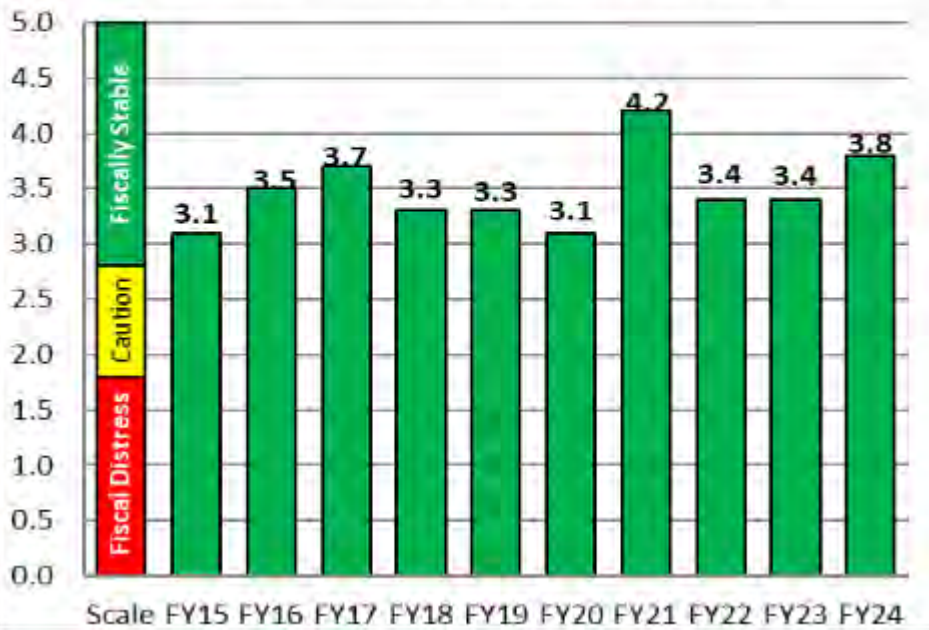
### Percentage Minority Full-Time Faculty and Undergraduate Students

Minority	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
FT Faculty	16.2%	17.8%	15.7%	15.2%	14.7%	13.4%	-0.01	-9%	-0.03	-17.78%
Undergraduates	14.8%	14.6%	14.5%	14.3%	14.7%	15.2%	0.01	4%	0.00	2.74%



## Historical Data

YSU's S.B. 6 composite scores have fluctuated over the last 10 years but have remained stable since inception.



The following are observations and actions steps as appropriate for each of the Board of Trustees Key Performance Indicators. These observations are from Key Performance Indicators in 2024.

- ***Yield of admitted students:*** For Fall 2023, the YSU yield of admitted students was 7% than that of the 29 peer institutions. While over five-years the YSU yield of admitted student decreased by 3%, the yield of admitted students for the 29 peer institutions declined by 8%. YSU will continue to refined efforts known to increase yield such as offering earlier and easier access to signing up for Orientation sessions.
- ***Headcount and full-time equivalent enrollment:*** Both headcount and full-time equivalent enrollment have increased over a one-year period (8%; 6%) but declined over a five-year timeframe (-2%; -9%). The Enterprise Enrollment strategy focusing on market share is intended to stabilize and/or reverse this trend.
- ***Cohort persistence through eight-years after entrance:*** While persistence there is 9% attrition from year 1 to year 2, there is an additional 11% attrition from year 2 to year 6. Implementing a student anticipatory and preventative advising and support strategy as well as having advising overseen by the associate provost for student success are intended to improve persistence across all years.
- ***4- and 6-y graduation rates (2017 cohort):*** Both 4- and 6-year graduation rates have increased over a 5-year period (+98%; +32%). The 4- and 6-y graduation rates are now 33% and 51%, respectively, for the Fall 2017 cohort while they were 16% and 39%, respectively, for the Fall 2012 cohort.
- ***4- and 6-y graduation rates minorities (2017 cohort):*** The 4- and 6-year graduation rates for minority students have increased over a 5-year period (+138%; +83%). This remains 13% and 16% lower, respectively, compared to all students (20%, 35%). Further analysis is required to understand the underlying reason(s) for such an outcome so support can be enhanced in strategic ways.
- ***Associate's degrees awarded:*** The number of Associate degree completions increased 42% year-over-year. Given the increased offerings of Associate degree programs, it is anticipated this number will increase substantially over time.
- ***Bachelor's degrees awarded:*** Bachelor's degrees awarded increased 15% year-over-year, and 24% over 5 years. While increasing the number of graduates is a measure of academic program success, this does create a dynamic tension with constructing the incoming classes. Beginning in fall 2025, 15 online undergraduate degrees, 5 per year over three years, will increase the number of Bachelor's degrees awarded. While primary focus of these programs is adults 25 y or older with some college and no degree, these programs will also attract students younger than 25-y with similar characteristics or perhaps those enrolled for the first-time.

- **Master's degrees awarded:** The number of Master's degrees awarded has increased 161% over 5 years and 27% over 1 year. This is the result of a very purposeful implementation of offering Master's degree programs online. It is also related to strategic marketing of Master's degree in the College of Science, Technology, Engineering, and Mathematics. Strategies are emerging to align Master degree offerings to businesses/industries and governmental agencies requiring Master's degree for career advancement (Air Force, etc.).
- **Doctoral degrees awarded:** The number of Doctoral degrees awarded has increased 161% and 113% over 5- and 1-year(s), respectively. This is the result of a very purposeful enhancement of Physical Therapy and the Ed.D., as well as implementation of such degrees in recent years (Nurse Practitioner and Anesthetist).
- **Percent of full-time faculty teaching:** It is known that the more exposure students have to full-time faculty the better the student experience. Except for 1000- and 2000-level courses, 60% or more of higher-level courses are taught by full-time faculty.
- **Diversity of instruction:** The diversity of the students and that of the full-time faculty are roughly equivalent over the past five years. There are no established criteria for this measure other than to be aware of this relationship. Should this remain a Board Key Performance Indicator?
- **Distance education enrollment:** A substantially larger proportion of undergraduate students enroll in at least one online course compared to peers. As expected, given the implementation of online Master's programs, a substantially larger proportion of graduate students, compared with peers, are enrolled totally in online degree programs.
- **Graduate compensation outcomes:** Individuals in Mahoning County with a high school diploma earn on average \$23,923. Average earning for Mahoning County with a Bachelor's degree is on average \$41,875. Given these facts, a Bachelor's degree from YSU adds value given the average mean income for a YSU Bachelor's degree recipient is \$57,078, potentially providing a \$15,203 compensation boost. One must keep in mind there might be a sampling bias in terms of the number of respondents, and those with higher earnings may be more inclined to respond to the survey.

[How Much Money Do Ohioians Make: See a City by City List \(Feb 23, 2024\)](#)

- **National Survey of Student Engagement:** The most recent administration of this survey instrument (2023) indicates that YSU students in both their first- and senior-years are satisfied with their experiences overall. In addition, most students both in their first- and senior-years would choose to attend YSU again. These results not dissimilar to those of 2021.
- **Senate Bill 6 Score:** Senate Bill 6 composite score is a measure of institutional fiscal stability. YSU's score has consistently been above 3.0 and has been as high as 4.2 for FY21, as influenced by federal relief funds related to COVID.

**Board of Trustees**
**March 12, 2025**
**2024 IPEDS Data Feedback Report**

Data is mostly from Fall 2023, FY 23 or AY 2022-23 (unless otherwise specified)

Variable (avg or numerical)	YSU	29 Peers	13 Public Institutions in Ohio	Three public institutions in Northeast Ohio <sup>1</sup>
<b>Enrollment</b>				
% Applicants admitted	80%	92%	85%	87%
Yield	28%	21%	21%	19%
<b>Students</b>				
% Pell	35%	40%	29%	32%
Full-time retention rate	77%	71%	78%	73%
Six-year graduation rate	53%	47%	60%	49%
Eight-year graduation rate-Pell	36%	38%	47%	44%
Eight-year graduation rate-non-Pell	57%	53%	65%	58%
Transfer-out Rate	17%	26%	24%	25%
<b>Cost of Attendance</b>				
Tuition and Required Fees	\$10,791	\$9,254	\$12,823	\$12,799
Any loans	\$6,205	\$5,877	\$7,832	8,111
Avg. net price of attendance	\$11,740	\$13,156	\$18,751	\$16,307

<sup>1</sup> Cleveland State University, Kent State University, and The University of Akron

**Board of Trustees****March 12, 2025****High Level Summary****2024 IPEDS Data Feedback Report**

Data is mostly from Fall 2023, FY 23 or AY 2022-23 (unless otherwise specified)

**Summary** (in the context of three comparison groups as illustrated in the preceding table)

YSU continues to be an affordable institution of choice considering lower tuition and fees, net cost of attendance, and student loan amounts. From a student attraction and retention/persistence point-of-view, YSU yields a larger percent of those admitted and has a lower transfer-out rate. YSU has a larger percent of students who receive federal Pell funding provided to students who have exceptional financial need who are typically at-risk for persistence and completion-higher attrition rates. There is an achievement gap for Pell vs. non-Pell students compared to the 29 peer institutions (Peer-29) that has been addressed via adjustments in initial support services and advising enhancements. This is demonstrated by the fact that for the Peer-29, the 2011-12 first-time, full-time degree/certificate seeking students, the eight-year graduation rates were identical, whereas YSU is 3% higher for this report. For the earlier cohort, YSU had a 10% lower Pell graduation rate that is now only 2% different from the Peer-29. The eight-year graduation rate for Pell in this report is 36%, whereas for the earlier cohort it was 24%, a 12% improvement.

**Enrollment**

- YSU is slightly more selective, with an acceptance rate of 80%, with a 7% to 9% higher yield of 28%, compared to all comparison groups.

