



**Pennsylvania's State System of
Higher Education
Northeast
Implementation Plan Report
July 7, 2021**

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Executive Summary

University integrations recommended here are a bold and innovative response to demographic, funding, and other challenges confronting higher education nationally and which are particularly acute in the Commonwealth of Pennsylvania. A major part of a more comprehensive System Redesign launched in 2016 by the Board of Governors (BOG or the Board) of Pennsylvania's State System of Higher Education (the State System or System), integrations provide a path for the State System's 14 universities to continue fulfilling their historic mission of providing affordable, high-quality public higher education for all Pennsylvanians well into the 21st century and serving as engines of economic development and social mobility.

The Board's consideration of these recommendations is permitted by Public School Code of 1949 – Omnibus Amendment Act of Jul. 1, 2020, P.L. 558, No. 50 (Act 50 of 2020 or Act 50). Signed into law in July 2020, Act 50 allows the Board of Governors to develop policies and procedures by which it may create, expand, consolidate, transfer, or affiliate an institution, with some exceptions (reference [BOG Policy 2020-03: Act 50 of 2020 Implementation Policy](#))¹. The recommendation herein results in a consolidation, which does not close any existing universities, but results in a State System comprised of ten accredited universities.

In ongoing consideration of the acute challenges confronted by the State System and in accordance with Act 50, the Board directed the Chancellor in July 2020 to conduct a review of the System's financial stability and develop a report and recommendation for potential university integrations. Upon consideration of that review in October 2020, the Board then, in accordance with Act 50, authorized the Chancellor to develop a proposed integration implementation plan. The implementation plan comprised within this document represents a comprehensive, collaborative, consistent, empathetic, and organized approach in accordance with Act 50 and with our institutional accreditor, Middle States Commission on Higher Education (MSCHE). Of all trajectories evaluated by the Board of Governors, this approach provides the best path to financially sustainable operations, and ensures we continue to provide an affordable, high-quality education at each of the System's universities.

The Northeast integration (NE or Northeast) proposes to integrate (which we believe corresponds to the statutory and MSCHE definitions of "consolidate;" for this report we use the term "integrate") Bloomsburg University of Pennsylvania (Bloomsburg), Lock Haven University of Pennsylvania (Lock Haven), and Mansfield University of Pennsylvania (Mansfield) (collectively, the Northeast) into a single, integrated entity that retains the accreditation and degree-granting authority of one of the partner institutions.

The integrated university will have:

- A single president and leadership team with one reporting relationship to the Board of Governors through the Chancellor.
- A single faculty providing instruction in a single academic program array that leverages program, faculty, and facilities strengths at participating campuses and in which the majority of credentials, majors, minors, and areas of concentration is available to all students at each of the partner campuses through a combination of face-to-face and remote instruction. General education courses will be available on each campus through face-to-face instruction.
- An integrated enrollment management strategy and student-facing supports and services (including academic advising, financial aid, health and wellness counseling, library services, career counseling, etc.).
- A comprehensive range of offerings developed to serve the lifelong educational needs of non-traditional students by providing sustainable, relevant, and high-demand skills, aligned with industry/business needs.
- A robust student recruitment process with an expanding array of high schools, community colleges (only 15% of whose students attend a State System university after leaving community college), and other education providers, including robust dual enrollment and transfer articulation agreements and associated student supports.

¹ <https://www.legis.state.pa.us/cfdocs/legis/li/uconsCheck.cfm?yr=2020&sessInd=0&act=50>

- Significantly expanded opportunities for adult students seeking to re-skill and up-skill through non-degree credentialing courses.
- Credentialing programs developed in close consultation with regional employers to ensure they have the skilled workforces they need as well as opportunities to re-skill and up-skill current employees.
- A process to select a new name, which will be determined in Summer 2021. Within the naming convention for the integrated university, we expect to incorporate the current location name for each partner institution and continue to leverage it in traditional ways, including with student recruitment, alumni and donor relations, branding, marketing, etc.

Students at each of the universities being considered for integration will:

- Have access to a comprehensive range of postsecondary degrees and credentials, including a wide range of majors, minors, and areas of concentration;
- Be able to participate in and benefit from the many advantages associated with a residential university experience, including through face-to-face engagement with faculty and student support staff, participation on athletic teams, in co-curricular activities, and in student clubs and organizations; and
- Experience improvements in educational outcomes (measured in terms of student retention and graduation rates).

Our shared and single-minded goal in integrating is to capture economies of scale and leverage our individual and collective strengths while increasing educational access and measures of success for all students, investing in new markets, and securing our mission of educational opportunity for our region far into the future – **doing more together than any one institution could do alone**. Based on the implementation plan, we expect the Northeast integration to result in the creation of a student-focused, sustainable, totally integrated university that benefits the Commonwealth and honors the identities of the three integrating universities, but is one university. With the Board’s approval, the integration will embark on implementing the recommendations herein.

Planning was conducted by more than 589 students, faculty, and staff through their participation in 16 working groups (WG) and 135 subgroups – each looking at a specific aspect of integration (e.g., leadership and governance, academic program array, student financial aid, technology integration). The process was governed by a leadership team, comprising the Chancellor and the presidents of Bloomsburg, Lock Haven, and Mansfield, and a planning framework that focused working groups on:

- Establishing long-range goals for the functions under their consideration,
- Recommending how to achieve those goals in discrete phases, beginning with “Phase 1,” “Priority One” work required for an integrated university to enroll its first cohort of students in August 2022, and
- Evaluating potential impacts of recommendations on various stakeholders, processes, technologies, finance, physical assets, and compliance and legal requirements.

The implementation planning process is described summarily in [Appendix A](#).

As part of the Act 50 process, the implementation plan went through a public comment period that sought feedback through a variety of channels, including four public hearings, an online submission form and via email. To ensure transparency, comments have been made available on the [PASSHE public comment website](https://www.passhe.edu/publiccomment/Pages/default.aspx) (<https://www.passhe.edu/publiccomment/Pages/default.aspx>).

Feedback was grouped into three categories:

- Plan actionable – Unique actionable comments that impact the plan; note that several comments had duplicative actions
- Non-plan actionable – Comments that are already addressed in the plan and/or are specific enough to lead to an update in other documents such as FAQ, website information, or to be saved for consideration during implementation
- Viewpoint comments – Comments about the overall plans, approach, or other

Details are available in new [Appendix Z](#).

Plan actionable comments resulted in several adjustments to the Implementation Plan as follows:

- Section 5 Impacts on Academic Programs, Non-Academic Units and Accreditation.
 - Academic curriculum is being adjusted to provide for phased curriculum development, review, and implementation with full implementation of integrated curriculum targeted by August 2024. This allows additional time for increased faculty engagement, program specific accreditation, and provides greater clarity to current students and prospective students about their paths to graduation. Associated milestones for key aspects of the plan will be adjusted in support of the phased-in curriculum development including, but not limited to, information technology and student recruitment and enrollment. Note that this change does not impact the Middle States submission process, appointment of integration leadership team, or start date of integrated entity.
 - Additional clarifications were added to address how the curriculum will be delivered, including through the use of online and other remote technologies, notably with regard to:
 - the relatively limited overall reliance on online modalities for residential students
 - the perception of Zoom and/or asynchronous online as the learning tool of choice given the recent experiences resulting from the rapid transition to remote learning due to the COVID-19 pandemic
 - the investments that are planned in faculty and staff professional development and the technology environment as required to deliver the highest quality educational experiences, ensuring the broadest possible access and the best available student outcomes.
- Section 6 Impacts on Students, Faculty and Staff
 - Within this section the results of two student surveys are provided, including a new survey conducted in June 2021 demonstrating that the integrated entity's reliance on online instruction is well within willingness and expectations of current and prospective students and their parents. Details are available in [Appendix A.A](#).
- Section 7 Impacts on the Community
 - An updated economic impact analysis was conducted and added to the narrative and appendices. The analysis projects the impact of the Northeast integrations at \$573.5million during fiscal year 2025/2026, representing a 1.9% increase over the combined three-university impact projected in fiscal year 2022-2023, and a 5.0% increase over that calculated for 19/20. Details are available in [Appendix A.B](#).
 - Analysis also shows contraction by 9.5% of economic impacts for the State System as a whole between 13-14 owing largely to decreased student spending associated with the 14.7% decline in student enrollments during that period. (Change in the industry accepted multipliers also contribute to the decline.)
 - Reduction in employee headcount over the period contributed to the decline, but only modestly.
- Section 8 Impacts on Shared Governance
 - Working group recommendations for the future councils of trustees were added to the narrative and [Appendix A.C](#). Since legislative action would be required to implement some of the options that are shown, the plan recommends that should the Board move forward with the northeastern integration, we would pursue the required legislative changes.
 - Additional clarifications related to the roles of affiliated entities were added.
- Section 9 Before and After Organizational Charts
 - Information was added as to when during the implementation detailed employee-level organizational charts would be available.

- Language was added to address campus level leadership, notably with regard to the roles and responsibilities of the “campus administrator” (working title) – a member of the president’s leadership team located at a campus who combines an executive level function (e.g., VP Academic Affairs) with responsibility for relational, ceremonial and other related functions at each of the partner campuses.
- Section 10 Financial Sustainability Analysis
 - Projections were updated based on the Board of Governors’ tuition decision impacting fiscal year 2021/2022, results of the additional federal COVID-19 relief funds, and providing protections for a transitional period of reserve funds available upon integration.
 - Additional information was provided related to savings assumptions and deferred maintenance.
 - A clearer articulation of the plan’s overall goals and the key drivers that will result in their accomplishment.
 - Results of the updated financials and the third-party review of the projections are also included in the narrative and appendix.
 - All updates are included in the narrative and [Appendix A.D.](#)
- Section 11 Timeline for Implementation Plan Post-April
 - Major milestones are identified focusing on those that will be completed in the first quarter of fiscal year 2021/2022
 - Detailed plan for phased-in curriculum development, review and implementation developed.
 - Plan for the curriculum implementation impacts on supporting systems such as information technology, registration, financial aid, etc.
 - Middle States submission of Complex Substantive Change Request (full detail is available in Section 5 of this document).
 - Organization charts at the division level (academic organization charts were distributed to faculty for feedback and are currently under review)
 - Marketing and Branding strategy development.
- Section 12 Additional Considerations and Conclusion
 - Clarification that integration is not a substitute but a necessary complement to advocacy for greater state investment in the State System

The purpose of this plan is to guide the work to be conducted during the implementation. The implementation plan assumes the integrated university will begin operations in fiscal year 2022/2023 and will phase-in changes over a multiyear timeline with mission critical changes phased in first. If approved, status against plan will be provided to the Board of Governors and General Assembly on a quarterly basis. Detailed recommendations, evaluations of their impacts, and analysis are included within the appendices to this report. While this implementation planning report focuses on the Priority One recommendations for Phase 1 implementation, note that each of the working groups also identified Priority Two recommendations for implementation after the integrated university enrolls its first cohort of students in August 2022. The implementation plan outlined in this report sets the stage for a transformed Northeast integrated university that will be positioned to serve students, families, and the region for the future, enabling the continuation and expansion of high-quality, affordable educational opportunities that continue fulfilling the mission of the university and the System. This plan leverages the scale and resultant operational efficiencies achieved by combining the three universities, providing cost savings that allow us to reinvest in our students’ success. It sets the stage for long-term viability focused on the students and regions these universities serve, while improving access to affordable, high-quality education that our students need to continue driving the regional and statewide economies. It is the beginning of the journey, and one, through the experience of building the work included here, that we have every confidence will be successful. With your support, we can, we must, and we will.

Background

University integration is part of a broader System Redesign engaged by the Board in 2016 to ensure the State System's 14 universities continue their vital historical roles as engines of social mobility and economic development by offering affordable postsecondary pathways for all Pennsylvanians.

That historic mission is amply documented in the State System's accountability report as submitted annually to the General Assembly as part of the appropriations process. The 2021 Annual Accountability Report, available in [Appendix B](#), shows the many contributions State System universities make to the Commonwealth of Pennsylvania as:

- Engines of workforce development (reference [Appendix B](#), slides 10-12, Figures 2-4, and slides 16-18, Figures 8-12),
- Drivers of social and economic upward mobility (reference [Appendix B](#), slide 19, Figure 13),
- Creators of jobs and drivers of regional economies (reference [Appendix B](#), slide 9), and
- Net positive contributors to the Commonwealth's economy (reference [Appendix B](#), slide 9, Figure 1).

But the State System is also confronted with challenges that are pervasive across higher education nationally, and particularly acute in Pennsylvania. Over the past decade, the State System has lost 21% of its enrollments and, because it has not yet adjusted cost structures, and because the state is 48th in the nation in terms of public expenditure on higher education, it is severely challenged financially. Additionally, as enrollments contract, they struggle to offer the full range of programs required by their students and in their regions.

The challenges confronting the State System are also well-documented in the Annual Accountability Report in [Appendix B](#) (slides 21-30, 62-83), and in material presented to the State System Board of Governors at a workshop held on April 14, 2021 ([Appendix C](#)).

The Board of Governors ability to consider integration as an option results from legislation passed by the Pennsylvania General Assembly on June 24, 2020, which the Governor subsequently signed into law (Act 50). Act 50 allows the State System Board of Governors to create, expand, consolidate, transfer, or affiliate an institution with some exceptions. Act 50 requires a robust and consultative process, comprising the milestones below. A timeline for the work, in keeping with the requirements of Act 50, is outlined below:

- Conduct a review of the financial stability of State System universities assuming the continuation of present operations and as impacted by potential integrations (July-October 2020)
- Develop implementation plan(s) for candidate integrations for Board approval (October 2020-April 2021)
- Submit proposed implementation plan(s) for public comment for a period not less than 60 days (May-June 2021)
- Submit implementation plan for final approval by the Board (July 2021)
- Integration effected (July 2022)

Based on this proposed timeline, activities associated with implementation would begin in July 2021. The implementation plan sets out a phased implementation schedule, with those deliverables required for core operations necessary to register and provide services for students for the Fall semester of 2022 being prioritized as Phase 1. The development and implementation of an integrated curriculum would begin in July 2021 upon Board approval of the plan and continue in phases for three years with full integration accomplished by Fall 2024. The approach (see [section 5](#)) enables significant faculty engagement, supports program-specific accreditation needs, and provides greater clarity to new and existing students about available degree paths and program options.

While this implementation planning report focuses on the Priority One recommendations for Phase 1 implementation, note that each of the working groups also identified Priority Two recommendations for post-implementation improvement.

Implementation Plan Development Process

Implementation Plan Project Governance Structure

To effectively develop the implementation plan for the integration of the three universities, an implementation planning governance structure was established. Each integration was governed by a University Leadership Team (ULT) comprised of the Integration Lead President, Presidents of the integrating universities, Project Manager and Quality Manager, Chief Academic Officers (CAO), Vice Presidents (VP) of Finance and Administration (F&A) and designated functional Working Group Co-Leads of the integrating universities. The ULTs were responsible for leading decision-making processes, stakeholder engagement, and implementation planning activities; providing oversight and guidance for the working groups; and providing input to the single System Leadership Team (SLT). The SLT was comprised of the Chancellor, Vice Chancellor and Chief Academic Officer, Executive Vice Chancellor, Deputy Chancellor, Strategic Advisor for Institutional Integration, and West (W or West) and Northeast Integration Lead Presidents. The SLT was established to lead alignment between the two regional work streams, stakeholder engagement, and implementation planning activities that required coordination; create and oversee development of implementation planning deliverables adopted by ULTs; and serve as the escalation point for ULT-identified risks, issues, and decisions.

For each of the functions within the scope of integration, parallel working groups were formed to conduct planning and make recommendations for each integration and, in a few cases, joint planning teams worked together on processes that involve external agencies (such as MSCHE, the US Department of Education (ED), the National Collegiate Athletic Association [NCAA], the Mid-American Conference, the Atlantic-10, the Collegiate Spring Football League, and the Pennsylvania State Athletic Conference [PSAC]). Each of the working groups was guided by the System Integration Initiatives Charter ([Appendix D](#)), System Integration Working Groups Charter ([Appendix D](#)), and Individual Working Group Charges ([Appendix E](#)). Additionally, diversity, equity, and inclusion (DEI) representatives were engaged in reviewing working group deliverables to help create environments that recognize differences, provide appropriate and equitable systems that foster positive outcomes for all students, and eliminate gaps that persist in relative performance of different student groups.

Goals and Objectives

To facilitate a data driven, goal-based approach, the SLT in collaboration with the ULT identified aspirational goals for the newly integrated university. These goals were provided to the working groups for review and comment and were used to provide direction related to the future state recommendations. The goals and objectives have been and will continue to be communicated as part of updates to all stakeholders. Refer to [Appendix F](#) for detailed goals.

Recommendations, Impacts, and Timeline

The implementation plan was developed through a collaborative process that reviewed data, documentation, and leading practices to formulate recommendations related to academic and non-academic units. Data and documentation reviewed included program-level trend data for each institution such as student enrollments, faculty, facilities, and credentialing productivity; program and campus reputational data; regional workforce demand data (forecasted to 2026); NCAA reporting data; and higher education resources and compliance regulations. Refer to [Appendix W](#) for a list of sources reviewed as part of the integration planning.

To focus the work efforts on mission-critical activities and gather appropriate data to inform the implementation plan, each working group utilized a standard template to define their Phase 1 or high-priority recommendations – that is, recommendations that must be implemented by August 2022 when planning anticipates that the integrated university would enroll its first cohort of students. This template included the potential impact of the recommendations on various stakeholders. Based on the working group recommendations and impacts, the implementation plan timeline was developed that depicts predecessors and dependencies. In addition to Phase 1 recommendations, working groups identified Phase 2 recommendations for continued improvement post implementation. These recommendations, while not incorporated into the implementation plan or timeline, will be utilized post-integration as opportunities for continued transformation. As part of the implementation plan organization design work,

change management and communications will be developed to align to the rollout of the final organization. This will include, where appropriate, training and development as part of the implementation.

Financial Sustainability Analysis

Based on the working group recommendations, a financial analysis was conducted. The projected results reveal an integrated university that has an operating margin which exceeds the sustainability goal and a primary reserve ratio that is within one range (20-40%) below the goal of healthy. More importantly, the projections were able to contain investments of almost \$500,000 for student success, a clear goal of the integration. Additionally, projections provided for surpluses to allow for additional reinvestment in students and the physical plant as well as allow for the increase in reserves to fund future obligations. ([Appendix U](#) provides the Financial Sustainability Analysis.)

Stakeholder Engagement

Stakeholders were a key part of the creation of the recommendations outlined in the implementation plan and were engaged across all levels – the individual campus level, the three integrating universities, and the six integrating universities. Engagement avenues included, but were not limited to: regular conference calls with the State System caucus of the General Assembly and joint legislative committee hearings; campus open forums with the Chancellor every semester at each of the 14 universities; State-Wide Meet and Discuss (SWMD) (the faculty union labor relations meetings) and specially-convened meetings of all union leaders; regularly scheduled calls with leaders of the Pennsylvania (PA) Councils of Trustees (COTs); and regular meetings with functional groups from the State System universities, including Presidents, Chief Financial Officers, Chief Academic Officers, Chief Student Affairs Officers, Strategic Enrollment Management Officers, and Chief Diversity Officers, where regular input was sought on System-level strategy, including university integrations. Additionally, the Chancellor briefed on a regular basis the Governor and his staff, the Pennsylvania Secretary of Education, and the Executive Committee of the Board of Governors.

Student participation in the integration planning process was critical and provided essential insights into the students' needs and concerns, as well as pressure-testing of various options under consideration with respect to their impacts on the overall student experience. Student members were included in the Governance and Leadership Working Group, as well as the Student Government and Affiliate sub-group, and will continue to be included on implementation teams as integration continues. A Student Advisory Board, comprised of the student government president and vice president, student trustee, and student-athlete advisory committee president and vice president from each of the three integrating universities, provided students with updates on the integration planning, shared key information and discussed the timeline of deliverables, and provided feedback to integrations leadership on critical items. All three campuses' student government presidents and student association chairs also participated on select working groups, in addition to the System's regular interaction with the System-wide Board of Student Government Presidents.

Further, each working group for the West and Northeast integrations created a comprehensive consultation plan to support consideration of input and feedback from stakeholders. The consultation plans identified major stakeholders for each working group's functional area, how/when/what the working groups anticipated communicating with stakeholders, and who on the working group was the point of contact for each interface.

A System-level Advisory Group provided opportunity for the System-level leaders of stakeholder groups to share their insights and to periodically receive information regarding ongoing institutional integrations implementation planning work. Meetings have occurred ahead of presentations to the State System Board of Governors to inform the work ahead of consideration by the Board. The group includes leaders from the Board of Student Government Presidents, State System Faculty Council, Pennsylvania Association of Councils of Trustees (PACTs), Commission of Presidents, all state-level unions, the State System Board of Governors, the Pennsylvania House and Senate, the Governor's Office, and the Pennsylvania Workforce Development Association.

Finally, comments received throughout the public comment period from all sources were reviewed on a weekly basis. Major themes and key recommendations have been included throughout this document. The comments themselves are available via the [integrations public comment website](#) and a summary of their review and evaluation is contained within the June 30 BOG presentation (refer to [Appendix Z](#)).

Diversity, Equity, and Inclusion

The Northeast integrated university aspires to be a collaborative community, committed to active attention to DEI.

Led by the work of our DEI officers, we ensured that all integration leadership has a strong understanding of what DEI is and how it is vital to the success of the integrated university. Leadership shared this knowledge with working group members to identify opportunities and challenges that impact all members of our campus and greater community, including student, employees, alumni, and town residents. We aspired to create a plan fueled by positive DEI synergy. The working groups and DEI team (comprised of the three campuses' DEI officers) took the following action steps:

- Included DEI expectations in all working group charges
- Reviewed Priority One and Two recommendations from sample working groups to provide examples of contrasting feedback
- Defined DEI and prioritized these concepts in working group recommendations
- Provided a DEI resources list of web resources, book recommendations, and other methods to increase DEI knowledge
- Focused working group meetings on DEI topics approximately twice monthly

The working groups and DEI team also drafted the following recommendations to continue incorporating DEI during the integration implementation:

- Conduct research for more specific work process-targeted feedback items
- Refine DEI process evaluation metrics
- Establish a cabinet-level DEI unit led by a Chief Diversity, Equity, and Inclusion Officer
- Provide consistent DEI services on each campus
- Develop appropriate resources to best meet the needs of the campus community
- Establish (or adjust as necessary) policies and procedures to ensure the entire community has an equitable university experience

Implementation Plan Report Structure

The following aligns to each section required by Act 50, with supporting materials referenced within the Appendices. This document and its appendices will be available as part of the public comment period required in accordance with Act 50.

Act 50, Section 2002A a3 – Implementation Plan

1. Description of the Proposal to Exercise Powers under Subsection a.1 of Act 50, Namely to Create, Expand, Consolidate, Transfer, or Affiliate an Institution

The implementation plan as presented to the Board of Governors is for the consolidation of Bloomsburg University of Pennsylvania, Lock Haven University of Pennsylvania, and Mansfield University of Pennsylvania to form a single integrated, accredited institution. As part of the implementation plan, application for a Complex Substantive Change (CSC) must be made to the institutional accreditor MSCHE, and approval or notification processes followed for some program accreditors. In order to achieve the intended future state without submitting a new application for accreditation, MSCHE, in accordance with federal definitions, provides for a Complex Substantive Change process whereby the accreditation and degree-granting authority of one of the universities is retained, which will be labeled the “main” campus for administrative purposes, into which the other two are incorporated as other teaching locations. Accordingly, the integrated university will retain the accreditation and degree-granting authority of partner school Bloomsburg, and Lock Haven and Mansfield will be incorporated within the scope of that accreditation and authority. Although this “main” campus designation is required by MSCHE and ED, we wish to state clearly that each partner campus of the integrated university will operate as full and co-equal campuses in all other respects.

The MSCHE Complex Substantive Change process requires two submissions.

- First, each of the integrating universities submits a Complex Substantive Change Preliminary Review Form, which sets out the substantive change in a broad outline. The integrating universities in the west submitted their Preliminary Review forms first, per guidance from MSCHE. Upon review of submissions from the West, MSCHE provided additional guidance to northeast integration universities about additional information they should include. Those revisions have now been made and the Preliminary Review forms are being circulated to secure the required signatures. Submission is targeted for the first week of July. Once submitted, these forms will be available upon request.
- MSCHE may provide additional guidance and/or request additional information upon receipt of the Preliminary Review forms. Following that period of consultation, the universities will submit a Complex Substantive Change Request. The projected date for submission of the Request is September 1, 2021. The Request becomes the basis for peer review and, together with the peer reviewers' report, for MSCHE's action on the request. The universities have requested that the Complex Substantive Change be considered at the Commission's March 2022 meeting, with an effective date of July 1, 2022.

The integrated university will have a new name, which is yet to be determined. A process to select that new name is underway, with input from a wide range of stakeholder groups. Within the naming convention for the integrated university, we expect to incorporate the current location name for each partner location. The integrated university's name will be selected from options that have been market-tested for their appeal to our target audience(s). Recognizing that our existing campus names/brands have tremendous value, each campus's local identity and brand will be maintained, regardless of the final integrated university name.

2. Rationale, Goals, and Objectives of the Proposal to Exercise Powers under Subsection a.1

Rationale

A declining demographic and increasing competition from in-state and out-of-state institutions of higher education, compounded by stagnant state support and consequent increases in tuition, led to significant enrollment declines. Enrollment declines, in turn, resulted in unsustainable financial positions of several universities, including Lock Haven and Mansfield, and by extension, of the System as a whole. Most concerning is the disproportionate negative impact on the enrollment of lower- and middle-income families, whom it is our particular mission as a public university to serve. ([Appendix B](#), slide 27). If the Northeast integration universities try to combat these downward pressures alone, and primarily by contracting to reduce costs of student services and programs, our mission to serve our students and their families is put at risk. Moreover, the educational opportunity of first generation, underrepresented minority, and low- and middle-income students and prospective students in our region would be put in jeopardy. Instead, the Northeast integration proposes to combat the downward pressures and expand educational opportunity in our region, and our students' success, by integrating Bloomsburg, Lock Haven, and Mansfield to form a single and larger institution. For more details on the priorities used to guide our work, refer to the Integrations Initiative Charters in [Appendix D](#).

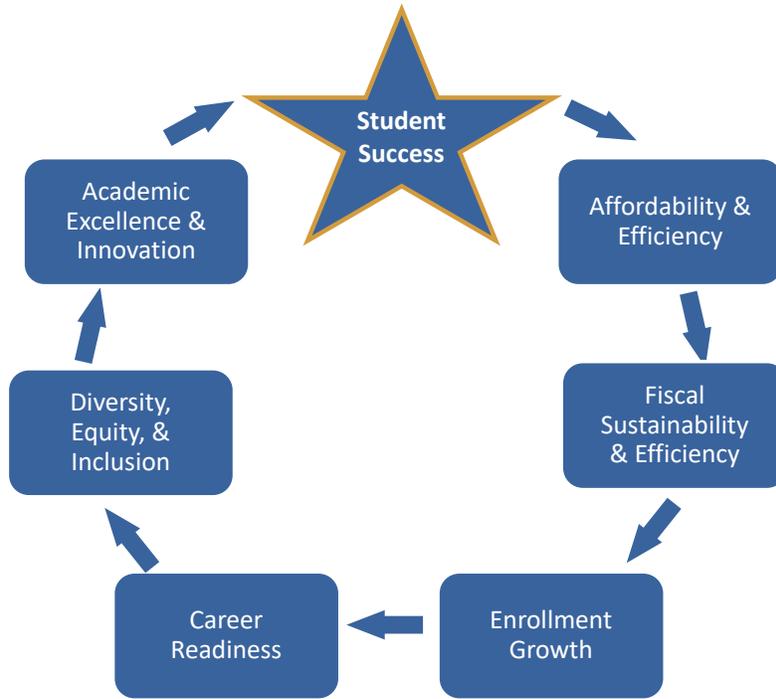
The challenges confronting the State System are also well documented in the Annual Accountability Report in [Appendix B](#), and in material presented to the State System Board of Governors at its meeting in July 2020 in support of the Board's action to initiate the integration planning process as defined in Act 50.

The limited ability for the individual universities, without integrations, to provide the array of programs and student services while maintaining affordability is a driving force for this integration. As described in the Integrations Initiative Charters, we believe this approach will allow us to:

- Maintain or expand high-quality educational opportunities for students across Pennsylvania
- Improve and expand access, affordability, and success for all students
- Honor and engage local identity and key stakeholders (trustees, alumni, affiliates, donors, etc.)
- Meet regional economic and workforce needs
- Position institutions for growth, including in new markets
- Realize cost savings
- Leverage talented faculty and staff

Goals and Objectives

Our shared and single-minded goal in integrating is to enable student success by capturing economies of scale and leveraging our individual strengths to increase educational access and measures of success for all students, invest in new markets, and secure our mission of educational opportunity for our region far into the future. This goal is reflected in detail in the Goal and Objective documents ([Appendix F](#)) and the Integration Initiatives Charters ([Appendix D](#)). These documents were developed collaboratively, and embraced by the Northeast integration as the touchstone of our work. The ultimate goals of the integration are as follows:



See [Appendix F](#) for detailed integration goals and objectives, and additional aspirational goals.

3. Method for Evaluating Achievement of Goals and Objectives

As part of overall System transparency and accountability, where applicable, status against goals and objectives will be included in overall dashboards, and will be provided as part of stakeholder and legislative updates. Additionally, [Appendix F](#) includes the method for evaluating the achievement of goals and objectives. The Office of the Chancellor at the System level will incorporate these goals in the existing System-wide dashboard to enable consistent evaluation of integration goals and objectives.

4. Relation of the Proposal to the Mission and Strategic Plan of the Institution and System as a Whole

The current missions of the Northeast integrating institutions and the System are:

- **Bloomsburg's mission:** An inclusive comprehensive public university that prepares students for personal and professional success in an increasingly complex global environment.
- **Lock Haven's mission:** Offers an excellent and affordable education characterized by a strong foundation in the liberal arts and sciences for all students, majors in the arts and sciences, and a special emphasis on professional programs. All programs are enhanced with real-world experiences and co-curricular activities that enable students to realize their full potential. In close personal interactions with faculty who are passionate about teaching, students are challenged to develop their minds and skills in order to be responsible citizens and to succeed in a global and technologically advanced society.
- **Mansfield's mission:** Offering dynamic programs in the arts and humanities, natural and social sciences, and professional studies, Mansfield prepares our students for successful lives and careers. As an inclusive public institution, Mansfield provides our students with a welcoming environment, individualized attention, and meaningful opportunities to learn and grow within and beyond the classroom. Through the Mansfield experience, our students develop the knowledge, skills, and character necessary to achieve their educational and career goals.
- **System's mission:** To increase educational attainment in the Commonwealth; to prepare students at the undergraduate and graduate levels for professional and personal success in their lives; and to contribute to the economic, social, and cultural development of Pennsylvania's communities, the Commonwealth, and the nation.

At the heart of each of these missions is a student focus. The 14 State System universities strive to provide access to high-value, relevant educational experiences that prepare students in a timely manner for pathways to successful lives and careers. The integration envisions, through the implementation process, development of a mission statement for the integrated university with these priorities in mind.

The missions of each of the three campuses are reasonably aligned with academic excellence and student centeredness as the hallmarks of each. The missions at each integrated campus propone to prepare students for personal and professional success and are committed to serve as an economic catalyst and steward to the community, region, and the Commonwealth of Pennsylvania. Additionally, the recently drafted positioning statement ([Appendix G](#)) for the integrated university reinforces the commitment of the integrated university to:

- Provide students an affordable education in sync with their career and personal ambitions
- Support students in the pursuit of their educational and personal goals
- Contribute to the economic viability of the region and Commonwealth of Pennsylvania

The proposal aligns to the System mission and its System Redesign efforts by strengthening the fiscal foundation, which allows for the continuation of access to affordable education for our students through the:

- Reinvention of higher education from a student-facing perspective
- Deepening of vibrant campus relationships with the community and region
- Growth of enrollments, service of new populations, and meeting of employer needs
- Support of financially sustainable operations to ensure our mission continues
- Harnessing of collective strengths of the integrating universities and leveraging of those strengths to best meet student needs
- Expansion of experiential learning opportunities, thereby strengthening career readiness

5. Impacts on Academic Programs, Non-Academic Units, and Accreditation

The Northeast integration included 12 working groups (and three additional working groups that were combined with the West integration project), which drafted Priority 1 recommendations, defined as key activities that must be completed by July 2022 for the integrated university. Additionally, working groups identified the potential impacts of these recommendations within the following categories:

- **People** – Student, faculty, staff, governance (e.g., trustees, organizations)
- **Process** – Policy, procedures, contracts, partnerships
- **Technology** – Systems and support
- **Finance** – Required funding or cost savings as a result of the recommendation
- **Physical Assets** – Re-purpose, upgrade, or disposal actions as appropriate
- **Compliance and Legal** – Federal, state, and local laws, regulations, and other requirements that would need to be changed to implement the recommendation
- **Community** – Known community stakeholders impacted by the recommendation
- **Benefits** – Anticipated benefits associated with the recommendation
- **Risk** – Known risks associated with implementation of the recommendation

Academic Programs

Academics: The Northeast integration creates an integrated university with three regionally distinct locations and incorporates a shared academic program array designed to meet the educational and career goals of an increasingly diverse population of twenty-first century students. In developing the single academic program array, the provosts and working groups aligned the resultant array recommendations with the primary principle that the integration of the three universities should result in an expanded set of educational opportunities for students by maximizing access to the array at each of the campuses.

The recommended program array was specifically informed by enrollment drivers, market demand information, and the potential for career and degree pathways. The design of the array was grounded in a set of guiding principles ([Appendix H](#)), and informed by an analysis of data, including: student demand, program enrollment data, including current headcount and full-time equivalent (FTE) enrollments, enrollment trends, program recruitment data as evidenced by numbers of incoming students and transfer students, average section size by program, student credit hours generated by program, student FTE to faculty FTE ratio by program, cost/revenue data by program, and market/industry demand by the relevant Classification of Instructional Programs (CIP) code.

To identify the Northeast integrated university's primary enrollment drivers, we first considered the headcount enrollment numbers by the two-digit Classification of Instructional Programs code. This provides us with a high-level overview of the disciplinary fields that have the largest headcount enrollment based on Fall 2020 data submissions from each of our integrating universities. As can be seen from the table below, the top eight disciplinary fields for the Northeast integrated institution, based on combined Fall 2020 undergraduate headcount enrollment, represent 75% of the total undergraduate enrollment at our three campuses.

Total Number of Undergraduate Level Majors* by Field and University, Fall 2020, Ranked in Descending Order

Two-Digit CIP	Disciplinary Field (CIP)*	BLOOMSBURG	LOCK HAVEN	MANSFIELD	Total
51	Health Professions and Related Clinical Sciences	1,197	705	224	2,126
52	Business, Management, Marketing and Related Support Services	1,469	234	120	1,823
13	Education**	695	204	120	1,019
43	Security and Protective Services (includes programs in Criminal Justice Administration and Digital Forensics/Cybersecurity)	601	232	102	935
42	Psychology	333	151	141	625
31	Parks, Recreation, Leisure and Fitness Studies (includes programs in Recreation Management, Sport Admin, Exercise Science, Health and Physical Ed)	164	292	0	456
09	Communication, Journalism and Related Programs	373	40	37	450
26	Biological and Biomedical Sciences	226	119	99	444
	SUBTOTAL TOP EIGHT UNDERGRADUATE DISCIPLINARY FIELDS				7,878
	TOTAL HEADCOUNT FOR ALL UNDERGRADUATE DISCIPLINARY FIELDS (EXCLUDING UNDECLARED AND NON-DEGREE STUDENTS)				10,426
	PERCENTAGE OF HEADCOUNT REPRESENTED BY TOP EIGHT DISCIPLINARY FIELDS				75.6%

*Excludes non-degree and second majors.

**Secondary Education majors are counted in their home discipline.

Source: Data Warehouse, Student Data Submission

Key Disciplinary Fields by Enrollment – Northeast Integration

Health Sciences	Business	Education
<p>Focus</p> <ul style="list-style-type: none">Professional, career-focused, nationally accredited offerings in nursing and allied health sciences. Multiple entry points including associate, baccalaureate, master's, and doctoral levels. <p>Key Growth Area</p> <ul style="list-style-type: none">Nursing	<p>Focus</p> <ul style="list-style-type: none">Nationally accredited programs with experiential emphasis flexible delivery. Multiple entry points, including associate, baccalaureate, and master's levels. <p>Key Growth Areas</p> <ul style="list-style-type: none">AccountingBusiness AdministrationFinanceMarketing	<p>Focus</p> <ul style="list-style-type: none">Nationally accredited programs leading to teacher certification at all PreK-12 levels. Baccalaureate and master's options available. <p>Key Growth Areas</p> <ul style="list-style-type: none">Early Childhood EducationMath and Science EducationSpecial Education

The top three highest-enrolled disciplinary fields align well with workforce demand across the Commonwealth. If the workforce area is restricted to the Northern Tier Workforce Development Area (a region which includes Mansfield) or the Central Workforce Development Area (a region which includes both Lock Haven and Bloomsburg universities), the top three results are the same: Business, Education and Health professions are the two-digit CIPs that align with (by far) the greatest workforce needs. The same is true, in fact, for each of the 23 Workforce Development Areas throughout Pennsylvania.