**Students**

- At YSU, 35% of degree/certificate-seeking undergraduates were awarded federal Pell grants, which is lower than the average for the 29 peer institutions (Peer-29), but 3% to 6% higher compared to other public institutions in Ohio (OH-13), including three public institutions in Northeast Ohio (NEO-3).
- The retention rate for first-time full-time degree/certificate-seeking students (FTFT) for Fall 2022 cohort is 4% to 6% higher at YSU (77%) compared to the Peer-29 and the NEO-3. The retention rate for the OH-13 is only one percentage point higher than YSU.
- Six-year graduation rate for 2017 cohort is 4% to 6% higher for YSU (53%) compared to the Peer-29 and the NEO-3. However, the YSU graduation rate is 7% lower when compared to the OH-13, several of which are highly selective institutions.
- For the 2015-2016 FTFT cohort:
  - Amongst Pell recipients, the YSU graduation rate (36%) is 2%, 11% and 8% lower compared to Peer-29, NEO-3, and OH-13.

- Among non-Pell recipients, YSU graduation rate (57%) is 4% higher than that of the Peer-29, but 1% and 8% lower than the NEO-3 and the OH-13, respectively.
- The transfer-out rate for YSU (17%) is 8% lower than the transfer-out rate compared to the average of the three comparison groups.

**Cost of attendance**

- Tuition and required fees for FTFT are higher for YSU compared to the Peer-29, but \$2,020 lower than the average for the OH-13 and NEO-3.
- The average amount of any loans awarded to YSU FTFT is higher than the Peer-29, but \$2,819 lower compared to the average for the OH-13 and NEO-3.
- The average net price of attendance for YSU FTFT undergraduate students is lower than that of all comparison groups. It is \$7,011 lower compared to the OH-13.

### 3356-5-02 Advertising/sponsorship policy.

Responsible Division/Office: University Relations  
Responsible Officer: ~~Associate VP of University Relations~~ [Vice President of Strategic Communications/Chief of Staff](#)  
Revision History: September 1997; June 2010; June 2015; December 2019; [March 2025](#)  
Board Committee: Institutional Engagement  
**Effective Date:** ~~December 12, 2024 (reviewed; no changes)~~ [March 13, 2025](#)  
Next Review: ~~2029~~ [2030](#)

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- (A) Policy statement. Institutional publications, statements, and advertisements must represent the highest professional standards for design and content, shall be truthful, informative and constructive, and avoid misleading or exaggerated impressions with respect to the university.
- (B) Purpose. To maintain the consistency of the university's public image and to ensure appropriate use of the university's name and brand, the efficient use of university resources, and to provide information regarding the use of university funds in support of community activities and events.
- (C) Scope. This policy applies to all advertising, including sponsorships, done by the university. Adherence to the highest professional content, design, and production standards is required to ensure that core institutional messaging, imaging and branding is accurately and effectively expressed and presented to the public in all media.
- (D) "Sponsorship." The use of university funds for the betterment of agencies/ community partners that work in collaboration with the university but are not a part of the university system. Sponsorship includes underwriting, advertising, or attendance sponsorship, such as a seat or table fifteen hundred dollars and above.
- (E) Guidelines.



- (1) The success and public acceptance of effective advertising is dependent on a strategy built upon research, credibility and consistency; and it must be based on a well-planned and executed program. The office of marketing and communications is responsible for assuring that these standards are met.
- (2) The YSU contact that requests or receives table seats as part of sponsorship is responsible to assure the table is full and provides a great opportunity for faculty, students, or administrators to appropriately represent the university and expand their learning experiences while mutually benefitting the partner organization.

(E) Procedures.

- (1) University departments and offices wishing to use university resources for a sponsorship to advertise in any medium (e.g., internet websites, print publications, outdoor media, radio, television) must do so in consultation with the office of marketing and communications.
- (2) A written request for advertising or sponsorship planning, design and/or placement services must be submitted to the office of marketing and communications prior to the commitment of any university funds at least three weeks in advance of the advertisement or sponsorship deadline. At that time, the office of marketing and communications will provide the requester with final production and placement cost estimates before proceeding.
- (3) Once a final design and budget are agreed upon, the office of marketing and communications will be responsible for quality control in the design, content, and timely placement of the final advertisement or sponsorship.
- (4) With respect to the department of intercollegiate athletics, the [Cliffe](#) college of creative arts ~~and communication~~, and employment advertising by the department of human resources, written requests for advertising are not required to be submitted to the office of marketing and communications. However, the marketing and/or advertising of these units must adhere to the guidelines and intent of this policy. The office of marketing and

communications will monitor practices to ensure appropriate professional standards.

**3356-5-02 Advertising/sponsorship policy.**

Responsible Division/Office: University Relations  
Responsible Officer: Vice President of Strategic  
Communications/Chief of Staff  
Revision History: September 1997; June 2010; June 2015;  
December 2019; March 2025  
Board Committee: Institutional Engagement  
**Effective Date: March 13, 2025**  
Next Review: 2030

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  - (1) The success and public acceptance of effective advertising is dependent on a strategy built upon research, credibility and consistency; and it must be based on a well-planned and executed

program. The office of marketing and communications is responsible for assuring that these standards are met.

- (2) The YSU contact that requests or receives table seats as part of sponsorship is responsible to assure the table is full and provides a great opportunity for faculty, students, or administrators to appropriately represent the university and expand their learning experiences while mutually benefitting the partner organization.
- (E) Procedures.
- (1) University departments and offices wishing to use university resources for a sponsorship to advertise in any medium (e.g., internet websites, print publications, outdoor media, radio, television) must do so in consultation with the office of marketing and communications.
  - (2) A written request for advertising or sponsorship planning, design and/or placement services must be submitted to the office of marketing and communications prior to the commitment of any university funds at least three weeks in advance of the advertisement or sponsorship deadline. At that time, the office of marketing and communications will provide the requester with final production and placement cost estimates before proceeding.
  - (3) Once a final design and budget are agreed upon, the office of marketing and communications will be responsible for quality control in the design, content, and timely placement of the final advertisement or sponsorship.
  - (4) With respect to the department of intercollegiate athletics, the Cliffe college of creative arts, and employment advertising by the department of human resources, written requests for advertising are not required to be submitted to the office of marketing and communications. However, the marketing and/or advertising of these units must adhere to the guidelines and intent of this policy. The office of marketing and communications will monitor practices to ensure appropriate professional standards.



**RESOLUTION TO MODIFY  
ADVERTISING/SPONSORSHIP POLICY 3356-5-02**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**

Youngstown State University Foundation  
Gift Processing Summary

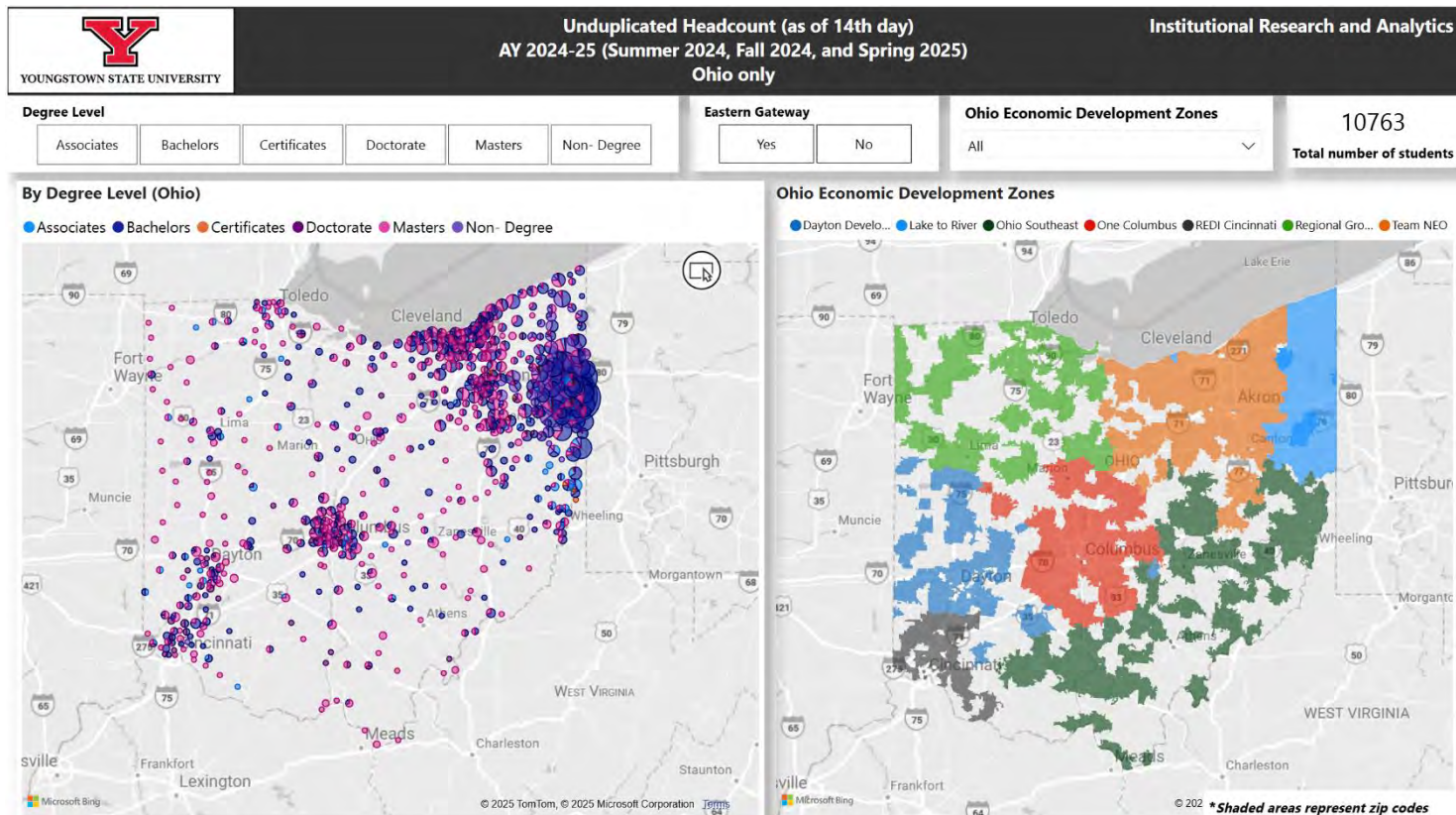
	Second Quarter			Year-to-Date		
	<u>FY'25</u>	<u>FY'24</u>	<u>Difference FY25/FY24</u>	<u>FY'25</u>	<u>FY'24</u>	<u>Difference FY25/FY24</u>
<b>Development (New Gifts and New Pledges):</b>						
YSU	\$2,047,622.60	\$2,120,736.56	-\$73,113.96	\$3,006,469.60	\$3,511,739.45	-\$505,269.85
YSUF	\$4,083,433.03	\$2,063,671.67	\$2,019,761.36	\$5,119,746.89	\$3,106,936.06	\$2,012,810.83
Total Development (New Gifts and New Pledges)	\$6,131,055.63	\$4,184,408.23	\$1,946,647.40	\$8,126,216.49	\$6,618,675.51	\$1,507,540.98
Planned Giving/Charitable Gift Annuities	\$3,010,000.00	\$200,000.00	\$2,810,000.00	\$6,810,000.00	\$490,000.00	\$6,320,000.00
<b>Pledge Payments (For Pledges Currently or Previously Included as Development):</b>						
YSU	\$910,641.26	\$965,681.35	-\$55,040.09	\$1,727,597.09	\$1,226,772.50	\$500,824.59
YSUF	\$544,781.47	\$550,850.52	-\$6,069.05	\$703,688.87	\$618,193.80	\$85,495.07
Total Pledge Payments	\$1,455,422.73	\$1,516,531.87	-\$61,109.14	\$2,431,285.96	\$1,844,966.30	\$586,319.66
<b>Number of Gifts</b>						
New Gifts	1,290	1,567	-277	1,665	2,007	-342
Pledges	44	35	9	54	43	11
Payments	109	107	2	191	184	7
Planned Gifts/Charitable Gift Annuities	2	1	1	5	3	2

# Youngstown State University Board of Trustees Governance Committee March 12, 2025

## HEAT-MAPS TO STRATEGIZE GAINING MARKET SHARE

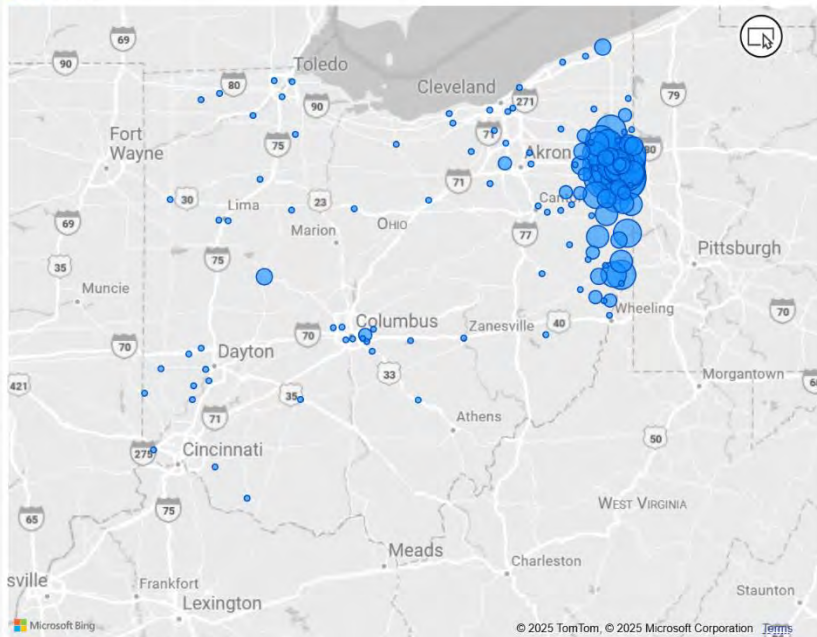
Left illustration: Distribution of students in Ohio by degree/certificate/non-degree status using permanent residence zip code. The size of the circle increases with increasing student numbers.

Right illustration: Distribution of students in Ohio, by Ohio economic development zones. If one student is enrolled, the entirety of the zip-code is highlighted



**By Degree Level (Ohio)**

● Associates

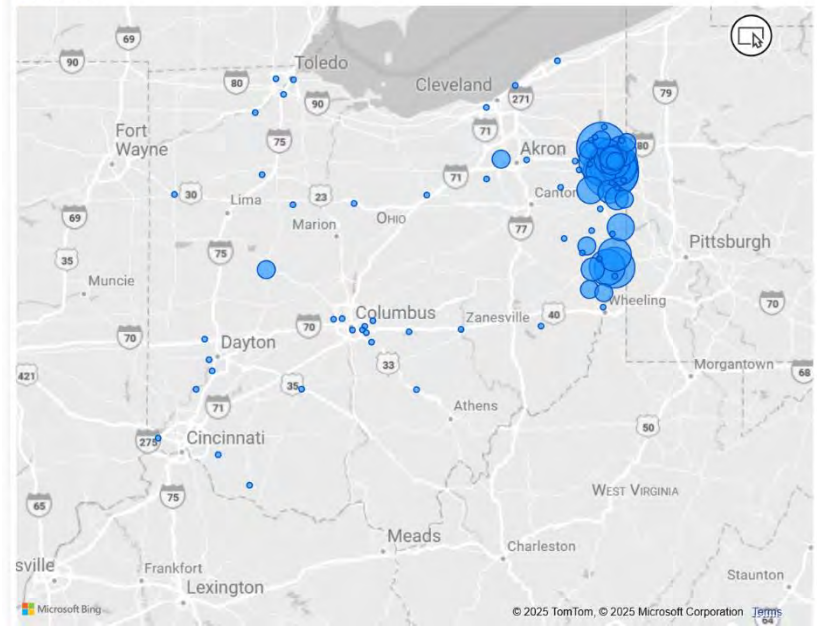


647 Ohio Associate degree-seeking students by permanent address zip code. Size of circle represents number of students.

222 Ohio EGCC Associate degree-seeking students by permanent address zip code. Size of circle represents number of students.

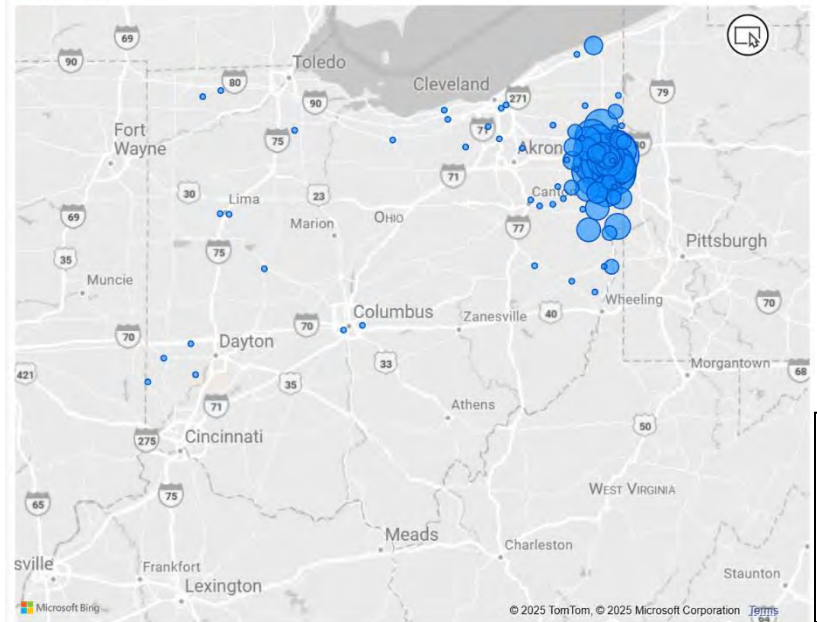
**By Degree Level (Ohio)**

● Associates



**By Degree Level (Ohio)**

● Associates



425 Ohio non-EGCC Associate degree-seeking students by permanent address zip code. Size of circle represents number of students.



### By State (excluding Ohio)



2,021 national (not including Ohio) Associate degree-seeking students by permanent address zip code. Size of circle represents number of students.

293 national (not including Ohio) EGCC Associate degree-seeking students by permanent address zip code. Size of circle represents number of students.

### By State (excluding Ohio)



1,728 national (not including Ohio) non-EGCC Associate degree-seeking students by permanent address zip code. Size of circle represents number of students.