The shared program array will consist of approximately 80 to 90-degree programs at the associate, baccalaureate, master's and doctoral levels, with the majority accessible to students at all three locations. This total represents more than double the number of programs currently offered at Mansfield, and nearly double the number offered at Lock Haven. The total shared program array number is close to, but still higher than, the total number of programs currently offered at Bloomsburg

As part of their evaluation, the academics working group also recommended that the unified general education program should be aligned with the single academic program array, integrated program requirements and courses cross-walk plans and/or teach-out plans to transition students from existing to integrated programs. Working group recommendations also are intended to address Academic Affairs' organizational structure, adoption of a common academic calendar and course schedule, and development of guidance documents.

The curriculum will be delivered through a variety of learner-focused, content-appropriate modalities each of which has an evidence base pertaining to effectiveness having to do with student accessibility and outcomes. Those modalities include:

- **in-person** (which may include courses or sections delivered remotely or online, but which may be completed fully in-person),
- **synchronous and/or asynchronous online** (which may include Zoom or **interactive video** (ITV) sessions with students gathered at multiple locations or participating singly and which may be completed 100% online),
- **hybrid** (in which some elements of the program are designed for online learning and others for in-person), and
- **hyflex or multi-modal** (in which instruction is delivered face to face and, additionally, via synchronous or asynchronous remote technologies and in which students may participate using any or all of the modalities over the course of the semester).

Additionally, training and supports will be available to faculty, staff and students to ensure their facility with and success in these modalities. Along with additional investments in technology improvement, this will ensure the educational experience at our integrating universities is of the highest quality and delivered in a way that ensures the very best student experience is available while supporting student learning

outcomes, assuring access (and accessibility) and opportunity to the diverse array of traditional and non-traditional students the integrated institution will serve.

The development and implementation of an integrated curriculum would begin in July 2021, upon Board approval of the plan, and continue in phases for three years, consistent with the approved academic program array. The approach enables significant faculty engagement, supports program-specific accreditation needs, and provides greater clarity to new and existing students about available degree paths and program options.

In each of the two subsequent years, integrated curricula will be developed and launched through fall 2024 according to a plan that will be fully developed by September 2021. The integrated general education curriculum and much of the undergraduate and graduate curricula will be launched in fall of 2023. Integrated curricula for any remaining graduate and undergraduate programs will be launched fall 2024. The integrated curriculum for the entire program array, excepting new programs still to be developed, will thus be fully implemented in fall 2024.

Specifically, in academic year 2022-23, continuing and new undergraduate and graduate students will enroll in the integrated university, by which their degrees will be granted, and will follow existing major and general education requirements at each location. As the integrated curriculum for each program is developed and approved, the academic year prior to its implementation will be used to advise students and to load the requirements into the system. This orderly roll-out will provide more certainty for students about how they will complete their program requirements in the integrated university through the entire transition from three curricula to an integrated curriculum.

The recommendations in this area impact stakeholders, including students (i.e., current and prospective), faculty, deans, as well as the academic organizational structure. The recommendations also have process, technological, and financial impacts. It is expected that investment in technology will be required to operate in an integrated model across multiple locations. Anticipated enrollment growth and improved retention are anticipated to positively impact total student revenue.

Priority Two considerations include researching and developing new programs; identifying additional high-demand academic programs and emphasis areas; enhancing high-impact practices related to interventions and online instruction; and executing high-impact assessment practices and outcome frameworks.

Workforce development: The recommendations for workforce development are developed to align academic program pathways by creating a unified approach to workforce development with a common structure in the integrated university. These recommendations leverage focus disciplinary areas of the combined academic program array to create seamless pathways between the degree-based programs and non-degree credit or certificate programs, offering new stackable degree offerings, and also creating an array of market demand non-credit bearing certifications and training programs (e.g., Bloomsburg's truck driving school, rehabilitative justice certification, Mansfield's public safety training institute). The recommendations also include supporting students and alumni by developing robust and in-demand continuing education, lifelong learning, and career up-skilling and workforce skill development programs; creating relationships and responsive workforce programming/training for regional industry and business partners; and offering ancillary in-demand and revenue-generating services (e.g., testing centers).

The recommendations have the potential to positively impact students, alumni, faculty, staff, trustees, and community stakeholders, including regional employees, employers, regional economic and workforce development entities, local businesses, and regional industry. To create an integrated workforce development program across the three campuses will require: upfront assessment of market demand and opportunities; considerable redesign of workforce development program strategy and offerings; implementation of standard program accountabilities, reporting, and financial oversight frameworks; careful integration of technology in support of student reporting, student account information, internal financial management, and integrated course delivery; and modification to course pricing. The primary fiscal impacts are estimated to be reduction in cost of degree attainment, enrollment growth, and cost savings.

The Priority Two considerations include additional revenue generation services; regional partnerships with career centers and high schools; WEDnet and Ed2Go integrations; training development for workforce partners; credit for prior learning; and development of rural satellite delivery locations.

Refer to [Appendix H](#) for detailed recommendations from the academics and workforce development working groups.

Non-Academic Units

Working groups involved in the Northeast integration drafted recommendations and impacts for the following non-academic topics. Note that student-related recommendations and impacts are included in Section 6 of this report.

Enrollment management: The recommendations regarding enrollment management include implementing integrated admission, recruitment, and financial aid strategies, as well as integrating recruiter and administrative structures and standardizing processes (e.g., inquiry, application and admissions processes for all students to ensure seamless entry and navigation across all campuses). Additionally, the working group recommends enhancing the approach to dual enrollment for qualified high school students, improving the strategy for financial aid leveraging and pricing, aligning communication strategies, and evaluating and standardizing the admissions policies for first time freshman (FTF), transfer students, and graduate students. The recommendations also include expanding and clarifying enrollment and transfer pathways. Proactive and integrated marketing for prospective students is recommended for enrollment, as well as faculty and staff training on the integrated university's branding, benefits, and comprehensive recruiting strategy. Lastly, the recommendations include integrating customer relationship management (CRM) and student information system (SIS) technology, as well as integrating or consolidating third-party and recruitment services contracts.

The recommendations will affect students (e.g., new students, work study students), parents, faculty, staff (e.g., recruitment staff, coaches, Admissions Office, Registrar's Office), recruitment partners (i.e., alumni recruiters, partner high school districts, community colleges, other university transfer or admit partners), and donors/foundation partners. The recommendations also have process, technology, and financial impacts, such as modifications to processes to enhance the ability of the enrollment management team to effectively grow enrollment and leverage available strategies to attract and retain students. Additionally, there will be costs associated with implementing and integrating critical systems, which will eventually lead to operational cost savings. There are also potential long-term cost savings related to consolidating and updating third-party contract agreements and operational policies.

The Priority Two considerations include additional modifications to specific admissions processing aspects, continued evolution of new dual enrollment partnerships, and additional evaluation of/modification to financial aid leveraging.

Financial aid: The recommendations include determining the cost of attendance, federal campus-based aid, and disbursement of aid to students (e.g., timing and refund processes, obtaining a single ED Office of Postsecondary Education Identification [OPEID]). Additionally, the recommendations include developing common policies and procedures to complete all required financial aid tasks, integrate software platforms (e.g., CRM, document tracker, scholarship manager), and determine book voucher/bookstore options. Finally, separate student information systems need to be integrated into the regional SIS.

The recommendations impact students, faculty, financial aid staff, finance and administration, enrollment management, technology, and academic stakeholders. The recommendations may also require funding for implementation, but are expected to result in cost savings opportunities after integration.

The Priority Two considerations include creating a comprehensive financial literacy program; developing staff and student facing services to help with yield and retention; streamlining the work study application; expanding potential student outreach; and developing a common document imaging system.

Human resources and labor relations (HR/LR): The recommendations regarding human resources (HR) and labor relations (LR) relate to implementing shared HR services among the integrated campuses; establishing an organizational structure for the integrated university; determining appropriate workforce

expertise; identifying negotiated employment and personnel deadlines; determining student employment processes, including graduate students; and ensuring diversity, equity, and inclusion are considered.

The recommendations impact faculty and staff, including student financial aid staff and career services staff. The recommendations also have process, technology, financial, and legal impacts, such as policies and procedures for awarding aid; shared technology (e.g., single student employment module, systems, applications, and products [SAP], service platform, electronic official personnel folder [OPF], common job posting); and costs associated with information technology (IT) solutions.

The Priority Two considerations include implementing an HR customer service platform; assessing future state when negotiating upcoming contracts; implementing diversity training for search committee members, hiring authorities, and other campus groups; evolving the organizational review and redesign; and evaluating adjustments to services exceeding customer expectations.

Donors/alumni relations/foundations (donors/alumni): The donors/alumni recommendations relate to alumni, employer, and student engagement. The recommendations leverage alumni and employer relationships to expand career and professional development opportunities for students and graduates across the campuses in support of student success.

The recommendations impact alumni, prospective students, current students, faculty, community and business leaders, career services, admissions, marketing and communications, academic leadership (e.g., deans), institutional effectiveness, and employers. The impacts extend to processes and technology, including alignment with policies and procedures; data collection and tracking information; and technology platforms (e.g., employer database, web pages, CRM engagement tools, social media, event management tools, learning outcomes, assessment tools, student engagement database, virtual engagement platforms).

The Priority Two considerations include fundraising efforts (e.g., annual giving, major giving, planned giving, corporate/foundation giving) and how they impact stewardship, gift processing/accounting functions, database management, prospect research functions, and reporting and compliance. The considerations also focus on investments, including real estate, endowments, and exploring alternative investments to generate revenue. Lastly, the considerations include alumni engagement and associations, including volunteers, and affiliate/foundation human resource management.

Information technology: IT has academic-focused recommendations, including the technological impacts of academic program array decisions on course catalog, class schedules, and student data; development of schedule and transcripts; degree audit; admissions application and on-boarding; and financial aid considerations (e.g., Free Application on Federal Student Aid [FAFSA] verifications, award letters, aid packaging). The recommendations also include technological integrations and configurations, including financial aid integration; SIS configuration; student identification (ID) consolidation and configuration; biographical and demographic data conversion; consolidated active directory; CRM; and reviewing/adjusting technological integrations and ancillary systems. Lastly, the recommendations address additional hardware, classroom technology, software, and licensing; staff training; billing and payment processes; and student center branding.

The recommendations will likely impact staff and students, as well as contracts and policies. Additionally, the recommendations' technological impacts include SIS, financial aid system, CRM, MSCHE accreditation, Active Directory, institutional performance software, and survey software. The recommendations may require additional funding; however, the configurations, integrations, and consolidations of technologies are vital for the institutional integration.

The Priority Two considerations include creating common or combined enterprise security, contracts, knowledge bases, classroom technology, and learning management system (LMS) training sessions. Additionally, the Priority Two considerations focus on a single telecommunications system, successful migration, and implementation of the OneSIS, implementation of SIS multilingual language pack, and electronic fax service.

Communications and marketing: The recommendations related to communications and marketing include determining a common agency contract, workflow, technologies, aligning sports information resources and operations, and messaging for communications and marketing. Additionally, the

recommendations include an enterprise-wide CRM solution (in partnership with Enrollment Management and Information Technology), alignment of existing common technology contracts, and an integrated university naming process, beginning with naming research. The recommendations impact processes, technology, and physical assets; additional funding for new technologies, which will generate cost savings; server capacity and computer hardware/software; General Data Protection Regulation (GDPR) and accessibility regarding the Americans with Disabilities Act; and a new trademark for the integrated university. Additionally, the recommendations will likely impact staff, but may also impact faculty and students in terms of tools, processes, and resources.

The Priority Two considerations include implementing common technology contracts, and aligning workflows, marketing strategy, messaging, and web structure. The considerations also focus on the integrated university naming and entity branding, as well as considering stakeholder needs (e.g., alumni, advancement, community, employers).

Facilities and infrastructure: Facilities and infrastructure focus on maintenance of the physical plant. The recommendations include generating updated data on building and facilities inventory; aligning and developing common policies and procedures; implementing integrated work order and scheduling systems; determining emergency notification system (ENS); and identifying and consolidating existing service contracts.

The recommendations will likely impact the work order and scheduling staff at the integrating universities and policies related to the use of university property facilities and maintenance work orders. Recommendations are intended to result in cost savings.

The Priority Two considerations include centralizing services and contracts, as well as consolidating contracts, purchases, and software. Additionally, Priority Two considerations include a focus on workplace safety and optimizing facility operations (e.g., uniform work order system). Lastly, the considerations include achieving accreditation and determining impacts from changes to the academic plan for each location.

Refer to [Appendix I](#) for Act 50 reporting on property for sale.

Finance and administration: The recommendations related to finance and administration oversight aligning and combining practices, including implementing common budget processes; aligning contracts; developing common connection points for communication and information; developing common student billing procedures; creating a single right-to-know (RTK) response structure; and developing common accounting structure and procedures. The recommendations also relate to fees and tuition rates (in-state and out-of-state tuition rates); pricing and financial aid review; and charging consistent basic fees to all students. The recommendations also include technological recommendations related to coordinating the cutover of Financial Systems; reviewing and adopting best practices for student information processes; and cross-training on key student account touchpoints. Budgeting and financial recommendations include developing realistic integrated financial projections, assessing pre-Integration progress toward July 1, 2022, sustainability goals; and distributing the academic year (AY) 22/23 budget preparation manual for the integrated university. Lastly, the recommendations relate to optimizing staff and physical assets and automating processes.

The recommendations impact students, COTs, campus governance groups, faculty, Board of Governors, legislative stakeholders, and staff. The process impacts are primarily related to revising and adding policies, procedures, and contracts (e.g., accounting, budgeting, customer support, vendor contracts, collective bargaining). The technological impacts relate to business intelligence (BI) reporting, shared services, and ancillary systems associated with student success. The recommendations are intended to result in long-term cost savings.

The Priority Two considerations include a debt restructure strategy; adopting a service center model; incorporating incentive-based budgeting at the academic department level; and efficiently utilizing physical spaces.

Refer to [Appendix J](#) for detailed recommendations from the non-academic unit working groups. Refer to [Appendix K](#) for academic program baseline data as of April 2021.

Accreditation

The single institution to be formed by the integration of three existing universities will be the accredited entity. The accredited entity will exist only after the approved transaction date and will enroll all new and continuing students on multiple locations and be recognized as the degree-granting institution. The integrated university will have a single leadership team, a single faculty, a single academic program array, one combined budget, one enrollment management strategy, one OPEID number, and one reporting relationship through the Chancellor to the Board of Governors. Currently, Bloomsburg, Lock Haven, and Mansfield are each accredited and in good standing with MSCHE, the regional accrediting body. The most recent reaffirmations of accreditation were for Bloomsburg in 2019, Lock Haven in 2016, and Mansfield in 2017. All three institutions are approved to deliver programs via distance education. These institutions also have specialized accreditations for certain programs, which will also need to receive approval as the newly integrated institution.

The main recommendations regarding accreditation are to ensure required submissions to MSCHE. These recommendations and the response of MSCHE impact leadership, faculty, staff, strategic planning and assessment processes, and related technologies. There will be costs associated with accreditation approval for the integration.

The Priority Two considerations include activities such as planning for an MSCHE site visit, raising awareness of the ongoing accreditation cycles, and evaluating the institutional assessment cycle and frameworks.

Refer to [Appendix L](#) for detailed recommendations from the accreditation working group.

6. Impacts on Students, Faculty, and Staff

Students

The proposed integration will benefit students of all three locations. An integrated program array will create curricular efficiencies while providing expanded pathways for students. Most importantly, the missions of each of the three universities are aligned around academic excellence and student centeredness. The mission at each partner institution is to prepare students for personal and professional success, and each institution is committed to serve as an economic catalyst and steward to the community, region, and the Commonwealth of Pennsylvania. The draft positioning statement for the integrated university ([Appendix G](#)) reinforces the commitment of the integrated university to:

- Provide students an affordable education in sync with their career and personal ambitions
- Support students in the pursuit of their educational and personal goals
- Contribute to the economic viability of the region and Commonwealth of Pennsylvania.

One of the primary goals of the integration is to make higher education more affordable. Specifically, one integration goal is to reduce the cost of degree attainment by 25%. This goal does not assume primarily a reduction in tuition, but incorporates opportunities such as reductions in time to degree attainment due to expanded program availability, high school dual enrollments, lower student fees, additional fundraising achievements, space utilization improvements, reduced operating expenditures, enhanced grant funding, more federal work study opportunities, working with community partners to reimburse student wages off-campus, and timing of summer job opportunities for students. Additionally, the new academic program array offers enhanced student ability to participate in expanded educational offerings (e.g., majors, minors, and concentrations) and to obtain degrees in a manner not fiscally feasible for any one campus independently. The integration also allows faculty and academic affairs staff the opportunity to rethink the academic program array and related non-degree programs in a way that aligns the integration's academic disciplinary strengths with the specific market needs of the region. For the purposes of aligning workforce development programs and student pathways to degrees, new or expanded programming priorities will first address workforce skills and degree demand within the health sciences and advanced manufacturing sectors based on proven regional and state market needs.²

Student success, services, and campus life: The primary recommendations are focused on supporting the diverse needs of the student population to foster the success and retention of students. The recommendations prioritize aligning student support services with leading national practices and holistic advising, including student success coaches, early alert systems, shared student data management, and common first-year experience (FYE) and first-year seminar (FYS) structures. Additionally, the recommendations include ensuring equitable access to military and veteran resources, accommodations, internship offerings, and tutoring. Further, the recommendations prioritize common access to critical student life resources, such as health and wellness resources (including mental health and counseling), alcohol and other drug education and awareness, housing, and dining and vending. The recommendations also include deploying common student governance structures and policies, including student code of conduct and judicial procedures, student activities, and student government.

The recommendations impact stakeholders across the university community, including students, parents, faculty, and staff, including union representatives, and external vendors and agencies. The recommendations may affect areas such as fee structures, contracts, student-related processes and

² Data analyzed to identify workforce and student demand included the [PASSHE Academic Master Planning Tool \(AMPT\)](#) (<https://viz.passhe.edu/t/Public/views/AMPT/PASSHEProgramMap?isGuestRedirectFromVizportal=y&embed=y>); the [Prepared4PA Survey Report](#) (<https://static1.squarespace.com/static/5efc8fadba4b1050c62ac93d/t/5f5bce726510e11c1c0a6686/1599852149654/PASSHE+Survey+Report+%287%29.pdf>), PASSHE and the Council for Adult & Experiential Learning (CAEL), 2020; the EMSI Economic Analysis Platform; and the Hanover Research: Labor Market Analysis for Bloomsburg, Lock Haven, and Mansfield Service Regions, December 2020.

structures, new or integrated technologies, and system and/or software implementation. There are initial costs anticipated to implement some of the recommendations, while cost savings are expected in the long term. Finally, the impacts will extend to compliance and legal considerations.

As part of the development of the plan, and in addition to the various consultation paths and student inclusion during plan development, two surveys of current students were conducted. Refer to [Appendix A.A.](#)

In response to feedback during the public comment period, a second survey was conducted that included prospective students and parents in addition to current students (refer to [Appendix A.A](#) for the results of the second survey. A total of 1,360 people participated in the survey conducted June 2-19:

- 546 were inquiries on file with the six institutions involved in the integration
- 509 were rising sophomores, juniors and seniors at the six institutions involved in the integration plus Westchester and Millersville
- 305 were parents of high school juniors and seniors (no affiliation with PASSHE institutions)

For prospective students, the results showed that:

- 88% are willing to take some courses online to have access to a wider range of degrees/majors (58% are willing to take more than 25% of their courses online)
- 90% are willing to take some of their courses online in order to keep the price they pay the lowest (69% are willing to take more than 25% of their courses online)
- 91% are willing to take some of their courses online in order to earn their degree more quickly (62% are willing to take more than 25% of their courses online)

For current students, 90% or more are willing to take some courses online for any of three reasons tested (about 70% are willing to take more than 25% of their courses online for any of the three reasons).

Parents results showed that 99% are comfortable with their child taking some courses online for any of the three reasons tested (about 80% are comfortable with their child taking more than 25% of their courses online).

Four modalities were also tested:

1. You meet in a physical classroom with other students to participate together in online lectures and activities taught by a professor who is either online or live on another campus
2. You participate in live online lectures, discussions, and activities with other students and a faculty member from a location of your choice (e.g., home, dorm room)
3. Lectures are pre-recorded and you interact with other students and faculty on a discussion board when it's convenient for you
4. Lectures are pre-recorded and you regularly participate in small group discussions and activities live online with other students and a faculty member

The survey results showed that Option 1 was most appealing to prospects and Option 4 was least appealing however Options 1-4 were almost equally appealing to parents and current students suggesting a wide variety of modalities should be offered.

The Priority Two considerations for student success, services, and campus life include further aligning and extending student support and campus services, such as expanded health and counseling services, diversity, equity, and inclusion efforts, accessibility services, student leadership development, campus recreation, residential life services, student activities (including Reserve Officer Training Corps, living and learning communities), and housing technology and other related programs.

Athletics: The strong recommendation is to maintain current NCAA Division I and Division II sports at all integrating institutions and grow current team rosters as well as analyze the addition of new teams. There is a strong commitment at all integrating institutions, as well as the Pennsylvania State Athletic Conference, to maintain the current complement of teams at all integrating universities. Furthermore, the State System is also deeply committed to preserving and expand athletic opportunities for

students at all integrating universities. A key objective of the proposed integration is to create opportunities for enrollment growth at the integrating institutions; hence, preserving the complete complement of athletic teams at the integrating universities is critical to realizing this goal. The history, legacy, traditions, and campus vibrancy are critical to each of the integrating institutions. Athletics are at the core of these deeply rooted and honored local and regional traditions. Furthermore, today's and tomorrow's students are attracted to a vibrant campus environment and athletics is critical to creating this sought-after vibrancy. The athletic programs at the integrating universities account for approximately 10% of total undergraduate (UG) enrollment, and also support an additional 8% of athletic-related undergraduate enrollment. Our athletic programs are rich in diversity and have traditionally retained students more successfully than non-athlete student counterparts. Preserving and growing our diverse student body is critical to the success of the State System as well as our Commonwealth. The athletic programs can serve as best practices for other areas of the universities as we continue to focus on closing gap performance for our students of difference. The financial analysis of athletics confirms that athletics at all integrating institutions have a positive impact on the bottom line. We are committed to ensuring Title IX compliance for all women's and men's teams.

These recommendations impact students, student-athletes, community visitors, local high schools and towns, faculty, staff, alumni, coaches, athletic administration, HR, and financial aid stakeholders. Additionally, the recommendations have process, technology, finance, and legal impacts; software used to support scholarship offers and team scholarship limits, as well as the NCAA Compliance Assistance Software; and the expansion/allocation of additional funds for scholarships. The recommendations will require additional funding for recruiting, which in turn should increase enrollment and create a positive return on investment. We continue to work with the NCAA in our pursuit to maintain all athletic teams at the integrating institutions.

The Priority Two considerations address athletics recruitment, enrollment, and retention, in relation to compliance and transfer guidelines, academics, and scholarships. The considerations are also focused on operational aspects, including roles and responsibilities; facility improvements; sport and conference sponsorships; communication and sports information; software packages; budgeting; and sport additions.

Student Government Associations: The recommendation is that each of the three universities maintains their current student government associations, allowing each organization to continue operating as separate affiliated entities and providing services to students within each of the campus locations, while also continuing to analyze future-state alternatives to best serve students as the integrated university transitions to its future state.

Refer to [Appendix M](#) for detailed recommendations from the student success, services, and campus life and the athletics working groups. Refer to [Appendix N](#) for Act 50-required reporting on enrollment projections, graduation outcomes, cost of tuition, room and board, and cost of attendance.

Faculty and Staff

The System, as part of the Board-approved University Sustainability Policy, embarked on plans to align operating expenses with annual revenue as well as achieve specified student to faculty ratios by July 2020. These efforts are currently underway, and the projected outcomes are the starting point for the implementation plan assumptions

In accordance with Act 195, any recommendations that impact collective bargaining agreements (CBAs)/memoranda of understanding will comply with applicable labor laws.

Faculty: Pursuant to Act 50 of 2020, as part of the implementation plan, a single faculty organizational structure will be established for each integrated university by July 2022.

As part of the recommendations associated with the program array, student success, and the workforce development initiatives, enrollment is anticipated to increase in the integrated years by 1% year-over-year. Future staffing levels will be based on faculty complement needed to service the future program array/demand. Performance against metrics will be measured.

Refer to [Appendix U](#) for the financial assumptions for this projection. Refer to [Appendix O](#) for Act-50 required reporting on staffing.

Staff: As part of the implementation plan, a reorganization of the non-academic structure will be conducted to create a single organization by July 2022. Non-faculty complement will be structured in a way that allows the efficiencies associated with integrating to be realized, particularly as it relates to executive leadership, management, and administrative support.

As part of the recommendations associated with the program array and student success initiatives, revenue and expenses were projected. The total estimated savings are outlined in the financial assumptions in [Appendix U](#). Given the efficiencies to be achieved and analysis of retirement eligibility, continued planning is occurring to achieve these results, where possible through removal of vacancies and attrition while maintaining optimal functional capacity. Periodic adjustments to personnel may be required to meet institutional needs.

Refer to [Appendix O](#) and [Appendix P](#) for Act 50-required reporting on academic and non-academic data regarding the number of employees, location, reductions in workforce, reassignment to other universities, financial impacts of reductions, and student to faculty and non-faculty ratios.

Additional personnel related assumptions can be found in [Appendix A.D](#).

7. Impacts on the Community

As noted earlier in this report, the implementation plan is to maintain all three campus locations, including the athletic programs, with goals to grow through changes in program array, which enhance the student experience.

While the integration is designed to benefit the students, campuses, System, and communities, the integration does not require changes to all current practices. Examples of aspects that will not change as part of the integration as planned are that:

- The three existing campuses will remain and retain their identities
- Athletics programs and events will remain available at all integrating campuses
- Students will remain in-person at campuses, and will only take all classes online if they choose to enroll in a fully online degree program
- Students will not see impacts to existing financial aid and scholarships
- Student participation in high-impact practices will take priority
- Institution programming will consider regional and community workforce needs
- Dual enrollment options will continue to be a priority
- Affiliation agreements with community colleges and other educational partners will be vital
- Donors will continue to donate to the institution (campus) or program they choose, with all donor intent or restrictions remaining in place

Given these decision points, the campuses will continue to be strong pillars in their communities. The State System is among the top 30 largest employers in Pennsylvania based on 2019 second quarter data from the state [Department of Labor and Industry](#)³, and enrolled 95,802 students across the 14 universities as of [fall 2019](#)⁴. The State System has a direct presence in 20 of the 67 counties of Pennsylvania, varying from urban to rural locations. As a result of a large geographic reach across the Commonwealth, the State System plays a key role in stimulating the economies of the counties in which each university resides. The State System directly impacts the regional economies by injecting millions of dollars into Pennsylvania's economy on local, county, and state levels. Additionally, the presence of the State System universities enhances [workforce development](#)⁵ and therefore, impacts employment opportunities, not only for the students, but also for those who reside in the surrounding communities.

As noted in the prior section, the plan is not projecting faculty staffing changes and minimally results in nonfaculty staffing changes. The 2015 Economic Impact Report was updated in response to requests during the public comment period. Refer to [Appendix A.B](#) for the updated Economic Impact Report.

Specific to the Northeast integration, the results of the Economic and Employment Impact Study show that:

- The total economic impact of the Northeast Integrated University is projected to be \$573.5 million during fiscal year 2025-2026. This represents a 1.9% increase over the combined three-university impact projected in fiscal year 2022-2023.
- The change in economic impact by spending category from the 2022-2023 fiscal year to the 2025-2026 fiscal year is as follows:
 - Institutional Spending Impact: 0.2% increase
 - Faculty/Staff Spending Impact: 3.5% increase
 - Student Spending Impact: 3.4% increase
- The total model derived jobs supported by the Northeast University is projected to decrease by 250 jobs or 3.6% from the 2022-2023 fiscal year to the 2025-2026 fiscal year

³ <https://www.wtae.com/article/pennsylvania-largest-employers-1576875315/30299746#>

⁴ <https://www.passhe.edu/SystemData/Documents/Enrollment%20Trends%20Fall%202019%20-%20PRELIMINARY.pdf>

⁵ <https://www.passhe.edu/SystemData/Documents/EconomicAndEmploymentImpactReport.pdf>

The Impact Study also shows a 9.5% reduction in State-System impact between 2013-2014 and 2019-2020, resulting largely from decline in student enrollments and consequent reduction in student spending. While this impact has nothing to do with integration, it is important to point out because it documents specific aspects of the community challenges that university integration is intended to address.

The three universities also have relationships with affiliated entities. Affiliated entities are defined according to Board policy as a private organization (typically classified as a 501(c)(3) nonprofit organization for federal tax purposes) that exists solely for the benefit of the university, including, but not limited to, foundations, alumni associations, and student associations. To be affiliated, the organization must: (1) be recognized as an affiliate through a Council of Trustees' resolution; (2) make financial contributions to the university or provide similar benefits on a regular basis, satisfactory to the president and Council of Trustees; and (3) provide an annual external audit report to the university on a timely basis.

Inasmuch as each existing campus will remain as part of the proposed integration, the proposed implementation plan is not anticipating community and affiliate changes now; however, changes may occur in the future. Specific to foundations, donations will remain within the current affiliated entity, including any current donor restriction.

Refer to [Appendix Q](#) for Act 50-required reporting on affiliated entities.

8. Impacts on Shared Governance

The State System is committed to honoring the terms of its CBAs/memoranda of understanding with each of its bargaining units.

Integration, further, will not impact the control (public) or ownership (Commonwealth of Pennsylvania) of the integrated institution. The integrated institution's governance will conform to the provisions of Act 188, as amended, including roles and responsibilities delineated for the Board of Governors and Council of Trustees.

The main recommendations regarding governance are to consider the composition and meeting schedule for the integrated university's Council(s) of Trustees; determine the integrated university's representation on the PACT; review transitional leadership governance documents and proposed functional units, and student, faculty, and athletics governance structures; and review the strategic direction planning and current decision-making processes.

Refer to [Appendix R](#) for detailed recommendations from the institutional governance and leadership working group.

The roles and responsibilities of the Council of Trustees were reviewed by the leadership and governance working group.

Several options were considered in the Northeast including:

- Single COT as currently defined (10 +1 student) with Student Advisory Committee
- Single COT with more members (15 + 3 students)
- Single COT with more members (15 + 3 students) and Campus Advisory Boards
- Multiple COTs

Of the above options, legislative action would be required for options 2, 3 and 4. Refer to [Appendix A.C](#) for the option analysis.

Accordingly, should the Board approve the integration plan we would pursue the necessary legislative agenda.

In addition, the three universities also have relationships with affiliated entities managed at the university level. Affiliated entities are defined according to Board policy as a private organization (typically classified as a 501(c)(3) not-for-profit organization for federal tax purposes) that exists solely for the benefit of the university, including, but not limited to, foundations, alumni associations, and student associations. To be affiliated, the organization must: (1) be recognized as an affiliate through a Council of Trustees' resolution; (2) make financial contributions to the university or provide similar benefits on a regular basis, satisfactory to the president and Council of Trustees; and (3) provide an annual external audit report to the university on a timely basis.

Because affiliates are independently structured entities, the Board has no authority to integrate them or alter their structure in any way. Additionally, the implementation plan neither requires nor anticipates changes made by the affiliate; though changes may occur in the future as they have in the past through the normal course of operations. Specific to foundations, donations will remain within the current affiliated entity, and all current donor restrictions will be maintained.

9. Before and After Organizational Charts for All Impacted Institutions

As part of the implementation plan, organizational design focused on two phases.

During fiscal year 2021-2022 the three universities must continue operations as independently accredited universities while also working on the implementation plan to enable the opening of the integrated university at the start of the next fiscal and academic year (2022-2023).

The second phase of work will begin following Board approval, and will align staff with the detailed organization structure consisting of activities associated with labor relations, employee communications and change management.

In alignment with the goals and the planned submission to MSCHE, the before and after high-level organizational charts are presented in [Appendix S](#). The organizational charts were built to align to the goals of providing a robust program array to students through a combined faculty, supporting the recommendations from the working groups, and at the same time reducing duplication to drive savings for reinvestment in students. As the proposed implementation moves forward, staffing will be aligned within the organizational units with associated organizational changes and training conducted in accordance with the timelines. It is anticipated that some organizational changes may take place prior to July of 2022 for functions such as shared services while others may be phased in following July 2022.

The following provides additional clarification around the roles and responsibilities of the executive leadership that are contained within [Appendix S](#).

President

The University President is responsible for articulating the University's vision, mission and values with internal and external stakeholders; supporting and enhancing the institution's academic mission and overall operations; building upon the existing traditions, distinctiveness and strengths of the campuses; approving and overseeing the overall university budget and operations; securing external funding support; working with the Board of Governors, Chancellor, elected officials, alumni, donors, and the broader community to advance the mission of the University; and developing and implementing strategic and tactical objectives.

Academic Affairs

The Provost/Vice President for Academic Affairs is the chief academic officer of the university and provides vision and leadership in planning, developing and implementing the University's academic mission and programs to ensure the growth and quality of all educational offerings and academic support functions. This includes oversight of educational policy and academic programs, including program review and improvement, accreditation, academic management/personnel decisions, program and curriculum development and the improvement of teaching and learning. In collaboration with the other vice presidents, ensure that all aspects of institutional effectiveness meet the University mission goals and objectives.

Campus Administrator

A member of the president's leadership team located at a campus, who combines an executive level function (e.g., VP Academic Affairs), with responsibility for relational, ceremonial and other related functions at each of the partner campuses.

Chief of Staff

The Chief of Staff (COS) is responsible for implementing strategic and tactical objectives of the Office of the President. This includes working across the institution to identify, facilitate and coordinate opportunities and initiatives which involve multiple units within and affiliated with the institution. The COS will assist the President in managing priorities to maximize relationships with the Council of Trustees, Foundation and Alumni Boards, donors, alumni, students, and other key groups and individuals. The COS will collaborate with faculty, staff and students to promote an inclusive and diverse campus community.

Diversity, Equity and Inclusion

The Chief Diversity, Equity and Inclusion Officer will develop, implement and assess initiatives and programs that will provide focus and accountability for equity, inclusion and diversity across the University. This includes the office of social equity and Title IX compliance, developing and overseeing a comprehensive, university-wide diversity plan, oversight of diversity activities across the campuses, and work with faculty and staff on practices that support equity and inclusion.

Finance and Administration

The Vice President of Administration and Finance plans, organizes and directs operations in the areas of financial planning, accounts payable, travel processing, p-card reconciliation and review, capital project accounting, financial accounting and reporting, student residency classification determination and appeals, grant accounting and administrative support including emergency management, facilities management, occupational safety programs, human resources, public safety, campus security, and parking and transportation services.

Marketing and Communication

The Vice President for Marketing and Communications is responsible for providing leadership, broad policy guidance, and direction to advance the University's mission through marketing and communications, web and social media site management, external and governmental affairs relations, and publications.

Student Success and Enrollment Management

The Vice President for Student Success and Enrollment Management is the chief student affairs and enrollment management officer leading and informing the President on all matters pertaining to student life and strategic enrollment management. Student Success efforts includes student support programs, residence life and housing, student judicial affairs, student health and wellness, and auxiliary services. Strategic Enrollment efforts include oversight of admissions, financial aid, recruitment to facilitate the development and implementation of the University's strategic enrollment plan, promote institution-wide recruitment, and retention initiatives in collaboration with faculty, staff, administration, student organizations, and community stakeholders. This position maintains a visible profile both on campus and with external constituencies and engages with the faculty, students, alumni, staff and local communities.

University Advancement

The Vice President for University Advancement is the chief advancement and development officer for the university. This includes management and operation of university development, alumni relations, as well as community and donor relations.

The proposed organizational structure of the division of Academic Affairs in the integrated university was shared with faculty (June 23, 2021) for feedback as part of the implementation plan activities.

Based on the current timeline, it is anticipated that the proposed organization structure at the division levels for the remaining functions within the university will be shared in early August following the Board of Governors meeting.

Work will continue on finalizing the organizations of the new university through the second quarter of 2021-2022 including change management activities.

10. Information Included in the Chancellor’s Report and Recommendation under Subsection a.2 of Act 50, Namely the Financial Sustainability Analysis

Pursuant to Act 50 and as part of the System Redesign effort, the Chancellor proposed to the State System Board of Governors at its July 2020 meeting to embark on a financial review, per Act 50, of potential integration of several State System universities, seeking through such integrations to expand students’ educational opportunities and ensure that affordable, career-relevant higher education remains available in a sustainable way across all regions of Pennsylvania.

In September 2020, the first phase of the financial review and recommendation was presented by the Chancellor pertaining to the institutional integrations overview and Phase 1. This recommendation moved from three combinations to two combinations based on the analysis. On October 14, 2020, in accordance with Act 50, the Chancellor presented to the Board the report and recommendation of the financial stability of any impacted institution. The report and recommendation were contained within the Board PowerPoint presentation with appendices and the Board affirmation. Upon receipt of the report and recommendation, which showed the benefits and opportunities of the two combinations of integrations, the Board affirmed the ongoing institutional integrations process and authorized the Chancellor to proceed with the development of appropriate implementation plans for review by the Board in 2021.

[Appendix T](#) comprises the October 2020 Board of Governors report and recommendation. Note that impacts on community and affiliates identified in the October report as part of the implementation planning process can be found in Section 7 of this report.

As part of the implementation plan, the financial analysis conducted in October was refined with new information associated with the working group recommendations ([Appendix U](#)). It is important to note that the financial projections are an iterative process and will be updated as part of the Comprehensive Planning Process (CPP) in September. Adjustments associated with the Board of Governor’s approved tuition freeze for fiscal year 2021-2022 and receipt of COVID-19-related federal relief funds as well as associated protections related to reserves are presented in [Appendix A.D.](#)

Overall, program array and student success recommendations resulted in a 1% year-over-year enrollment increase beginning in FY 2023/24. This aligns with the goal associated with sustainability for enrollment.