### By State (excluding Ohio)



BOT Report  
Sarah Keeler, Vice President  
Office of Government Affairs  
March 12, 2025

- State Operating Budget
  - Seeking \$2.65M in addition to SSI allotment
  - Seeking to protect the 25 percent budget increase for the Tech Prep program
- Federal Appropriations Requests (pending)
  - Working on application for an expanded circle outside the student center on Tressel Way
  - Requests from FY25
- State Elected Officials
  - Meeting with House and Senate Leadership, Finance, and Higher Education Committees
  - March 10-11 IUC Day at the Statehouse
- Grants
  - \$50K Campus Security Grant
  - In the process of submitting several corporate grants for the Student Center
- Greater Community Objectives
  - YBI application for an innovation hub –
  - Youngstown Warren Regional Chamber’s Government Affairs Council
  - Chairing campus committee to review Joint Use Agreements with community partners.
- IUC Objectives
  - Be a voice for Youngstown State at the IUC regarding policy and funding decisions
- Campus Community Objectives
  - Advocate for legislative priorities, as per the President and the Board of Trustees

**RESOLUTION TO MODIFY  
MILITARY (UNIFORMED SERVICE LEAVE) POLICY, 3356-7-12**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**

**3356-7-12 Military (~~uniformed service~~) leave.**

Responsible Division/Office: ~~Legal Affairs and~~ Human Resources

Responsible Officer: VP for ~~Legal Affairs and Human Resources~~ [Strategic Communications/Chief of Staff](#)

Revision History: October 1998; December 2010; March 2015; March 2020; [March 2025](#)

Board Committee: University Affairs

**Effective Date:** ~~March 5, 2020~~ [March 13, 2025](#)

Next Review: ~~2025~~ [2030](#)

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- (A) Policy statement. Youngstown state university recognizes the need to have a policy that addresses the employment and reemployment rights of full and part-time employees who serve in the uniformed services. It is the policy of the university to comply with the Uniformed Services Employment and Reemployment Act of 1994 (“USERRA”), as revised, and applicable state laws which protect job rights and benefits for veterans and members of the reserves.
- (B) Purpose. The purpose of this policy is to demonstrate the university’s support for its employees who are part of the uniformed services and to outline the rights and responsibilities of such employees.
- (C) Scope. This policy applies to permanent public employees who are performing service in the uniformed services as defined in section 5923.05 of the Revised Code.
- (D) Definition, as defined in section 5923.05 of the Revised Code:
- (1) “Uniformed services means the armed forces; the Ohio organized militia, when engaged in active duty for training, inactive duty training, or full-time national guard duty; the commissioned corps of the public health service; and any other category of persons designated by the president of the United States in time of war or emergency.”
  - (2) “Permanent public employee” means any person holding a position in public employment that requires working a regular schedule of twenty-six consecutive biweekly pay periods or any other regular

schedule of comparable pay periods which is not limited to a specific season or duration. Permanent public employee does not include student help, intermittent, seasonal or external interim employees, or individual covered by personal services contracts.

(E) Parameters.

- (1) Employees defined in this policy are eligible for uniformed services benefits and reemployment rights in accordance with state and federal law.
- (2) Leaves of absence for service in the uniformed services shall be granted in accordance with Chapters 5903. and 5923. of the Revised Code and Chapter 123:1-34 of the Administrative Code.
- (3) Reinstatement and reemployment of employees in the uniformed services shall be in accordance with the Uniformed Services Employment and Reemployment Rights Act of 1994 (38 U.S.C. 4301, et seq.) and Chapter 123:1-34 of the Administrative Code.
- (4) Generally, permanent public employees, as defined in section 5923.05 of the Revised Code, who are members of uniformed services, as defined in paragraph (A)(D) of this rule, are entitled to a leave with pay for such time as they are performing service in the uniformed services for up to one month, ~~as defined in 5923.05,~~ **days** in any calendar year. Paid leave may not exceed one hundred seventy-six hours in any calendar year.
- (5) Any permanent public employee called to the uniformed services for a period in excess of one month (one hundred seventy-six hours) because of an executive order issued by the president of the United States or because of an act of congress or because of an order to perform duty issued by the governor, pursuant to section 5919.29 or 5923.21 of the Revised Code, may receive during this period the difference between the employee's gross monthly wage or salary from the university and his/her gross uniformed service pay and allowances received in a particular month.
- (6) Leave without pay will be granted in the event of voluntary or involuntary induction into uniformed service and in compliance with federal and state statutes.

- (7) Employees on uniformed service leave without pay beyond thirty days have the right to elect continuation of health care coverage for up to eighteen months, but will be responsible for the full premium for the coverage elected. Employees on uniformed service leave without pay for up to thirty days will be given the option of making direct payments of the employee's share of the health insurance premium.
- (8) Employees who accrue more than five years of cumulative uniformed service leaves of absence are excluded from university reemployment and fringe benefit rights, except as provided in 38 U.S.C. 4312, as amended.



**Explanation of policy modification:**

**3356-2-02 Equal Opportunity and Affirmative Action Recruitment and Employment**

Presidential Executive Order 14173, Ending Illegal Discrimination and Restoring Merit Based Opportunity, issued January 21, 2025, rescinded Executive Order 11246 which imposed affirmative action duties and obligations regarding sex and race.

The amendments contained in University Policy 3356-2-02 are in conformance with the required changes and must be completed within ninety days (90) of issuance of the new Executive Order.

**RESOLUTION TO MODIFY AND RETITLE  
EQUAL OPPORTUNITY AND AFFIRMATIVE ACTION  
RECRUITING AND EMPLOYMENT POLICY, 3356-2-02**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**



**3356-2-02    Equal opportunity ~~and affirmative action recruitment and employment.~~**

Responsible Division/Office: Equal Opportunity, Policy Development and Title IX  
Responsible Officer: Executive Director, Equal Opportunity, ~~Policy~~  
~~Development and Title IX~~ and Human Resources  
Revision History: August 2010; March 2011; September 2016; September 2021; March 2025  
Board Committee: University Affairs  
**Effective Date:** ~~September 2, 2021~~ March 13, 2025  
Next Review: 2026

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- (A) Policy statement. Youngstown state university is committed to the principles of ~~affirmative action and~~ equality of treatment and opportunity without regard to sex (including pregnancy), race, religion, color, age, national origin, sexual orientation, gender identity and/or expression, disability, veteran or military status or any other basis protected by law (protected class status).
- (B) Principles.
  - (1) It is the responsibility of the entire university to create a campus environment that values all individuals and groups, to provide for equality of opportunity, and to maintain openness to diversity of ideas and experiences.
  - ~~(2) — The commitment of the university is directed, in part, by the affirmative action plan.~~
  - ~~(3) — The affirmative action plan outlines the parameters of the university's affirmative action practices in recruitment and employment, which are reported regularly to the board of trustees.~~
- (C) Procedures.
  - (1) University employment and personnel actions and access to university-sponsored training, education, tuition assistance, social and recreational programs will be administered in accordance with

applicable state and federal regulations, executive orders, and university policies.

- (2) The office of equal opportunity, ~~title IX and~~ [policy development and Title IX](#) is responsible for the development and implementation of the university's equal opportunity ~~and affirmative action~~ policies and for receiving complaints of discrimination or harassment based on protected class status.
- (3) The office of equal opportunity, ~~title IX and~~ [policy development and Title IX](#), in coordination with the office of human resources, shall monitor recruitment and employment practices for compliance with applicable legal requirements and university policies.
- ~~(4) — The office of equal opportunity, title IX and policy development in conjunction with the office of human resources may require additional and/or specific efforts outside of the standard employment search process in furtherance of the university's equal employment and affirmative action goals. Such efforts include but are not limited to the drafting of job postings, the selection of applicants for interview, and advertisement and recruitment methods.~~
- ~~(5)~~(4) Specific information regarding equal opportunity recruitment and employment is found on the [office of equal opportunity, policy development and Title IX](#) website.
- ~~(6) — The university's affirmative action plan is available for viewing in the office of equal opportunity, title IX and policy development.~~

**RESOLUTION TO MODIFY  
SELECTION, APPOINTMENT, AND EVALUATION OF EXECUTIVE OFFICERS,  
ADMINISTRATIVE OFFICERS, AND PROFESSIONAL/ADMINISTRATIVE STAFF  
POLICY, 3356-7-56**

**WHEREAS**, University Policies are being 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.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby approve the modification of the University Policy stated above and attached hereto.

**3356-7-56 Selection, appointment, and evaluation of executive officers, administrative officers, and professional/administrative staff.**

Responsible Division Office: Human Resources  
Responsible Officer: VP [of Strategic Communications/Chief of Staff](#)~~for~~  
~~Legal Affairs and Human Resources~~  
Revision History: [March 2025](#)~~December 2024~~  
Board Committee: University Affairs  
**Effective Date:** [March 13, 2025](#)~~December 12, 2024~~  
Next Review: 2029

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- (A) Policy statement. The board of trustees is committed to establishing and developing processes designed to select, appoint, and evaluate effective, innovative, and strategic executive officers, administrative officers, and professional/administrative staff. In the selection, appointment, and evaluation of said staff, the board of trustees is committed to the principle of collegiality, where, as appropriate, members of the university community (students, faculty, and staff) have an opportunity to participate in the decision-making processes of the university. The board of trustees acknowledges the need for the establishment of processes for the selection, appointment and evaluation of said staff.
- (B) Purpose. To provide guidelines and processes necessary to meet the need for selection, appointment, and evaluation of executive officers, administrative officers, and professional/administrative staff.
- (C) The procedures that follow provide an overall structure for the selection, appointment, and evaluation of executive officers, administrative officers, and professional/administrative staff. It is recognized that these procedures may need to be adjusted in consultation with the chief human resources officer to accommodate a particular situation. The following is a general description of the selection, appointment, and evaluation process.
- (D) Definitions.
- (1) “Executive officers” – maintain overall leadership for a particular division or unit. As university officials, each has the responsibility to represent the university and provide leadership in the specified

areas of responsibility. The executive officers serve as primary advisors and the members of the president's cabinet. In addition, the president may designate others to serve as members of the cabinet. Executive officers of the university include:

- (a) The provost and vice president for academic affairs is the chief academic officer of the university. As the president's first delegate, the provost and vice president for academic affairs has primary responsibility for the overall administration of the academic programs of the university.
- (b) The vice president for institutional effectiveness and board professional is responsible for the university's institutional effectiveness agenda, provides leadership for institutional research and strategic planning implementation and assessment, supports the president internally and externally, and supports the successful functioning of the board of trustees as a board professional.
- (c) The vice president for student affairs is the chief student personnel officer for the university and provides leadership for the division of student affairs and its major units.
- (d) The vice president for finance and business operations is the chief fiscal officer for the university, provides leadership for the division of finance and business operations, recommends fiscal policy to the president for consideration by the board of trustees, and is responsible for implementation of these policies.
- (e) The vice president of legal affairs and human resources and university general counsel is the chief legal officer of the university and provides leadership for the division of legal affairs and human resources.
- (f) The vice president for government affairs is the chief government affairs officer and provides strategic leadership in building effective relationships with federal, state, and local officials as well as key community stakeholders to advance the university.