However, when looking at the five-year projections, while the operating margin is projected to meet the minimum of the range, 2%, by FY 20224/25, the primary reserve ratio improves to 33.8% but does not meet the desired goal of 40%.

The financial projections, if the plans associated with pre-integration sustainability plans are met, and if anticipated student demand is realized, show a stable integrated university that has a positive operating margin after the investment of approximately \$500,000 in student success initiatives and growth in faculty complement needed to deliver the academic program array recommendations. This positive position allows for reinvestment in the physical plant, which is necessary as locations within the integrated university need maintenance investment, as well as allows for the incremental increase in reserves for future debt service obligations and student success initiatives.

Refer to [Appendix U](#) for April financial projections and additional data, including:

- Overview of the financial position contained within the financial statements
- Operating budgets and projections for the current year plus five years
- Administrative savings assumed from the integrations

Refer to [Appendix A.D](#) for updated financial projections and additional data, including:

- Updated overview of the financial position contained within the financial statements
- Updated operating budgets and projections for the current year plus five years
- Administrative savings assumed from the integrations and the assumptions related to the personnel savings and operating savings
- Highlights of major changes between April and June projections
- Results from the third party review of the financial projections and assumptions
- Short term deferred maintenance
- Summary of implementation outcomes

11. Timeline for the Implementation Plan Post-April

The **implementation plan** is built upon a timeline to launch the university by July 2022 with a phased implementation for continuous improvement. The first visual below shows the student lifecycle, which represents key items for prospective students, applicants, enrolled students, academics (i.e., returning students), graduation, and alumni giving.

Student Lifecycle Activities		2021				2022				2023+			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Prospect	UG students inquire about admissions information for Fall 2022												
	Grad students inquire about admissions information for Fall 2022												
	Student-athletes inquire about athletics and admissions recruitment information for Fall 2022												
Applicant	Students begin submitting their applications on a rolling basis												
	Students begin applying for scholarships												
	Students begin submitting their financial aid applications												
Admitted	Students receive admissions decisions for Fall 2022												
	Grad student receive financial aid offer letters												
	UG student receive financial aid offer letters												
Enrolled	Student participate in orientation												
	UG student deadline to submit housing deposits												
	New students register for Fall 2022 courses												
Academics	Returning students register for Fall 2022 courses												
	Students arrive on campus												
	Monitor retention and persistence												
Graduation & Alumni	Graduation												
	Alumni Engagement												

The table below shows the major work streams within the implementation plan. The implementation plan is built upon a timeline to launch the university by July 2022 with a phased implementation for continuous improvement. Refer to [Appendix V](#) for a detailed timeline of critical path items identified by working groups during the implementation planning phase.

Academic curriculum is being adjusted to provide for phased curriculum development, review, and implementation, with full implementation of integrated curriculum targeted by August 2024. This allows additional time for increased faculty engagement, program specific accreditation, and most importantly improves the ability for new and current students to have clear paths to graduation.

The major upcoming activities to be completed over the first quarter of fiscal year 2021-2022 upon Board approval include the below. Based on the completion of these activities the timeline will be adjusted accordingly:

- Detailed plan for phased-in curriculum development and implementation and supporting technology integration plans
- Middle States submission of Complex Substantive Change Request (full detail is available in [Section 5](#) of this document)
- Organization charts at the division level (academic organization charts were distributed to faculty for feedback and are currently under review)
- Marketing and branding strategy

Associated milestones for key aspects of the plan will be adjusted in support of the phased-in curriculum development and implementation, this includes, but is not limited to, information technology and student recruitment and enrollment.

INTEGRATION PILLARS	JAN – JUN 2021	JUL – DEC 2021	JAN – JUN 2022	JUL – DEC 2022+
Student Experience	<ul style="list-style-type: none"> • Wellness services • Career services • Financial literacy programs • Athletics program structure • International services and opportunities • Editorial Calendar • Brand identity • Student fee policies 	<ul style="list-style-type: none"> • Student services • DEI policies and training • Introduce future students • Marketing and communications strategy and function 	<ul style="list-style-type: none"> • Disability/accessibility services • Testing resources and procedures • Scholarships • Residence life offerings • Academic Advisors • Writing Center • Admissions process for athletes • Student Code of Conduct/handbook • Title IX compliance • Federal Drug Free Schools and Campuses Act • Hazing Regulations • Federal Clery Act Regulations 	<ul style="list-style-type: none"> • Tutoring services • Holistic advising • DEI staff and affiliates • Diversity demographics • Vendor contracts
Academics	<ul style="list-style-type: none"> • Integrated academic program array • Academic structure 	<ul style="list-style-type: none"> • Academic program synthesis • Academic catalog 		

INTEGRATION PILLARS	JAN – JUN 2021	JUL – DEC 2021	JAN – JUN 2022	JUL – DEC 2022+
	<ul style="list-style-type: none"> Common academic calendar 			
Institutional Accreditation	<ul style="list-style-type: none"> MSCHE CSC preliminary review 	<ul style="list-style-type: none"> CSC request form 	<ul style="list-style-type: none"> MSCHE board approval 	<ul style="list-style-type: none"> MSCHE site visit
Regional SIS and Enrollment	<ul style="list-style-type: none"> ED requirements Admissions deadlines 	<ul style="list-style-type: none"> Packaging and processing aid Standardize scholarships Class schedules Allocations/modifications from ED Admissions communications Application launch Technology for FAFSA Recruitment strategy Technology platforms and systems Pennsylvania Higher Education Assistance Agency (PHEAA) requirements/changes Contracts/affiliation agreements 	<ul style="list-style-type: none"> FAFSA and financial aid applications Tuition and fee structures IT policy alignment Transcript development Data conversions Degree audit 	<ul style="list-style-type: none"> Financial aid structure Financial aid disbursements FAFSA and financial aid eligibility Financial aid verification process Conversion to regional SIS Bill and payment
Finance and Infrastructure	<ul style="list-style-type: none"> Shared services model Purchasing processes Facilities management system 	<ul style="list-style-type: none"> Pricing out-of-state tuition Financial aid and enrollment projections Vendor contracts Singular budgeting process 	<ul style="list-style-type: none"> Tuition and fee structure Foundations and alumni Budget preparation manual 	<ul style="list-style-type: none"> Career/professional engagement Service centers New SAP Single budget into SAP Rating and lending agencies Prior year Financial Statement Audit and Single Audit
Human Resources		<ul style="list-style-type: none"> Integrated HR structure Organizational structure 		

In addition, the Northeast integration team drafted the below preliminary timeline in preparation for the MSCHE submission process, which is included within the critical path.

Critical Implementation Milestones	Estimated Date
Early notification of MSCHE	August 2020
Financial review	July - October 2020
State System Board of Governors affirmation of System Redesign direction	October 2020
Implementation planning process	October 2020 - April 2021
Creation and charge of implementation planning teams	October - November 2020
Early notification of Pennsylvania Department of Education	December 2020
Contact ED regarding any impact on Title IV	December 2020
State System Board of Governors interim review of implementation planning	January 2021
Submit CSC Preliminary Review Form to MSCHE VP	July 2021
State System Board preliminary approval of integration implementation plans	April 2021
Sixty-day public comment period	April-June 2021
State System Board final approval of integration implementation plans	July 2021
Submission of CSC request to MSCHE	September 2021
Implementation Phase 1	July 2021 - July 2022
MSCHE action	March 2022
Effective transaction date	July 1, 2022
MSCHE site visit	January - February 2023
MSCHE post-site visit Commission review and action	March 2023

12. Additional Considerations and Conclusion

Based on the implementation plan, we expect the Northeast integration to result in a student-focused, sustainable integrated university that benefits the Commonwealth and honors the identities of the three integrating universities. Upon the Board's final approval, the integration will embark on the implementation plan to execute the recommendations herein.

Any implementation of this scale comes with risks. The below outlines the primary financial risks, which will need to be mitigated for improved sustainability within the region for the students, families, and communities that we serve. Long-term sustainability will require integration and a new partnership with the Commonwealth resulting in greater recurrent investment in the State System Universities and or its students.

First, the Northeast integration needs to be protected from operating losses resulting from Mansfield's weak starting position and the declining position at Lock Haven (refer to [Appendix C](#) and [Appendix U](#)). Currently, Mansfield's academic program and auxiliary operations operate at a net loss. Mansfield also carries a negative reserve balance and relies upon annual System loans to meet expenditures. Lock Haven's academic program and auxiliary operations are nearly break-even. Additionally, assuming appropriations were distributed solely by enrollment, the two universities require a cross-subsidy of \$19 million annually. Mansfield and Lock Haven are the second and third most-subsidized universities in the System.

The financial projections shown in [Appendix U](#) are sensitive to assumptions having to do with enrollment growth, state funding, tuition actions, etc.; however, the program array recommendations as well as savings associated with the integration will begin to mitigate this risk and move the integrated university to an improved financial position. Additionally, Board actions will be necessary for the Northeast integration to shield it from financial risks related to Mansfield's System loans.

Second, the combined debt load of the Northeast universities is substantial. Totaling \$215 million (much of it in under-occupied residence halls), the \$21 million annual debt service must be repaid irrespective of enrollment. While the integrated university is able to invest in the physical plant, it is important to note the investment is minimal compared to the approximately \$120 million in current deferred maintenance for near-term needs in E&G and auxiliary operations. Alleviating the financial pressures associated with the debt load requires an ongoing partnership with the Commonwealth. This could take many forms, including selected building acquisition and/or targeted support for debt service payments. Either would help improve net revenue and allow for investments in students and physical plant.

Finally, the financial projections assume no change in the System's distribution of state appropriated dollars, thus continuing cross-subsidies for both Lock Haven and Mansfield – cross-subsidies that other universities can no longer afford without impacting their students' success and their institutions' financial health. Alleviating the need for cross-subsidy in the Northeast would require an additional \$19 million annually. Eliminating the need for cross-subsidy for the System as a whole would require \$46 million in annual appropriations.

Despite this, integration is the best path forward as visible when comparing scenarios of the individual universities against integrated university projections for net revenues ([Appendix Y](#)).

Trajectories considered by the Board and their costs

It is important to note that prior to embarking on integrations, as part of due diligence, the System had meaningful discussions about the following possible actions concerning the future of the System ([Appendix Y](#)).

Trajectory considered	Projected cost
Maintaining the three universities in their current operating models without implementation of the System sustainability policy	Between \$17 million to \$30 million annually in ongoing support, for a total of \$129 million for the five-year period.
Maintaining the three universities and requiring each to align cost with revenues under System sustainability policy, but not integrate	Between \$4 million to \$9 million annually in ongoing support, for a total of \$29 million for the five-year period. Requires additional targeted scholarships of between \$14 million to \$45 million annually to incentivize/maintain enrollments at two universities left with non-viable program arrays (as proven effective at Cheyney University with \$4.9 million annual investment in Keystone Scholarship).
Ceasing operations at selected universities	Requires legislative action, plus approximately \$180 million to offset closing costs (e.g., at the least sustainable university).
Dissolve the relationships that make us a system allowing universities to operate independently (e.g. as state related)	Requires legislative action. Also increases cost of university operations, which take responsibility for shared functions (legal, labor relations, payroll), plus targeted investment in maintaining or closing most universities not capable of sustaining on enrollment-driven and existing state revenues
Implementing the sustainability policy to align costs with revenues prior to integrating into a single accredited entity	Standard ongoing support, projected to achieve balance by FY24. Northeast one-time start-up costs estimated at approximately \$9 million, aligned mostly to IT for the student information system changes and faculty stipends over the five-year period. Total one-time start-up costs inclusive of support for both integrations are estimated at \$29 million over the five-year period.

Closing selected universities and dissolving the System are neither desirable nor possible without legislative action. Of the remaining three trajectories, sequentially implementing the sustainability policy and integrating universities are the best path to financially sustainable operations that ensure affordable, high-quality education is available at each of the System’s universities. Specifically:

- Only the integration plan allows for the ongoing investment necessary to support new academic programs, student supports, and growth into new student markets.
- Only the integration plan, through its deliberate focus on low-cost degree pathways, addresses student affordability issues outlined in [Appendix C](#). The data show the System affordability advantage diminished from \$6,500 to \$1,500 per student per year between 2010 and 2019. To impact student affordability through state support requires investment totaling \$12 million annually for every \$1,000 reduction in net average student cost of attendance.

Conclusion

The implementation plan outlined in this report sets the stage for a transformed Northeast integrated university that will be positioned to serve students, families, and the region for the future, enabling the continuation and expansion of high-quality, affordable educational opportunities that continue fulfilling the mission of the university and the System. This plan leverages the scale and resultant operational efficiencies achieved by combining the three universities, providing cost savings that allow us to reinvest in our students' success. It sets the stage for long-term viability focused on the students and regions these universities serve, while improving access to affordable, high-quality education that our students need to continue driving the regional and statewide economies. It is the beginning of the journey, and one, through the experience of building the work included here, that we have every confidence will be successful. With your support, we can, we must, and we will.

Acronyms and Definitions

- AA: Associate of Arts
- AACSB: Advance Collegiate Schools of Business
- AAS: Associate in Applied Science
- ABET: Accreditation Board for Engineering and Technology
- ACEN: Accreditation Commission for Education in Nursing
- ACEND: Accreditation Council for Education in Nutrition and Dietetics
- Accr: Accreditation
- ACS: American Chemical Society
- Act 50 or Act 50 of 2020: Public School Code of 1949 – Omnibus Amendment Act of Jul. 1, 2020, P.L. 558, No. 50
- ADA: American with Disabilities Act
- AOD: Alcohol and Other Drugs
- APSCUF: Association of Pennsylvania State College and University Faculties
- AFSCME: American Federation of State, County, and Municipal Employees
- AS: Associate of Science
- ASBMB: American Society for Biochemistry Molecular Biology
- ASHA: American Speech-Language Hearing Association
- ASN: Associate of Science in Nursing
- AuD: Clinical Doctorate of Audiology
- AUD: Audiology
- AY: Academic Year
- BA: Bachelor of Arts
- BASTL: Bachelor of Applied Science in Technical Leadership
- BI: Business Intelligence
- BFA: Bachelor of Fine Arts
- Bloomsburg: Bloomsburg University of Pennsylvania
- BM: Bachelor of Music
- BOG or Board: Board of Governors
- BSBA: Bachelor of Science in Business Administration
- BSN: Bachelor of Science in Nursing
- BS: Bachelor of Science
- BSEd: Bachelor of Science in Education
- BSW: Bachelor of Social Work
- CAAASLP: Council on Academic Accreditation in Audiology and Speech-Language Pathology
- CAAHEP: Commission on Accreditation of Allied Health Programs
- CACREP: Council for Accreditation of Counseling and Related Educational Programs
- CAE: National Center of Academic Excellence
- CAEP: Council for the Accreditation of Educator Preparation
- CAO: Chief Academic Officer
- CARES Act: Coronavirus Aid, Relief, and Economic Security Act
- CBA: Collective Bargaining Agreement
- CCNE: Commission on Collegiate Nursing Education
- CIP: Classification of Instructional Programs
- COA: Cost of Attendance
- CoAES: Committee on Accreditation for Exercise Sciences
- CoARC: Commission on Accreditation for Respiratory Care
- COT: Councils of Trustees
- CPP: Comprehensive Planning Process
- CRLA: College Reading and Learning Association
- CRM: Customer Relationship Management
- CRRSAA: Coronavirus Response and Relief Supplemental Appropriations Act
- CSC: Complex Substantive Change
- CSWE: Council on Social Work Education
- DCED: Pennsylvania Department of Community and Economic Development
- DFSCA: Drug Free School and Communities Act
- DEI: Diversity, equity, and inclusion
- DNP: Doctor of Nursing Practice
- Donor/Alumni: Donors, Alumni Relations, and Foundations
- E&G: Educational and General
- EAB: Education Advisory Board
- EADA: Department of Education Equity and Athletics Disclosure Act
- ED: US Department of Education
- EEO: Equal Employment Opportunity
- EIN: Employer Identification Number
- EITC: Educational Improvement Tax Credit
- EM: Enrollment Management
- EMR: Electronic Medical Records
- ENS: Emergency Notification System
- ETAC: Engineering Technology Accreditation Commission
- ETPL: Eligible Training Provider List
- F&A: Finance and Administration
- F2F: Face-to-Face
- FAFSA: Free Application for Federal Student Aid

- FERPA: Family Educational Rights and Privacy Act
- FinAid: Financial Aid
- FTE: Full-Time Equivalent
- FTF: First Time Freshman
- FTG: First Time Graduate
- FTT: First Time Transfer
- FYE: First-Year Experience
- FYS: First-Year Seminar
- GDPR: General Data Protection Regulation
- GPA: Grade Point Average
- GR or Grad: Graduate
- HEERF: Higher Education Emergency Relief Fund
- HIPAA: Health Insurance Portability and Accountability Act
- HR: Human Resources
- HR/LR: Human Resources & Labor Relations
- ID: Identification
- IPEDS: Integrated Postsecondary Education Data System
- IT: Information Technology
- JRCERT: Joint Review Committee on Education in Radiologic Technology
- LMS: Learning Management System
- Lock Haven: Lock Haven University of Pennsylvania
- MAcc: Masters of Accountancy Program
- Mansfield: Mansfield University of Pennsylvania
- MarComm: Marketing and Communications
- MBA: Master of Business Administration
- MD: Maryland
- MEd: Master of Education
- MHS: Master of Health Science
- MOU: Memorandum of Understanding
- MS: Master of Science
- MSCHE: Middle States Commission on Higher Education
- MSN: Master of Nursing
- MSW: Master of Social Work
- NACADA: National Academic Advising Association
- NASAD: National Association of Schools of Art and Design
- NASM: National Association of Schools of Music
- NCAA: National Collegiate Athletic Association
- NE: Northeast Integration
- NSCA: National Strength and Conditioning Association
- OCR: Office of Civil Rights (138)
- OOC: Office of the Chancellor
- OPEID: Office of Postsecondary Education Identification
- OPEIU: Office of Professional Employees International Union Healthcare Pennsylvania
- OPF: Official Personnel Folder
- PA: Pennsylvania
- PACT: Pennsylvania Association of Councils of Trustees
- PHEAA: Pennsylvania Higher Education Assistance Agency
- POA: State System Officers Association
- PRP: Policy, Review, and Procedure
- PSAC: Pennsylvania State Athletic Conference
- PSU: Pennsylvania State University
- RMS: Report Management System
- ROI: Return on Investment
- RTK: Right-to-Know
- SAP: Systems, Applications and Products
- SCUPA: State College and University Professional Association
- SIS: Student Information System
- SLT: System Leadership Team
- SNHU: Southern New Hampshire University
- SPFPA: International Union, Security, Police and Fire Professionals of America
- State System or System: Pennsylvania's State System of Higher Education
- Support Services: Integration Support Services Group
- SWMD: State-Wide Meet and Discuss
- Tech: Technology
- UG or Ugrad: Undergraduate
- UCR: Uniform Crime Reporting system
- ULT: University Leadership Team
- VP: Vice President
- W: West region
- WG: Working Group
- WIB: Workforce Investment Board

Act 50 Quarterly Report Alignment

The table below correlates the Act 50 requirements to the relevant appendix or appendices.

Act 50 Requirement	Appendix
(1) An overview of the financial position of the respective universities at the time of plan approval and the time of the report.	Appendix U: Financial Sustainability Analysis
(2) The operating budget and total budget for each university at the time of plan approval and at the time of the report.	Appendix U: Financial Sustainability Analysis
(3) The estimated amount of expenditures needed to support plan implementation at the time of plan approval and the cumulative amount of expenditures made to support plan implementation at the time of the report.	Appendix X: Implementation Costs
(4) The applicable organizational charts at the time of plan approval and at the time of the report.	Appendix S: Organizational Charts
(5) Full-time enrollments at the time of plan approval and at the time of the report.	Appendix N: Act 50 Reporting on Student Metrics and Analysis
(6) Graduation outcomes at the time of plan approval and at the time of the report.	Appendix N: Act 50 Reporting on Student Metrics and Analysis
(7) The cost of tuition, room and board and fees at the time of plan approval and at the time of the report.	Appendix N: Act 50 Reporting on Student Metrics and Analysis
(8) The average cost of attendance at the time of plan approval and at the time of the report.	Appendix N: Act 50 Reporting on Student Metrics and Analysis
(9) The number of faculty and non-faculty employees at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Faculty Appendix P: Act 50 Reporting on Staff
(10) The number of faculty and non-faculty employees by location at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Faculty Appendix P: Act 50 Reporting on Staff
(11) Each impact to faculty and non-faculty employee staffing, including, but not limited to, separations, reductions in force, reclassifications of job responsibilities or roles or reassignments to other universities within the system. The notification under this paragraph shall include an estimated financial impact for the current and subsequent two fiscal years.	Appendix O: Act 50 Reporting on Faculty Appendix P: Act 50 Reporting on Staff
(12) The faculty-to-student ratio and the faculty and non-faculty employee-to-student ratio at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Faculty
(13) A list of academic programs that have been terminated or consolidated and an explanation of the reasons for termination or consolidation.	Appendix K: Act 50 Reporting on Academic Programs
(14) A list of new academic programs that have been approved and an explanation of the need for the programs.	Appendix K: Act 50 Reporting on Academic Programs

Act 50 Requirement	Appendix
(15) The number of academic programs by location at the time of plan approval and at the time of the report.	Appendix K: Act 50 Reporting on Academic Programs
(16) A list of property that is for sale or has been sold and the value of the proceeds from the sale.	Appendix I: Act 50 Reporting on Property for Sale
(17) A list of administrative service consolidations and the value of savings resulting from the consolidations.	Appendix U: Financial Sustainability Analysis
(18) A list of outlining concerns related to the implementation of the plan on the community and affiliated organizations.	Appendix Q: Act 50 Reporting on Affiliated Entities' and Communities' Concerns
(19) Any other information as requested by the chairpersons enumerated under this subsection.	N/A

Appendices

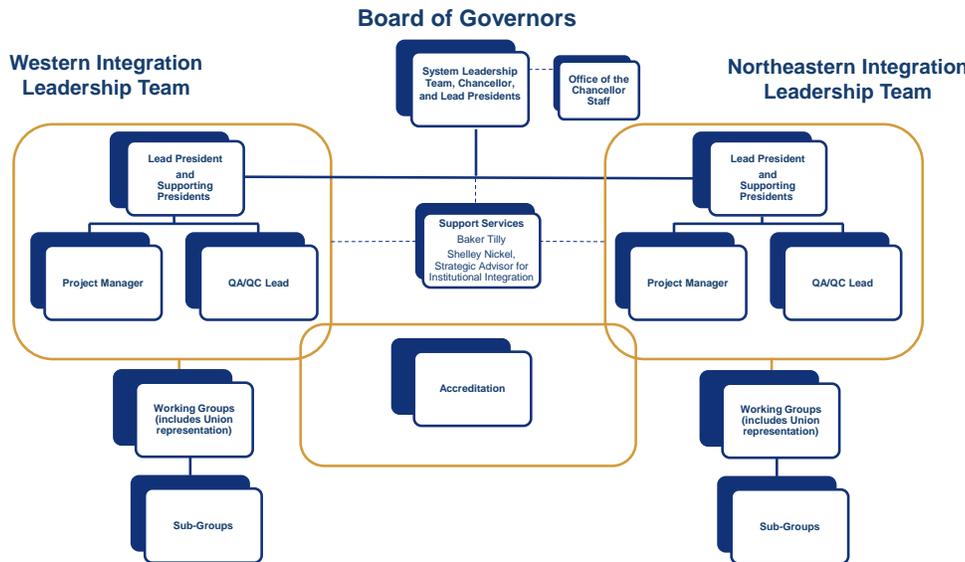
Appendix A: Implementation Planning Process

How Are We Pursuing Integration?



1

Implementation Planning Takes Place in the Regions...



2

...Through 29 Working Groups (and 215 Subgroups) Focused on Key University Functions.

Identified and populated initial working groups (WGs) with leads, co-leads, and subgroup members. Each WG has distinct charters and charges.

Parallel Working Groups (One per Region)		Regional-Specific Working Groups	
1	Academics		
2	Athletics		
3	Communication and Marketing		
4	Donors/Alumni Relations/Foundations		
5	Enrollment Management		
6	Facilities and Infrastructure		
7	Finance and Administration		
8	Human Resources and Labor Relations		
9	Institutional Governance and Leadership		
10	Technology		
		Western	Northeastern
		11 Online	14 Workforce Development and Non-degree Programs
		12 Student Affairs	15 Student Success, Services, and Campus Life
		13 Student Success and Retention	
		Combined Working Groups	
		16 Accreditation	
		17 Financial Aid	
		18 State System Technology	
		19 Human Resources and Labor Relations	

Plus 215 Subgroups!

3

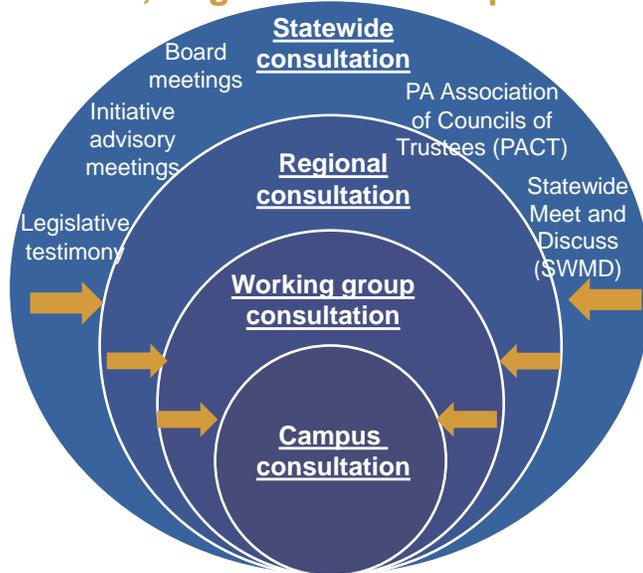
The Process Engages the Expertise of Our Stakeholder Groups...

WGs and subgroups were structured to meet the WG charges in accordance with a common framework that was customized in each region to ensure needed skills and expertise as well as constituency representation

Western Integration	Northeastern Integration
As of 1/8/2021:	As of 1/8/2020:
<ul style="list-style-type: none"> • 145 Managers • 130 APSCUF Members • 60 SCUPA Members • 23 Coaches • 21 AFSCME Members • 13 Students (does not include advisory group) 	<ul style="list-style-type: none"> • 166 Managers • 279 APSCUF Members • 38 SCUPA Members • 9 Coaches • 72 AFSCME Members • 3 Trustee Students
<ul style="list-style-type: none"> • 11 Trustees • 8 Affiliates (SAI, Foundation Members, PSECU Reps, Military, etc.) • 4 Alumni (Non-Employee) • 2 SPFPA Members • 2 POA Members • 1 OPEIU 	<ul style="list-style-type: none"> • 10 Trustees • 10 Affiliates (BU and LHU Foundation, BU CGA Affiliate) • 1 SPFPA Members • 1 OPEIU Member • (Does not include non-employee alumni or POA members)
421 total individuals serving on working groups and subgroups	589 total individuals serving on working groups and subgroups

4

...and Involves Extensive Consultation at Statewide, Regional, and Campus Levels.



Appendix B: 2021 Annual Accountability Report

The 2021 Annual Accountability Report (i.e., Appropriations Request) was published on March 3, 2021 and includes information regarding the contributions State System universities make to the Commonwealth of Pennsylvania and the challenges confronting the State System. Refer to: https://www.passhe.edu/Shared%20Documents/FINAL_AppropsBook_3Mar2021.pdf.

Appendix C: Northeast Integration Financial Challenges

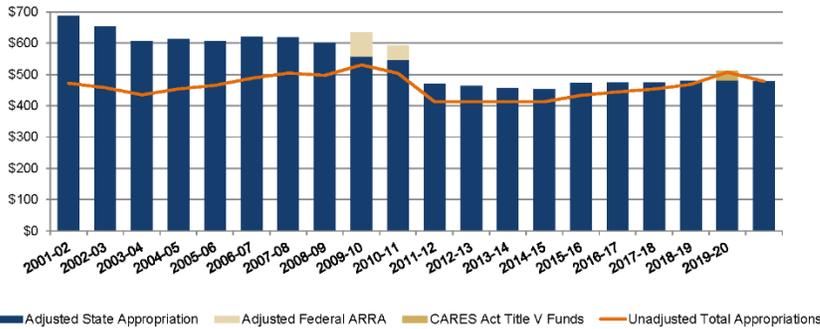
The following excerpt details the review of structural trends, impacts on the State System and university financial health, and State System trajectories.

Review of Structural Trends

The challenges we are facing



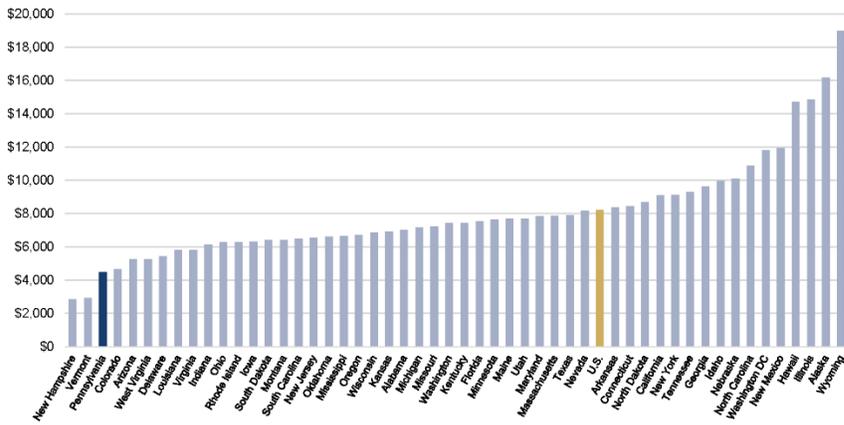
As State Funding has Declined (annual state appropriations to State System adjusted for inflation)



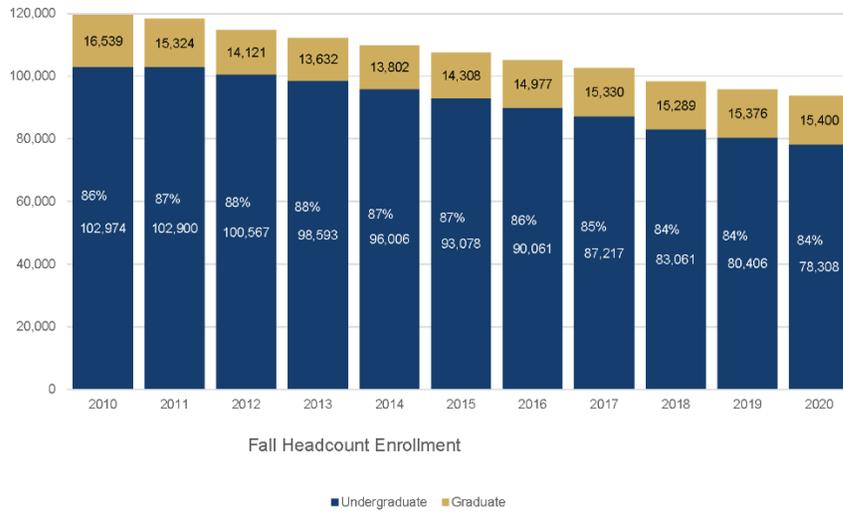
Although Pennsylvania has increased funding in recent years, current funding is down \$210 million (31%) since 2001, when adjusting for inflation.

*Inflation adjustment based on CPI-U through 2019-20, and 2020-21 inflation of 0.9% per Congressional Budget Office projection. Does not include CARES Act funding.

Pennsylvania's Position Has Declined Relative to States in Educational Appropriations per FTE



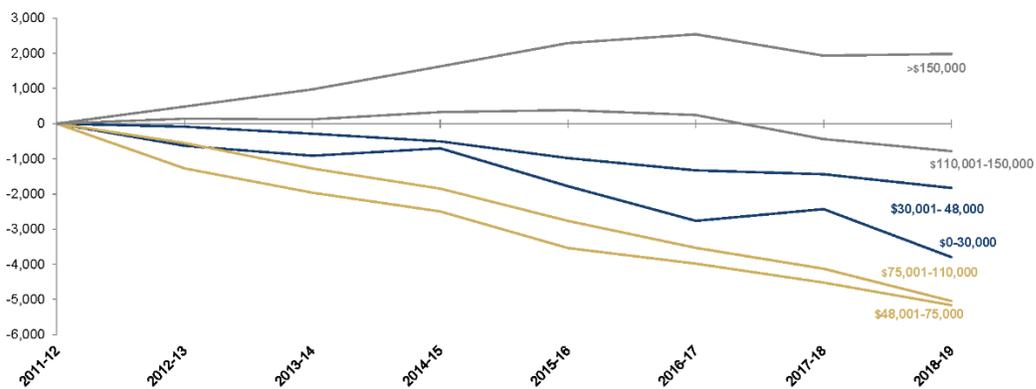
Driving Enrollment Down (by 21% since 2010)



Decline is 27% without West Chester University, which has grown

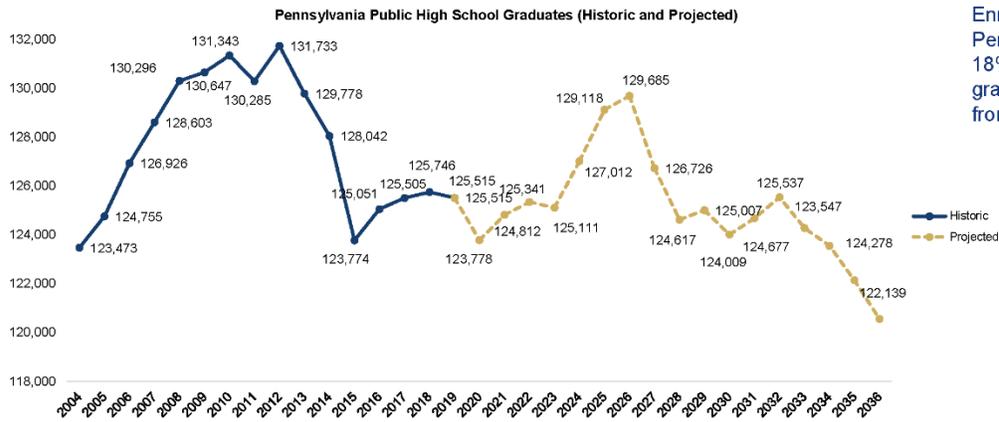
Particularly Amongst Students from Low- and Middle-Income Families (the students public higher ed was created to serve)

Change in Fall In-State Degree/Certificate-seeking Undergraduate Headcount by Family Income Level
For those who completed the FAFSA and received any aid



Source: Census Student and Annual Financial Aid Data Collection, State System Student Data Warehouse

Demographic Trends Contribute But Account for Only A Fraction of the Loss (change in size of high-school-leaving population)



So Does the Competitive Higher Ed marketplace



Nearly 250 Institutions Offer Degrees in PA

- PASSHE
- Community Colleges
- State-Related
- Thaddeus Stevens
- Private State-Aided
- Private Colleges/Universities
- Theological Seminaries
- Private 2-Year Colleges
- Specialized Associate Degree Institutions
- Out-of-State Provider

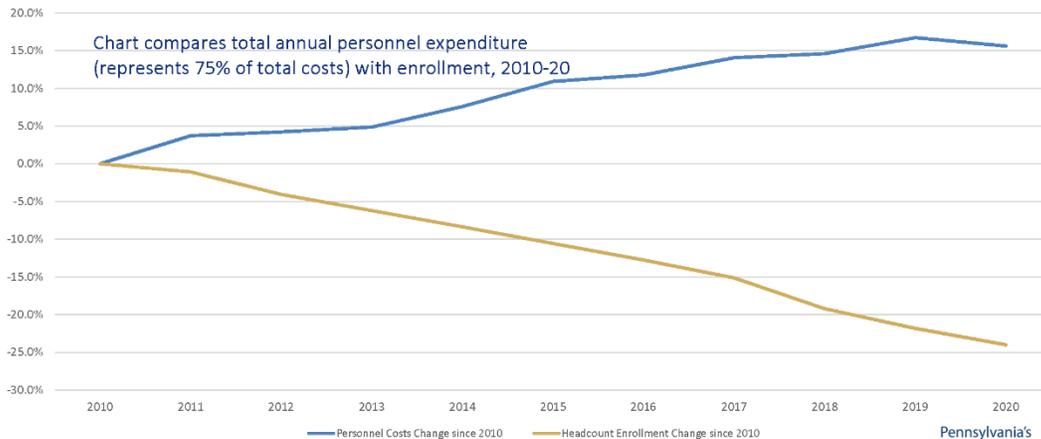
Source: Pennsylvania's Department of Education

But the Greatest Driver Appears to be Price (the State System's average net price of attendance up 62.4% 2009-10 to 2018-19)

Average net Price (Cost of Attendance minus Average Grants)	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	Percentage Change from 2009-10 to 2018-19
State System	\$12,807	\$14,078	\$15,342	\$16,304	\$16,333	\$17,696	\$18,482	\$19,763	\$20,270	\$20,799	62.4%
PA State Related	\$19,330	\$20,577	\$19,983	\$20,620	\$20,868	\$21,676	\$21,471	\$21,835	\$22,504	\$22,428	16.0%
PA 4 Year Privates	\$21,028	\$22,007	\$22,457	\$23,220	\$23,382	\$22,748	\$22,651	\$22,968	\$23,296	\$23,496	11.7%
National 4 Year Public	\$11,641	\$11,966	\$12,631	\$13,032	\$13,143	\$13,497	\$13,746	\$13,957	\$14,033	\$14,294	22.8%

The trend has significantly reduced State System Universities' affordability advantage in PA.

Trends Are Devastating Financially — Fewer and Fewer Students Carry the Burden of Fixed and Growing Costs



Impacts on System and University Financial Health

The problem we are trying to solve



Annual Operating Margins Weaken



— Threshold goal is recommended by National Association of College and University Business Officers and is industry standard; calculation was slightly modified beginning 2014/15 based on KPMG methodology; prior data reflects Moody's methodology.

The State System's goal* is for each university to achieve a 3-year rolling average operating margin of at least 2-4%.

The operating margin has declined in all but the most recent year and is still overall less than the 2-4% goal.

In 2019-20, operating margins at 11 universities was below 2%, compared to 5 universities in 2015-16.

The 2019-20 reflects deposit of CARES Act Funds (June 2020) – funds which were already spoken for (and inadequate to meet COVID related)

Source: SAP, Business Warehouse

As Do Primary Reserve Ratios



The State System's goal* is for each of its universities to have a reserve 3-year rolling average of 40%.

The ratio for the System overall has declined in recent years.

In 2019-20, 9 universities were below 40%, compared to 5 in 2015-16.

*Threshold goal recommended by the National Association of College and University Business Officers and is industry standard. Primary Reserve Ratio: Expendable financial resources (unrestricted plus temporary restricted) divided by annual operating requirements (total expenses).

Source SAP; Business Warehouse

And Minimum Reserve (days cash* on hand)



The State System's goal* is for universities to have reserves on hand for 180 days of operations.

In 2019-20:

- 10 universities have lower minimum reserves than in 2015-16

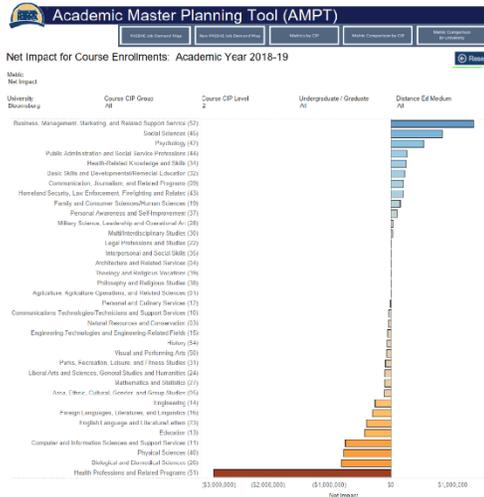
- half do not have 180 days reserves on hand

- 3 have less than three months (90 days)

*Threshold goal recommended by the National Association of College and University Business Officers and is industry standard. Includes System loans, where applicable

Source SAP; Business Warehouse

Bloomsburg University



Net financial impact of academic program array (19/20)
 Fall/Spring: (\$2.1M)
 ALL terms: (\$689K)
 Fall Headcount Enrolment trend since 2010: **-16%**

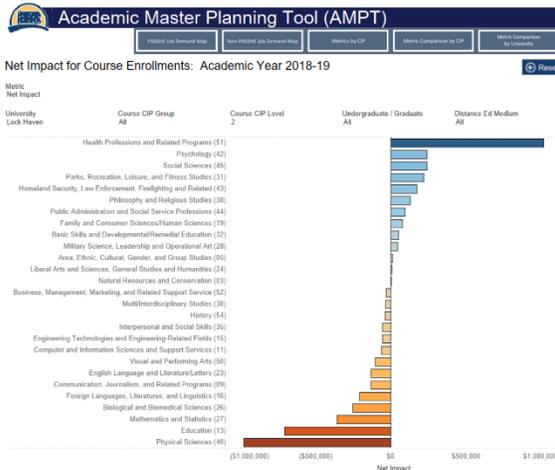
	Actual 6/30/20	Estimated 6/30/22
Unrestricted net position:	67.8M	52.6M
Change in net position: (from 86.8M in 2015)	-19.0M	-34.2M

Total bond debt (6/30/20):
 Current FY 20/21 debt service for E&G: \$1.1M
 Current FY 20/21 debt service for Auxiliary: \$8.4M
 Average occupancy of residence halls: 92.7%
 Auxiliary operations FY 18/19 (Pre-COVID): **-37.8k**

2019/20 subsidy to other universities: \$5.0M



Lock Haven University



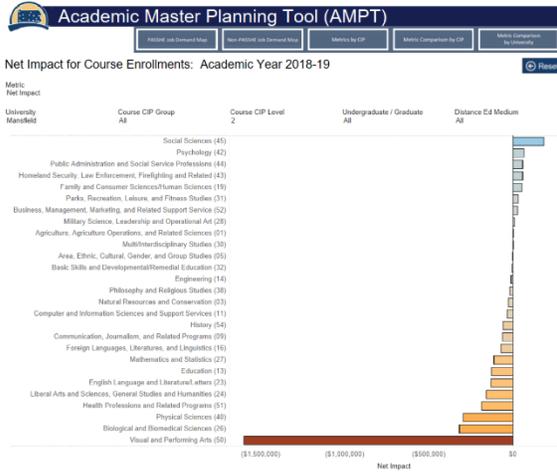
Net financial impact of academic program array (19/20)
 Fall/Spring: **(\$1.2M)**
 ALL terms: \$160K
 Fall Headcount Enrolment trend since 2010: **-42%**

	Actual 6/30/20	Estimated 6/30/22
Unrestricted net position:	\$52.6M	\$39.7M
Change in net position: (from \$61.8M in 2015)	-\$9.2M	-\$22.1M

Total bond debt (6/30/20): \$42.3M
 Current FY 20/21 debt service for E&G: \$903K
 Current FY 20/21 debt service for Auxiliary: \$3.6M
 Average occupancy of residence halls: 79.7%
 Auxiliary operations FY 18/19 (Pre-COVID): **(\$279K)**

2019/20 subsidy from other universities: **\$9.5M**

Mansfield University



Net financial impact of academic program array (19/20)

Fall/Spring: **(\$7.3M)**

ALL terms: **(\$7.3M)**

Fall Headcount Enrolment trend since 2010: **-47%**

	Actual 6/30/20	Estimated 6/30/22
Unrestricted net position:	(\$5.9M)	(\$25.5M)
Change in net position: (from +18K in 2015)	\$25M	\$44.6M

Total bond debt (6/30/20): **\$79.8M**

Current FY 20/21 debt service for E&G: **\$988K**

Current FY 20/21 debt service for Auxiliary: **\$5.5 mil**

Average occupancy of residence halls: **72.2%**

Auxiliary operations FY 18/19 (Pre-COVID): **(\$1.9M)**

2019/20 subsidy from other universities: **\$9.6M**

System Trajectories Considered

System Redesign could have taken any number of paths, as laid out in the risk assessment framework presented to the Board of Governors at its meeting in July 2020



Potential trajectories for System Redesign, as reviewed by Board 7/20

Trajectories	Potential Benefits	Associated Risk(s)
1. Dissolve the system; universities would fend for themselves; operate more like state-related	Eliminates financial pressures resulting from cross-subsidies and system loans; relaxes / eliminates non-compete constraints, e.g., academic programming, enrollment/recruitment	Requires legislative action Shared activities (benefits, payroll, retirement) would have to be performed by each university, increasing costs; absent significant ongoing targeted state investments, selected universities are unlikely to succeed (see risks under "cease operations")
2. Cease operations at some universities	Eliminates universities operating at annual net loss and the financial drain on the system, which is required to cover losses	At minimum requires legislative action to buy down the closing costs that the system can't meet Devastating socio-economic impact on regional economy, e.g., job loss, access to skilled workforce
3. Substantially increase state funding	Maintains affordable postsecondary pathways across all regions of PA, and critical engines of social mobility and economic devt	Requires ongoing commitment from the State to fundamentally adjusted funding level with ongoing incremental growth
4. Maintain the current path - July 2202 (operate 14 independently accredited universities with terms of Board's sustainability policy)	Enables continuity of operations mitigating immediate need for transformational changes represented by integration, and options 1, 2, and 5	Absent significant ongoing increase in state appropriations, sustainability operations force reduction in program breadth, further depressing enrollments and place greater financial pressure on other system universities through use of system loans, cross subsidy
5. Pursue university integrations	Enable all universities sustainably to continue residential experiences for traditional students while maintaining their identities, expanding academic opportunities, improving student outcomes, serving new markets	Identified below and including ongoing state appropriation, debt level, labor costs, enrollments, etc.

Appendix D: Integrations Initiative Charters

System Redesign: Integrations

Integrations Initiative Charter

November 12, 2020

Document Purpose

This charter defines the purpose and organizational structure of the State System Redesign integrations initiative and outlines the roles of groups involved.

Act 50 requires the Board of Governors receive a report and recommendation from the Chancellor inclusive of an implementation plan. The components of this document align to the requirements of the Act and provide the structure to be used to complete the work and present to the Board of Governors.

Initiative Purpose, Rationale, Goals and Objectives, and Guiding Principles

Integrations Initiative Overall Purpose and Rationale

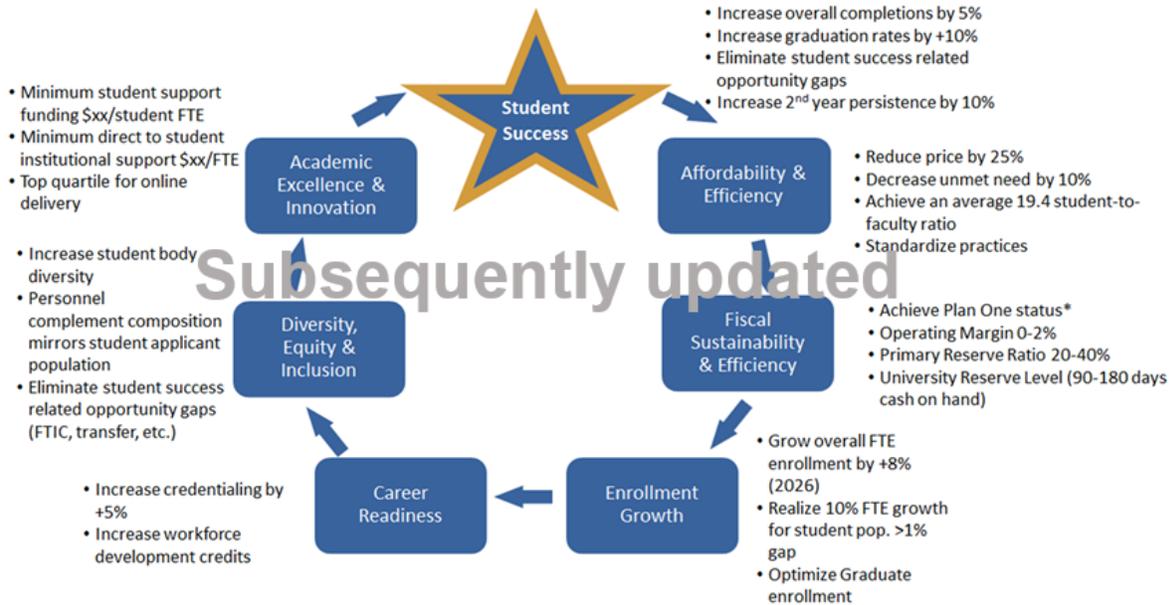
- Maintain or expand high-quality educational opportunities for students across Pennsylvania
- Improve and expand access, affordability, and success for all students
- Honor and engage local identity and key stakeholders (trustees, alumni, affiliates, donors, etc.)
- Meet regional economic and workforce needs
- Position institutions for growth, including in new markets
- Realize cost savings
- Leverage talented faculty and staff

Selected Integrations Purpose and Rationale

- **Potential to Serve More Students, Grow into New Markets:** The integrations will allow growth into adjacent markets by combining the capacities of integrating institutions, which enables them to compete in the marketplace more effectively than if they stand alone.
- **Strong Regional Proximity:** Integrated universities must be able to sustain face-to-face instruction with a “single” or integrated faculty and administration. While a great deal can be done remotely, students involved in residential education have an expectation for an on-campus experience. Regional proximity also leverages the universities’ deep roots in their surrounding communities and, by working together, they can provide essential pathways into sustaining careers for people in those communities.
- **Opportunity for Cost Savings and Program Alignment:** Integration design will begin with a rigorous analysis of the academic program arrays, staffing structures, and potential cost savings that result from the integration process, thus enhancing financial sustainability.

Goals and Objectives

- Goals: Specific, desired future outcomes of the integration with measurable metrics for August 2022 and August 2026
- Objectives: Annual targets, action steps, and desired outcomes to achieve the goals



Integration Guidelines – Fundamental considerations to incorporate in all aspects of integration implementation planning to guide the recommendation and decision-making processes.

Guiding Principles

- **Academic Excellence and Innovation** – Maintain or expand high-quality educational opportunities for students. Leverage talented faculty and staff. Establish robust program pathways among universities, schools, and community colleges.
- **Student Success** – Provide access to high-value, relevant educational experiences that prepare students in a timely manner for pathways to successful lives and careers.
- **Enrollment Growth** – Position institutions for growth, including in new markets.
- **Affordability** – Consider affordability from the students’ perspective and embrace pricing flexibility strategies.
- **Efficiency and Fiscal Sustainability** – Provide students the full breadth of academic programming, while realizing greater regional efficiency and cost savings.
- **Diversity, Equity, and Inclusion** – Create environments that recognize differences, and provide appropriate and equitable systems that foster positive outcomes for all students, and eliminate gaps that persist in relative performance of different student groups. Honor and engage local identity and key stakeholders.
- **Career Readiness/Development to Meet Regional and Commonwealth Needs** – Meet regional and economic work force needs. Strengthen connections to workforce with pathways, experiential learning, career services, adult learning, and post-traditional.

Organizational Methodology

- Start with the end in mind.
- Innovate to unique, sustainable, and efficient solutions in all areas.
- Guide recommendations development using established goals and objectives around student success, affordability, and high-quality education.
- Recommend actions to create single, integrated universities with common or standard processes and approaches, tightly integrated functions with respect to people, organizations,

systems, policies, and approaches, and, where appropriate, joint supporting joint functions between the newly integrated university.

- Focus on the critical path to August 2022; identify other opportunities for a phased-in implementation approach.
- Design for long-term sustainability with cost savings/return on investment (over a ten-year time horizon and beyond).
- Consider all topics/areas; nothing is off-limits.
- Coordinate among integrating institutions to align processes and methods (where possible) to create synergies and identify opportunities.

Expectations and Deliverables

- Develop recommendations and suggestions to inform final leadership decision making.
- Where multiple views exist, bring forth alternatives and pros/cons.
- Represent your subject matter expertise, not your current university.
- Listen with respect to everyone's opinion and keep a sense of humor.
- Consider all ideas.
- All deliverables will be met by established deadlines.
- Engage and consult with key stakeholders and promote transparency.
- Confidentiality will be maintained in all working group discussions and understanding that decisions are not final until appropriate protocols are followed.
- Focus on data-informed decision making.
- Confirm existing information; assess if additional information is needed before creating something new. (Don't recreate the wheel.)
- Seek opportunities to identify and consider impact of recommendations on non-integrating universities.

Scope, Roles, and Responsibilities

Scope and Assumptions

- **West Integration:** California University of Pennsylvania, Clarion University, and Edinboro University
- **Northeast Integration:** Bloomsburg University, Lock Haven University, and Mansfield University
- **Assumptions** include that each integration entails:
 - One leadership team
 - A single faculty and staff
 - A single program array
 - A unified enrollment management strategy
 - A single, combined budget
 - One reporting relationship through the Chancellor to the Board
 - A single accredited entity

Key Roles and Responsibilities

- **SLT:** Chancellor, Vice Chancellor and Chief Academic Officer, Executive Vice Chancellor, Deputy Chancellor, Strategic Advisor for Institutional Integration and West and Northeast Integration Lead Presidents
 - The Chancellor serves as the initiative sponsor; sets the strategic direction, objectives, and funding for integrations; approves integration plans for consideration by the Board of Governors, and serves as the "face" for the System for the integration effort
 - The Integration Lead Presidents collaborate with the Office of the Chancellor (OOC) staff to create and oversee development of integration planning deliverables from planning frameworks adopted by ULTs; and serve as the escalation point for ULT-identified risks, issues, and decisions

- **ULT**
 - **West Integration:** West Integration Lead President, Presidents, Project Manager and Quality Manager, CAOs, VP of Finance and Administration, and designated functional Working Group Co-Leads
 - **Northeast Integration:** Northeast Integration Lead President, Presidents, Project Manager and Quality Manager, CAOs, VPFAs, and designated functional Working Group Leads/co-leads
 - ULTs provide input to the System Leadership Team in developing a planning framework and implementation approach; creating and overseeing implementation planning in each integration group, including populating, overseeing, and integrating deliverables produced by, and acting as the review/evaluation point for risks, issues, and recommendations generated by, underlying Working Groups; packaging and transmitting deliverables to the SLT; engaging with the SLT in resolving questions and issues arising therefrom
- **Integration Support Services Group (Support Services):** Strategic Advisor for Institutional Integration; Baker Tilly team members serving in advisory and support roles, including liaisons to Working Groups, Program Management Lead, Lead Engagement Partner, West and Northeast Project Managers, Project Management Senior Consultant, and subject matter experts
- **Office of the Chancellor:** In the integration process, staff from the Office of the Chancellor will:
 - Serve as a resource, in support of the integration work
 - Provide guidance about how options being considered integrate with and/or impact systemwide strategies, directions, and/or policies, and escalate issues as necessary to the system leadership team
 - Ensure compliance with all applicable laws, policies, and contractual obligations
 - Ensure consistency in messaging and approach where appropriate across integration teams

At the request of a working group's lead, OOC Staff may (but are not required to) participate in parallel and regional-specific working groups.

OOO staff may play a greater leadership role in combined working groups where they are established to consider issues with potential for specific, direct system impacts (e.g., technology, labor relations)

Detailed Responsibilities

The ULTs (West and Northeast) share identical roles and responsibilities. Each group is charged with undertaking a collaborative, consultative process for planning an effective integration design and implementation strategy for each of the three integrating university groups, forwarding these to the SLT for review and consideration by the Chancellor and ultimately consideration by the Board of Governors. This includes the following activities:

- Designating specific Working Groups to draft considerations to inform the integration design and implementation plan for key functional areas and overseeing the process of populating membership among the Working Groups, specifically:
 - Building a membership matrix that defines the organization of the Working Groups, including needed skillsets and subject matter expertise, constituencies represented, and number of representatives
 - Inviting nominations for Working Group leads/co-leads/members/subgroup members based on shared governance considerations, specifically requesting that stakeholder groups provide multiple nominees from which final appointments will be selected
 - Appointing co-leads for Working Groups to serve as the primary liaisons and representatives between the ULTs and Working Groups; the co-leads of the Working Groups are responsible for:
 - Building a subgroup membership matrix that specifies needed skillsets and subject matter expertise, constituencies represented, and number of representatives, to inform the ULT's invitation for subgroup nominations
 - Collaborating with the ULT to select subgroup members for Working Groups

- Leading the Working Groups to set the subgroup charges (aligned with the Working Group charges)
 - Sharing information with both Working Group members and subgroup leads to enable updates to their constituencies
 - Supporting adherence to the integration guiding principles, maintaining confidentiality, and providing representative, collaborative, constructive input
 - Supporting Working Group leads by inviting nominations for subgroup members
 - Sharing information to support Working Groups leads' ability to:
 - Provide updates to their Working Groups on the broader initiative plans and progress and
 - Support their Working Group members' in fulfilling their responsibilities to update their constituencies
- Establishing a tone at the top of positive support for the integration work and implementation plan
- Supporting Working Groups to adhere to the integration planning timeline and achieve assigned objectives
- Collaborating regularly with the other ULT to identify initiative efficiencies, align integration approaches, and leverage synergies among Working Groups
- Using Working Group recommendations to design a recommended detailed future state of the three integrating entities, including vision, mission, goals, objectives, organizational charts, academic program array, and communication and implementation plans
- Consulting with the SLT and collaborating with Support Services on initiative progress and communication plans
- Collaborating with the SLT's Communication Office to proactively prepare communications to stakeholders regarding the integration initiative and implementation planning
- Socializing the integration implementation plan with stakeholders and refining the plan as necessary

The SLT serves as the executive champion of the integration project, regularly coordinating with the West and Northeast ULTs to act as the final decision-making body. The SLT provides strategic direction and milestones, monitors progress, and considers benefits, opportunities, and synergies that can expand beyond the six institutions involved in the integration to the entire System. Specifically, the SLT supports the West and Northeast ULTs in adhering to the integration timeline and planning their respective groups' activities to achieve the purpose, goals, and objectives of the integrations, including assessing the design of the future state entities against the mission and strategic plan of the State System as a whole.

The Integration Support Services Group provides advisory support for the SLT and both ULTs.

Specifically, Support Services will assist with:

- Maintaining overall initiative project plans and timelines
- Providing frameworks, tools, templates, and timelines to support the integration planning
- Drafting and/or advising on key initiative deliverables
- Providing higher education subject matter expertise upon request
- Facilitating planning and status meetings with the SLT and both ULTs
- Supporting regular meetings to review activities and progress
- As needed, facilitating working sessions with the SLT, ULTs, and other key stakeholders to design detailed future states of the integrating universities
- Supporting the analysis and assessment of various optimization scenarios, including required changes and impacts, and helping with subsequent updates to any necessary financial projections
- Supporting the creation of before and after organizational charts for the two ULTs
- Assembling implementation plans based on the future state, facilitating processes to obtain and incorporate feedback, and finalizing the implementation plan and timeline
- Supporting preparation for the Spring 2021 Board of Governors' meeting and public hearings

Key Deliverables and Timelines

The following deliverables will be drafted per Act 50:

- Integration Report and Recommendation including goals and objectives. The report will outline the recommendations from each of the Working Groups.
- Impact Analysis based on the recommendations, the impacts on students, faculty, staff, community and governance will be provided.
- Organization Analysis including before and after organization charts.
- Financial Projections based on recommendations and timelines to implement.
- Implementation plan which outlines the major tasks and associated timeframes to implement the integrated university by August 2022.

Due dates for the working group deliverables will be phased in based on both Act 50 and Middle States requirements.

Upon approval by the SLT, the project timeline to complete the work per Act 50 will be located at the Integrations SharePoint site.

System Redesign: Integrations Integration Working Groups Charter November 12, 2020

Document Purpose

This document defines the roles and responsibilities of integration Working Groups designated by the West and Northeast Integrations for the State System integration initiative. It articulates the purpose, goals, principles, scope, roles, and deliverables with which the Working Groups are charged.

Purpose and Rationale of the Integrations

See Overall Integrations Initiative Charter

Goals and Objectives

See Overall Integrations Initiative Charter

Guiding Principles

See Overall Integrations Initiative Charter

Key Roles and Scope

Parallel Working Groups – The following Working Groups will exist for each integration:

1. Academics Working Group
2. Athletics Working Group
3. Communication and Marketing Working Group
4. Donors/Alumni Relations/Foundations Working Group
5. Enrollment Management Working Group
6. Facilities and Infrastructure Working Group
7. Finance and Administration Working Group
8. Human Resources and Labor Relations Working Group
9. Institutional Governance and Leadership Working Group
10. Technology Working Group

Regional-Specific Working Groups – The following Working Groups will be unique:

11. Online Working Group (West only)
12. Workforce Development and Non-degree Programs Working Group (Northeast only)
13. Student Affairs Working Group (West only)
14. Student Success and Retention Working Group (West only)
15. Student Success, Services, and Campus Life Working Group (Northeast only)

Combined Working Groups – The following Working Groups will be combined:

16. Accreditation Working Group
17. Financial Aid Working Group
18. State System Technology Working Group
19. Human Resources and Labor Relations Working Group

Key Roles and Terminology: The following outlines the governance structure overseeing the integration Working Group activities (see responsibilities outlined in the Overall Integrations Initiative Charter for the groups below) and key terminology:

- **ULT – West Integration Group:** West Integration Lead President, Presidents, Project Manager and Quality Manager, Chief Academic Officers (CAO), Vice Presidents (VP) of Finance and Administration (FA), and designated Working Group Leads
- **ULT – Northeast Integration Group:** Northeast Integration Lead President, Presidents, Project Manager and Quality Manager, CAOs, VPFAs, and designated Working Group Leads

- ULTs are responsible for identifying the specific Working Groups who will draft considerations for the integration and implementation plan for each key functional area, while engaging appropriate stakeholders throughout the process
- Specifically, the ULT is charged with:
 - Building a membership matrix that defines the organization of the Working Groups, including needed skillsets, subject matter expertise, constituencies represented, and number of representatives
 - Overseeing nominations for Working Group members/subgroup members based on shared governance considerations, specifically requesting that stakeholder groups provide multiple nominees from which final appointments will be selected
 - Appointing leads/co-leads for Working Groups to serve as the primary liaisons and representatives between the ULT and Working Groups
 - Sharing information to support Working Groups leads' ability to:
 - Provide updates to their Working Groups on the broader initiative plans and progress and
 - Support their Working Group members' in fulfilling their responsibilities to consult with their stakeholder constituencies
- **Individual Working Groups:** Identified leaders per Working Group with relevant supporting Working Group members from each Integration's three institutions
 - Provides input to ULTs in developing the implementation approach; engages in planning and analysis in key functional planning areas (e.g., academic programming, student supports, leadership/governance, etc.); prepares deliverables for and transmits to ULT; engages iteratively with ULT, resolves questions and issues arising therefrom
- **Support Services:** Strategic Advisor for Institutional Integration; Baker Tilly team members serving in advisory and support roles, including liaisons to Working Groups, Program Management Lead, Lead Engagement Partner, West and Northeast Project Managers, Project Management Senior Consultant, and subject matter experts
- Key terminology will be accumulated and shared on the Integrations project SharePoint site

Working Group Roles and Responsibilities

The Integration Working Groups for the two Integrations are charged with developing recommended integration plans for their key functional areas. These integration plans should include recommendations for concrete multi-year, measurable goals that align with the Integration Initiative goals and objectives.

Each Integration Working Group will be led by leads and co-leads. The leads and co-leads of the Working Groups are responsible for:

- Building a subgroup membership matrix that specifies needed skillsets and subject matter expertise, constituencies represented, and number of representatives, to inform the ULT's of the subgroup nominations
- Collaborating with the ULT to select/confirm subgroup members for Working Groups the Working Groups to set the subgroup charges (aligned with the Working Group charges)
- Sharing information with both Working Group members and subgroup leads to enable consultation with their constituencies
- Supporting adherence to the integration guiding principles, maintaining confidentiality, and providing representative, collaborative, constructive input

The Integration Working Groups may compose operational subgroups as needed to complete the work, and will be responsible for developing and communicating the charge of those specific subgroups and assigning subgroup members. Together, the Integration Working Groups and subgroups will address the following for their functional areas:

- Incorporate the guiding principles into all decision-making processes and recommendations
- Draft considerations to inform the integration design and implementation plan that address the specific milestones, topics, and questions outlined in the Working Group charge for the specific functional area

- For all recommendations, Integration Working Groups should identify the impact of the recommendation based on the following categories with associated required changes, benefits, and risks:
 - People – Student, faculty, staff, governance (e.g., trustees, organizations) – individuals impacted by the change and any know required activities to support the change (classification, training etc.)
 - Process – Policy, procedures, contracts, partnerships, etc. that support the current state which would have to be changed to support the recommendation
 - Technology – Systems, support, applications that support the recommended changes and if any updates would be required
 - Finance – Required funding to implement or lead to a cost savings
 - Physical Assets – Physical assets (buildings) that would be impacted by recommendations
 - Compliance and Legal – Federal, state, and local laws, regulations, and other requirements that would need to be changed to implement the recommendation
 - Community – Known community stakeholders impacted by the recommendation
 - Benefits – Anticipated benefits associated with the recommendation – linked to goals and objectives, if possible
 - Risk – Known risks associated with implementation of the recommendation

Support Services provides consultative support for the SLT, West and Northeast ULTs, and the Working Groups. Specifically, Support Services liaisons' interactions with the Working Groups include participating in and, as requested, facilitating Working Group meetings, supporting and reviewing draft deliverables from the Working Groups as needed, communicating opportunities to leverage successful practices used by other Working Groups, and providing advisory subject matter expertise for Working Group meetings as needed.

Key Deliverable Templates and Timelines

Deliverables should follow the defined review process outlined by the ULT for submission to the SLT. All deliverables should be worked on collaboratively on the Integrations project SharePoint site. Each recommendation from the deliverable should be provided into the overall recommendation spreadsheet, to include the following components:

- Item number
- Fiscal year task
- Required fiscal year implementation date
- Recommendation name
- Recommendation key components
- Key dependencies
- Date submitted Impacts:
 - People
 - Process
 - Technology
 - Finance
 - Physical Assets
 - Community
 - Compliance and Legal
 - Benefits
 - Risk

Appendix E: Working Group Charges

Regional leadership teams drove the implementation planning in the Northeast and West regions by forming a total of 29 working groups: 10 parallel groups in each region, 5 region-specific groups, and 4 joint (cross-regional) groups working together on issues that are common across the regions. Leadership drafted charges for each working group that included specific milestones, questions, and goals to be addressed by each working group specifically. These charges are available online: <https://www.passhe.edu/SystemRedesign/groups/Pages/default.aspx>.

Appendix F: Goals, Objectives, and Measurements

Initial goals and objectives for integrated universities for 2026 and beyond were presented to the Board of Governors in the February 2021 meeting. Simultaneously, working groups evolved aspirational goals and metrics to evaluate progress towards these goals, as described in the framework below.

These goals are aspirational and identify areas of potential focus as highlighted by working groups. In some cases, the suggested target may be a reach, but we believe these are the goals we should seek to achieve long-term. Both regions will use this framework to set specific annual targets and execution plans toward these outcomes.

Aspirational Goal	Objectives/Focus for Metrics/Targets	Measurements/Cumulative Impact (2026)
Student Success		
Achieve and maintain graduation rate improvement of 1% annually over average of the integrating institutions	High-impact student success practices	<ul style="list-style-type: none"> Improve 6-year graduation rate by 1% annually from average rate of integrating universities
	Efficacy of advisement and interventions <ul style="list-style-type: none"> Early alerts Mental health/behavioral interventions 	<ul style="list-style-type: none"> Retain 70% of students referred to behavioral intervention teams 90% academic intervention success rate
Eliminate opportunity gaps	Orientation program involvement	<ul style="list-style-type: none"> 99% of new students participate in orientation
	Underrepresented students ⁶ enrollment and persistence	<ul style="list-style-type: none"> Improve enrollment and persistence by 10%
	Unrestricted retention funding	<ul style="list-style-type: none"> Address financial-related retention issues for underrepresented students via grants
Improve retention rates <ul style="list-style-type: none"> Improve 2nd year student retention rate by 4% over baseline Achieve overall retention rate of 4% higher than integration average 	Transfer student support	<ul style="list-style-type: none"> 20% more retained transfer students
	High-impact student success practices (interventions only) <ul style="list-style-type: none"> Advising/coaching Coordinated behavioral interventions 	<ul style="list-style-type: none"> Increase 2nd year retention by 1% annually from FY23 baseline results
Increase student involvement	Participation in FYS	<ul style="list-style-type: none"> 100% new student participation
	Participation in learning communities (if applicable)	<ul style="list-style-type: none"> Increase at-risk student participation in learning communities by 20%
	Mentorship program optimization	<ul style="list-style-type: none"> 100% new student participation
	Apprenticeship/internship opportunity expansion	<ul style="list-style-type: none"> Increase participation by 10%
	Co-curricular involvement	<ul style="list-style-type: none"> Reach 60% undergraduate participation in co-curricular opportunities

⁶ Underrepresented students are defined as American Indian or Alaska Native, Black or African American, Hispanic, or two or more races.

Aspirational Goal	Objectives/Focus for Metrics/Targets	Measurements/Cumulative Impact (2026)
Enrollment Growth (by 2026)		
Grow overall enrollment by +8%	Growth through expanded academic access and programming and additional degree access (including optimization of graduate enrollment)	<ul style="list-style-type: none"> +300-400 new students (each integration) or 1.5% enrollment growth Online growth
	Integrated recruitment/admissions strategies	<ul style="list-style-type: none"> 4% enrollment growth via new geographies and student populations
	Strategic athletic programming	<ul style="list-style-type: none"> 4% total enrollment growth (each integration)
	Dual enrollment prospect access	<ul style="list-style-type: none"> 10% dual enrollment-related growth in regional market share
	Prospect yield improvement	<ul style="list-style-type: none"> 3% total enrollment growth
Realize 10% FTE growth for student pop. >1% gap	Underrepresented, Pell-grant eligible, military, and adult learner enrollment ⁷	<ul style="list-style-type: none"> 2.0% growth per year (from baseline) in each population group, with a cumulative result of 8%
	Targeted scholarships (unmet need)	<ul style="list-style-type: none"> 2% growth in these populations Increase fundraising by 1-3% annually to mitigate the unmet need cliff based on average student unmet need benchmarks
	Mentorship programs and alumni engagement	<ul style="list-style-type: none"> Increase student enrollment for groups with a gap by 10%
Career Readiness		
Increase credentialing by 5%	Certificate or professional credential offerings growth	<ul style="list-style-type: none"> 5% more certificates awarded
Achieve 15% growth in career aligned pathways	Career services use expansion	<ul style="list-style-type: none"> 15% more students use career services
	Internship opportunities, participation, and funding	<ul style="list-style-type: none"> 15% more students complete internships
	Career and degree pathway identification within disciplinary focus areas	<ul style="list-style-type: none"> Increase % of students completing defined degree or career pathways (e.g., ASN to RN to MSN over five to ten years)
Affordability & Efficiency		
Create pathways to reduce total cost of undergraduate degree attainment by 25%⁸	Overall retention and progression improvement <ul style="list-style-type: none"> Success rate of students in gatekeeper courses 	<ul style="list-style-type: none"> 6% increase in retention (2024-2026) <ul style="list-style-type: none"> 12-15% increase in progression through gatekeeper courses
	Accelerated degrees and pathways expansion	<ul style="list-style-type: none"> Increase participation in accelerated programming by 15%

⁷ Strategies include new degree and career pathways listed in academics and career readiness

⁸Price reduction will occur as a result of increases in retention, progression through gatekeeper courses, and participation in accelerated programming, in addition to reductions in performance gaps, student fees, and operational costs.

Aspirational Goal	Objectives/Focus for Metrics/Targets	Measurements/Cumulative Impact (2026)
	Underrepresented student group performance gap elimination	<ul style="list-style-type: none"> 6% reduction in performance gap
	Room, board, and student fee structure review	<ul style="list-style-type: none"> Reduce overall non-tuition costs by 3-5%
	Shared services and administrative efficiencies	<ul style="list-style-type: none"> Reduce operational costs by 20% and modify tuition as feasible
Decrease unmet need by 10%	Target program scholarship funding and opportunities enhancement	<ul style="list-style-type: none"> 10% increase over baseline
	Athletic scholarship funding and opportunities expansion	<ul style="list-style-type: none"> 10% increase over baseline
	Transfer scholarship funding and opportunities	<ul style="list-style-type: none"> 7-10% increase over baseline
	Institutional need-based awards optimization	<ul style="list-style-type: none"> 3% increase in available funding
Fiscal Sustainability & Efficiency		
Achieve operating margin of 0 to 2%	Optimize administration/faculty/staff ratios	<ul style="list-style-type: none"> Improve overall operating margin to 2%
	Contract economies of scale	
	Consolidated technology assets	
	Standardized practices to create efficiencies	
Increase university reserve level to 90-180 days cash on hand	Optimize billing and collection cycles and create reserves from increase on operating margins	<ul style="list-style-type: none"> Improve cash reserve to 90-180 days cash on hand
Improve primary reserve ratio from 20 to 40%	Net tuition per student improvement	<ul style="list-style-type: none"> Improve primary reserve ratio to within 20-40% threshold range
	Reduction in operating expense	
	Manage debt to decrease working capital requirements	
Diversity, Equity, & Inclusion		
Increase student body diversity (baseline 2022)	Mentorship programs and alumni engagement	<ul style="list-style-type: none"> Increase student retention for underrepresented groups by 10%
	Flexible academic offerings, schedules and mini-courses targeted to specific career experiences (e.g., military, other)	<ul style="list-style-type: none"> Improve retention of underrepresented students by 8%
Increase compositional diversity of underrepresented minority faculty and staff	Staff and faculty recruitment and retention strategy	<ul style="list-style-type: none"> Faculty and staff composition mirrors student population at the system level % of new hire composition representing underrepresented minorities % of searches with a diverse pool of candidate
	System-wide training for faculty search committees	
	Standards and procedural guidance for conducting searches	
	Adopt best practices to foster diverse applicant pools	

Aspirational Goal	Objectives/Focus for Metrics/Targets	Measurements/Cumulative Impact (2026)
		<ul style="list-style-type: none"> • % of finalist lists with diverse pool of candidate
Academic Excellence & Innovation		
Align academic programming with student and market demands	Continuum of stackable degrees and credentials within focus disciplinary areas	<ul style="list-style-type: none"> • Expand academic opportunities within top three disciplinary areas by 10-15%
	Adequate academic support spending	<ul style="list-style-type: none"> • Meet return on investment targets identified for academic support investments
Achieve top-quartile satisfaction levels for online academic delivery	Technology support and access	<ul style="list-style-type: none"> • Adopt best practice standards for technology spent per student and faculty/staff FTE
	Robust faculty and staff online and hybrid modality training	<ul style="list-style-type: none"> • 95% attend offered training

Appendix G: Positioning Statement

Integration re-imagines higher education from a student-centric perspective. Integrating three universities that are closely intertwined with their regions creates single, stronger institutions with an expanded capacity to serve an increasingly diverse student population. Integration increases access to exemplary and affordable higher education, leading to better lives for people of all ages and backgrounds. Our graduates play a preeminent role in strengthening our communities and helping to power the Commonwealth's ever-evolving economy. Integration will create an inclusive and dynamic campus community that embraces shared governance, collaboration, and continuous improvement in the interest of our students.