- (g) The vice president for strategic communications provides a comprehensive leadership vision for development and implementation of a communications, marketing, branding, and public relations strategy. Serves as the university's chief spokesperson and representative to the news media.
  - (h) Other positions designated by the president with the approval of the board of trustees.
- (2) "Administrative officers" – maintain management responsibilities for a specific segment of the campus. They also serve as an integral part of the university's leadership team that is responsible for the overall direction of the institution. Each serve as a primary advisor on the various divisional advisory committees and as members of the executive and administrative staff council. Each dean, associate dean, and chair has certain responsibility for one of the colleges and reports directly or through the chain of command to the provost and vice president for academic affairs. Associate vice presidents, associate provosts, assistant provosts, and executive directors are responsible for a major administrative unit.

Administrative officers of the university include:

- (a) College deans, associate deans, and chairs.
- (b) Associate vice presidents.
- (c) Executive directors.
- (d) Associate provosts.
- (e) Assistant provosts.
- (f) Executive director of equal opportunity, policy development, and Title IX.
- (g) Chief human resources officer.
- (h) Other positions designated by the president.

- (3) “Professional/administrative staff” (including part-time and externally funded) – perform nonteaching duties of a professional, administrative, or research nature and are not in the classified civil service or in a bargaining unit. Includes intercollegiate athletic coaches who have instructional responsibilities in the division of intercollegiate athletics.

(E) Selection.

(1) Executive officers.

(a) Posting requirements.

- (i) Vacant or new positions shall be posted on the university website and on other appropriate platforms, as determined by the office of human resources.
- (ii) Postings shall identify the minimum qualifications to fill the position and may identify preferred qualifications.

(b) Search committee.

- (i) The president will appoint a search committee to fill a vacant or new executive level position and shall identify one member of the committee to serve as chair.
- (ii) The search committee shall include representatives of the affected university division, member(s) of the board of trustees, as designated by the board chair, and may include other members of the university community and other external members, as appropriate.
- (iii) Prior to serving on a search committee, all search committee members shall attend and complete search committee training.

- (iv) All timely applications received shall be reviewed by the search committee chair or a representative of human resources to identify those candidates who meet the minimum qualifications.
  - (v) The candidates who meet the minimum qualifications shall be forwarded to the search committee for further review. The search committee shall rate each candidate.
  - (vi) The search committee chair shall complete a review of references provided by the qualified candidates and shall determine and review additional references germane to the candidates' prior employment history. Based upon the ratings and the reference check review, the search committee chair will identify candidates to interview. Alternatively, the president may authorize the use of a search firm.
  - (vii) An on-campus interview shall be conducted by the search committee and may include a broad representation of each division of the university, other members of the university community, including the board of trustees and others identified by the appropriate executive level officer or designee appointed by the president.
  - (viii) The president will host a meeting with each of the final candidates and members of the board of trustees.
  - (ix) The president, in consultation with the board of trustees, will identify the candidate to be extended the offer.
- (c) Exceptions to the selection process.
- (i) Search waiver. A waiver of the search process may be requested in accordance with rule 3356-7-55 of



the Administrative Code, “Search waivers for hiring of faculty, executive officers, administrative officers, and professional/administrative staff.”

- (ii) Interim appointment. Positions may be filled on an interim basis without initiating the search process (see rule 3356-9-10 of the Administrative Code, “Acting/interim appointments of university executive and administrative employees”).
- (2) Administrative officers.
- (a) Posting requirements.
    - (i) Vacant or new positions shall be posted on the university website and on other platforms, as determined by the office of human resources.
    - (ii) Postings shall identify the minimum qualifications to fill the position and may identify preferred qualifications.
  - (b) Search committee.
    - (i) The appropriate executive level officer or the president’s designee shall appoint a search committee to fill a vacant or new administrative officer level position and shall identify one member of the committee to serve as the chair.
    - (ii) The search committee shall include representatives of the affected university division and may include other members of the university community and other external members, as appropriate.
    - (iii) Prior to serving on a search committee, all search committee members shall attend and complete search committee training.
    - (iv) All timely applications received shall be reviewed by the search committee chair or a representative of

human resources to identify those candidates who meet the minimum qualifications.

- (v) The candidates who meet the minimum qualifications shall be forwarded to the search committee for further review. The search committee shall rate each candidate.
- (vi) The search committee shall complete a review of references provided by the qualified candidates and shall determine and review additional references germane to the candidates' prior employment history. Based upon the ratings and reference check review, the search committee chair will identify candidates to interview. Alternatively, the president may authorize the use of a search firm.
- (vii) An on-campus interview shall be conducted by the search committee and may include a broad representation of each division of the university, other members of the university community, including the board of trustees and others identified by the appropriate executive level officer or designee appointed by the president.
- (viii) Upon conclusion of the interview process, the search committee shall submit a list of candidates that are well-qualified to fill the position to the appropriate executive level officer or designee appointed by the president.
- (ix) The appropriate executive level officer or designee appointed by the president, in consultation with the president, shall review the list of well-qualified candidates and identify the person to be extended an offer of employment.

- (c) Exceptions to the selection process.
  - (i) Search waiver. A waiver of the search process may be requested in accordance with rule 3356-7-55 of the Administrative Code, “Search waivers for hiring of faculty, executive officers, administrative officers, and professional/administrative staff.”
  - (ii) Interim appointment. Positions may be filled on an interim basis without initiating the search process (see rule 3356-9-10 of the Administrative Code, “Acting/interim appointments of university executive and administrative employees”).
- (3) Professional/administrative staff.
  - (a) Posting requirements.
    - (i) Vacant or new positions shall be posted on the university website and on other platforms, as determined by the office of human resources.
    - (ii) Postings shall identify the minimum qualifications to fill the position and may identify preferred qualifications.
  - (b) Search committee.
    - (i) The hiring manager will follow the prescribed electronic process to seek approval to post a professional/ administrative position.
    - (ii) The hiring manager shall appoint a search committee to fill a new or vacant professional/ administrative position and shall identify one member of the search committee to serve as chair.
    - (iii) Prior to serving on a search committee, all search committee members shall attend and complete search committee training.

- (iv) All timely applications received shall be reviewed by the search committee chair or a representative of human resources to identify those candidates who meet the minimum qualifications.
  - (v) The candidates who meet the qualifications shall be forwarded to the search committee for further review. The search committee shall rate each candidate. Based upon the ratings and the reference check review, the search committee chair will identify candidates to interview.
  - (vi) Upon conclusion of the interview process, the search committee shall submit to the hiring manager a list of the candidates that are well-qualified for the position.
  - (vii) The hiring manager shall interview the well-qualified candidates and identify the person to be extended an offer of employment.
- (c) Exceptions to the selection process.
- (i) Search waiver. A waiver of the search process may be requested in accordance with rule 3356-7-55 of the Administrative Code, “Search waivers for hiring of faculty, executive officers, administrative officers, and professional/administrative staff.”
  - (ii) Interim appointment. Positions may be filled on an interim basis without initiating the search process (see rule 3356-9-10 of the Administrative Code, “Acting/interim appointments of university executive and administrative employees”).
- (F) Appointments.
- (1) Executive officers.
    - (a) For an executive level position, the president, in consultation with the board of trustees, will identify the

candidate to be extended the offer. The office of human resources will extend an offer of employment that is contingent upon the approval of the board of trustees. The offer will be in the form of either an appointment or employment contract.

- (i) Appointments will include a ninety-day notice of termination clause.
  - (ii) When it is in the best interest of the university, the president may issue an employment contract for multiple years.
  - (iii) Both appointments and employment contracts of an executive officer must be approved by the board of trustees prior to the employment start date.
- (b) Employment is contingent on acceptable background checks. The requirement for a background check cannot be waived.
- (c) The chief human resources officer will prepare and submit a summary of all personnel actions for executive level officers to the university affairs committee for recommendation for approval by the board of trustees. The personnel actions shall be contingent upon approval by the board.
- (2) Administrative officers.
- (a) For an administrative officer level position, the office of human resources will extend an offer of employment that is contingent upon approval of the board of trustees. The offer will be in the form of either an appointment or an employment contract.
    - (i) Appointments will include a ninety-day notice of termination clause. Appointments are contingent upon board approval; however, employees may begin employment prior to board approval. Administrative officers with tenure may be returned

to faculty without providing the ninety-day notice period. See rule 3356-9-05 of the Administrative Code, “Faculty rank and tenure for designated administrators.”

- (ii) When it is in the best interest of the university, the president may issue an employment contract for multiple years. Employment contracts must be approved by the board of trustees in advance of the employment start date.
  - (iii) Employment is contingent on acceptable background checks. The requirement for a background check cannot be waived.
  - (iv) The chief human resources officer will prepare and submit a summary of all personnel actions for administrative level officers to the university affairs committee for recommendation for approval by the board of trustees. The personnel actions shall be contingent upon approval by the board.
- (3) Professional/administrative staff.
- (a) The offer of employment may only be extended by the office of human resources in collaboration with the hiring manager.
  - (b) The offer will be in the form of either an appointment or an employment contract.
    - (i) Appointments, including multi-year appointments, will include a sixty-day notice of termination clause. Appointments are contingent upon board approval; however, employees may begin employment prior to board approval.
    - (ii) In the event that a multi-year appointment for an intercollegiate athletic coach reaches the conclusion of the appointed term and an additional multi-year appointment is not considered, the appointment

shall be determined to be a continuing appointment with no interruption in employment status and will be subject to a sixty-day termination clause.

- (iii) When it is in the best interest of the university, the president may issue an employment contract for multiple years. Employment contracts must be approved by the board of trustees in advance of the employment start date, [except for head intercollegiate athletic coaches](#).
- (iv) The president will keep the board of trustees informed of negotiations involving employment contracts for multiple years.
- (c) Employment is contingent on acceptable background checks. The requirement for a background check cannot be waived.
- (d) The chief human resources officer will prepare and submit a summary of all personnel actions for professional/administrative staff, to the university affairs committee for recommendation for approval by the board of trustees. The personnel actions shall be contingent upon approval by the board.
- (G) Evaluation of executive officers, administrative officers, and professional/administrative staff.
  - (1) The procedures that follow provide an overall structure for evaluation. The university will maintain an electronic process. However, it is recognized that these procedures may need to be adjusted to accommodate a particular situation.
  - (2) The evaluation process is conducted on an annual basis; for intercollegiate athletic coaches, the evaluation process will be conducted at the end of each season.
  - (3) For executive and administrative officers, the board of trustees considers it important to have the evaluation of executive and administrative officers include the perspective of their constituents

and subordinates. Therefore, an important component of the overall evaluation may be input from a sample of constituents and subordinates.

- (4) The president will consult with the board of trustees during the evaluation process as to the performance of executive level officers and will inform the board of trustees about the results of their evaluation of each executive level officer.

(H) Salary adjustments.

(1) Executive officers.

- (a) At year's end, during a one-on-one session between the executive level officer and the president, preliminary salary adjustment considerations may be discussed.

- (b) When considering salary adjustments for executive level officers, the president will submit proposed adjustments to the university affairs committee for its review and approval prior to implementing said adjustment(s).

(2) Administrative officers.

- (a) At year's end, during a one-on-one session between the administrative officer and the executive officer, preliminary salary adjustment considerations may be discussed.

- (b) When considering salary adjustments for administrative officers, the president will submit proposed adjustments to the university affairs committee for its review and comment prior to implementing said adjustment(s).

(3) Professional/administrative staff, not including intercollegiate athletic coaches.

The president may consider a merit pay policy with the approval of the board of trustees.

(4) Intercollegiate athletic coaches.



- (a) Determinations regarding merit increases, if any, will be based on achievements, change in duties or responsibilities, and competitive or equity adjustments.
- (b) Salary adjustments may not exceed the resources allocated by the university to the athletic department budget.
- (c) For sports that utilize assistant coaches, the head coach, in consultation with the executive director of athletics, has the authority to allocate funds budgeted for their assistant coaches at their discretion and within budgetary limitations at any point during the fiscal year.
- (d) Unsuccessful competitive performance may affect salary adjustments.
- (e) The executive director will recommend merit increases to the president for approval.

**RESOLUTION TO RATIFY  
PERSONNEL ACTIONS**

**WHEREAS**, the *Policies of the Board of Trustees* authorize the President to manage the University, including appointing such employees as are necessary to effectively carry out the operation of the University and any other necessary personnel actions; and

**WHEREAS**, new appointments and other personnel actions have been made subsequent to the December 12, 2024, meeting of the Board of Trustees; and

**WHEREAS**, such personnel actions are in accordance with the 2024-2025 Budget and with University policies 3356-2-02, Equal Opportunity and Affirmative Action Recruitment and Employment; 3356-9-05, Faculty Rank and Tenure for Designated Administrators; 3356-9-02, Selection, Appointment, and Annual Evaluation of Administrative Officers; 3356-7-42, Selection, Appointment, and Evaluation of Professional/Administrative Staff; 3356-7-43, Externally Funded University Positions; 3356-7-36, Hiring and Selection Process, Evaluation and Compensation for Intercollegiate Athletic Coaches; and 3356-7-46, Supplemental Pay Assignments for Full and Part-time Faculty and Professional/Administrative Staff and Secondary Appointments for Full-time Faculty;

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Trustees of Youngstown State University does hereby ratify and confirm the personnel actions, attached hereto.

**Board of Trustees Meeting  
March 13, 2025  
YR 2025-**



## **SUMMARY OF PERSONNEL ACTIONS**

### **Faculty & Department Chairs**

**10/16/2024 through 1/15/2025**

#### **Separations – 5**

- Faculty Tenured – 2
- Faculty Term – 3

#### **Appointments – 7**

##### **New Positions – 2**

- Faculty Term – 2

##### **Replacement Positions – 5**

- Faculty Tenure Track – 1
- Faculty Term – 4

#### **Position Adjustments – 2**

- Faculty Tenured – 1
- Department Chair – 1

**YOUNGSTOWN STATE UNIVERSITY**  
**FACULTY DEPARTMENT CHAIRS**  
**PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025**  
**SEPARATIONS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT/PROGRAM</b>	<b>DATE OF SEPARATION</b>	<b>FTE</b>	<b>SALARY</b>	<b>SEPARATION TYPE</b>
<b>Term Appointments</b>							
Adewole, Babatunde	Faculty	Lecturer	Computer Science Info. Systems	1/10/2025	1.00	\$ 60,000.00	Withdrawn
Hudson, Monica	Faculty	Lecturer	Nursing	12/31/2024	1.00	\$ 53,000.00	Resignation
Lyda, Kelsey	Faculty	Senior Lecturer	Mechanical Engineering	12/16/2024	1.00	\$ 59,358.48	Resignation
<b>Tenured Appointments</b>							
Krummel, Christopher	Faculty	Professor	Dana School of Music	12/31/2024	1.00	\$ 93,136.71	Retirement
Matanin, Marcia	Faculty	Professor	Teacher Education	12/31/2024	1.00	\$ 97,263.90	Retirement

**YOUNGSTOWN STATE UNIVERSITY  
 FACULTY DEPARTMENT CHAIRS  
 PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025  
APPOINTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT/PROGRAM</b>	<b>APPOINTMENT DATE</b>	<b>FTE</b>	<b>SALARY</b>
<b>Term Appointments</b>						
Jacobs, Gary*	Faculty	Principal Lecturer and Program Coordinator	Teacher Education	1/1/2025	1.00	\$ 86,067.00
Adewole, Babatunde	Faculty	Lecturer	Computer Science & Info Systems	1/1/2025	1.00	\$ 60,000.00
Alelaiw, Ali	Faculty	Temporary Lecturer	Mechanical Engineering	1/1/2025	1.00	\$ 60,000.00
Ismail, Hiba*	Faculty	Lecturer	Health Professions	1/1/2025	1.00	\$ 51,000.00
Martuccio, Mason	Faculty	Lecturer	Mathematics & Statistics	1/1/2025	1.00	\$ 49,000.00
Nachim, Paul	Faculty	Lecturer	Mathematics & Statistics	1/1/2025	1.00	\$ 49,000.00
<b>Tenure Track Appointments</b>						
Shilling, Erin	Faculty	Assistant Professor	Physical Therapy	1/1/2025	1.00	\$ 72,000.00
<i>*New Positions</i>						

**YOUNGSTOWN STATE UNIVERSITY  
 FACULTY DEPARTMENT CHAIRS  
 PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025  
POSITION/SALARY ADJUSTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>NEW POSITION TITLE/ OLD POSITION TITLE</b>	<b>NEW DEPARTMENT/ OLD DEPARTMENT</b>	<b>APPOINTMENT DATE</b>	<b>FTE</b>	<b>NEW SALARY</b>	<b>OLD SALARY</b>
Christiansen Erb, Joy	Chair	Chair and Professor/Acting Chair and Professor	Art	10/1/2024	1.00	\$ 106,923.35	\$ 106,923.35
Genna, Douglas	Faculty	Professor	Chemistry	1/13/2025	1.00	\$ 109,928.00	\$ 82,445.58

**SUMMARY OF PERSONNEL ACTIONS**  
**Professional Administrative - (Excludes Athletics)**  
**10/16/2024 through 1/15/2025**

**Separations – 11**

- Professional Administrative Staff – 2
- Professional Administrative Excluded – 7
- Professional Administrative Externally Funded – 2

**Appointments – 13**

**Replacement Positions – 13**

- Professional Administrative Staff – 8
- Professional Administrative Excluded – 4
- Professional Administrative Externally Funded – 1

**New Positions – 0**

**Search Waivers – 0**

**Reclassifications/Position Adjustments – 7**

- Professional Administrative Staff – 1
- Professional Administrative Excluded – 4
- Professional Administrative Externally Funded – 2

**Promotions – 8**

- Professional Administrative Staff – 3
- Professional Administrative Excluded – 5

**Search Waivers – 4**

**Salary Adjustments – 9**

- Professional Administrative Staff – 4
- Professional Administrative Excluded – 2
- Professional Administrative Externally Funded – 3