Integration builds on these core principles:

- Empowering student success, access, and opportunity
 - Undergraduate and graduate students will have multiple entry points to higher education, in-person and remotely, through a broad array of certificate and degree programs unbounded by campus borders.
 - Students will have expansive opportunities to shape the future they envision by engaging in work-based learning experiences, leadership opportunities, and co-curricular activities aligned with their career goals and personal interests.
 - Students will gain skills and confidence through hands-on, experiential learning opportunities that serve as pathways to sustaining careers, empowering them to participate meaningfully in the 21st century economy and contribute effectively to their communities.
 - Students will be guided, supported, and mentored in pursuit of their educational and personal goals.
 - All students will be welcomed into a diverse and inclusive community of learners where individual stories are recognized and valued.
- Creating value
 - Students can expect the integrated institution to seek cost savings for students while investing in academic excellence, the student experience, and student success.
 - Students can anticipate a broader range of academic majors leading to enhanced career opportunities.
 - Students who graduate with less debt have a head-start on building a secure and financially rewarding future.
 - Students, their regions, and the Commonwealth all benefit from the collective energy of an engaged, diverse community of lifelong learners.

Appendix H.1: Academic WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast academic working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Optimal, combined academic program array	Integrate existing academic programs into a single program array, optimizing for student accessibility, operational efficiency, and enrollment growth.
Resource analysis	Review resources available at each campus for implementation of program array and curriculum.
Guidance documents	Development of academic policies and procedures. Note: CBA-related matters are subject to negotiation between the State System and Association of Pennsylvania State College and University Faculties (APSCUF).
General education	Determine impact of unified general education curriculum across the array for impact on accreditation and content requirements in programs.
Organizational structure of Academic Affairs	Recommend organizational structure for an integrated Academic Affairs Division to include a to-be-determined number of colleges and departments. Confirm the final impacts for the CPPs on the program array, with an eye on implications of the budget – midyear submission review and CPP implications integrated into the purposed budget model in the program array.
New program development	Review program array for areas of expansion based upon labor/workforce data and resource availability.
Curriculum committee	Establish a curriculum committee and curricular review process for the purpose of integration planning. This process is subject to negotiations between the State System and APSCUF.

People: The recommendations will likely impact the following stakeholders:

- Students (current and prospective)
- Faculty will be impacted as programs are integrated and delivered mutually, where practicable, across the integrated institution
- Faculty impacted by new integrated organizational Academic Affairs structure and in terms of departmental and college affiliation
- Department chairs (for those departments combined into one)

Process: The recommendations enhance student accessibility to academic program offerings, career and degree pathways, as well as instructional modalities available across the three campuses. To ensure clarity and equitable treatment across all program and campuses, academic policies and procedures need to be integrated as recommended by the subgroup. These could include things such as transfer and eligibility policies, and/or course or student outcome assessment approaches. Specific plans and policies will need to be identified to ensure all students enrolled in current programs are cross-walked to the new program array. Many of these changes require some form of consultation with the System office, MSCHE, APSCUF, and/or the Department of Education.

Technology: The recommendations primarily impact the technology support required to operate in an integrated university model across multiple campuses. Specific technology needs include transition to a single student information system and a unified CRM system. The recommended single CRM offers

opportunity to expand access to faculty for the purposes of participating in student support and, as appropriate, student recruitment activities.

Enhanced infrastructure capacity to deliver courses in a variety of modalities is recommended to include things such as web-enabled classrooms (e.g., asynchronous instructional delivery), fully online student and faculty technology support, and technology to support the ability to conduct academic affairs administrative tasks remotely.

Finance: The recommendations are intended to result in enrollment growth and improve retention, which should positively impact student success resulting in improved revenue. Additionally, the integration of what was previously three academic affairs administrative structures should allow for reallocation of resources to new and/or innovative programs and/or academic delivery approaches and/or cost savings. In addition to investment in technology to expand programs offered via distance education, one-time investment will be required to reconfigure facilities to expand or enhance program delivery. Also, one-time investments in technology infrastructure will be needed to effectively deliver new programs. Also, adequate marketing resources will be required to promote and educate relative to the integrated program array and any new academic programs. Administrative costs for traveling among three campuses may increase.

Physical Assets: None

Compliance and Legal: None

Community: Engaging local and regional communities is essential.

Benefits: The recommendations within the academic affairs area are intended to provide students increased accessibility to more educational opportunities and faculty expertise, and increased access points/pathways for students across the triad and beyond, including community college and high school dual admission students. The recommended array offers new career and degree pathways to students and adult learners regardless of campus proximity. The recommendations also increase opportunities for faculty collaboration in teaching, service, and scholarship. Integrated academic programs also allow for increased instructional productivity through the reduction of small course offerings and administrative costs.

Risk: Potential for risk exists in that expansion of offerings to all campuses in the triad may reduce enrollments at the campus or campuses that previously offered a program. Thus, there is the potential for simply shifting enrollments within the triad rather than growing enrollment. Need to provide support structures for creating positive climate across the three campuses. Potential exists for initial negative student impact relative to any increase in online modalities. Potential exists for students not to attend due to extent of online curriculum. Potential impact of faculty perception that integration will not benefit faculty, programs, and students.

Appendix H.2: Academic WG Program Array Report



ACADEMIC PROGRAM ARRAY REPORT

Northeast Integration

Bloomsburg, Lock Haven, and Mansfield

Submitted by the Northeast Integration Provosts

PART 1: INTRODUCTION

Bloomsburg, Lock Haven, and Mansfield universities each enjoy a long and rich history, having served the Commonwealth of Pennsylvania faithfully and admirably for more than 150 years. Deeply rooted in their home communities and the regions they serve, our institutions have evolved over time on parallel courses, adjusting their purpose and identity to meet the needs of their students and the Commonwealth. Beginning as state normal schools in the nineteenth century, the institutions became state teachers colleges in the 1920s, then regional comprehensive state colleges in the 1960s, and then, in the 1980s, universities within the State System of Higher Education. Our institutions are now evolving once again as we plan for an institutional integration that will create a single institution with three regionally distinct locations, each mutually supporting a shared academic program array designed to meet the educational and career goals of an increasingly diverse population of twenty-first century students. In developing this initial recommendation for such an array, the provosts have kept this principle at the forefront of our work: that the integration of our three universities should result in an expanded set of educational opportunities for our students by maximizing access to the array for students at each of our locations. This principle is consistent with the integration project's guiding principles and its preliminary vision statement, as listed in the program array considerations section of this report.

PART 2: SUMMARY OF RATIONALE AND RECOMMENDATIONS

As we will make clear in what follows, for the purpose of this initial recommendation we have grouped our program array into four categories:

A. Enrollment Drivers: These are academic programs that, by virtue of their robust enrollments and strong student demand, represent a majority of the total enrollment of the integrated institution. These programs are expected to continue attracting students to our integrated institution and will be shared across all three campuses. At the undergraduate level, these programs include Business Administration, Nursing, Health Sciences with pre-professional pathways, Early Childhood Education, Special Education, Criminal Justice Administration, Digital Forensics/Cybersecurity, Biology, Psychology, Social Work, Media/Journalism, and Exercise Science.

B. Academic Program Hubs: These are academic programs where the vast majority of the enrollment and supporting faculty happen to be located at one or two of our institutions. Keeping in mind our guiding principle of expanding educational opportunity and maximizing access, we intend these areas to function as the primary (but not necessarily exclusive) instructional delivery hubs for

their academic programs across the integrated institution. We recognize, certainly, that in some cases restrictions and limitations due to program-specific facilities or the nature of instruction will limit a program's capacity to be fully accessible across all three campuses. Our academic hubs are enumerated in the Program Array Recommendations below. For the purpose of this summary, Business may serve as an example. The Business programs at Bloomsburg are Advance Collegiate Schools of Business (AACSB)-accredited and housed in a donor-named college, the Zeigler College of Business. The majority of the student enrollment and the faculty complement in Business are also located at that campus. Because the accreditor requires that the Business programs have a "home base," so to speak, and because the majority of the enrollments and the faculty are located there, we consider Bloomsburg to be the Business "hub" for the integrated university. At the same time, though, it is important to recognize that the Business programs at Lock Haven and Mansfield are also robustly enrolled relative to the size of those campuses, and the Business faculty on those campuses will continue to offer Business courses in support of the array of accredited Business programs. In this way, the Business programs are shared across the three campuses, with Bloomsburg serving as the accreditation home and providing primary instructional support for more specialized degrees, concentrations, and options within the Business program array.

C. Shared Programs Supporting the Array: While these programs may not have robust enough enrollments to designate them as primary enrollment drivers, they are nevertheless attracting students to our institutions and are no less vital given their contribution to the program array's breadth and diversity of educational opportunities. Most of the degree programs that form our integrated program array belong to this category. Such programs typically have a physical presence at each campus in terms of student enrollment and faculty complement (though these may indeed vary somewhat from campus to campus), and the program design is intended to enable the program to be mutually supported across all three campuses. Our shared programs are enumerated in the Program Array recommendations below. For the purpose of this summary, Psychology may serve as an example. Psychology has significant student enrollments and faculty complements at each location in the integrated university relative to each campus' size. The Psychology program, when integrated, may therefore be shared and mutually supported across all three campuses without any one campus having to serve as an instructional or accreditation "hub."

D. Programs in Need of Further Discussion: These programs recommended by our academic sub-subgroup teams have been identified as needing more discussion regarding enrollment trends, possible curricular design, alignment with workforce needs, and other considerations such as those listed under Program Array Considerations.

As of this writing, we anticipate that our shared program array will consist of approximately 80-90 degree programs at the associate, baccalaureate, master's, and doctoral levels, with the majority accessible to all three campuses. This total represents more than double the number of programs currently offered at Mansfield, and nearly double the number offered at Lock Haven. The total shared program array number is close to, but still higher than, the total number of programs currently offered at Bloomsburg.

PART 3: GUIDING PRINCIPLES AND PROGRAM ARRAY CONSIDERATIONS

Guiding Principles: Common Language across NE and W Integrations

1. Create robust educational experiences in all programs with enhanced access points for students to grow enrollment, reduce cost to students, and retain well-prepared and qualified faculty.
2. Define streamlined academic administrative resources for each campus to serve the three partnering universities (i.e., administrative support primarily located on that campus, while faculty may contribute to a multi-campus academic program).

3. Identify academic areas of growth
 - Investment in growth dependent upon realization of efficiency
 - Focus on student and emerging market demand
 - Emphasize opportunities for career and degree pathways
4. Improve efficiency of the Academic Array
 - Align course offerings with defined sustainability metrics
 - Design programs and course schedules to permit timely degree completion
 - Increase opportunities for students to take courses in the summer and/or winter to reduce time to completion, repeat deficient classes, enhance career opportunities, and complete pre-requisite courses
5. Increase accessibility (i.e., for students, and to new student populations)
6. Align with goals of workforce development growth initiatives
7. Design program array that promotes diversity, equity, and inclusion

Assumptions:

- Integrated university is the regional comprehensive entity
- Pursue multi-modal options where appropriate, to expand student access, and obtain scale
- Verified potential for competitive market position (gap analysis conducted)
- Phased approach to executing optimal program array
- Transitional timeline up to 5 years to fully establish/evolve administrative approach and innovative academic programs of growth and for investment

NE Program Array Considerations

In addition, to develop the Northeast Integrated Program Array recommendations, the NE provosts have considered the following:

- The guiding principles for integration as articulated in the Integrations Initiative Charter dated 12 November 2020:
 - **Academic Excellence and Innovation:** Maintain or expand high-quality educational opportunities for students. Leverage talented faculty and staff. Establish robust program pathways among universities, schools, and community colleges.
 - **Student Success:** Provide access to high-value, relevant educational experiences that prepare students in a timely manner for pathways to successful lives and careers.
 - **Enrollment Growth:** Position institutions for growth, including in new markets.
 - **Affordability:** Consider affordability from the students' perspective and embrace pricing flexibility strategies.
 - **Efficiency and Fiscal Sustainability:** Provide students the full breadth of academic programming, while realizing greater regional efficiency and cost savings.
 - **Diversity, Equity, and Inclusion:** Create environments that recognize and honor differences, provide appropriate and equitable systems that foster positive outcomes for all students, and eliminate gaps that persist in relative performance of different student groups. Honor and engage local identity and key stakeholders.
 - **Career Readiness/Development to Meet Regional and Commonwealth Needs:** Meet regional and economic workforce needs. Strengthen connections to workforce with pathways, experiential learning, career services, adult learning, and post-traditional.
- The preliminary vision statement related to integration planning as presented to the Board of Governors on 4 February 2021:
 - Leveraging the promise and power of three institutions to maximize opportunities for students.
 - Re-imagining higher education from a student-facing perspective.

- Uniting three universities that are closely intertwined with their regions—creating a single, stronger institution with expanded capacity to serve an increasingly diverse student population.
 - Designing new academic programs and modalities to meet market needs.
 - Increasing access to exemplary and affordable higher education, leading to better lives for people of all ages and backgrounds.
 - Preparing graduates who play a preeminent role in strengthening our communities and helping to power the Commonwealth's ever-evolving economy.
 - Creating inclusive and dynamic campus communities that embrace shared governance, collaboration, and continuous improvement in the interest of our students.
- The existing mission and vision statements from each institution.
 - The existing program arrays at each institution.
 - The existing facilities at each institution.
 - The draft program recommendations submitted by faculty volunteers serving on our NE academic sub-subgroups. Such drafts are advisory for the purpose of developing the program array.
 - The feedback on these drafts provided by the relevant NE academic subgroups (consisting of both faculty members and managers) to their program-specific sub-subgroups. This feedback is also advisory for the purpose of developing the program array.
 - Program enrollment data, including current headcount and FTE enrollments as well as enrollment trends.
 - Program recruitment data as evidenced by numbers of incoming students and transfer students.
 - Average section size by program.
 - Student credit hours generated by program from the State System's Business Intelligence database.
 - Student FTE to faculty FTE ratio by program from the State System's Business Intelligence database.
 - Cost/revenue data by program from the State System's Business Intelligence database.
 - Student demand and labor demand by the relevant CIP code provided by Hanover Research and the State System's Advanced Data Analytics.

PART 4: PROGRAM ARRAY RECOMMENDATIONS AND JUSTIFICATION

To identify the Northeast integrated university's primary enrollment drivers, we first considered the headcount enrollment numbers by the two-digit Classification of Instructional Programs code. This provides us with a high-level overview of the disciplinary fields that have the largest headcount enrollment based on Fall 2020 data submissions from each of our integrating universities. As can be seen from the table below, the top eight disciplinary fields for the NE integrated institution, based on combined Fall 2020 undergraduate headcount enrollment, represent 75% of the total undergraduate enrollment at our three campuses.

Total Number of Undergraduate Level Majors* by Field and University, Fall 2020, Ranked in Descending Order

Two-Digit CIP	Disciplinary Field (CIP) *	BLOOMSBURG	LOCK HAVEN	MANSFIELD	Total
51	Health Professions and Related Clinical Sciences	1,197	705	224	2,126
52	Business, Management, Marketing, and Related Support Services	1,469	234	120	1,823
13	Education**	695	204	120	1,019

Two-Digit CIP	Disciplinary Field (CIP) *	BLOOMSBURG	LOCK HAVEN	MANSFIELD	Total
43	Security and Protective Services (includes programs in Criminal Justice Administration and Digital Forensics/Cybersecurity)	601	232	102	935
42	Psychology	333	151	141	625
31	Parks, Recreation, Leisure, and Fitness Studies (includes programs in Recreation Management, Sport Admin, Exercise Science, Health and Physical Ed)	164	292	0	456
9	Communication, Journalism, and Related Programs	373	40	37	450
26	Biological and Biomedical Sciences	226	119	99	444
	SUBTOTAL TOP EIGHT UNDERGRADUATE DISCIPLINARY FIELDS				7,878
	TOTAL HEADCOUNT FOR ALL UNDERGRADUATE DISCIPLINARY FIELDS (EXCLUDING UNDECLARED AND NON-DEGREE STUDENTS)				10,426
	PERCENTAGE OF HEADCOUNT REPRESENTED BY TOP EIGHT DISCIPLINARY FIELDS				75.6%

*Excludes non-degree and second majors.

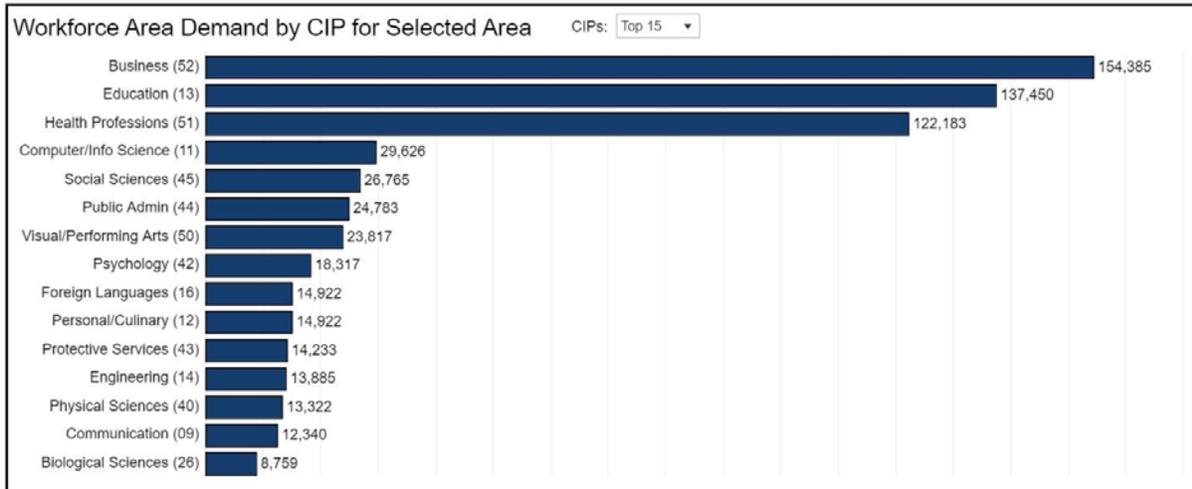
**Secondary Education majors are counted in their home discipline.

Source: Data Warehouse, Student Data Submission

Key Disciplinary Fields by Enrollment – Northeast Integration

<h2 style="margin: 0;">Health Sciences</h2>	<h2 style="margin: 0;">Business</h2>	<h2 style="margin: 0;">Education</h2>
<p>Focus</p> <ul style="list-style-type: none"> Professional, career-focused, nationally accredited offerings in nursing and allied health sciences. Multiple entry points including associate, baccalaureate, master’s, and doctoral levels. <p>Key Growth Area</p> <ul style="list-style-type: none"> Nursing 	<p>Focus</p> <ul style="list-style-type: none"> Nationally accredited programs with experiential emphasis flexible delivery. Multiple entry points, including associate, baccalaureate, and master’s levels. <p>Key Growth Areas</p> <ul style="list-style-type: none"> Accounting Business Administration Finance Marketing 	<p>Focus</p> <ul style="list-style-type: none"> Nationally accredited programs leading to teacher certification at all PreK-12 levels. Baccalaureate and master’s options available. <p>Key Growth Areas</p> <ul style="list-style-type: none"> Early Childhood Education Math and Science Education Special Education

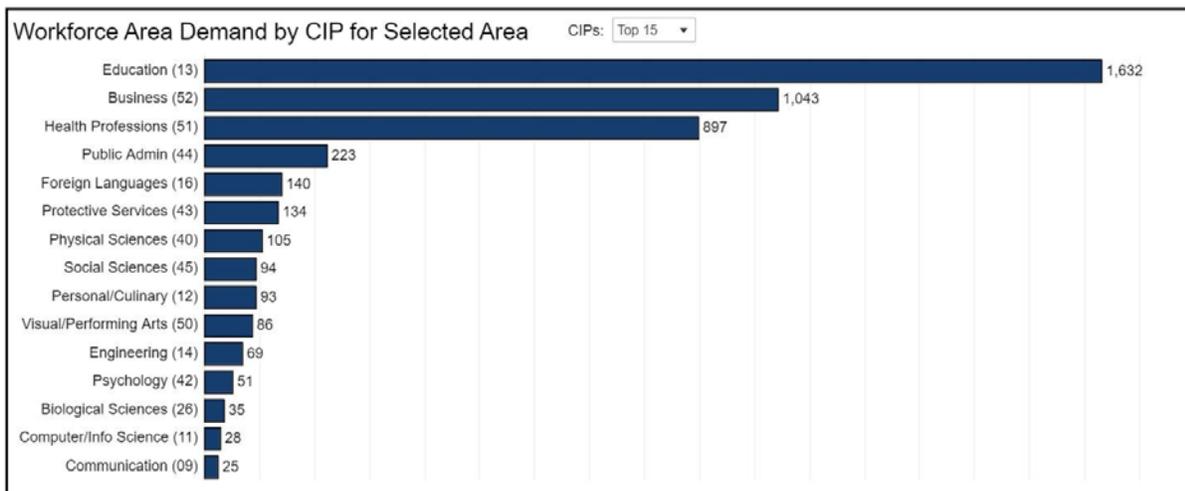
The top three highest-enrolled disciplinary fields align well with workforce demand needs across the Commonwealth when mapped to existing State System programs by two-digit CIP, as can be seen in the chart below. Note: the “Selected Area” in the chart below = all workforce development regions across Pennsylvania.



Source: Academic Master Planning Tool, State System Advanced Data Analytics

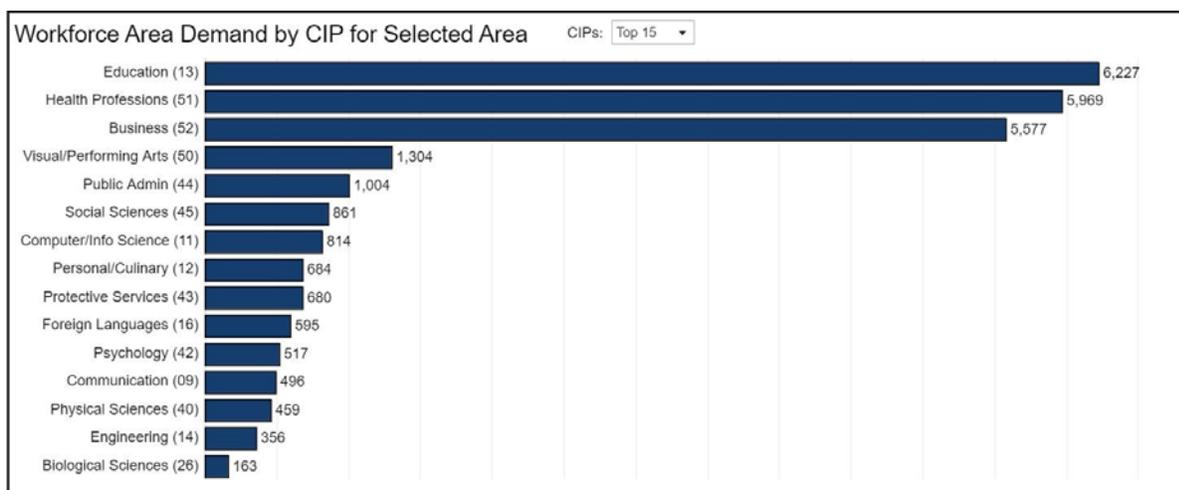
If the workforce area is restricted to the Northern Tier Workforce Development Area (a region which includes Mansfield) or the Central Workforce Development Area (a region which includes both Lock Haven and Bloomsburg universities), the top three results are the same: Business, Education, and Health Professions are the two-digit CIPs that align with (by far) the greatest workforce needs. The same is true, in fact, for each of the 23 Workforce Development Areas throughout Pennsylvania.

The chart below is restricted to data for the Northern Tier Workforce Development Area:



Source: Academic Master Planning Tool, State System Advanced Data Analytics

The chart below is restricted to data for the Central Workforce Development Area:



Source: Academic Master Planning Tool, State System Advanced Data Analytics

When we narrow the focus to concentrate on degree programs rather than high-level disciplinary fields, we find that the proposed academic array degree programs with the highest combined enrollments across all three campuses align almost completely with the top eight disciplinary fields. The only exception is the Bachelor of Social Work (BSW), which appears below as one of the twelve highest-enrolled degree programs, but whose CIP (44) is not among the top eight disciplinary fields. As can be seen from the table below, the twelve degree programs with the highest combined enrollment account for nearly two-thirds of the entire combined FTE enrollment among all four-year undergraduate programs across our integrating universities.

TWO-DIGIT CIP	HIGHEST-ENROLLED BACCALAUREATE DEGREE PROGRAMS	ENROLLMENT BASED ON COMBINED FALL 2020 FTE
52	Business Administration (Bachelor of Science in Business Administration [BSBA])	1,227*
51	Nursing (Bachelor of Science in Nursing [BSN])	646
42	Psychology (Bachelor of Science [BS])	608
51	Health Sciences (BS)	602
43	Criminal Justice Administration (BS)	588
13	Early Childhood Education (Bachelor of Science in Education [BSEd])	506**
26	Biology (BS)	399
13	Special Education (BSEd)	386
44	Social Work (BSW)	329
43	Digital Forensics/Cybersecurity (BS)	288
9	Media and Journalism (BS)***	269
31	Exercise Science (BS)/Health and Phys. Ed (BS)	234
	SUBTOTAL TOP 12 DEGREE PROGRAMS	6,082
	TOTAL FTE ALL FOUR-YEAR PROGRAMS	9,496
	PERCENTAGE OF FTE REPRESENTED BY TOP 12 DEGREE PROGRAMS	64%

*Combined enrollment includes BS programs at Lock Haven and Mansfield.

**Excludes students pursuing special education certification.

***As proposed in the sub-subgroup's first draft recommendations

Source: Program FTE data reported by each campus's Institutional Research office

Because these twelve programs account for nearly two-thirds of our current combined undergraduate enrollment, it is imperative that they be understood as enrollment drivers. As such, it will benefit the integrated university to make sure these programs are accessible, to the extent possible, to students at all three campuses. In some cases, we have designated certain programs on this list as having a location-specific "Academic Hub" due to the vast majority of the enrollment and the supporting instructional staff being located at one or two of our campuses. Programs with this designation are listed and described further in the Academic Hubs section below.

Where graduate enrollments at the master's level are concerned, it is not surprising to find the strongest enrollments among programs in the Health Sciences, Business, and Education, the disciplinary fields with the strongest undergraduate enrollments. Eight programs account for 75% of the total master's degree enrollments as of Fall 2020, as listed in the table below. Lock Haven's Physician Assistant program and Bloomsburg's Nursing MSN together account for one-third of the total graduate enrollment at the master's level across all three institutions. Because it is much less typical to have graduate programs in common among our three campuses, the graduate programs below are often designated as an Academic Hub given that the program's location and enrollment are typically found on just one of the three campuses. Nevertheless, it is the intent of this proposal to make such programs accessible to students at all three campuses to the extent possible. In some cases, though, as will be evident in the sections below, pursuit of certain graduate programs will require attendance at a particular campus. It should be noted here as well that Bloomsburg has two doctoral-level programs not included in the master's level data below, one in Audiology (AUD) and one in Nursing (Doctor of Nursing Practice [DNP]).

HIGHEST-ENROLLED MASTER'S DEGREE PROGRAMS	ENROLLMENT BASED ON COMBINED FALL 2020 FTE
Physician Assistant (MHS)	158
Nursing (MSN)	70
Clinical Mental Health Counseling (MS)	61
Speech-Language Pathology (MS)	61
Educational Leadership (MEd)	52
Sport Science (MS)	42
Business Administration (MBA)	40
Instructional Technology (MS)	38
SUBTOTAL TOP 8 MASTER'S DEGREE PROGRAMS	521
TOTAL FTE ALL MASTER'S PROGRAMS	691
PERCENTAGE OF FTE REPRESENTED BY TOP 8 MASTER'S DEGREE PROGRAMS	75%

Source: Program FTE data reported by each campus's Institutional Research office

In addition to the workforce data described above, we consulted [#Prepared4PA's Industry Competency Maps](#)⁹. As the #Prepared4PA's website explains, these competency maps are:

- Designed to articulate employers' requirements for competencies and credentials for in-demand occupations that will inform training and education programs designed to help build our talent pipeline
- A part of #Prepared4PA's efforts to bring together employers and educators to align competencies and skills needed for successful transitions in the workforce

⁹ <https://www.prepared4pa.org/compmaps>

- To be used as a resource when building pilot programs to train workers, job seekers, and students to meet employers' workforce needs
- An output from #Prepared4PA's
 - Labor market data gathering and analysis
 - July 2020 survey of Pennsylvania's employers, workforce systems, chambers, higher education, and others
 - September 2020 Regional Assemblies sessions
 - December 2020/January 2021 survey and feedback sessions with employers

For example, the Healthcare Competency Map indicates that the occupations with the highest demand for the Northern Region (which includes Bloomsburg, Lock Haven, and Mansfield universities) are as follows:

- Registered Nurses
- Personal Care Aides/Nursing Assistants
- Licensed Practical and Licensed Vocational Nurses
- Mental Health and Substance Abuse Social Workers
- Medical Assistants

Such information is useful for both the development of credit-bearing degree program credentials (the focus of this report) as well as the development of non-credit workforce-based credentials.

Finally, in an effort to make sure we considered data reflecting student demand and labor demand in Pennsylvania and its nearest neighboring states, we also considered student demand and labor demand projections for program areas by six-digit CIP provided by Hanover Research. These projections pertain to the "Mid-East" region of the United States, including Delaware (DE), the District of Columbia (DC), Maryland (MD), New Jersey (NJ), New York (NY), and Pennsylvania – in other words, the integrated university's in-state recruitment region (PA) and the contiguous states from which we draw the majority of our out-of-state students (NY, NJ, DE, and MD). Our highest-enrolled disciplinary fields, the disciplinary fields with the highest Pennsylvania (PA) workforce area demand, and our degree programs with the highest combined enrollments – all presented in the tables above – align well with the six-digit program areas with the highest student demand and the highest labor demand in the Mid-East region of the United States. Such data is useful in helping us identify growth opportunities in existing program areas as well as opportunities for launching new programs to meet growing demand in other areas.

Bachelor's-Level Program Areas with Projected High Growth by Six-Digit CIP: Mid-East Region (DE DC MD NJ NY PA) Note: Table is sorted by 2026 Projected Labor Demand column					
CIP Code and Title	Student Demand	Labor Demand	2026 Projected Labor Demand	Projected Numeric Change from 2016	Projected % Growth from 2016
52.0101 and 52.0201 Business/Commerce, General and Business Admin./Management	High Growth	High Growth	1,061,520	92,680	10%
52.0801 Finance, General	High Growth	High Growth	824,850	80,780	11%
51.3818 Nursing Practice	High Growth	High Growth	660,120	91,610	16%
51.3801, 51.3808, and 51.3899 Registered Nursing/Registered Nurse; Nursing Science; Nursing Admin., etc.	High Growth	High Growth	578,950	78,400	16%
11.0701 Computer Science	High Growth	High Growth	536,990	66,270	14%

**Bachelor's-Level Program Areas with Projected High Growth by Six-Digit CIP:
Mid-East Region (DE DC MD NJ NY PA)**

Note: Table is sorted by 2026 Projected Labor Demand column

CIP Code and Title	Student Demand	Labor Demand	2026 Projected Labor Demand	Projected Numeric Change from 2016	Projected % Growth from 2016
11.0103 Information Technology	High Growth	High Growth	490,610	70,200	17%
52.1301 Management Science	High Growth	High Growth	465,100	42,940	10%
52.0301 Accounting	High Growth	High Growth	350,510	34,290	11%
14.0901 Computer Engineering, General	High Growth	High Growth	315,040	51,750	20%
11.1003 Computer and Information Systems Security/Information Assurance	High Growth	High Growth	262,070	21,580	9%
52.1401 Marketing/Marketing Management, General	High Growth	High Growth	257,770	34,570	16%
11.0401 Information Science/Studies	High Growth	High Growth	215,110	21,090	11%
44.0701 Social Work	High Growth	High Growth	212,550	26,480	14%
44.0000 Human Services, General	High Growth	High Growth	173,890	23,650	16%
14.1901 Mechanical Engineering	High Growth	High Growth	110,900	9,970	10%
31.0501 Health and Physical Education/Fitness, General	High Growth	High Growth	107,060	14,180	15%
31.0504 Sport and Fitness Administration/Management	High Growth	High Growth	106,910	14,170	15%
51.2201 Public Health, General	High Growth	High Growth	106,770	17,040	19%
52.1003 Organizational Behavior Studies	High Growth	High Growth	102,890	8,630	9%
09.0902 Public Relations/Image Management	High Growth	High Growth	100,420	9,990	11%
51.0701 Health/Healthcare Administration/Management	High Growth	High Growth	81,170	13,210	19%
14.0801 Civil Engineering, General	High Growth	High Growth	78,550	7,340	10%
26.0202 Biochemistry	High Growth	High Growth	57,280	5,910	12%

Source: Data supplement to Hanover Research Market Opportunity Scan completed for Mansfield University (2019)

Not surprisingly, many of the same high-growth program areas listed in the bachelor's level table are reflected in the master's level table below:

Master's-Level Program Areas with Projected High Growth by Six-Digit CIP: Mid-East Region (DE DC MD NJ NY PA)					
Note: Table is sorted by 2026 Projected Labor Demand column					
CIP Code and Title	Student Demand	Labor Demand	2026 Projected Labor Demand	Projected Numeric Change from 2016	Projected % Growth from 2016
52.0801 Finance, General	High Growth	High Growth	814,620	83,320	11%
52.0701 Entrepreneurship/Entrepreneurial Studies	High Growth	High Growth	659,670	55,080	9%
11.0701 Computer Science	High Growth	High Growth	547,130	67,420	14%
52.1301 Management Science	High Growth	High Growth	495,390	48,290	11%
11.0103 Information Technology	High Growth	High Growth	490,610	70,200	17%
52.0301 Accounting	High Growth	High Growth	380,800	39,640	12%
14.0901 Computer Engineering, General	High Growth	High Growth	326,400	53,400	20%
52.1401 Marketing/Marketing Management, General	High Growth	High Growth	288,060	39,920	16%
14.0903 Computer Software Engineering	High Growth	High Growth	287,090	51,180	22%
52.1001 Human Resources Management/Personnel Administration, General	High Growth	High Growth	267,020	23,540	10%
11.1003 Computer and Information Systems Security/Information Assurance	High Growth	High Growth	262,070	21,580	9%
11.0401 Information Science/Studies	High Growth	High Growth	225,250	22,240	11%
44.0701 Social Work	High Growth	High Growth	214,300	26,580	14%
52.0213 Organizational Leadership	High Growth	High Growth	191,380	23,150	14%
27.0305 Financial Mathematics	High Growth	High Growth	162,160	14,960	10%
43.0116 Cyber/Computer Forensics and Counterterrorism	High Growth	High Growth	115,870	9,830	9%
09.0902 Public Relations/Image Management	High Growth	High Growth	108,970	11,010	11%

**Master's-Level Program Areas with Projected High Growth by Six-Digit CIP:
Mid-East Region (DE DC MD NJ NY PA)**

Note: Table is sorted by 2026 Projected Labor Demand column

CIP Code and Title	Student Demand	Labor Demand	2026 Projected Labor Demand	Projected Numeric Change from 2016	Projected % Growth from 2016
14.1001 Electrical and Electronics Engineering	High Growth	High Growth	95,140	8,330	10%
51.0912 Physician Assistant	High Growth	High Growth	93,650	21,410	30%
51.0203 Speech-Language Pathology/Pathologist	High Growth	High Growth	90,700	16,660	23%
51.2306 Occupational Therapy/Therapist	High Growth	High Growth	90,200	17,840	25%
14.0801 Civil Engineering, General	High Growth	High Growth	89,910	8,990	11%
14.3501 Industrial Engineering	High Growth	High Growth	87,940	7,360	9%
14.1901 Mechanical Engineering	High Growth	High Growth	86,990	8,000	10%
51.0701, 51.1702, and 51.3802 Health/Healthcare Administration/Management; Hospital and Health Care Facilities Administration/Management; Nursing Administration	High Growth	High Growth	81,170	13,210	19%
52.1206 Information Resources Management	High Growth	High Growth	76,840	7,510	11%
50.0602 Cinematography and Film/Video Production	High Growth	High Growth	69,210	7,870	13%
52.1302 Business Statistics	High Growth	High Growth	64,130	9,600	18%
51.3899 Registered Nursing, Nursing Administration, Nursing Research and Clinical Nursing, Other	High Growth	High Growth	55,530	13,430	32%
27.0501 Statistics, General	High Growth	High Growth	54,620	6,420	13%
14.1401 Environmental/Environmental Health Engineering	High Growth	High Growth	53,550	5,000	10%
30.1901 Nutrition Sciences	High Growth	High Growth	50,630	5,890	13%

Source: Data supplement to Hanover Research Market Opportunity Scan completed for Mansfield (2019)

A much smaller number of two-year degree program areas have high-growth indicators for both student demand and labor demand. As can be seen from the table below, the majority are six-digit CIPs in the Business and Health Sciences disciplines:

Associate-Level Program Areas with Projected High Growth by Six-Digit CIP: Mid-East Region (DE DC MD NJ NY PA) Note: Table is sorted by 2026 Projected Labor Demand column					
CIP Code and Title	Student Demand	Labor Demand	2026 Projected Labor Demand	Projected Numeric Change from 2016	Projected Percentage Growth from 2016
51.0713 Medical Insurance Coding Specialist/Coder	High Growth	High Growth	139,140	27,070	24%
44.0000 Human Services, General	High Growth	High Growth	111,040	15,920	17%
52.0101 Business/Commerce, General	High Growth	High Growth	85,810	8,640	11%
52.0201 Business Administration and Management, General	High Growth	High Growth	85,810	8,640	11%
51.0701 Health/Health Care Administration/Management	High Growth	High Growth	81,170	13,210	19%
47.0201 Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician	High Growth	High Growth	58,480	6,930	13%
12.0501 Baking and Pastry Arts/Baker/Pastry Chef	High Growth	High Growth	31,140	4,190	16%

Source: Data supplement to Hanover Research Market Opportunity Scan completed for Mansfield University (2019)

Among our three universities, existing enrollments in our associate degree programs generally align with high-demand areas in Health Sciences and Business, though as can be seen from the table below, Mansfield's Associate of Arts (AA) Liberal Studies program is the highest-enrolled across the three campuses. Mansfield's program functions as an access point for students not yet ready for matriculation into a four-year degree program. The program array recommendation section below includes this program (renamed as Multidisciplinary Studies) as one that could be offered across all three campuses as a common access point.