**YOUNGSTOWN STATE UNIVERSITY  
PROFESSIONAL ADMINISTRATIVE  
PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025  
SEPARATIONS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>DATE OF SEPARATION</b>	<b>FTE</b>	<b>SALARY</b>	<b>SEPARATION TYPE</b>
Adler, Alexandra	APAS	Case Manager	Dean of Students	10/18/2024	1.00	\$ 47,003.25	Resignation
McEldowney, Cara	APAS	Technology Trainer	IT Training Services	11/30/2024	1.00	\$ 49,140.00	Resignation
Cohol, Marianne	Excluded	Director Information Technology Application and Project Management Office	Chief Information Officer	1/2/2025	1.00	\$ 122,672.40	Resignation
Ewing, David	Excluded	Associate Director	Grounds	12/31/2024	1.00	\$ 79,590.60	Retirement
Lamb, Carol	Excluded	Interim Associate Dean	Dean - STEM	11/22/2024	0.23	\$ 21,916.00	Temp Appt. Ended
Markowitz, Ronald	Excluded	Associate Director Operations and Events	Kilcawley Center	11/26/2024	1.00	\$ 59,302.80	Resignation
Nave, Lance	Excluded	Associate Director Residence Life	Housing	10/16/2024	1.00	\$ 60,863.40	Resignation
Sanders, Salvatore	Excluded	Dean and Assistant Provost	Dean-College of Graduate Studies	12/31/2024	1.00	\$ 150,358.29	Retirement
Varian, Becky	Excluded	Director	Academic Success Center	10/31/2024	1.00	\$ 75,942.13	Retirement
Chapman, Chaste	Externally Funded	Instruction Specialist	Rich Center for Autism	11/29/2024	1.00	\$ 23,132.00	Resignation
Morgione, Dominic	Externally Funded	Associate Director of Business Development and Industry Partnerships	Center for Workforce Education & Innovation	10/31/2024	1.00	\$ 66,585.60	Resignation



**YOUNGSTOWN STATE UNIVERSITY  
PROFESSIONAL ADMINISTRATIVE  
PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025  
APPOINTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>APPOINTMENT DATE</b>	<b>FTE</b>	<b>SALARY</b>
Colyer, Llita	APAS	Counselor Financial Aid	Financial Aid and Scholarships	1/6/2025	1.00	\$ 40,000.00
Dodge, Alisha	APAS	Assistant Director	Honors College	10/16/2024	1.00	\$ 45,500.00
McCurry, Nicole	APAS	Financial Aid Counselor	Financial Aid and Scholarships	12/16/2024	1.00	\$ 40,000.00
Osborne, Jacob	APAS	Academic Advisor 2	Dean - WCBA	11/1/2024	1.00	\$ 44,000.00
Osman, Alyssa	APAS	Coordinator Enrollment Marketing and Recruitment	Dean - HHS	12/2/2024	1.00	\$ 50,000.00
Spence, William	APAS	Reference Librarian Health & Human Services	Maag Library	12/2/2024	1.00	\$ 43,888.00
Townsend, Yvonne	APAS	Academic Advisor 2	Dean - WCBA	11/1/2024	1.00	\$ 44,000.00
Zero, Tyler	APAS	Academic Advisor 1	Dean - HHS	11/18/2024	1.00	\$ 43,805.00
De'Armond Szucs, Laura	Excluded	Associate Director International Admissions	International Programs Office	10/16/2024	1.00	\$ 70,000.00
Jurczak, Jade	Excluded	Assistant Registrar	Registration & Records	10/16/2024	1.00	\$ 64,000.00
Lamb, Carol	Excluded	Interim Associate Dean	Dean - STEM	10/28/2024	0.23	\$ 21,916.00
Swisher, Sarah	Excluded	Intermittent Intramural Athletic Trainer	Club Sports	10/28/2024	0.25	\$ 31,200.00
Davis, Kyle	Externally Funded	Instruction Specialist	Rich Center for Autism	10/16/2024	1.00	\$ 28,000.00

**YOUNGSTOWN STATE UNIVERSITY  
PROFESSIONAL ADMINISTRATIVE  
PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025  
RECLASSIFICATIONS/POSITION ADJUSTMENTS**

<b>EMPLOYEE NAME</b>	<b>NEW EMPLOYEE TYPE / PREVIOUS EMPLOYEE TYPE</b>	<b>NEW POSITION TITLE/ PREVIOUS POSITION TITLE</b>	<b>NEW DEPARTMENT/ PREVIOUS DEPARTMENT</b>	<b>APPOINTMENT DATES</b>	<b>NEW FTE/ OLD FTE</b>	<b>NEW SALARY</b>	<b>PREVIOUS SALARY</b>
Schaper, Michele	APAS	Assistant Director, Degree Audit and Curriculum/Assistant Director	Registration & Records	7/1/2024	1.00	\$ 74,743.85	\$ 71,184.62
Donaldson, Rosalyn	Excluded	Director IT Project Management Office & Training Services/Director IT Training & Academic Continuity Team Program Manager	IT Training Services	1/1/2025	1.00	\$ 114,704.10	\$ 109,242.00
Herman, Jeanne	Excluded	Associate Vice President Strategic Enrollment/Associate Vice President Institutional Effectiveness	Student Enroll & Business Services	9/1/2024	1.00	\$ 140,000.00	\$ 127,703.10
Geilhard, Tasha	Excluded	Director IT Enterprise Data & Application Services/Director Data Analytics	IT Data Analytics	1/1/2025	1.00	\$ 114,704.10	\$ 109,242.00
O'Connell, Christina	Excluded	Executive Director Center of Career Management/Director Center of Career Management	Dean - WCBA	11/16/2024	1.00	\$ 73,601.00	\$ 57,147.24
Binsley, Jenna	Externally Funded	Program Administrator/Associate Director Marketing and Communications	Tressel Institute Leadership & Teamwork	10/16/2024	1.00	\$ 59,390.00	\$ 69,870.00
Dobson, Rachael	Externally Funded	Director/Associate Director for Behavioral Programming	Rich Center for Autism	11/1/2024	1.00	\$ 84,597.49	\$ 76,906.81

**YOUNGSTOWN STATE UNIVERSITY  
PROFESSIONAL ADMINISTRATIVE  
PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025  
PROMOTIONS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE / PREVIOUS EMPLOYEE TYPE</b>	<b>NEW POSITION TITLE / PREVIOUS POSITION TITLE</b>	<b>NEW DEPARTMENT/ PREVIOUS DEPARTMENT</b>	<b>APPOINTMENT DATE</b>	<b>FTE</b>	<b>NEW SALARY</b>	<b>PREVIOUS SALARY</b>
Campbell, Rebecca	APAS	Assistant Director/Coordinator	Undergraduate Admissions	11/1/2024	1.00	\$ 49,000.00	\$ 41,814.00
Eisnagle Bika, Sarah	APAS	Assistant Director/Coordinator	College Access and Transition	12/1/2024	1.00	\$ 62,000.00	\$ 51,721.43
Merlino, Aaron	APAS	Information Security Architect/ Information Security Engineer	IT Security Services	11/16/2024	1.00	\$ 96,847.00	\$ 79,261.84
Conway, E. Rich	Excluded	Associate Director Grounds and Motor Pool/Groundskeeper 3	Grounds	1/12/2025	1.00	\$ 68,000.00	\$ 55,265.60
Greco, Michael**	Excluded	Director/Associate Director	Academic Success Center	11/1/2024	1.00	\$ 70,000.00	\$ 61,123.63
Harrington, Timothy**	Excluded	Vice President Strategic Communications & Chief of Staff/Special Assistant President Strategic Communications	University Relations	12/16/2024	1.00	\$ 170,000.00	\$ 140,000.00
Van slambrouck, Severine**	Excluded	Associate Provost, Research Services & Graduate Studies/ Director	Office of Research Services/Office of Research Services & Graduate Studies	1/1/2025	1.00	\$148,000	\$ 107,712.61
Wormley, Jeffrey**	Excluded	Associate Director/ Senior Project Manager	IT Training Services	12/16/2024	1.00	\$ 94,251.00	\$ 89,762.87
**Search Waiver							

**YOUNGSTOWN STATE UNIVERSITY  
PROFESSIONAL ADMINISTRATIVE  
PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025  
SALARY ADJUSTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>APPOINTMENT DATES</b>	<b>NEW FTE</b>	<b>NEW SALARY</b>	<b>OLD FTE</b>	<b>PREVIOUS SALARY</b>
Dodge, Alisha	APAS	Assistant Director	Honors College	1/1/2025	1.00	\$ 46,000.00	1.00	\$ 45,500.00
Nuskiewicz, Joseph	APAS	Environmental Health and Safety Specialist	Environmental Health and Safety	1/1/2025	1.00	\$ 71,373.80	1.00	\$ 70,873.80
Reichert, Lisa	APAS	Special Assistant to AVP/Controller	Controller's Office	1/1/2025	0.75	\$ 66,104.97	0.50	\$ 44,069.98
Reichert, Lisa	APAS	Special Assistant to AVP/Controller	Controller's Office	12/1/2024	0.50	\$ 44,069.98	0.75	\$ 66,104.97
Cossentino, Amy	Excluded	Dean and Associate Provost	Provost VP - Academic Affairs	10/16/2024	1.00	\$ 158,561.55	1.00	\$ 151,011.00
Herman, Jeanne	Excluded	Associate Vice President Strategic Enrollment	Student Enroll & Business Services	1/1/2025	1.00	\$ 147,000.00	1.00	\$ 140,000.00
Seagroves, Reilly	Externally Funded	Instruction Specialist	Rich Center for Autism	11/1/2024	0.80	\$ 20,400.00	1.00	\$ 25,500.00
Smith, Donivan	Externally Funded	Registered Behavior Technician	Rich Center for Autism	1/1/2025	0.60	\$ 21,767.62	1.00	\$ 36,279.36
Veisz, Patricia	Externally Funded	Temporary Director	Dean - WCBA	1/1/2025	1.00	\$ 84,896.64	0.80	\$ 67,917.31



**SUMMARY OF PERSONNEL ACTIONS**  
**Athletic Employees**  
**10/16/2024 through 1/15/2025**

**Separations – 6**

- Professional Administrative Excluded – 6

**Appointments – 1**

**Replacement Positions – 1**

- Professional Administrative Externally Funded – 1

**Multi-Year Appointments - 1**

- Professional Administrative Excluded – 1

**YOUNGSTOWN STATE UNIVERSITY**  
**ATHLETICS EMPLOYEES**  
**PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025**  
**SEPARATIONS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>DATE OF SEPARATION</b>	<b>FTE</b>	<b>SALARY</b>	<b>TYPE OF SEPARATION</b>
Berassa, Jelani	Excluded	Assistant Coach	Football	12/31/2024	1.00	\$ 65,524.80	Resignation
Dukes, Christian	Excluded	Assistant Coach	Football	12/31/2024	1.00	\$ 56,161.20	Resignation
Green, Joshua	Excluded	Assistant Coach	Soccer - Women's	1/7/2025	1.00	\$ 49,588.21	Nonrenewal
Larkin, Jeremy	Excluded	Assistant Coach	Football	12/31/2024	1.00	\$ 56,161.20	Resignation
Maryskova, Anita	Excluded	Assistant Coach	Soccer - Women's	1/7/2025	1.00	\$ 31,680.18	Nonrenewal
Shrum, Brian	Excluded	Head Coach	Soccer - Women's	1/7/2025	1.00	\$ 72,848.96	Resignation

**YOUNGSTOWN STATE UNIVERSITY**  
**ATHLETICS EMPLOYEES**  
**PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025**  
**APPOINTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>CONTRACT/ APPOINTMENT DATES</b>	<b>FTE</b>	<b>SALARY</b>
Law, Nicole	Externally Funded	Athletic Academic Coordinator	Athletic Administration	12/2/2024	1.00	\$ 43,947.00

**YOUNGSTOWN STATE UNIVERSITY**  
**ATHLETICS EMPLOYEES**  
**PERSONNEL ACTIONS 10/16/2024 THROUGH 1/15/2025**  
**MULTI-YEAR APPOINTMENTS**

<b>EMPLOYEE NAME</b>	<b>EMPLOYEE TYPE</b>	<b>POSITION TITLE</b>	<b>DEPARTMENT</b>	<b>CONTRACT/ APPOINTMENT DATES</b>	<b>FTE</b>	<b>SALARY</b>
Wall, Richard	Excluded	Head Coach	Soccer - Women's	1/6/2025 - 6/30/2028	1.00	\$ 75,000.00





**SUMMARY OF PERSONNEL ACTIONS**  
**Supplemental and Secondary Pay Assignments**  
**10/16/2024 through 1/15/2025**

**Supplemental Pay Assignments – 60**

**General/Restricted Funded Assignments – 52**

- Professional Administrative Staff – 5
- Professional Administrative Excluded – 3
- Professional Administrative Externally Funded – 1
- Full-time Faculty – 21
- Part-time Faculty – 22

**Grant Funded Assignments – 8**

- Professional Administrative Externally Funded – 2
- Full-time Faculty – 2
- Part-time Faculty – 4

**Faculty Secondary Appointments – 0**

**YOUNGSTOWN STATE UNIVERSITY**  
**SUPPLEMENTAL PAY ASSIGNMENTS AND SECONDARY APPOINTMENTS**  
**RECEIVED 10/16/2024 - 1/15/2025**  
**GENERAL FUND SUPPLEMENTAL PAY ASSIGNMENTS**

LAST NAME	FIRST NAME	EMPLOYMENT TYPE	ORIGINATING DEPARTMENT	RECEIVED IN HR	DATES DUTIES PERFORMED	PAYMENT AMOUNT
Eisnaugle Bika	Sarah	APAS	College Access and Tradition	10/25/2024	12/09/24 - 02/28/25	\$2,400.00
Eisnaugle Bika	Sarah	APAS	Chemical Biological Sciences	1/7/2025	01/06/25 - 04/26/25	\$2,000.00
McCormick	Dan	APAS	Communication	11/5/2024	11/04/24 - 03/01/25	\$4,350.00
Robich	Laura	APAS	Nursing	11/27/2024	01/06/25 - 05/06/25	\$5,000.00
Vinkler	Susan	APAS	Nursing	11/6/2024	01/06/25 - 05/06/25	\$5,000.00
De'Armond Szucs	Laura	Excluded	International Programs Office	1/7/2025	12/16/24 - 06/15/25	\$5,400.00
Saenger	Christina	Excluded	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$12,300.00
Sanders	Sal	Excluded	BCLASSE	12/16/2024	01/01/23 - 09/01/23	\$625.00
Italiano	Kristen	Externally Funded	Teacher Education Leadership Studies	11/1/2024	11/15/24 - 06/30/25	\$4,820.85
Beese	Jane	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$500.00
Chung	Miri	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$450.00
Eunni	Rangamohan	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$31,000.00
Hinz	Jessi	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$4,750.00
Jeffords	Charles	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$750.00
Jeffords	Charles	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$750.00
Jeffords	Charles	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$250.00
McClusky	Paula	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$1,250.00
Mikula	Vincent	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$250.00
Mikula	Vincent	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$750.00
Myers	Nathan	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$750.00
Peck	Teresa	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$1,250.00
Ratican	Crystal	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$750.00
Shields	Cynthia	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$750.00
Shields	Cynthia	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$1,250.00
Shortreed	Mary	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$250.00
Thomas	Wendy	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$250.00
Tyus	Jeff	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$500.00
Van Dussen	Dan	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$1,000.00

**YOUNGSTOWN STATE UNIVERSITY**  
**SUPPLEMENTAL PAY ASSIGNMENTS AND SECONDARY APPOINTMENTS**  
**RECEIVED 10/16/2024 - 1/15/2025**  
**GENERAL FUND SUPPLEMENTAL PAY ASSIGNMENTS**

LAST NAME	FIRST NAME	EMPLOYMENT TYPE	ORIGINATING DEPARTMENT	RECEIVED IN HR	DATES DUTIES PERFORMED	PAYMENT AMOUNT
Wallace	Debra	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$750.00
Weaver	Amy	Full-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$2,000.00
Balestra	Ruth	Part-time Faculty	University Theatre	11/6/2024	11/06/24 - 12/13/24	\$350.00
Borovitcky	Cheryl	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$75.00
Campagna	Anna	Part-time Faculty	Teacher Education Leadership Studies	12/17/2024	10/14/25 - 12/13/25	\$300.00
Foster	Susan	Part-time Faculty	Dana School of Music	12/16/2024	01/06/25 - 04/13/25	\$2,000.00
Hendershott	Joseph	Part-time Faculty	Teacher Education Leadership Studies	12/16/2024	01/01/24 - 06/01/24	\$1,250.00
Isaacs	Diana	Part-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$250.00
Janek	Mary	Part-time Faculty	Chemical Biological Sciences	1/3/2025	01/06/25 - 05/03/25	\$1,500.00
Jesko	Bernadette	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$200.00
Johnson	Janis	Part-time Faculty	Teacher Education Leadership Studies	12/17/2024	08/26/24 - 12/13/24	\$300.00
Johnson	Janis	Part-time Faculty	Teacher Education Leadership Studies	1/9/2025	01/06/25 -05/02/25	\$3,075.00
Marino	Robert	Part-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$1,500.00
Masucci	Mike	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$300.00
Meadows	Dana	Part-time Faculty	Nursing	11/4/2024	01/06/25 - 05/04/25	\$2,250.00
Schafer	Holly	Part-time Faculty	Teacher Education Leadership Studies	12/16/2024	01/01/24 - 12/01/24	\$1,250.00
Scotch	Shannah	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$200.00
Spinosa	Amanda	Part-time Faculty	ART	12/9/2024	01/06/25 - 05/05/25	\$3,550.00
Tomko	Ron	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$125.00
Tomko	Ron	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$125.00
Toy	Lisa	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$200.00
Toy	Lisa	Part-time Faculty	Teacher Education Leadership Studies	12/19/2024	08/26/24 - 12/13/24	\$300.00
Varga	Barbara	Part-time Faculty	Distance Education	11/18/2024	10/21/24 - 12/14/24	\$250.00
Welch	Holly	Part-time Faculty	Teacher Education Leadership Studies	12/16/2024	01/06/25 - 04/27/25	\$2,150.00

**YOUNGSTOWN STATE UNIVERSITY**  
**SUPPLEMENTAL PAY ASSIGNMENTS AND SECONDARY APPOINTMENTS**  
**RECEIVED 10/16/2024 - 1/15/2025**  
**GRANT FUNDED SUPPLEMENTAL PAY ASSIGNMENTS**

LAST NAME	FIRST NAME	EMPLOYMENT TYPE	ORIGINATING DEPARTMENT	RECEIVED IN HR	DATES DUTIES PERFORMED	PAYMENT AMOUNT
Campolito	Erika	Externally Funded	Rich Center for Autism	10/30/2024	11/01/24 - 04/30/25	\$3,458.70
Dobson	Rachael	Externally Funded	Rich Center for Autism	10/30/2024	07/01/24 - 10/31/24	\$3,200.00
Borra	Vamsi	Full-time Faculty	Rayen School of Engineering	11/19/2024	09/01/24 - 12/15/24	\$7,000.00
Mercer	Jacklynn	Full-time Faculty	English and World Languages	12/10/2024	09/01/24 - 11/30/24	\$400.00
Dick	Jeffrey	Part-time Faculty	Physics Astronomy Geology Environmental Science	12/20/2024	07/15/24 - 06/30/25	\$3,562.00
McCaughtry	Michele	Part-time Faculty	Teacher Education Leadership Studies	12/5/2024	08/01/24 - 12/31/24	\$400.00
McCormick	John	Part-time Faculty	Physics Astronomy Geology Environmental Science	12/20/2024	07/15/24 - 06/30/25	\$3,000.00
Sammartino	Carrie	Part-time Faculty	Teacher Education Leadership Studies	12/5/2024	08/01/24 - 12/31/24	\$400.00