HIGHEST-ENROLLED ASSOCIATE DEGREE PROGRAMS	ENROLLMENT BASED ON COMBINED FALL 2020 FTE
Liberal Studies (AA)	111
Nursing (Associate of Science in Nursing [ASN])	102
Healthcare Professions (Associate in Applied Science [AAS])	46
Criminal Justice (AA/Associate of Science [AS])	36
Business (AS)	24
SUBTOTAL TOP 5 ASSOCIATE DEGREE PROGRAMS	319
TOTAL FTE ALL ASSOCIATE DEGREE PROGRAMS	344
PERCENTAGE OF FTE REPRESENTED BY TOP 5 ASSOCIATE DEGREE PROGRAMS	93%

Source: Program FTE data reported by each campus's Institutional Research office

Finally, with regard to teacher preparation, we consulted the [K-12 Teacher Supply, Demand, and Shortages in Pennsylvania¹⁰](#) (July 2020) report prepared by Dr. Fuller and Dr. Pendola of Penn State University. In the section of their report called "Conclusions on Supply, Demand, and Shortages," Drs. Fuller and Pendola note that "[t]here is a shortage of teachers in Pennsylvania as evidenced by the ratio of newly prepared teachers to the number of beginning teachers hired, the dramatic increase in the number of teachers employed on long-term emergency permits, press reports, responses to surveys, and districts' indications of shortage areas. The shortage is much more acute in specific subject areas and for specific areas of the state. The subject areas include special education, English Language Learner in urban areas, secondary math, and secondary science (physics, chemistry, and other advanced courses). To a lesser extent, evidence also suggests there may be shortages for secondary social studies, foreign language, physical/health education, and fine arts (music and art). With respect to location, there are shortages in some of the large city districts and in some rural districts. In particular, there is evidence of current shortages in districts in the Philadelphia Metro, North Central, and South Central regions of the state. There is also evidence that many rural districts are experiencing difficulty in finding a sufficient supply of teachers in a wide array of subject areas. These shortages are projected to, at best, persist over time."

ACADEMIC PROGRAM HUBS

These are academic programs where the vast majority of the enrollment and supporting faculty happen to be located at one or two of our institutions. Keeping our guiding principle of expanding educational opportunity and maximizing access in mind, we intend these areas to function as the primary (but not necessarily exclusive) instructional delivery hubs for their academic programs across the integrated institution. We recognize, certainly, that in some cases restrictions and limitations due to program-specific facilities or the nature of instruction will limit a program's capacity to be fully accessible across all three campuses.

Note: Programs with an asterisk (*) are identified as needing further discussion.

BUSINESS

HUB LOCATION: BLOOMSBURG

Due to AACSB requirements, Bloomsburg must serve as the hub for all AACSB-accredited Business programs. The Business core will be accessible on all campuses. Sub-disciplines will be offered either face-to-face or via distance education as appropriate based on enrollments and faculty complements. The Business core on each campus provides a pathway to all accredited Business programs with only Supply Chain Management exclusively requiring a physical presence at Bloomsburg for degree completion.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Accounting	BSBA	AACSB	Bloomsburg
Business Administration	AS	N/A; AACSB does not accredit two-year programs	Lock Haven/Mansfield with pathways to the accredited four-year programs
Business Administration	BSBA	AACSB	Bloomsburg
Business Education	BSEd	AACSB/ Council for the Accreditation of Educator Preparation (CAEP)	Bloomsburg

¹⁰ <https://www.rural.palegislature.us/documents/reports/PA-Teacher-Supply-Demand-Shortages-2020.pdf>

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Finance, Insurance, and Risk Management	BS	AACSB	Bloomsburg
International Business	BSBA	AACSB	Bloomsburg
Professional Sales and Marketing	BSBA	AACSB	Bloomsburg
Supply Chain Management	BSBA	AACSB	Bloomsburg
Accountancy	Master of Accountancy (MAcc)	AACSB	Bloomsburg
Sport Management	BS, MS	NASSM	Lock Haven
Business Administration	MBA	AACSB	Bloomsburg

NURSING

HUB LOCATIONS: BLOOMSBURG FOR GRADUATE NURSING PROGRAMS; LOCK HAVEN AND MANSFIELD FOR THE ASN

As a primary enrollment driver, the BSN will be offered at all three campuses with pathways to the MSN graduate programs based at Bloomsburg and offered in a hybrid format. The ASN will be offered at both Lock Haven and Mansfield. Organizationally, Nursing will require elevation to a School of Nursing due to size and also need an Associate Dean as a nurse administrator.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Nursing	ASN	Accreditation Commission for Educating in Nursing (ACEN); Commission on Collegiate Nursing Education (CCNE) does not accredit two-year programs	Lock Haven/Mansfield
Nursing	BSN	CCNE	Bloomsburg/Lock Haven/Mansfield
RN to BSN	BSN	BSN outcomes must be same as RN to BSN for ACEN, but not CCNE	Based jointly at Bloomsburg/Lock Haven
Adult-Gerontology Primary Care Nurse Practitioner	MSN	CCNE	Bloomsburg
Family Nurse Practitioner	MSN	CCNE	Bloomsburg
Nursing Administration w/MBA option	MSN	CCNE	Bloomsburg
Nurse Anesthesia	DNP	CCNE	Bloomsburg
Public Health	MSN	CCNE	Bloomsburg
Public Health - School Nursing	MSN	CCNE	Bloomsburg
Doctor of Nursing Practice	DNP	CCNE	Bloomsburg

SPEECH LANGUAGE PATHOLOGY AND AUDIOLOGY

HUB LOCATION: BLOOMSBURG

Students may access the first two years of the BS at any campus, but must complete the degree at Bloomsburg. Graduate degrees accessible only at Bloomsburg. The program runs a full clinic site as a component of its programming.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Audiology and Speech-Language Pathology	BS	American Speech-Language Hearing Association (ASHA)-based curriculum	Bloomsburg
Speech-Language Pathology	MS	Council on Academic Accreditation in Audiology and Speech-Language Pathology (CAAASLP)	Bloomsburg
Doctorate in Audiology	Clinical Doctorate of Audiology (AuD)	CAAASLP	Bloomsburg

DIGITAL FORENSICS/CYBERSECURITY AND ACCREDITATION BOARD FOR ENGINEERING AND TECHNOLOGY (ABET)-ACCREDITED COMPUTER SCIENCE

HUB LOCATION: BLOOMSBURG

Bloomsburg offers the only digital forensics and cybersecurity bachelor's degree in the State System and is Pennsylvania's Center for Digital Forensics. Currently, Bloomsburg is designated as a National Center of Academic Excellence (CAE) in Cyber Defense Education with a focus in the area of digital forensics through academic year 2021. Access to the Digital Forensics/Cybersecurity program may be possible for students at Lock Haven and Mansfield through a 2+2 arrangement. Bloomsburg's ABET-accredited Computer Science program will remain based at Bloomsburg and require the physical presence of enrolled students. Another proposed degree program, Applied Computer Science (BS), is recommended as shared across all three campuses via combination of face-to-face, hybrid, and online classes.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Computer Information System	AS		Bloomsburg/Lock Haven/Mansfield
Applied Computer Science	BS	N/A	Bloomsburg/Lock Haven/Mansfield
Computer Science	BS	ABET	Bloomsburg only
Digital Forensics and Cybersecurity	BS	CAE recognition	Bloomsburg only with possible 2+2 for students at Lock Haven and Mansfield

AMERICAN SIGN LANGUAGE/ENGLISH INTERPRETING

HUB LOCATION: BLOOMSBURG

Curriculum is best delivered face-to-face due to the three-dimensional aspect of the language.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
ASL/English Interpreting	BS	Commission on Collegiate Interpreter Education	Bloomsburg

MASTER OF SCIENCE in BIOLOGY

HUB LOCATION: BLOOMSBURG

A 3+2 or 4+1 model should be explored to promote increased enrollment in the graduate program.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Biology	MS	N/A	BU with 3+2 pathway from BS Biology

BACHELOR OF APPLIED SCIENCE IN TECHNICAL LEADERSHIP (BASTL)

HUB LOCATION: BLOOMSBURG

The BASTL program is a 2+2 program in collaboration with technical associate degree programs in the region. The program is offered online.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Technical Leadership	BAS	N/A	Bloomsburg

ELECTRONICS ENGINEERING TECHNOLOGY

HUB LOCATION: BLOOMSBURG

Students may complete the first two years on any campus, but due to the technical equipment required and program size, students must complete the degree requirements at Bloomsburg.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Electronics Engineering Technology	BS	ETAC of ABET	Final two years at Bloomsburg only

ALLIED HEALTH AND NUTRITION

HUB LOCATIONS: MANSFIELD FOR RADIOLOGIC TECHNOLOGY, RESPIRATORY CARE, AND NUTRITION; BLOOMSBURG FOR MEDICAL IMAGING

Mansfield has an accredited two-year program in Radiologic Technology and an accredited four-year program in Respiratory Care (itself formerly a two-year program) in partnership with Guthrie based at Robert Packer Hospital in Sayre, PA. Although the Radiologic Technology program is Mansfield-based, the intention is to explore expansion to Lock Haven via online classes and clinicals. Expansion to Bloomsburg may be limited by clinical instructors committed to the BS in Medical Imaging, which is delivered at Bloomsburg only. Due to Commission on Accreditation for Respiratory Care (CoARC) accreditation requirements, Mansfield must serve as the hub for Respiratory Care and the final two years must be completed under that program.

The Nutrition BS program is Mansfield-based, but intended to be shared with the other campuses via distance education. The MS program is already designed to be delivered fully online.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Radiologic Technology	AAS	Joint Review Committee on Education in Radiologic Technology (JRCERT)	Mansfield
Medical Imaging	BS		Bloomsburg
Respiratory Care	BS	CoARC	Mansfield
Nutrition	BS	Accreditation Council for Education in Nutrition and Dietetics (ACEND)	Mansfield
Nutrition	MS	ACEND	Online program accessible to Bloomsburg/Lock Haven/Mansfield

MUSIC

HUB LOCATIONS: MANSFIELD AND BLOOMSBURG

Mansfield and Bloomsburg both have National Association of Schools of Music (NASM)-accredited Music programs. Mansfield's program has the professional Bachelor of Music degrees. The recommendation is to establish one shared Music program with the configuration listed below. Due to the nature of instruction and facilities requirements, students will need to be located at either Mansfield or Bloomsburg depending on the program and the concentrations within. At Lock Haven, Music instruction is expected to be limited to general education.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Music	BA	NASM	Mansfield/Bloomsburg
Music Education	Bachelor of Music (BM)	NASM	Mansfield/Bloomsburg

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Music Performance	BM	NASM	Mansfield/Bloomsburg
Emphasis in Music Technology	BM	NASM	Mansfield/Bloomsburg

PHYSICIAN ASSISTANT

HUB LOCATION: LOCK HAVEN

Lock Haven has the only Physician Assistant program across the integrating universities. Didactic instruction is delivered virtually and may be accessible to students across all three campuses. It is envisioned that clinical sites will be expanded beyond the current catchment area to include service areas around Mansfield and Bloomsburg. Expansion of the Pre-PA Health Sciences programs to include Mansfield (currently available at Lock Haven and Bloomsburg) will be necessary as will adjustments to increase priority admission to students from the integrated university.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Health Sciences: Pre-Physician Assistant	BS		Lock Haven with 3+2 accelerated path to the master's degree
Physician Assistant	MHS	Accreditation Review Commission on Education for Physician Assistant, Inc.	Lock Haven

EXERCISE SCIENCE, SPORT PSYCHOLOGY, AND HEALTH/PHYSICAL EDUCATION

HUB LOCATIONS: LOCK HAVEN AND BLOOMSBURG FOR BS EXERCISE SCIENCE, BLOOMSBURG FOR MS EXERCISE SCIENCE, LOCK HAVEN FOR MS SPORT PSYCHOLOGY AND HEALTH/PHYSICAL EDUCATION BSEd

Access to the menu of programs in this broad area will be limited to students at Lock Haven and Bloomsburg because of infrastructure constraints.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Exercise Science		Commission on Accreditation of Allied Health Programs (CAAHEP)/ Committee on Accreditation for Exercise Sciences (CoAES)/ National Strength and Conditioning Association (NSCA)	Shared jointly at Bloomsburg and Lock Haven
Exercise Science		AHEP/CoAES/NSCA	Bloomsburg only
Sport Psychology			Lock Haven only
Athletic Training		Commission on Accreditation of Athletic Training Education	Lock Haven only
Health and Physical Education K-12	Ed	EP	Lock Haven only

CLINICAL MENTAL HEALTH COUNSELING

HUB LOCATION: LOCK HAVEN

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Clinical Mental Health Counseling	MS	Council for Accreditation of Counseling and Related Educational Programs (CACREP)	Lock Haven

SHARED PROGRAMS SUPPORTING THE ARRAY

Note: Programs with an asterisk (*) are identified as needing further discussion.

EDUCATOR PREPARATION

A majority of the education programs can be shared across the array via distance education for some program areas. Pennsylvania has shortages in most areas of educator preparation with strong needs in science education. Content area courses for small degree programs overlap with the disciplinary major and provide support for enrollments in those programs.

PROGRAM NAME	DEGREE	ACCREDITATION	CERTIFICATION AREA	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
PreK-Grade 4/Early Childhood Education	BSEd	CAEP		Based jointly at Bloomsburg/Lock Haven/Mansfield
Middle Level Education	BSEd	CAEP	English/Language Arts and Reading Mathematics Science Social Studies	Bloomsburg with distance education
Secondary Education	BSEd	CAEP	English 7-12 Mathematics 7-12 Science-Biology 7-12 Science - Chemistry 7-12 Science - Earth and Space Science 7-12 Science - General Science 7-12 Science - Physics 7-12 Social Studies 7-12	Based jointly at Bloomsburg/Lock Haven/Mansfield

PROGRAM NAME	DEGREE	ACCREDITATION	CERTIFICATION AREA	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Special Education	BSEd	CAEP	Early Childhood Hearing Impaired N-12 Stand Alone option	Based jointly at Bloomsburg/Lock Haven/Mansfield Bloomsburg only Based jointly at Bloomsburg/Lock Haven/Mansfield
School Counseling	MEd	CAEP		Consider combining with mental health counseling post-integration under CACREP accreditation
Educational Leadership	MEd	CAEP		Bloomsburg-based/blended delivery
Educator Professional Development	MEd	CAEP		Bloomsburg-based/blended delivery

HEALTH SCIENCES

PROGRAM NAME	DEGREE	CONCENTRATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Healthcare Professions	AAS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Public Health Education*	AAS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Public Health Education and Promotion	BS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Health Sciences	BS	Medical Laboratory Science	Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations; primarily face-to-face (F2F) with some distance education options
		Pre-Physical Therapy	Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations; primarily F2F with some distance education options
		Pre-Pharmacy	Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations; primarily F2F with some distance education options

PROGRAM NAME	DEGREE	CONCENTRATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
		Pre-Second-Degree Accelerated Nursing	Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations; primarily F2F with some distance education options
		Medical Genomics and Counseling	Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations; primarily F2F with some distance education options
		General option	Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations; primarily F2F with some distance education options
Healthcare Management	Currently MHS; reconfigure as concentration under MBA in the Business array		Lock Haven-based

Note: For Pre-Physician Assistant, Nursing, Allied Health, and Nutrition, see Academic Program Hubs.

HUMANITIES

A majority of these programs have robust enrollments and are easily maintained across all campuses. In areas with lower enrollments, distance education is an option.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
English	Bachelor of Arts (BA)	N/A	Accessible to all three locations via F2F and distance education. Creative Writing primarily based at Bloomsburg.
History	BA	N/A	Accessible to all three locations via F2F and distance education.
Philosophy	BA	N/A	Accessible to all three locations via F2F and distance education.
Languages and Cultures	BA	N/A	Language option not located at Lock Haven and Mansfield accessible to those locations via distance education.
Communication Studies	BA	N/A	Accessible to all three locations via F2F and distance education.
Media and Journalism	BA	N/A	Accessible to all three locations via F2F and distance education.

INTER/MULTIDISCIPLINARY PROGRAMS

PROGRAM NAME	DEGREE	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY	NOTES
Interdisciplinary Studies	BA/BS	Shared by all three locations	Intended to serve as a "design your own major" option
Multidisciplinary Studies	AA	Shared by all three locations	Intended to serve as an access program
Multidisciplinary Studies	BA	Shared by all three locations	Intended to serve as a degree completion program

STEM

Although resource intensive, the sciences, beyond their independent value, also provide critical cognate coursework for health professions and will be needed across the array.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Biology	BA/BS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Chemical Technology	AS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Chemistry	BA/BS - American Chemical Society (ACS) certified	Biochemistry concentration- American Society for Biochemistry Molecular Biology (ASBMB) Accredited	Based jointly at Bloomsburg/Lock Haven/Mansfield
Physics*	BA/BS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Environmental Technology*	AAS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Environmental Geoscience*	AS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Geography and GIS*	AS		Based jointly at Bloomsburg/Lock Haven/Mansfield
Environmental, Geographical, and Geological Sciences	BS		Based jointly at Bloomsburg/Lock Haven/Mansfield

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Instructional Design and Technology	MS		Bloomsburg/Lock Haven/Mansfield; accessible from all three locations because online; delivered currently by Bloomsburg
Radiation Science	BS		Based at Bloomsburg
Mathematics	BS		Based jointly at Bloomsburg/Lock Haven/Mansfield

SOCIAL SCIENCES

A majority of these programs have robust enrollments and are easily maintained across all campuses. In areas with lower enrollments, distance education is an option.

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Substance Use and Behavior Disorder Counseling*	AS		Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations via hybrid/online course offerings
Anthropology	BA		Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations via hybrid/online course offerings
Criminal Justice	BS		Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations via hybrid/online course offerings
Criminal Justice	AS		Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations via hybrid/online course offerings, possibly completely online
Economics	BA		Based primarily at Bloomsburg but accessible to all three locations via hybrid/online course offerings
Political Science	BA		Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations via hybrid/online course offerings
Psychology/Psychological Sciences	BS		Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations F2F and via hybrid/online course offerings
Social Work	BSW	Council on Social Work Education (CSWE)	Per consultation with CSWE, a main campus program will be designated with the other two locations as satellites. The BSW will be accessible to students on all three locations primarily, but not necessarily exclusively, through F2F instruction.
Social Work	MSW	CSWE	Currently Bloomsburg only; plan to be accessible to Lock Haven and Mansfield
Sociology	BA		Based jointly at Bloomsburg/Lock Haven/Mansfield and accessible to all three locations F2F and via hybrid/online course offerings

VISUAL AND PERFORMING ARTS

PROGRAM NAME	DEGREE	ACCREDITATION	CAMPUS(ES) PRIMARILY RESPONSIBLE FOR PROGRAM DELIVERY
Visual Arts	BA/Bachelor of Fine Arts (BFA)	National Association of Schools of Art and Design (NASAD)	Mix of F2F and distance education across all three locations; emphases include Art History, Art Studio, and Graphic Design.
Theatre	BA	NAST	Foundational courses accessible to all three locations; final two years at Bloomsburg

Note: for Music, see Academic Program Hubs

Academic Program Accessibility

Below is a preliminary visual representation of program accessibility across the shared array. It is important to note that program accessibility and associated modalities may change based upon final curriculum proposals. Our guiding principle is to maximize student access to the program array to the extent possible across all three campuses. Upper division courses when shared from a primary hub will be provided face-to-face on one campus with possible distance education on the other two campuses with a goal of live synchronous instruction via technology-enhanced classrooms.

Note: Programs with an asterisk (*) are identified as needing further discussion.

<p>Primarily Face-to Face (F2F)</p>	<p>Blended F2F and Online</p>
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Disciplinary Field	NE Academic Degree Program Accessibility		
	Bloomsburg	Lock Haven	Mansfield
Health Sciences	Healthcare Professions (AAS)		
	Public Health Education* (AAS)		
	Public Health Education and Promotion (BS)		
	Health Sciences (BS): Medical Laboratory Science concentration		
	Health Sciences (BS): Physician Assistant concentration and Physician Assistant (MHS) Note: PA MHS program must be completed at Clearfield		
	Health Sciences (BS): Pre-Physical Therapy concentration		
	Health Sciences (BS): Pre-Pharmacy concentration		
	Health Sciences (BS): Pre-Second Degree Accelerated Nursing concentration		
	Health Sciences (BS): Medical Genomics and Counseling concentration		
	Health Sciences (BS): General option concentration		
	Exercise Science (BS)		
	Exercise Science (MS)		
	Sport Psychology (MS)		
	Athletic Training* (MS)		
	Healthcare Management (MHS) (currently an MHS but proposed to be reconfigured as a concentration under the MBA in Business array)		
	Health and Physical Education K-12 (BSEd)		
	Nursing (ASN)		
	RN to BSN		
Nursing (BSN)			
Nursing (MSN and DNP) Note: Requires some F2F sessions at Bloomsburg only Note: Also available at the Dixon Center			

Disciplinary Field	NE Academic Degree Program Accessibility		
	Bloomsburg	Lock Haven	Mansfield
	Medical Imaging (BS)	Lock Haven access to Radiologic Technology to be explored in relation to accreditation requirements	Radiologic Technology (AAS)
			Respiratory Care (BS) Note: Final two years F2F at Mansfield
			Nutrition (BS)
Health Sciences	Nutrition (MS) Note: Fully online program		
	Clinical Mental Health Counseling (MS) Note: Fully online program		
	Speech Language Pathology and Audiology BS, MS, AuD		
Business	Accounting (BSBA)		
		Business Administration (AS)	
	Business Administration (BSBA)		
	Business Education (BSEd/M.Ed.)		
	Finance, Insurance, and Risk Management (BS)		
	International Business (BSBA)		
	Professional Sales and Marketing (BSBA)		
	Supply Chain Management (BSBA)		
	Accountancy (MAcc)		
		Sports Management (BS, MS)	
	Business Administration (MBA) Note: Fully online program		
	Information Technology (MS) Note: Fully online program		

Disciplinary Field	NE Academic Degree Program Accessibility		
	Bloomsburg	Lock Haven	Mansfield
Education	PreK-Grade 4/Early Childhood Education (BSEd)		
	Middle Level Education (BSEd)		
	Secondary Education (BSEd)		
	Special Education (BSEd)		
	School Counseling (MEd)		
	Educational Leadership (MEd)		
	Educator Professional Development (MEd)		
	ASL/English Interpreting (BS)		
Humanities	English (BA)		
	History (BA)		
	Philosophy (BA)		
	Language and Cultures (BA)		
	Communication Studies (BA)		
	Media and Journalism (BA)		
Inter- and Multi-disciplinary Programs	Interdisciplinary Studies (BA/BS)		
	Multidisciplinary Studies (AA)		
	Multidisciplinary Studies (BA)		
STEM	Biology (BA/BS)		
	Biology (MS)		
	Chemical Technology (AS)		
	Chemistry (BA/BS)		
	Physics* (BA/BS)		
	Environmental Technology* (AAS)		
	Environmental Geoscience* (AS)		
	Geography and GIS* (AS)		
	Environmental, Geographical, and Geological Sciences (BS)		

Disciplinary Field	NE Academic Degree Program Accessibility		
	Bloomsburg	Lock Haven	Mansfield
	Technical Leadership (BAS)		
	Instructional Design and Technology (MS) Note: Program is fully online		
	Mathematics (BS)		
	Computer Information Systems (AS)		
	Applied Computer Science (BS)		
	Computer Science (BS)		
	Digital Forensics and Cybersecurity (BS) Note: possible 2+2 pathway for Lock Haven and Mansfield students		
	Electronics Engineering Technology (BS) Note: possible 2+2 pathway for Lock Haven and Mansfield students		
Radiation Science (BS)			
Social Sciences	Substance Use and Behavior Disorder Counseling* (AS)		
	Anthropology (BA)		
	Criminal Justice (AS and BS)		
	Economics (BA)		
	Political Sciences (BA)		
	Psychology/Psychological Sciences (BS)		
	Social Work (BSW) Note: Per consultation with CSWE, a main campus program needs to be designated with the other two campus programs as satellites.		
	Social Work (MSW)	MSW to be expanded to Lock Haven and Mansfield post-integration	
	Sociology (BA)		
Visual Arts (BA, BFA) – Emphases in Art Studio, Graphic Design, Art History Note: Studio residencies vary by campus			

Disciplinary Field	NE Academic Degree Program Accessibility		
	Bloomsburg	Lock Haven	Mansfield
Visual and Performing Arts Visual and Performing Arts	Theatre (BA)		
	Music (BA)		Music (BA)
	Music Education (BM)		Music Education (BM)
	Music Performance (BM)		Music Performance (BM)
	Emphasis in Music Technology (BM)		Emphasis in Music Technology (BM)

Existing Programs in Need of Further Discussion

Most of the following programs are likely to be continued in the array, but need further discussion. Concerns vary, including the viability of the degree based on current enrollments and cost, the ability to share curriculum across campuses, and the resources/enrollments needed to offer proposed concentrations under a major. These concerns have been shared with NE sub-subgroups for feedback.

Programs In Need of Further Discussion
<ul style="list-style-type: none"> • Athletic Training (MS): Program in probationary status at Lock Haven • Environmental Technology (AAS): Further analysis of workforce needs will help determine status of program • Environmental Geoscience (AS): Further analysis of workforce needs will help determine status of program • Geography & GIS (AS): Further analysis of workforce needs will help determine status of program • Physics (BA/BS): proposals to date from the sub-subgroup are insufficient to enable a full analysis of the program going forward • Public Health Education (AAS): Further analysis of workforce needs will help determine status of program • Recreation Management (BS): The sub-subgroups proposed realignment of two tracks with other programs. Remaining tracks bear further analysis for growth potential/workforce demand. • Substance Use and Behavior Disorder Counseling (AS): Further analysis of workforce needs will help determine status of program

One-time required investments to support the plan

Type	Program	Investment Description	Estimated Amount	Year (e.g., year investment made)	ROI type (enrollment, net tuition revenue, other)	Program Maturity Year
General Infrastructure	All	Technology enhanced classrooms	70 new rooms at Lock Haven and Mansfield, finish build out of rooms at Bloomsburg	2021	Enrollment expansion across the three campuses	
Technology Infrastructure	All	Tablets, Headphones, televisions	Based on pilots suggested by faculty, approx. 200	2021	Enrollment	
New Program Support	New Programs	Marketing Resources		Annually with launch of new programs	Enrollment	

The following programs are under consideration for development based upon current workforce data. Programs without enrollment trends are in need of market analysis to determine expected initial program cohort size. The plan would be to work with Hanover Research for more detailed study of new programs that require financial commitments such as new faculty complements. These data would also help inform timelines for launch.

Program Areas Recommended for Growth and New Development			
Estimated Inception Year & Growth Level	Program Areas with Growth Potential	Estimated Inception Year & Growth Level	New Program Areas for Development
Fall 2021 15 students per year, years 1-2; begin possible second cohort at Mansfield or Lock Haven year 3 with 15 additional students	Masters of Social Work	Fall 2022 15 new students initially with 20 students per year thereafter; 3.1% degree conferral increase beginning at year 4 of program	BSBA Hospitality Management & Marketing
5 new students per year	Professional Sales	Fall 2022 10 students for start-up and 5 additional annually	BSBA Finance, Insurance & Risk Management

Program Areas Recommended for Growth and New Development			
Estimated Inception Year & Growth Level	Program Areas with Growth Potential	Estimated Inception Year & Growth Level	New Program Areas for Development
5 new students per year	Supply Chain Management	Fall 2022 10 students for start-up and 5 additional annually	BSBA Small Business and Entrepreneurship
		Fall 2023 10 students for start-up and 5 additional annually	Medicinal Plant Studies (BA/BS)
		Fall 2023 10 students for start-up and 5 additional annually	Cannabis Studies certificate
		Fall 2023 10 students for start-up and 5 additional annually	Master's in Security Studies
		Fall 2023 10 students for start-up and 5 additional annually	Professional Science Master's Degree
		Fall 2023 10 students for start-up and 5 additional annually	Master of Public Administration
		Fall 2023 10 students for start-up and 5 additional annually	Pre-Art Therapy
		Fall 2023 10 students for start-up and 5 additional annually	Pre-Music therapy
		Fall 2023 10 students for start-up and 5 additional annually	Intensive English Language program
		Fall 2023 10 students for start-up and 5 additional annually	Data Analysis & Presentation Certificate

Program Areas Recommended for Growth and New Development			
Estimated Inception Year & Growth Level	Program Areas with Growth Potential	Estimated Inception Year & Growth Level	New Program Areas for Development
		Fall 2023 2-3 students per year	Transfer-Oriented Programs <ul style="list-style-type: none"> • Pre-Engineering with Shippensburg University • Pharmacy with Temple and Fairleigh Dickinson University • Law School with Temple University and Penn State University
		Fall 2023 5 students per year	Mater of Arts in Teaching- unifies post-baccalaureate teacher licensing programs

Prioritization Criteria Considered for Growth Focus and Sequencing

The below criteria were or will be considered in all or in part based on the maturity level of the new program (e.g., *conceptual versus in design versus in initial year of inception*).

- Student demand
- Market demand
- Ease of implementation (e.g., size, accreditation requirements)
- Ability to leverage existing resources
- Level of investment required
- Complimentary to existing programs
- Expands a degree or career pathway
- Time to expected return on investment (ROI) (i.e., enrollment growth, fiscal sustainability, + contribution margin or distinctive reputation/draw)

**NORTHEAST INTEGRATION
ACADEMIC PROGRAM (“SUB-SUBGROUP”) REPORTING TEMPLATE
DRAFT 1 OF RECOMMENDATIONS**

ACADEMIC PROGRAM SUB-SUBGROUP NAME:
SUB-SUBGROUP MEMBERS:
INTEGRATED ACADEMIC PROGRAM RECOMMENDATION
DEGREE:
PROGRAM NAME:
CONCENTRATIONS (IF ANY):
DESCRIPTION OF INTEGRATED PROGRAM (describe below)
Note: Include description of how program will be mutually supported across the integrated university. Also include a list of program outcomes if these have been drafted.
PROGRAM REQUIREMENTS (USE EXCEL TEMPLATE)
COURSE SEQUENCING PLAN (USE EXCEL TEMPLATE)
COURSE LIST (USE EXCEL TEMPLATE)
OPPORTUNITIES/BENEFITS OF INTEGRATED PROGRAM (list or describe below)
Note: List/description to include, but not be limited to, expanding educational opportunities, generating enrollment growth, identifying new markets, and/or operating efficiently and sustainably.
CONCERNS/LIMITATIONS OF RECOMMENDATION (list or describe below)
ACCREDITATION ISSUES TO BE RESOLVED (if relevant – list or describe below)
PHYSICAL RESOURCES/FACILITIES ISSUES TO BE ADDRESSED (if relevant – list or describe below)
AGREEMENTS/PARTNERSHIPS WITH EXTERNAL ORGANIZATIONS/AGENCIES TO BE ADDRESSED (if relevant – list or describe below)
ADDITIONAL INFORMATION (list or describe below any additional information the group wishes to report that isn’t captured above)
FEEDBACK FROM SUBGROUP (the subgroup will enter its feedback to the sub-subgroup in the space below)

Appendix H.3: Workforce Development WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast Workforce Development Working Group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Assess student and regional market demand in relation to core competencies to define total addressable market and focus industry	Identify high target areas of opportunity which align student and market needs with existing non-credit and credit programming to leverage existing capabilities/reputation and determine sequence of program development and marketing activities.
Conduct economics analysis within opportunity areas	Highlight areas with ability to meet optimal program economics relative to investment and ROI (e.g., revenue, relationships, student access, and unmet market needs).
Develop integrated workforce development strategy and organizational structure for workforce development	Develop a common workforce development strategy for the region.
Determine ideal opportunity profiles	Evaluate the intersection between student segments, credentialing types, and focus disciplines to highlight priority program, and career paths for short term focus.
Product development: Develop a combined array of non-credit bearing certificates and training programs	Build out non-credit certificates, badges, and micro-credentials and create progression pathways and assessments
Product development: Develop career pathways across non-credit and credit programs	Identify career paths from entry-level to doctoral degrees for existing and potential programs.
Product development: Evaluate customized solutions structure and program models for direct service to industry and business partners	Develop model parameters and specifics related to industry partnerships and priorities and criteria for ad-hoc offerings (e.g., alignment with existing competencies and demand, economics of program, relevance across region, and market supply gaps).
Define priority industry and business relationships for pursuit	Develop priority listing of industry and business partnerships and map relationship development process and expected outcomes.
Assess workforce development programs against defined criteria and priorities	Determine future of current programs (e.g., public safety, rehabilitative justice, truck driving institute, etc.) and highlight areas of expansion relative to growth potential, industry relationship priorities, and current competencies and capacity.
Listed on the Eligible Training Provider List (ETPL) through Labor and Industry and Workforce Investment Board (WIB)	List programs and certificates on the ETPL to allow for better searching through CareerLink and to obtain Workforce Innovation and Opportunity Act funding and Trade Adjustment Assistance.
Create lifelong learning pathways/passport for alumni	In conjunction with alumni office and foundations, develop opportunities and programs to keep graduates engaged and aware of up-skilling opportunities,

People: The recommendations will likely impact the following stakeholders:

- Students and alumni
- Industry and business partners

- Faculty/staff responsible for program delivery
- Regional workforce and economic development leaders
- Trustees and elected officials as local, regional, and state advocates
- Local community leaders

Process: The recommendations will require a rethinking of how workforce development related programs are managed both in process and in content. Specific impacts from a process-perspective would include a unified program and certificate array, a unified approach to program designing, and course delivery. Aspects in need of evaluation and clarity include:

- Current approval of non-degree programs and related partnership agreements
- Program resource and financial management, including measurable goals and return on investment
- Marketing and outreach for high-target student and industry/business populations
- Contracts with third-party entities as needed

Technology: The recommendations would require careful integration of technology in support of student reporting student account information, internal financial management, and integrated course delivery (e.g., shared registration, common instructional platforms, student outcomes reporting), to include:

- Common CRM systems
- Integrated student information system
- Unified financial reporting and tracking system
- Identified technology in support of licensure and certificate tracking for industry needs.
- Database system compatibility between SIS and fundraising system

Finance: The recommendations are intended to result in enhanced responsiveness to regional workforce development needs, including student-specific demands relative to retraining, up-skilling and career progression within fiscally sustainable models that allow the integrated university to leverage existing resources and capabilities. The primary fiscal impacts are estimated to be: student cost of degree attainment reduction due to clear paths to degrees and careers; enrollment growth translating into revenue enhancement, and cost savings due to program cost effectiveness and streamlined and optimally leveraged program resources (e.g., administrative infrastructure, streamlined management). It is likely that investment will be required to create the technology needed to manage programs in a more unified manner.

Physical Assets: None

Compliance and Legal: Potential exists for legal assistance to be required for renegotiating related partnership agreements and third-party contracts

Community: The recommendations will likely impact:

- Local Career and Technical Centers
- Businesses and industries
- Employers
- CareerLink
- Community technical colleges
- Community members and employers utilizing current testing sites.
- Workforce Investment Boards (WIBs)
- Pennsylvania Department of Community and Economic Development (DCED)
- Pennsylvania Department of Labor and Industry
- Office of Vocational Rehabilitation

Benefits: The creation of a unified and strategic workforce development program can position the integrated university as a critical and strategic partner in the region's economy, and can serve to enhance long-term relationships with regional community members as employees and employers. The intentional work around meeting unmet workforce needs and defining clear and accessible certificates and other credentialing pathways is mutually beneficial to both the integrated university and the communities it serves. The positives include access to a broader array of programs and expertise across the region and

the potential for greater availability of course schedule options for participants. Also, by partnering more closely with regional economic and workforce development entities, it is feasible that additional opportunities to garner dedicated funding for unique and innovative programming and or experimentation may be possible.

Risk: Risks relative to a unified workforce development program include the potential that if not managed carefully, moving from a local community-based to a more regional approach could be perceived as less responsive, especially if parameters and models for customized industry and business partner solutions are not well-defined. In conducting the assessments and designing program arrays and course offerings moving forward, the ability to be objective and to apply agreed-to and intentional criteria will be key – not having the discipline to do so is a risk. Organizational structure and reporting relationships must be carefully considered to ensure availability and seamless navigation between non-credit and credit programs (e.g., dotted or solid line to the Provost, etc.). A risk is maintaining the “status quo” and not taking advantage of the vast opportunity that comes with an intentional and analytically informed approach to workforce development in collaboration with regional partners.

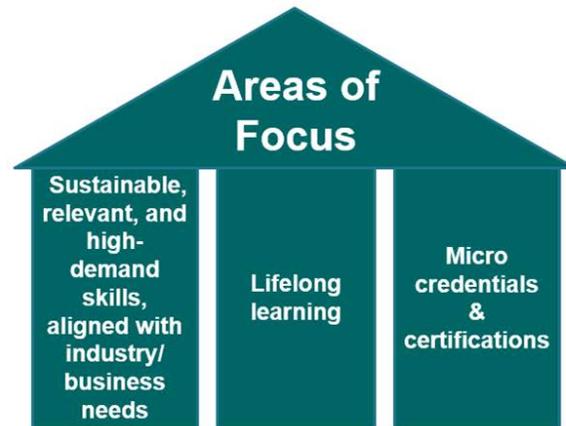
Appendix H.4: Workforce Development WG Workforce Development Report

Northeast Overview: Workforce Development, Continuing Education and Lifelong Learning

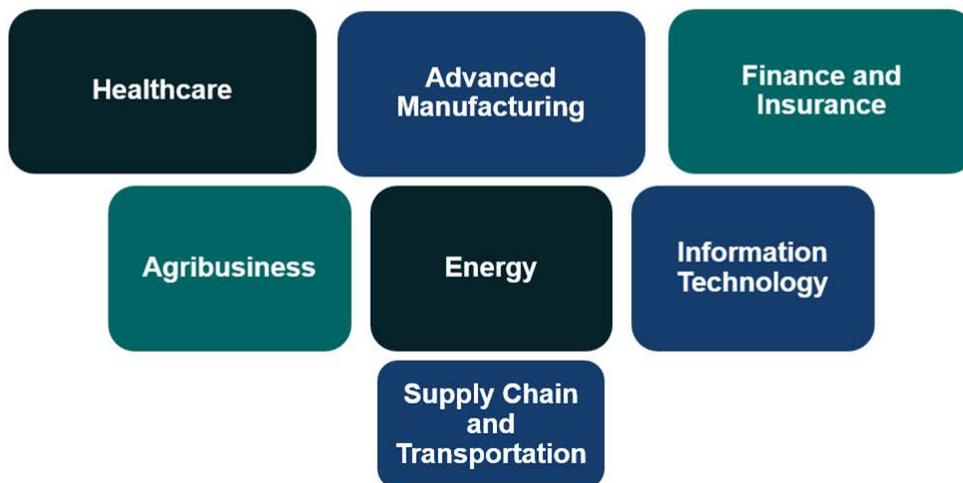
Mission: To serve the lifelong educational needs of non-traditional students pursuing upskilling and reskilling aspirations and to work with private and public entities to ensure curricular offerings meet industry needs

Focus Areas:

- Certificate and micro-credentials
- Workforce reskilling and upskilling
- Industry and business partners
- Former students who stopped out (Re-Up)



Northeast Workforce Development - Market Opportunities



Northeast Workforce Development - Draft roadmap of the academic areas and industries of focus, development from current to medium/longer term



Northeast Workforce Development - Market Demand Alignment

Market Demand ¹	Immediate Focus			Short Term Focus
	Healthcare	Business and General	Custom Solutions (Across Industries)	Advanced Manufacturing
Jobs Most Needed	<ul style="list-style-type: none"> Registered Nurses Personal Care Aides/Nursing Assistants Mental Health & Substance Abuse Social Workers Licensed Practical and Licensed Vocational Nurses 			<ul style="list-style-type: none"> First Line Supervisor Industrial Engineer Maintenance and Repair Workers Heavy and Tractor-Trailer Truck Drivers
Non-Degree Certificates	<ul style="list-style-type: none"> Cardiopulmonary Resuscitation (CPR), NCLEX Exam LPN/LVN License Medication Administration Certification Nursing Assistant Certification (CNA) 	<ul style="list-style-type: none"> Six Sigma Green Belt Certification Lean Six Sigma Certification 	<ul style="list-style-type: none"> Project Management Institute (PMI) or PMP Certification TQM, ASME, ASQ, NISE OSHA10, OSHA30 	<ul style="list-style-type: none"> Environmental Health & Safety Professional Certificate (EHS) APIC Certification Inventory Management (CPIM) OSHA certification
Other Demands and Opportunities	<ul style="list-style-type: none"> Certified Assisted Living Nursing Direct Care Aide Training Certificate Registered Behavioral Technician Credentialed Alcoholism and Substance Abuse Counselor (CSAC), (Level 2 and Advanced) 	<ul style="list-style-type: none"> Critical and analytical thinking Effective communication skills Problem solving/ decision-making Teamwork Interpersonal skills 	<ul style="list-style-type: none"> Basic computer skills Problem solving/ decision-making 	<ul style="list-style-type: none"> Scheduling/coordinating Forklift Operator Certification ServSafe Certification Maintenance and Reliability Technology Certification from the Society for Maintenance and Reliability Professionals MSSC Certification

¹ As defined by Hanover Research top industries in NE service regions and Prepared4PA competency maps – Northern and Eastern PA regions

Appendix I: Act 50 Reporting on Property for Sale

The table below reflects Act 50 reporting requirements related to property that is for sale or has been sold as of April 1, 2021.

Property for Sale	Estimated Value	Property Sold	Value of Sale Proceeds	Notes
None	N/A	N/A	N/A	

Administrative service consolidations resulted in savings, which are reflected in the financial projections in [Appendix U](#).

Appendix J.1: Enrollment Management WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast enrollment management working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
University staff and faculty training – integrated university branding, benefits, and comprehensive recruitment strategy	Faculty and staff on any of the campuses in the integrated university must have training on talking points, academic program array at undergraduate and graduate levels, certificate, associate degree, bachelor degree, and master degree programs, policies and procedures in order to help students navigate the integrated university. Training must address what each office can do to best support the eventual overall enrollment and retention goals for an integrated campus.
Integrated admissions strategy, administrative structure and processes	Develop a new admissions strategy and administrative structure in which all admissions staff work for the integrated university, but also serve in roles specific to their campuses.
Integrated recruitment strategy and administrative structure	Implement a new integrated recruitment strategy to expand the reach and impact of the recruitment process. Consider the opportunities to create/expand the role recruiters can play as it relates to increasing transfer enrollment, and graduate enrollment. Cross-train admissions counselors and coaches to include financial aid assistance for students (FAFSA filing). Ensure that recruitment teams represent the diversity of each campus and the integrated university.
Integrated CRM and SIS technology	Adopt a model of using one CRM and SIS to support all facets of recruitment, application processing, and all other core needs of enrollment management (e.g., credit evaluations, awarding scholarships, degree audits, communication strategies, etc.).
Recruitment services contract consolidation	Create efficiencies, experience cost savings, and unify enrollment management strategies by consolidating service contracts that support recruitment consulting, communication strategies, and marketing campaigns.
Uniform admissions and recruitment policies for FTF, first-time transfers (FTT) and first-time graduate (FTG) students	Require common policies for applicant data coding, application requirements, admissions review and criteria, SAT-optional, athletic admissions, awarding transfer credits, conducting and implementing credit evaluations, academic deposits, processes for readmission, and common residency requirements for graduation. Identify mechanisms through which students of difference are recruited. Assess and implement best practices. Include administration/faculty/students of different alumni and particular community members (e.g., coaches, pastors, recreational center directors) in recruiting process.
Integrated strategy and administrative structure for financial aid	Expand scope of financial aid mission beyond compliance and processes to a broader mission of supporting strategic enrollment management initiatives. Develop a new administrative structure in which all financial aid staff work for the integrated university. Integrate accountability measures related to recruitment and retention into job responsibilities.
Integrated recruitment and admissions strategy standardized application process	Develop one application process for the integrated university. The process will need to clearly communicate and organize the procedural steps for students interested in applying to one or more

Recommendation Name	Summary Recommendation Components/Description
	campus locations. The application process will need to be orchestrated by one electronic application for admission that is integrated with regional technology and manages three campus locations. Develop mutual enrollment and retention goals across programs/colleges in conjunction with academic departments that will ultimately help create and drive a robust enrollment management strategy across the integrated university.
Expanded enrollment pathways	Expand articulation agreements to attract more undergraduate students to continue to graduate programs at the integrated university. Combine existing articulation agreements with other State System schools for accelerated programs (3+3; 3+2). Create new graduate programs or certificates, especially those that are completely online.
Seamless and clear transfer pathways	Execute common policies for awarding transfer credits, and conducting and implementing credit evaluations; consider reverse transfers (as a recruiting strategy) and common residency requirements for graduation.
Proactive and integrated marketing for prospective students	Transform the marketing and recruitment approach to effectively convey what the integrated university offers. All recruitment collateral print, digital, email will need to be rewritten and reimaged. Ensure that the marketing strategy underscores DEI as a core attribute of each campus and for the integrated university.
Unified approach to dual enrollment housed within a common administrative structure	Define a unified approach to dual enrollment that includes a portfolio of student options, including: academic pathways, full-time enrollment, part-time enrollment, and concurrent enrollment, with courses available in a variety of modalities. Academic Affairs and the Registrar will need to collaborate regarding scheduling and seat availability. Dual enrollment policies and procedures will also need to be unified and standardized, including setting a common discounted price. Important: need to determine if existing memorandums of understanding (MOUs) between school districts and Bloomsburg, Mansfield, and Lock Haven are rendered null and void by integration, thus requiring new agreements to be executed between school districts and the integrated university.
Unified strategy for Financial Aid leveraging and pricing	Create a merit-based and need-based financial aid leveraging strategy. Identify opportunities to support underserved student populations. Conduct a tuition pricing sensitivity study with specific focus on out-of-state tuition and basic institutional fees. A unified pricing and awarding strategy must be in place in order for award letters to be generated to the first class for fall 2022.
Unified communication strategy	Develop messaging for the integrated university while also incorporating customized communication for each campus. Design drip campaigns (sequence of emails) for each campus. While some messaging can be general, it will be important to have unique messages for each campus.

People: The recommendations will likely impact the following stakeholders:

- All staff, faculty, coaches, and administrators (as student ambassadors) on each of the campuses
- Work study students
- Admissions Office and Registrar's Office in collaboration with Academic Affairs – partners in dual enrollment course identification and delivery
- Students, donors, foundations – tuition pricing perspectives

Process: The recommendations impact the ability of the enrollment management team to effectively increase enrollment and leverage available strategies to attract and retain students. Specifically, recommendations focus on staff collaboration across campuses and functional areas (e.g., enrollment management, academic affairs, athletics, financial aid) to execute integrated recruitment and admission strategies through coordinated operations, policies, and procedures. Consistent approaches and standards will be required related to admissions standards, workflows, and processes related to inquiry and application processing and review.

Recommendations include the integrated university setting tuition rates and student fees based on pricing sensitivity analysis recommendations and in alignment with BOG pricing policies. Integral to this pricing strategy is the opportunity to strengthen a consistent merit-based scholarship program and needs-based awards approach that leverages available student financial resources across the integrated university and in aligns with a unified recruitment and admissions strategy.

Standardization and coordination of all admissions, financial aid, and transfer policies is recommended to include specific agreement for a joint catalog of policies with any exceptions highlighted. In addition, it will be necessary to have collaboration on setting admissions (all students) and transfer eligibility requirements; standards related to degree/graduation requirements; and other admissions criteria. Coordination is also recommended relative to financial aid policies, procedures, and reporting. The assumption for all of these recommendations is that policies should be combined in a manner most beneficial to the student.

A key recommendation involves the assessment and integration of articulation agreements between the integrated university and other State System schools, community colleges and other partner institutions or educational entities. This includes the need to renegotiate and process MOUs in collaboration with school districts and in consultation with State System legal. Determine school districts and Bloomsburg, Lock Haven, and Mansfield. Also, evaluate existing agreement in conjunction with relevant compliance requirements and/or oversight bodies (e.g., accreditation, Transfer and Articulation Oversight Committee procure-to-pay Articulation).

Recommend jointly evaluating existing contracts with external vendors with a goal of identifying one external partner to support the integrated strategy (e.g., recruitment, admissions, leveraging aid and pricing) across all services, including consulting, student search, and yield optimization. This would require eliminating some current contracts to support one integrated plan.

A formal program to train on all new or revised policies and procedures will be critical to the success of the integrated university. Recommend developing a master calendar that includes ongoing trainings, professional development, and assessment of additional development needs based on key performance indicators.

Technology: The key recommendations include the need for integrated student information and customer relationship management systems and a common web portal and platforms for student (prospective and admitted) inquiry, application, and financial aid/scholarship management. Recommendations include transition to a regional SIS and CRM, with assumptions that a common application will be adopted. CRM and SIS functionality will support application processing and review, new data coding for a unified strategy, holistic reporting, third-party fulfillment services, and document imaging. Additionally, auxiliary platforms (Chat, survey tools, etc.) will be pursued. Ideally, the system functionality will allow for course catalog access and the ability to review transfer credits and access to policies for each campus. Additionally, the integrated systems should ultimately manage delivery of the critical communication plans. Assessment of all recruitment, admissions, and financial aid, and communication/marketing strategies will need to transition from individual campuses to a one university model. Interface capability or similar functionality to existing technologies is assumed.

Finance: The recommendations are expected to result in ongoing operational savings related to SIS and CRM investments and maintenance. However, it is assumed that all current staff will be part of the newly integrated team given that workload will not decrease because of aspirational enrollment growth goals and the need to explore new recruitment targets and opportunities to enhance services and approaches. The adoption of a "one university" recruitment team model might offer savings over time through potential recruitment budget modifications. Ambitious enrollment goals for the integrated university mandate a re-

imaging of how staff are deployed to take advantage of new opportunities (out-of-state recruitment, regional recruiters, etc.). It is possible that administrative cost savings may exist through integration of currently separate programs, dependent upon growth expectations (e.g., dual enrollment, partnerships).

The consolidation of existing contracts with vendors (now multiple vendors across three campuses) is anticipated to result in cost savings long-term. One-time funding will be needed for pricing sensitivity study(ies) to determine optimal tuition and student fee levels across campuses and for the integrated university. Consideration should also be given to piggy-back on other contracts that exist throughout the State System on these service contracts being renegotiated.

One-time investment is anticipated to address technology application purchase, implementation, and migration needs (e.g., implementation and conversation services, application upgrades, or purchases) to integrated systems for SIS and CRM.

During the transition year, it is planned that new admissions' material (print, email, digital) and generalized branding costs (billboards, advertisements, recruitment programming) will be required to proactively market the integrated university to prospects and educate current students on the opportunities and impacts of the integrated university. Costs may include survey and collateral development, consulting services, and market research.

Revenue growth opportunities exist for external funding through the Educational Improvement Tax Credit (EITC) program. Two institutions are already receiving EITC funding to support their dual enrollment programs. Dual enrollment students typically fill seats that would otherwise go unfilled; therefore, dual enrollment growth may be considered revenue-generating as well.

Physical Assets: The recommendations highlight the need for application processing and financial aid areas on each campus to have the necessary support to accommodate a more complex application processing and review paradigm. Additionally, the admissions offices on each campus will need to be transformed into service centers for the integrated university. Technology capabilities relative to imaging systems and more advanced workflow functionality in core administrative systems will be key.

Compliance and Legal: The recommendations primarily impact the need for updated contract agreements with vendors, service providers, articulation partners, and community partners in collaboration with State System legal. There will be a need to update all policies to accommodate State System requirements, changes relative to the integrated strategy or operational approach, and campus specifics.

Assessment and development of policies and procedures to ensure compliance relative to state and federal reporting such as ED and Title IV student data and reporting compliance, SAP, etc., will be necessary.

Any new tuition pricing will require BOG approval.

Community: The recommendations will likely impact most directly new students and their parents, but also to some extent our recruitment partners, including alumni recruiters, partner high school districts, and community college or other university transfer or admit partners (e.g., international agreements). Also, our Foundation partners could be impacted and definitely should be consultative partners in determining effective approaches to meet unmet student needs and aligning region and community workforce needs with available programs. Regional Workforce Investment Boards (WIBs) can be key partners to expand opportunities for adult and nontraditional individuals who are unemployed and underemployed looking for specific training opportunities (e.g., Career Link staff certificate and associate degree programs). Local business partners could also be impacted related to indirect impact on off-campus work study opportunities.

Benefits: Recommendations are intended to ensure an integrated and effective enrollment management strategy and execution that are anticipated to result in the following benefits:

- **Broader footprint and ability to target new markets and student populations** given broader appeal of larger institution and freed-up resources to do so.
- **Enhanced recruitment and enrollment growth potential and improved competitive position** as an integrated university with three campus locations.

- **Easier navigation for students and parents** given integrated enrollment management approach and consistent application and admission processes.
- **Seamless transition to graduation and earning a degree for first-time and transfer students** as the result of consistent admissions requirements and application evaluation processes.
- **Improved processing efficiency** as the result of one application process to allow for processing efficiency.
- **Effective and consistent communication to students, parents, and other stakeholders** through an integrated model that optimally aligns resources and technology.
- **Greater student accessibility** to additional academic programs and degrees and ability of the student to access a broader array of higher education opportunities.
- **Potential for increased student retention** due to the uniform approach to financial aid leveraging and financial literacy training. Consistency in financial aid processes across three campuses will reduce confusion for students navigating the integrated university's bureaucracy and promote achievement of enrollment goals.
- **Student-focused career and degree pathways** prompting more interest from students to get multiple degrees within the State System.
- **Positive staff morale and cohesive culture** based on greater adoption of enrollment best practices, availability of supportive analytics and processing management tools, and clear policies and requirements for staff.
- **Realized cost savings** due to vendor contract consolidation relative to financial aid leveraging, tuition and pricing evaluation, name buys, and favorable pricing from fulfillment and other services.
- **Improved success for students with higher levels of unmet need** given ability to strategically award financial aid and scholarship funds and strategically leverage merit- and need-based aid to underserved and first-generation student retention initiatives.
- **Sustained year-over-year enrollment growth and improved retention** due to unified pricing and effective financial aid leveraging.

Risk: Integrating the enrollment management and related financial aid functions involves risks such as the level of effort to adapt the existing culture in each admissions office to accommodate a different processing paradigm, which will be challenging and will take unwavering dedication and commitment. Potential confusion by the public about the core facets of the integrated university highlights the need for an intentional and strategic communication flow to both internal and external parties. Quick turnaround of key messaging and consistent participation in training to bring everyone up to speed will be mission critical.

Lack of coordination across campuses and institutional functions (e.g., financial aid, academic affairs) for key policies and processes is also a significant area of risk. For example, if credit evaluation procedures and policies are inconsistent, one campus could allow or deny credit (if operating independently) and cause confusion for students. This inconsistency could negatively impact a student's pathway to earn a degree and graduate. Similarly, determining an appropriate amount of institutionally-supported aid (tuition discount) will be more complex in an integrated university model. Thus, an effective roll-out addressing the complex changes needed across the enrollment management function will be essential.

The scope of work required to accommodate technology changes within the timeline may be too ambitious for IT resources. The considerable change involved with implementing integrated student information and CRM systems involves risks relative to process and workflow changes and personnel adaption to a new paradigm. If these systems or the related operations modifications are not rolled out effectively, there is risk of a likely impact on enrollment. Another risk is that the challenges of implementation not only involve IT, but all new contracts, especially during contract transition periods. Contracts with key service providers must be established cost effectively and within a new paradigm that supports the integrated university strategy. Procurement and Enrollment Management must work together.

The overall timeline for this integration, including the parameters imposed by regulatory agencies, may challenge our ability to effectively market and recruit the integrated university in conjunction with critical recruitment cycles.

Appendix J.2.: Financial Aid WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast financial aid working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Obtain single OPEID	Determine which OPEID will be used and outline timeline for application/submission to ED to coordinate with MSCHE Submission and implementation of regional SIS.
Campus-based aid	Determine how federal campus-based aid will be allocated to the integrated university and each institution.
Common calendar	Develop common academic and award year (processing/disbursements, etc.) calendar for all three campuses. Determine whether integrated university will award summer financial aid as a header (beginning of aid year) or trailer (end of aid year) institution.
Develop common policies and procedures	Develop a common policies and procedures manual for awarding policies and timelines.
Consider staffing models	Identify appropriate staffing model of financial aid function to ensure compliance with administrative capabilities.
Determine cost of attendance (COA)	Determine how COA will be calculated, whether a single COA across all three campuses or a different COA for each institution.
Disbursement of aid	Determine timing of disbursements and student refund processes.
Book voucher/advance of student refund	Determine process for ensuring students have access to funds for purchasing textbooks no later than the seventh day of the semester.
Document tracker/scholarship manager	Determine which integrated software platforms will be used for financial aid processing.

People: The recommendations will likely impact the following stakeholders:

- Financial aid staff
- Students
- Finance and administration
- Faculty and staff
- Enrollment management
- Technology
- Academics

Process: The recommendations impact:

- New E-App submitted to ED
- The institutions operating with different OPEIDs until close out of previous award year
- As policies and procedures are integrated some business processes will be modified, such as summer financial aid packaging, satisfactory academic progress, official and unofficial withdrawals, and return of Title IV funds, scholarship management, etc.

Technology:

- Migration of three SISs into regional SIS, maintaining three instances until the accreditation and single OPEID go into effect on July 1, 2022.
- Expansion of single university contracts to include all three as an integrated institution, such as scholarship management and document tracking systems.

- Appropriate telecommunications services to support cross-campus work processes occurring in three separate locations.

Finance: The recommendations will potentially require funding to implement with a proposed cost savings in the future. Subsequent to integration, cost savings opportunities are expected.

Physical Assets: None

Compliance and Legal: These recommendations are made to ensure compliance with Title IV and state regulations.

Community: None

Benefits: A synthesized, efficient financial aid function will provide additional opportunities for seamless experience for users (students, faculty, and staff) across all three campuses.

Risk: Risks exist that the timeline for implementation of a regional SIS is extremely condensed and will require extensive resources (people, time, dollars) in order to meet July/August 2021 go-live date. Further, operating under combined OPEIDs creates the possibility for processing error; processes will need to be established to mitigate risks. Any changes in processes will require clear, detailed communication to students in order to avoid negative impacts to student success.

Appendix J.3.i: Regional Human Resources and Labor Relations WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast human resources and labor relations working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Establish organizational structure for integrated university	Implement integrated university executive leadership structure. Collaborate with Academic Affairs to define new college and department structures. Consult with executive leadership team to determine and implement non-academic organizational structure. Establish new organization in SAP. Develop executive-level organizational chart outlining new structure and areas of oversight for each division.
Determine integrated HR structure	Create integrated HR/LR structure consisting of campus-based staff supporting integrated university leadership and shared services initiative. Expand the State System shared services initiative, as appropriate.
Determine appropriate academic, athletic, and administrative personnel complement for integrated university	Collaborate with academic affairs leadership to align faculty workforce to the academic program array. Determine athletic and administrative workforce needs in the integrated university and align personnel complement with areas of expertise. Develop dean/director-level organizational charts and complement of FTE for each division.
Reorganize and transfer employees from the three institutions into one structure in the integrated university	Establish an internal hiring/transfer process that considers the complement for each division by employee category. Consult with the stakeholders to identify divisional/department workforce needs and examine qualifications of existing non-represented personnel. Identify represented workforce needs and review CBA for reorganization guidelines. Document and address skills gap through professional development opportunities.
Engage campus community in change management strategy	Engage with organizational change management consultant to implement new organizational structure within the integrated university. Enhance employee satisfaction and identify and mitigate risks.
DEI	Establish comprehensive diversity, equity, and inclusion model for the integrated university focusing on personnel recruitment, selection, and onboarding processes. DEI will be considered in reorganization of exiting personnel into the integrated university.
Employee communication plan	Work with communications to develop comprehensive communication plan focused on improving employees' understanding of change.
Student employment/graduate assistant hiring process	Determine process to be used to identify, post and fill student employment positions across campuses. Evaluate current graduate assistant process at each integrating university, determine HR's role, if any, and plan for integrated organization.

People: The recommendations will likely impact the following stakeholders:

- Senior leadership
- Faculty
- Staff
- Student workers

- Discussions with local and state bargaining unit representatives
- State System LR

Process: The recommendations impact:

- APSCUF, American Federation of State, County, and Municipal Employees (AFSCME), State System Officers Association (POA), International Union, Security, Police and Fire Professionals of America (SPFPA), State College and University Professional Association (SCUPA) CBA/MOU
- Individual university-wide policies and procedures
- Position description

Technology: The recommendations primarily impact:

- SAP
- Shared technology
- Service Now or shared platform
- Electronic OPF to allow remote access
- Common applicant tracking software

Finance: The recommendations are intended to result in

- Cost of any IT solutions
- Anticipated personnel cost savings due to shared services/attrition

Physical Assets: The recommendations may result in repurposing campus facilities and the reduction of an individual campus footprint.

Compliance and Legal: The recommendations primarily impact CBA and employment laws.

Community: The recommendations could impact campus communities.

Benefits: This is intended to provide additional opportunities for:

- Strategic realignment of personnel to meet the mission and goals of the integrated university
- Implementation of comprehensive DEI initiatives with a goal to diversify personnel complement to more closely align with student applicant pool
- Streamlined human resource/labor relations services resulting in mid-term decreased labor cost through attrition
- Expanded and improved customer experience
- Consistent student employment practices focused on student need and retention

Risk: Risks exist that

- CBA/grievances/arbitrations/legal actions
- Need for change management to identify and mitigate risks such as lack of employee commitment; employee resistance; lack of support for the integrated university
- Skills gap for new roles
- Loss of talent as a result of uncertainty during transition to new structure

Appendix J.4: Donors/Alumni Relations/Foundations WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast donors/alumni relations/foundations working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Employer engagement	Coordinate employer engagement strategy across all three locations to leverage opportunities for students and graduates while utilizing employers as advisors in career readiness, curriculum, and the development of new non-degree and continuing education opportunities.
Student engagement in career and professional development	Coordinate opportunities across locations for career education and professional development programs and career coaching to support student recruitment, retention, and degree completion across all three campuses.

People: The recommendations will likely impact the following stakeholders:

- Academic leadership (deans and department chairs)
- Admissions
- Alumni and career development
- Alumni
- Current students
- Community and business leaders
- Employers
- Faculty
- Foundation and donors
- Institutional Effectiveness staff
- Marketing and communications
- Program accreditors
- Prospective students
- Workforce development

Process: The recommendations will strategically enhance the portfolio of employer engagement to include affiliation agreements, internships, and on-campus recruitment. These activities will impact applicable policies and processes as it relates to academic program development, student success and degree completion, and event scheduling/calendar. To measure these outcomes, data will be collected (e.g., student engagement data, accreditation surveys, assessment surveys, first destination data) to track and report applicable information (e.g., learning outcomes) so it may improve existing and new processes and resources (e.g., printed and electronic career education resources).

Technology: The recommendations will likely impact the following technologies:

- Employer database
- Web pages
- CRM engagement tools
- Social media
- Event management tools
- Learning outcomes and assessment tools and platforms
- Student engagement database and CRM
- Virtual engagement platforms

Finance: None

Physical Assets: None

Compliance and Legal: None

Community: The recommendations will primarily impact alumni, employers, and community and business leaders.

Benefits: The recommendations are intended to provide additional opportunities for expanded regional reach and increased opportunity for employers/partners. These opportunities will impact the integrated university's brand awareness, employment opportunities for new graduates, potential for industry/university innovations, new markets for prospective students, and increases in enrollment. Additionally, they provide efficiencies in shared engagement strategies and shared expertise between integrated Universities. These efficiencies increase the integrated university's ability to provide all students with a full array of career education and professional development opportunities. Further, additional opportunities exist to balance virtual interactions and affluent personal/in-person connections on campus, which can enhance applied learning experiences and high-impact practices. These recommendations improve the relationship and interactions between the campuses' surrounding areas and the students.

Risk: The recommendations could potentially create risks involving students, stakeholders, employees, and the campus community. To mitigate this, the integrated university would need to emphasize the importance of career and professional development, and reassure students of positive employment outcomes for graduates. The student success strategy would mitigate the potential imbalance between virtual and in-person interactions by prioritizing campus community engagement. Additionally, the integrated university would need to monitor enrollment of new academic programs and non-degree/continuing education programs so that it is not affected by a low level of student interest. In order to prioritize career and professional development, the industry also needs to be responsive by creating an ability to scale employer engagement to effectively manage campus relationships. The recommendations could also impact stakeholders by a lack of coordinated communication, which impacts the scale and scope of meeting student need and expectation.

Appendix J.5.i: Technology WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the technology working group with the accompanying anticipated impacts:

As part of the phased curriculum approach, associated system implementation dates will be adjusted accordingly.

Recommendation Name	Summary Recommendation Components/Description
Customer Relationship Management	Migrate to a regional CRM for integrated university.
Regional SIS	Migrate to a regional SIS for the integrated university for Fall 2022 operations.
Regional SIS core integrations	Convert core integrated systems (payments and financial aid) with SIS for the integrated university for Fall 2022.
Regional SIS common integrations	Identify required common integrations, select, implement integration with the integrated university SIS Fall 2022.
Regional SIS other integrations and interfaces	Assess, determine "combined vs. local," and adapt or implement other SIS integrations required for the integrated university for Fall 2022.
IT infrastructure for the integrated university	Design, configure, and implement/convert the integrated university's IT identity infrastructure.
IT server and network infrastructure	Design, configure, implement/convert the integrated university's IT network and server Infrastructure.
IT application and service infrastructure	Design, configure, implement/convert the integrated university's IT application and service infrastructure.
Instructional tech - LMS and instructional software	Implement, document, and provide training and support for the integrated university's LMS and instructional software services.
Instructional tech - general and specialized spaces/video	Implement, document, and provide training and support for the integrated university's instructional classroom/lab space and related video services.
IT support - general help desk	Implement unified support for the integrated university's general IT services.
IT support - academic and admin applications	Implement unified IT support for the integrated university's academic and administrative applications.
IT support - academic and admin facilities	Implement unified IT support for the integrated university's academic and administrative facilities.
Common collaboration platform	Move to a common unified communications platform for telephony, contact center, and messaging services.

People: The recommendations will likely impact the following stakeholders:

- Staff
- Students

Process: The recommendations impact:

- Contracts
- Policies

Technology: The recommendations primarily impact:

- SIS

- Financial aid system
- CRM
- MSCHE, Educause, and Department of Education classifications
- Active directory

Finance: The recommendations are intended to result in:

- May need additional funding because of increased FTE
- Funding possibly required for staff backfill
- Funding needed for consulting help
- Funding needed for additional training
- Additional consulting help will be needed in order to have these built before March 2022

Physical Assets: None

Compliance and Legal: None

Community: None

Benefits: This is intended to provide opportunities for:

- Equitable access at all sites
- Common systems for ease of use by students and staff
- Cost reductions through shared contracts and economies of scale
- Enhanced level of customer service beyond what any one existing institution currently offers

Risk: Risks exist that relate to:

- Staff resources
- Condensed implementation timeline
- Budget needs

Appendix J.5.ii: State System Technology WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the State System technology working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
IT governance process	Establish an IT prioritization process/structure to be used in both the West and Northeast regions.
IT policy alignment	Identify and assess existing university IT policies; prioritize focus areas and align high-priority policies.
Shared services utilization	Review how each of the integrating universities leverages existing shared services to ensure optimal utilization.

People: The recommendations will likely impact:

- Roles of personnel within the new IT prioritization structure
- Personnel as they may require re-training

Process: The recommendations, may impact new processes, which will need to be defined, and new IT policies, which will need to be aligned. Additionally, the recommendations could require new processes.

Technology: To be successful, the recommendations may require a single IT solution to house all IT projects/requests and may require newly aligned policies to necessitate convergence of certain technology solutions. Both of these may require a transition to new solutions.

Finance: The recommendations will potentially impact the financial analysis being performed and/or the integrated university's fiscal position.

Physical Assets: None

Compliance and Legal: None

Community: None

Benefits: If implemented, the recommendations result in greater savings by utilizing existing shared services in the most optimal way.

Risk: The recommendations will be successful as long as policies are aligned prior to the integrated university's launch and IT is prioritized on necessary projects.

Appendix J.6: Communications and Marketing WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast communications and marketing working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Integrated university naming research	Work with public relations firm on naming research strategy and data-backed recommendations.
Common messaging	Develop common messaging and language for recruitment, presentations, campus communications, etc.
CRM	Support implementation of enterprise-wide CRM.
Common (digital) agency	Develop a single service contract to support enrollment marketing initiatives to grow and evolve.
Common workflow	Determine an optimal workflow for communications and marketing functions by leveraging technology and best practices. Identify and/or support working with a common mailing vendor for admissions materials.
Common technologies	Select vendor(s) for the following areas after completing an assessment and confirming the pros/cons: media monitoring, project management, digital asset management, distribution, content management system (future state post 2022), enrollment supported functions, virtual tours, etc.

People: The recommendations will likely primarily impact staff, but may also impact faculty and Councils of Trustees. The impacts on these stakeholders are related to training needs on new systems and technologies, vendor onboarding, messaging and communications, client services, goal setting, job description and reporting line changes, and workflows and processes in the recommendations.

Process: The recommendations impact procurement and contracting for the integrating campuses, including vendor contract changes and alignment of scopes of work with communications workflows and procedures. Workflow changes will require that the integration team develop, update, and communicate policies and procedures to areas beyond the communications and marketing functions. The recommendations will also impact websites and publications, documentation standards, and brand standards and guides.

Technology: The recommendations will impact the following technologies:

- SIS
- CRM and Advancement systems
- Media monitoring/services
- Email Distribution
- Existing Content Management System and forms
- Creative resources and video tour/map
- Analytics
- Workflow management/office solutions

Finance: The recommendations may require funding for new vendors and technologies, but have the potential to generate cost savings through streamlining contracts and systems, and developing efficient processes that can be applied to all three campuses.

Physical Assets: The recommendations may impact server capacity and computer hardware or software.

Compliance and Legal: The recommendations impact GDPR and accessibility regarding the Americans with Disabilities Act as it relates to the web and CRM. Additionally, the new name for the integrated university will need to be registered and will require a new trademark.

Community: Naming recommendations for the integrated university that may impact faculty, staff, students (current and prospective), alumni, and community and government contacts.

Benefits: The recommendations are intended to provide benefits related to fiscal sustainability, affordability, process efficiencies, enrollment growth, cost savings, and additional diversity, equity, and inclusion efforts.

Risk: Risks exist related to funding requirements to implement the recommendations and increase advertising and awareness activities. The recommendations also present public relations risks about the new accredited entity name, such as, market confusion and negative stakeholder reactions. Requirements exist for increased advertising and other awareness activities related to stakeholder impacts (alumni, donors, and employees). Lastly, timing risks exist that could impact the implementation of recommendations in regards to trainings, procurement, new vendor/contract onboarding, and feedback from internal focus groups.

Appendix J.7: Facilities and Infrastructure WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast facilities and infrastructure working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Generate building inventory	Generate the data on an Excel spreadsheet or determine if there is a predetermined software package that will be used to inventory all campuses.
Develop facilities inventory	Develop facilities inventory for the following areas: <ul style="list-style-type: none"> • Athletics • Residence Life • Academics • Facilities reservation systems and scheduling
Review facilities staffing structure	Facilities Staffing groups from the Northeast and West should look at staffing from the same perspective. There may be benefits to both teams working together.
Ensure consistent facilities staff classification	Each campus should utilize the same position descriptions and methodologies and what classifications of positions are used.
Develop common policies and procedures	Develop common policies and procedures manual for services provided by Facilities Management to the campus community.
Implement system for work order requests and work orders	Choose a single Computerized Maintenance Management System for work requests to be submitted and processed for all three locations with one administrator and supportive clerical staff with student support.
Implement a single software for scheduling and room reservations	Choose a single software for scheduling, event requests, and room reservations to be submitted and processed for all three locations with one administrator and supportive clerical staff with student staff support team for set-ups.
Optimize Contracted services	Identify and consolidate existing service, maintenance and other outsourced contracts that can be optimized if used for all three locations.
Determine ENS	Determine which ENS will be utilized.
Align policies	Align police and safety policies.

People: In general, faculty, staff, and students will be impacted by the recommendations.

Process: The recommendations impact Bloomsburg's Policy, Rule, and Procedure (PRP) 2450 (Use of University Property Facilities) and PRP 5651 (Maintenance Work Orders).

Technology: The recommendations primarily impact support for single sign-on and the clearance registry for minors.

Finance: The recommendations are intended to result in cost savings.

Physical Assets: None

Compliance and Legal: None

Community: None

Benefits: The recommendations are intended to provide additional opportunities for unified processes and procedures. This will help obtain consistent services throughout each campus, in addition to financial savings through efficiencies.

Risk: None

Appendix J.8: Finance and Administration WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast finance and administration working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Continue to assess pre-integration progress toward 7/1/22 sustainability goals (as outlined in the September 2020 university submitted CPP22 documents)	Refine updates to FY 2020-21 and 2021-22 individual university budgets. Accelerate sustainability synergies across the triad, where appropriate, as part of this process. Monitor remediation/action plans, as part of ongoing CPP updates, for universities who are not on target to meet their pre-integration sustainability goals.
Refine realistic integrated university financial projections	Develop realistic integrated enrollment, workforce, and E&G/auxiliary/unrestricted plant financial projections (revenue, expense, unrestricted net assets, cash, etc.).
Implement a regional SIS and develop associated common procedures for the integrated university	Implement a regional SIS for the integrated university to maintain a smooth student lifecycle during transition (admissions, registration, student billing, and financial aid awarding/disbursement). Review student billing processes at each institution and adopt best practices within the constraints of implementation. Convert all student billing for the integrated university to a common system and develop associated common procedures.
Adopt the undergraduate/graduate in-state tuition rate approved by the board of governors through AY 2023-24 for all students enrolled at the integrated university	Adopt the in-state tuition rate approved by the Board through AY 2023-24.
Charge undergraduate and graduate non-resident tuition consistently, where feasible, for all students enrolled at the integrated university	Where feasible, charge non-resident students a common net tuition rate, based on student level (undergraduate/graduate). Assess whether it is best to accomplish this through a direct change to the published tuition rate or through strategic leveraging of institutional scholarships/waivers. Assessment will be done through the conduction of a third-party pricing (out-of-state tuition and basic fees)/financial aid leveraging strategy.
Charge consistent basic fees to all students enrolled at the integrated university	Charge three integrated university basic fees (instructional, student success, and registration/transcript) to all undergraduate students as commonalities currently exist in the services funded by this fee revenue. Charge the same fees, with the exception of the student success fee, to graduate/doctoral students. Assess appropriate pricing level for basic student fees through the conduct of a third-party pricing (non-resident tuition and basic fees)/financial aid leveraging study to be conducted between 8/1/21 and 11/30/21. It is assumed that a technology tuition fee will be charged to all students.
Develop an accounting and budget structure to support the financial reporting and resource allocation needs of the integrated university	Develop an accounting and budget structure to support the financial reporting and resource allocation needs of the integrated university. This includes: <ul style="list-style-type: none"> • Legal entity structure assessment • SAP tracking/reporting structure assessment (location driven, consolidated, or some combination thereof) • Development and implementation of common accounting processes and procedures that are not already dictated by the State System

Recommendation Name	Summary Recommendation Components/Description
	<ul style="list-style-type: none"> Development and implementation of a singular budget process and common budget processes/procedures to facilitate resource allocation for ongoing and strategic priorities, culminating in the distribution of a FY 2022-23 budget preparation manual for the integrated university
Automate workflow and processes across all financial functions	Use technology when available and cost-beneficial to maximize workflow and processing efficiencies.
Coordinate and implement cutover of financial systems	Coordinate and implement cutover of financial systems (SAP Financials-GL/FM, SAP Payroll/HR, SAP Procurement) based on the accounting and budget structure adopted to support the financial reporting and resource allocation needs of the integrated university.
Create a service center structure to optimize staff and provide exemplary, seamless service to the integrated university faculty, staff, students/supporters	Create budget, accounting services, and student billing service centers to optimize staff and provide exemplary, seamless service to the integrated university faculty, staff, and students/supporters.
Provide exemplary, seamless customer service to students/supporters	Cross-train student financials staff (student billing, registrar, and financial aid) to provide seamless customer service in terms of responses to common questions. Ensure that training includes DEI focus so that all students/supporters are communicated with in the most effective manner.
Implement a common connection point for all student-related financial offices to communicate with students	Implement a common student financials connection point/portal (new or via use of current functionality offered by an existing system) to better communicate with and coordinate information flow for students/parents/supporters. Ensure the connection point/portal is developed with DEI lens.
Optimize E&G and auxiliary physical assets	Reconcile E&G and auxiliary physical asset inventory with integrated university program array and enrollment projections to determine which need to stay, go, or be modified to meet the needs of the integrated university. Facilities should be heavily involved with this work, as well as an external consultant.
Coordinate and align contracts of the integrated university	Perform legal review of university-specific contracts that extend beyond 2022 to determine necessary vendor notifications and notify vendors, if applicable. Implement early adoption of consolidated contracts, if financially beneficial.
Develop a single, standardized RTK intake and response structure	Develop a single, standardized RTK intake and response structure and ensure that policies and processes align across the integrated university locations.

People: The recommendations will likely impact the following stakeholders:

- Students
- Faculty/staff
- Councils of Trustees and campus governance groups
- Board of Governors
- Legislature

Process: Policies, procedures, and contracts that support the current state, but that would need to be changed to support the integrated university, include those associated with:

- Accounting, budget allocation, student billing, and RTK
- Customer support
- Vendor contracts

- Collective bargaining (potential changes to position descriptions)

Technology: The recommendations primarily impact the following technology areas:

- State System Advanced Analytics team (i.e., analytics reporting)
- State System IT Shared Service (Right to Know email portal, including a shared drive for all related records)
- Ancillary systems associated with student success

Finance: The recommendations are intended to result in long-term cost savings associated with:

- Structural changes (including the elimination of redundancies)
- Operating cost reductions
- Costs associated with maintaining a capital asset inventory adequate to support the program array and enrollment projections of the integrated university
- Consolidation of contracts
- Achievement of pre-integration sustainability goals

However, there are start-up costs associated with the recommendations, including:

- The implementation of a regional SIS, common CRM, and supporting ancillary systems
- The engagement of an external consultant to assist with the reconciliation of physical assets with the integrated university program array/enrollment projections
- The purchase or expansion of an existing platform to facilitate a common connection point for all student financials office communication
- Staff training

Physical Assets: The recommendations may result in the reduction of E&G and/or Auxiliary facilities.

Compliance and Legal: Depending on the outcomes of the legal entity assessment and physical asset reconciliation, there may be legal impacts.

Community: None

Benefits: The recommendations provide the following benefits:

- Realistic integrated university financial projections necessary for decision making
- Optimization of physical assets based on integrated university program array and enrollment projections
- Efficient, streamlined, cost-effective, and exemplary delivery of services to faculty, staff, students/supporters
- Consistent student billing methodology for tuition and basic fees, along with a robust financial aid leveraging strategy to support student recruitment and retention
- An accounting and budgeting structure to support the financial reporting and resource allocation needs of the integrated entity

Risk: The potential for risk exists, primarily in relation to:

- Optimization of staff (classification and collective bargaining issues)
- Employee retention (significant change)
- Optimization of physical assets (local resistance)
- Timely implementation of the necessary technology, most notably regional SIS and associated ancillary systems necessary to maintain a smooth student lifecycle transition

Appendix J.9: Combined Human Resources and Labor Relations WG Priority 1 Recommendation with Impacts

The following Priority 1 recommendation was drafted by the Northeast and West human resources and labor relations combined working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
HR as a strategic partner	Collaborate with integrated university leadership to implement the organizational structure. Provide ongoing strategic advisement focused on successful implementation and long-term support of the mission and goals of the integrated university.

People: The recommendations will likely impact the following stakeholders:

- Faculty/staff
- Governance
- Trustees

Process: HR shared services with the State System in the areas of leave administration, workers compensation, payroll, and benefits

Technology: Employee on-line service delivery system

Finance: None

Physical Assets: None

Compliance and Legal: The recommendations primarily impact:

- CBAs
- Employment laws

Community: None

Benefits: This is intended to provide additional opportunities for:

- An additional focus on recruitment and retention of employees and other strategic initiatives
- Potential cost savings
- Improving employee morale

Risk: None

Appendix K: Act 50 Reporting on Academic Programs

The table below reflects Act 50 reporting requirements related to academic programs as of April 1, 2021. It reflects the number of academic programs by location at the time of plan approval and at the time of the report:

Number of Degree Programs by Location as of April 1, 2021			
University	Undergraduate	Graduate	Total
Bloomsburg	57	21	78
Lock Haven	59	7	66
Mansfield	38	2	40

Note: The above does not include concentrations, minors, and certificates.

Appendix L: Combined Accreditation WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast and West combined accreditation working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
MSCHE accreditation through successful submission of Complex Substantive Change Preliminary review form	Prepare and submit a compelling description and rationale to MSCHE for consolidating three existing institutions under the accreditation and degree-granting authority of one of them, which initiates a process of guidance and consultation with MSCHE.
MSCHE approval of integration through successful Complex Substantive Change request	Prepare and submit a comprehensive Complex Substantive Change Request to MSCHE outlining the intended impacts and benefits of the integrated institutions.

People: The recommendations related to the MSCHE-required process will likely impact leadership, faculty, and staff. The recommendations relative to the assessment plans and assurances within the documents will positively impact students and faculty.

Process: The recommendations impact submissions to MSCHE, existing system program review and academic program assessment peer review programs, and strategic planning and associated metrics.

Technology: The recommendations impact platform websites for the institution assessment plans, associated reporting tools, the university's survey capacity, and SIS.

Finance: None

Physical Assets: None

Compliance and Legal: None

Community: MSCHE approval of the Complex Substantive Change is required before the integration teams can start recruiting at integrated university.

Benefits: The feedback from MSCHE on the Preliminary and Complex Substantive Change submissions will help the integration teams with their completion of additional requirements. The development of the institutional assessment plan will establish assessment for integrated entities, ensuring explanation for accreditation and continuous improvement.

Risk: Risks exist that MSCHE may impose additional reporting requirements.

Appendix M.1: Student Success and Retention WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast Student Success, Services, and Campus Life working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Establish early alert outreach campaigns	Expand the Early Alert System.
Establish dedicated support for tutoring at all three campuses	Establish dedicated support for tutoring across campuses.
Align student support services with leading national practices and/or accreditation standards	Align student support services with national organizations, such as National Academic Advising Association (NACADA) and College Reading and Learning Association (CRLA), to ensure excellence and best practices
Establish centralized, holistic advising	Create a Student Success Center on each campus with teams from Exploratory (undeclared) Advising, Tutoring/Learning Support, FYE, Disability Services, and Counseling, and TRIO SSS, and ACT 101/Gateway Program. Focus on advising; on access to career-building opportunities, transfer students, high-school dual enrolled students, and change major students.
Determine FYE structure and align programming across campuses	In collaboration with Academic Affairs, determine level of coordination related to guest speakers, common themes, common read, and common training. Align first-year courses and learning communities.
Determine orientation structure and messaging	Determine orientation structure across campuses, including administrative structure, mission/values, and outcomes, level of coordination, fees, and common messaging. Assess current division structures among institutions and determine level of coordination. Create a common message/module for orientation events and initiatives for all campuses, and align orientation fees.
Combine orientation online platform contract/design	Combine contracts to include all campuses. Have a name for Branding and Marketing.
Establish single conduct report management system (RMS)	Determine single RMS across all campuses.
Develop unified Title IX, sexual misconduct process and structure	Develop a unified Title IX sexual misconduct process and structure.
Develop unified Code of Conduct and associated processes	Develop a unified Code of Conduct and conduct process. Develop a consistent, unified judicial/hearing board policy and procedure.
Standardize Title IX/sexual misconduct training requirements and conduct process	Establish standardized Title IX/sexual misconduct training requirements for student and employee populations. Establish standardized training requirements for Title IX and conduct process.
Develop unified Clery reporting process	Ensure single reporting methodology regarding Clery/Campus Security Reports.
Develop unified Alcohol and Other Drugs (AOD) education and awareness strategy and sanctioning	Develop a unified approach to AOD education and awareness. Establish consistent, uniform sanctioning practices.
Ensure that American with Disabilities Act (ADA) and other access/accommodations are in place across all campuses	Ensure all campuses are ADA accessible, including retrofitting each campus for compliance and ease of access.

Recommendation Name	Summary Recommendation Components/Description
Ensure compliance with AOD-related federal and state requirements	Develop a committee, including relevant stakeholders from all campuses to ensure compliance with the Drug Free Schools and Communities Act (DFSCA), EDGAR 86, and any other related federal regulations.
Ensure access to care/psychological services across all campuses	Explore shared scope of practice statement across centers. Determine electronic medical records (EMR) system and scheduling program for campus Counseling Centers. Ensure access to psychiatric care for students (i.e., collaborations with local practitioners or dedicated provider with hours across campuses).
Ensure care/psychological services are compliant with federal and state regulations	Create Health Insurance Portability and Accountability Act (HIPAA)-compliant contracts for all centers for telehealth. Create consistent HIPAA-compliant and state of PA-compliant forms for consent to treatment, consent to telehealth, consent to treatment by a practicum student/intern, and release of information.
Ensure access to critical/crisis care	Provide support and consultation for gatekeepers for suicide prevention and risk management. Create integrated, formalized intervention/risk management policy that involves Counseling Services and administration, deans, student affairs, disability services, and others as appropriate (i.e., Red Folder). Create after-hours policy and procedure that services students and protects counselor well-being.
Meet the academic and financial needs of diverse students	Survey students to assess areas of need such as academic preparation/help, financial support for tuition and/or books, and more. Begin to meet these needs through assigning student mentors who can point them to resources.
Develop a culture of student responsibility for advising, progression, and degree completion	In collaboration with Academic Affairs, develop culture of student responsibility focusing on the role students play in successful advising. Implement Degree Planner technology and training into New Student Orientation and FYE.
Develop common student event calendar across campuses	Develop a common calendar across campuses for student events and activities.
Unify student activities	Unify student activities under one umbrella.
Determine opportunities for shared services and processes for recreational services	Consider services that can be combined for cost savings (e.g., climbing wall inspections, ropes course training and inspections, booking talent, events, program, EMS software, other technology applications and online).
Develop residence life structure, training, and housing selection process	Determine departmental and professional student staff training and housing selection.
Develop Residence Hall student manual and policies	Create common residence hall student manual and residence hall policies (tied to conduct and student code) including documentation and reporting of conduct violations.
Determine housing costs and services provided	In collaboration with Finance and Administration, determine appropriate fees for various building types, utilities, laundry, and cable. Consider whether fees are included in room cost or pay per use.
Integrate housing software	Combine the housing software contract.

Recommendation Name	Summary Recommendation Components/Description
Establish diversity, equity, and inclusion policy, training and programming	Develop DEI strategic plan for all campuses (addressing shared goals and those unique to each institution). Develop diversity mission statement across all campuses. Develop key term definitions (such as diversity, equity, inclusion, access. Assess/develop programming and trainings for the campus communities (to promote DEI as everyone's responsibility, DEI is not limited to race/ethnicity), including student and staff orientations. Assess safety needs.
Establish DEI centers across all campuses	Establish DEI centers across each of the campuses. Each campus should have its DEI offices report to a unique DEI lead
Determine student leadership development offerings	Assess all current student leadership development offerings, certification programs, and officer/student staff trainings, experiences, and initiatives. Adopt one unified leadership training program for all students (current leaders and emerging leaders) to provide skills needed to be involved in campus life, enhance self-discovery, and foster effective group and organizational development.
Create unified peer tutor/mentor structure	In collaboration with Academic Affairs, designate tutoring director/coordinator on each campus to facilitate student interactions, development of specialized programs, and develop specialty areas as needed (e.g., supplemental instruction, peer tutor training, etc.). Provide in-person and remote tutoring options to all students at all campus locations.
Determine structure of military benefits administration	Determine structure and execution of consolidating all military benefits administration, including establishing an integrated military affairs department.
Create/maintain military resource center on each campus	Create/maintain military resource center on each campus in physical location appropriate for military student populations.

People: The recommendations will likely impact the following stakeholders:

- Students, including current and prospective students
- Student staff
- Residence Life and Housing Staff
- Deans, specifically Dean of Students
- All campus community members
- Orientation staff
- FYE faculty and staff
- Human resources staff
- Academic policy groups
- Department chairs
- Provost
- DEI Leadership
- Disability Services staff
- Admissions
- Unions
- CARE teams
- Counseling
- Custodial and facilities

- Vendors
- Board members
- Investigators
- Town relations, to include local law enforcement, landlord associations, Town Council, and local governments (Good Neighbor-type policies)

Process: Overall recommendations of this group ultimately contribute toward the success of each student. The recommendations impact programs and processes that directly enhance the student experience, including orientation, wellness and counseling services, accommodations, conduct and judicial processes, learning communities, housing selection and residential life, student-related fees, and campus security. Additionally, there are compliance requirements involved in many of these processes (e.g., ADA, Clery Act, HIPAA). Consideration should be given to existing contracts and agreements, particularly those related to systems with the opportunity for renewal/renegotiation, and administrative structures that can best support these programs.

Technology: The recommendations impact numerous technology applications. Consideration should be given to existing vendor and system contracts, particularly those with the opportunity for renegotiation.

Finance: The recommendations are intended to result in cost savings opportunities, which will be dependent upon administrative structures, fee structures, technology implementations, realized enrollment and retention, vendor negotiations, consolidated programming, and policy determinations. Many of the recommendations require up-front costs to enhance and integrate; however, these student success-focused programs are intended to have a longer-term impact on enrollment and retention.

Physical Assets: The recommendations may result in repurposed office space, shared assets, and consideration of space for new centers.

Compliance and Legal: The recommendations include considerations related to current contracts (e.g., CBAs, unions), compliance with federal and state regulations (e.g., ADA, HR-related laws, discrimination and harassment, Title IX, HIPAA, Family Educational Rights and Privacy Act [FERPA], Clery Act), and consistent policies and procedures across campuses.

Community: The recommendations will likely impact local government and law enforcement, external vendors, local real estate market (including landlords, utility providers), local partnerships (e.g., downtown associations and businesses, community service partners), health providers (e.g., psychotherapists, psychiatrists, crisis services in the community), donors, local and state military units, and benefits agencies.

Benefits: The recommendations are intended to provide additional opportunities for student success and retention, as well as enhance diversity, equity, and inclusion initiatives by helping ensure that students' needs are being met. Additionally, the recommendations offer opportunities to strengthen the student experience and accessibility, equitable access to student government and organizations, consistency of student services, improved town/gown relations, expectations of students, faculty and staff, campus safety and security, expertise and skill level of staff, reporting across campuses, recruitment, access to wellness and counseling services, military student recruitment and support, and crisis response. The DEI-focused initiatives are aimed at mirroring a more global environment for increased recruitment and retention.

Risk: Risks exist related to contracts, potential non-compliance with federal, local, and state laws and regulations, pricing, adequate recognition of unique characteristics of each campus (i.e., misalignment with campus community or campus culture), and sufficient resourcing for student health and wellness needs.

Appendix M.2: Athletics WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast athletics working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Determine impacts on sports sponsorship, enrollment growth, and recruiting	Continue to recruit prospective student-athletes, while retaining current student-athletes. Enhance and maximize all team rosters. Recommend additional sport participation opportunities to ensure enrollment growth and compliance with Title IX. Finalize the admissions application process.
Solicit NCAA decision to outline organization and sports sponsorship	Provide data required to determine sports program to optimize enrollment, contribution margin, student success, and diversity.
Determine the financial impact of sports programs offered	Formally calculate each team's financial impact and return on investment.
Determine the organizational structure, reporting lines, and budgets	Finalize recommendation of NCAA best practice organizational and reporting line structure. Determine operating (including recruiting) and scholarship budget processes, procedures, and timelines. Also finalize the student fee structure.
Identify opportunities to enhance student success (academic, athletic, and career)	Enhance and share common practices to improve the academic success of the student-athletes. Strive for academic and athletic conference, regional, and national recognition/success. Finalize the priority scheduling process and academic credit earned for student-athlete participation.
Enhance community engagement and campus identity (brand, pride, spirit)	Support communities and charities. Continue to enhance the institutional brand for deeper recruiting and visibility efforts.
Identify impacts on Title IX compliance	Continue to comply with federal guidelines. Identify the Title IX prong that will be utilized to ensure compliance. Continue to abide by existing agreements.
Determine scholarship budgets	Determine scholarship budget and out-of-state recruitment to maximize each team's contribution margin.
Maximize diversity efforts	Maximize diversity efforts through recruiting efforts and additional sport sponsorship offerings.
Improve retention and graduation rates	Continue to improve retention rates (year-to-year and overall) while focusing on grade point average (GPA) and graduation rate increases.
Develop common policies, procedures, and timelines	Develop common athletic department operations policies and procedures and compose manual. Develop a common student-athlete handbook.

People: The recommendations will likely impact the following stakeholders:

- Academic programs for major offerings
- Faculty
- Staff
- Alumni
- Students
- Human Resources
- Student-athletes
- Coaches

- Athletic Administration
- Financial Aid
- Creation programs and services that enhance all athletic populations (i.e., DEI)
- Addition of positions that directly work with student-athletes on success, retention, and graduation

Process: The recommendations include developing long-term athletic growth strategies that align with the selected prong in Title IX compliance. This may include resource adjustments, while growing the institution and surrounding communities via enrollment and fiscal returns.

Elements to consider include:

- Agreement with the NCAA (Division I and II), respective athletic conferences, and the integrated university structure
- Procedures in relation to dues and voting rights within the PSAC and other conferences, along with the NCAA
- Policies and procedures related to operating each athletic department
- Written and distributed policies and procedures related to compliance to all athletic personnel and student-athletes
- Policies related to medical (athletic training), budgeting, scholarships, all compliance issues, academics, best practices, expectations, and guidelines
- Policies related to sports information equitable coverages and responses
- Contracts of renewals for faculty and coaches
- Revamping job descriptions for each of the positions in athletics at each location
- Procedures around building budgets, budget requests, scheduling limitations and expectations for games, transportation, recruiting, and the number of student-athletes in the program based on NCAA averages
- Developing annual review of Department of Education Equity and Athletics Disclosure Act (EADA) reporting will need to be developed, as well as return on investment documents where each location stands in relation to Title IX, sport offerings, participation, and future plans and projections

Technology: The recommendations primarily impact the software used to support scholarship offers and team scholarship limits. Additionally, the NCAA Compliance Assistance Software can also support scholarship offerings and team scholarship limits, both in partnership with SIS and CRM systems.

Finance: The recommendations are intended to result in additional funds for recruiting, which may be necessary if not built into expansion plans. Operating dollar would need to be determined for equitable treatment for student-athletes within each athletic program (student government, E&G, and Foundation). Elements to consider include, but are not limited to:

- Costs of existing and additional programs
- Revenue generated from maximizing teams with higher ROIs and addition of new teams
- Funding for each athletic department, which is a cost to the university, through E&G and/or student governments
- Income received by each enrolled student-athlete
- Operating budgets and scholarships
- Consistent fee structure to address memberships (NCAA, PSAC, etc.), student-athlete insurance, mandated team physician coverage, and compliance and operational software

Physical Assets: As listed in the process category, with the expansion of athletic teams there will be necessary facility adjustments and improvements.

Compliance and Legal: The recommendations primarily impact the expansion/allocation of additional funds for scholarships. Additionally, System legal will need to evaluate the integrated university's enrollment and advise how Title IX numbers would be reviewed by the Office of Civil Rights (OCR). In addition, impact of current reviews by OCR on the integrated university's athletic departments will need to be determined.

Community: Recommendations will likely impact stakeholders such as community visitors, local high schools, and the towns where each campus is located. Additionally, with sport expansion, new recruiting markets will emerge, growing the footprint for all three locations – locally and regionally.

Benefits: The recommendations are expected to provide benefits (e.g., synthesized efficient programs, policies, job descriptions, processes, and budgetary structures) to enhance and increase enrollment, retention, diversity, and student-athlete success at all three locations. Additionally, if properly staffed and all goals are achieved, the return on investment provides a solid financial base for athletics while supporting the overall university finances.

Risk: The recommendations provide a few risks that could impact the overall operations of athletics, including:

- Review process and adjustment to coaching positions when a coach does not carry a roster number that provides a positive return on investment for the sport
- If the NCAA does not agree with the proposed structure, forcing the integrated university to begin looking at alternative plans
- The risk of institutional policies not adapting and aligning for all three athletic departments across the three locations
- Missing any deadlines of a contract that was to be renewed/not renewed may cause delays.
- There may be different expectations for each location that will make a job description unique to that location
- Groups not being able to raise the money that was offered to student-athletes can put the scholarship balance in a deficit. Not tracking scholarships properly can also hurt the university

Appendix N: Act 50 Reporting on Student Metrics and Analysis

The tables below reflect Act 50 reporting requirements related to students as of April 1, 2021.

- Total full-time and part-time enrollments:

Spring 2021			
University	Full-Time	Part-Time	Total
Bloomsburg	6,480	1,278	7,758
Lock Haven	2,286	602	2,888
Mansfield	1,321	357	1,678
Total	10,087	2,237	12,324

- Graduation outcomes:

Fall 2016 Cohort		
University	4-Year	6-Year
Bloomsburg	40%	n/a
Lock Haven	40%	n/a
Mansfield	44%	n/a
Average	41%	

- Cost of tuition, room and board, and fees:

FY2020/21 Minimum, Maximum, and Most Common Price of Attendance												
University	In-State Undergrad Tuition	In-State Tech Fee	In-State Mandatory Fees	Room			Board			Total		
				Min	Max	Most Common	Min	Max	Most Common	Min	Max	Most Common
Bloomsburg	\$7,716	\$478	\$2,764	\$6,434	\$9,048	\$6,918	\$2,964	\$4,186	\$3,244	\$20,356	\$24,192	\$21,120
Lock Haven	7,716	478	2,684	6,540	9,380	6,540	2,300	4,556	3,828	19,718	24,814	21,246
Mansfield	7,716	478	2,466	6,600	11,400	8,750	3,486	3,972	3,568	20,746	26,032	22,978
Average	\$7,716	\$478	\$2,638	\$6,525	\$9,943	\$7,403	\$2,917	\$4,238	\$3,547	\$20,273	\$25,013	\$21,781

- Average cost of attendance:

In-State Undergraduate, Dependent 2020-2021 Preliminary											
University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$10,958	\$10,528	\$4,258	\$9,244	\$3,310	\$3,310	\$3,310	\$1,200	\$25,996	\$19,726	\$24,712
Lock Haven	\$10,878	\$10,350	\$2,629	\$10,350	\$4,564	\$5,307	\$5,307	\$1,803	\$27,595	\$20,617	\$28,338
Mansfield	\$10,660	\$10,168	\$6,268	\$9,328	\$2,672	\$3,822	\$2,512	\$2,000	\$25,500	\$22,750	\$24,500
Average	\$10,832	\$10,349	\$4,385	\$9,641	\$3,515	\$4,146	\$3,710	\$1,668	\$26,364	\$21,031	\$25,850

University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$22,782	\$10,528	\$4,258	\$9,244	\$3,430	\$3,430	\$3,430	\$1,200	\$37,940	\$31,670	\$36,656
Lock Haven	\$20,702	\$10,350	\$2,629	\$10,350	\$5,709	\$5,709	\$5,709	\$1,803	\$38,564	\$30,843	\$38,564
Mansfield	\$13,226	\$10,168	\$6,268	\$9,328	\$2,856	\$4,006	\$2,696	\$2,000	\$28,250	\$25,500	\$27,250
Average	\$18,903	\$10,349	\$4,385	\$9,641	\$3,998	\$4,382	\$3,945	\$1,668	\$34,918	\$29,338	\$34,157

In-State Undergraduate, Independent 2020-2021 Preliminary											
University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$10,958	\$10,528	\$4,258	\$9,244	\$3,310	\$3,310	\$3,310	\$1,200	\$25,996	\$19,726	\$24,712
Lock Haven	\$10,878	\$10,350	\$2,629	\$10,350	\$4,564	\$5,307	\$5,307	\$1,803	\$27,595	\$20,617	\$28,338
Mansfield	\$10,660	\$10,168	\$6,268	\$9,328	\$2,672	\$3,822	\$2,512	\$2,000	\$25,500	\$22,750	\$24,500
Average	\$10,832	\$10,349	\$4,385	\$9,641	\$3,515	\$4,146	\$3,710	\$1,668	\$26,364	\$21,031	\$25,850

Out-of-State Undergraduate, Independent 2020-2021 Preliminary											
University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$22,782	\$10,528	\$4,258	\$9,244	\$3,430	\$3,430	\$3,430	\$1,200	\$37,940	\$31,670	\$36,656
Lock Haven	\$20,702	\$10,350	\$2,629	\$10,350	\$5,709	\$5,709	\$5,709	\$1,803	\$38,564	\$30,843	\$38,564
Mansfield	\$13,226	\$10,168	\$6,268	\$9,328	\$2,856	\$4,006	\$2,696	\$2,000	\$28,250	\$25,500	\$27,250
Average	\$18,903	\$10,349	\$4,385	\$9,641	\$3,998	\$4,382	\$3,945	\$1,668	\$34,918	\$29,338	\$34,157

Appendix O: Act 50 Reporting on Faculty

The tables below reflect Act 50 reporting requirements related to faculty as of April 1, 2021.

- Number of faculty and non-faculty employees by location:

Annualized 2019-20 Student to Non-faculty FTE Ratio				Fall 2020 Student to Faculty Ratio		
University	Annualized FTE Student	Non-faculty Annualized FTE	Annualized FTE Student/Non-faculty Ratio	Fall FTE Enrollment	Fall Faculty FTE**	Fall FTE Student to Faculty Ratio
Bloomsburg	8,131	554	14.7	7,504	406	18.5
Lock Haven	3,038	283	10.7	2,858	201	14.2
Mansfield	1,589	176	9.0	1,604	113	14.2
Overall Result	12,758	1,013	12.6	11,966	720	16.6

Notes:

Annualized Student to Non-faculty FTE Ratio

- Based on Fall Freeze and Intersession End-of-Term Student Enrollment Submissions (Active Data)
- All Non-faculty FTEs reflect those in non-APSCUF FTEs from UNRESTRICTED Funds, based on SAP Capacity Utilization (will not exceed 1.0), for employees in an active pay status
- Undergraduate FTE: Undergraduate Attempted Credits/30
- Graduate FTE: Graduate (Grad) Attempted Credits/24
- Annualized FTE Student to Non-faculty Ratio: Annualized FTE Students/Non-faculty Annualized FTE

Fall Student to Faculty Ratio

- Based on Fall Freeze Student Enrollment Submission (Active Data)
- All Faculty FTEs reflect those APSCUF only FTEs from UNRESTRICTED Funds, based on SAP Capacity Utilization (will not exceed 1.0), for employees in an active pay status
- Undergraduate FTE: UG Attempted Credits/15
- Graduate FTE: Grad Attempted Credits/12
- Fall FTE Student to Faculty Ratio: Fall FTE Students/Fall FTE Faculty

****Faculty Sharing applied to Fall 2020**

- Negative FTE associated to service-providing university, positive FTE associated to service-purchasing university
- Source of Faculty Sharing FTE: Comprehensive Planning Process, Workforce tab (submitted by universities 9/4/2020)
- Annualized FTE Student to Non-faculty Ratio: Annualized FTE Students/Non-faculty Annualized FTE

University	Fall 2020 Faculty Sharing**
Bloomsburg	0.25
Lock Haven	0.00
Mansfield	-0.50

Appendix P: Act 50 Reporting on Staff

The tables below reflect Act 50 reporting requirements related to staff as of April 1, 2021.

- Number of faculty and non-faculty employees by location:

University	Total Employee Headcount	Faculty	Total Non-faculty	AFSC ME	Non-represented	SCUPA	SPFPA & POA	Coaches	Cheer Adviser	OPEIU
Bloomsburg	1,019	467	552	312	97	76	22	28	1	16
Lock Haven	484	213	271	152	56	27	9	27	0	0
Mansfield	307	137	170	92	36	14	10	18	0	0
Total	1,810	817	993	556	189	117	41	73	1	16

Note:

- Includes total employee headcount for all active employees (will include those on various types of leave without pay, etc.)
- Excludes employees classified as Volunteers, Contractors or Other, as well as student employees
- Includes all groups (Permanent/Temporary, Full Time/Part Time/Hourly)
- Total Non-faculty figures are the sum of all non-APSCUF units: AFSCME, Non-represented, SCUPA, SPFPA & POA, Coaches, Cheer Advisors, Office of Professional Employees International Union Healthcare Pennsylvania (OPEIU), Physicians
- Current Employee Complement for April 2021 (will be subject to retro-activity)

Appendix Q: Act 50 Reporting on Affiliated Entities' and Communities' Concerns

Via the public comment period, concerns from the community and affiliated entities will be documented and reported.

All comments and hearings are available online.

Appendix R: Leadership and Governance and Leadership WG Priority 1 Recommendations with Impacts

The following Priority 1 recommendations were drafted by the Northeast institutional governance and leadership working group with the accompanying anticipated impacts:

Recommendation Name	Summary Recommendation Components/Description
Recommend Council of Trustees structure	Consulted State System legal regarding integrated university's COT makeup, bylaws, officers, and terms.
Update COT meeting schedule	Review current calendar for COT meetings for Bloomsburg, Lock Haven and Mansfield. Create new meeting calendar for integrated university. Determine location rotation for integrated university and virtual options.
Determine Pennsylvania Association of Councils of Trustees (PACT) representation	Determine PACT representation for COT.
Review student governance structure	Review possible student leadership and governance structures and identify preferred model.
Review university governance structure	Review possible (faculty and/or staff) leadership and governance structures and identify preferred model.
Review transitional leadership governance documents	Review proposed transitional leadership structure. Review high-level overview document with core function of roles. Review job descriptions of each role.
Review proposed functional units	Review proposed functional units.
Review current decision-making process	Review the oversight methodology used at Bloomsburg, Lock Haven, and Mansfield. Audit similarities and differences. Develop a draft methodology for integrated university.
Develop branding and identity	Consult with branding and marketing agencies to align naming conventions to ensure retention of local brand and identity. Confirm organizational structure supports local brand and identity.
Review strategic direction planning process	Review current strategic planning process for Bloomsburg, Lock Haven, and Mansfield. Create document for strategic planning process for integrated university. Create proposed calendar for strategic planning process for integrated university.

People: The recommendations will likely impact the following stakeholders:

- Trustees at Bloomsburg, Lock Haven, and Mansfield. Board of Governors, PACT, Governor's Office, and Legislature.
- Students
- Faculty
- Staff
- State System

Process: The recommendations impact the bylaws.

Technology: None

Finance: None

Physical Assets: None

Compliance and Legal: The recommendations should adhere to Act 188.

Community: The recommendations will likely impact the following community areas:

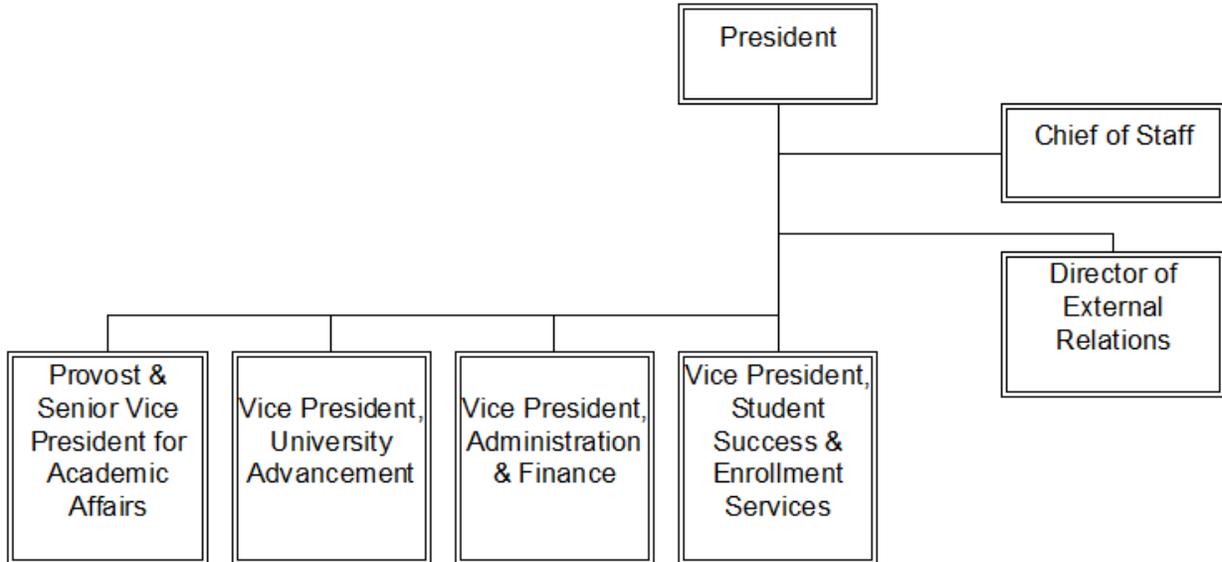
- Bloomsburg COT
- Lock Haven COT
- Mansfield COT
- Alumni
- Donors and friends of each university
- Community

Benefits: A synthesized, efficient program array is intended to provide additional opportunities for a unified governing body, access to meetings (e.g., different locations, live streamed), greater efficiencies for leadership, and increased enrollment and retention by way of increased access for students and reduced cost of degree attainment. Additionally, the recommendations should maintain or increase alumni and donor engagement.

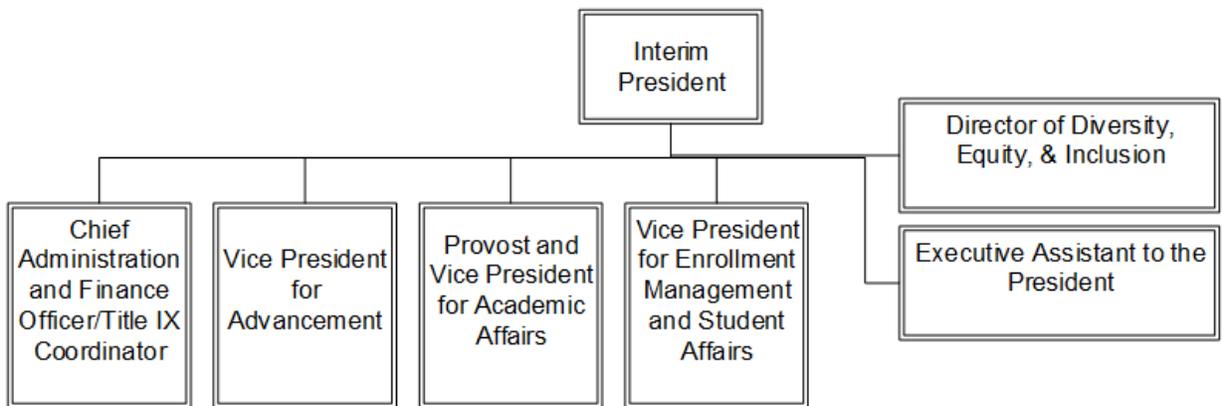
Risk: Risks exist related to the morale from current leadership and campus communities, which could lead to negative feedback from local communities and current council members.

Appendix S: Organizational Charts

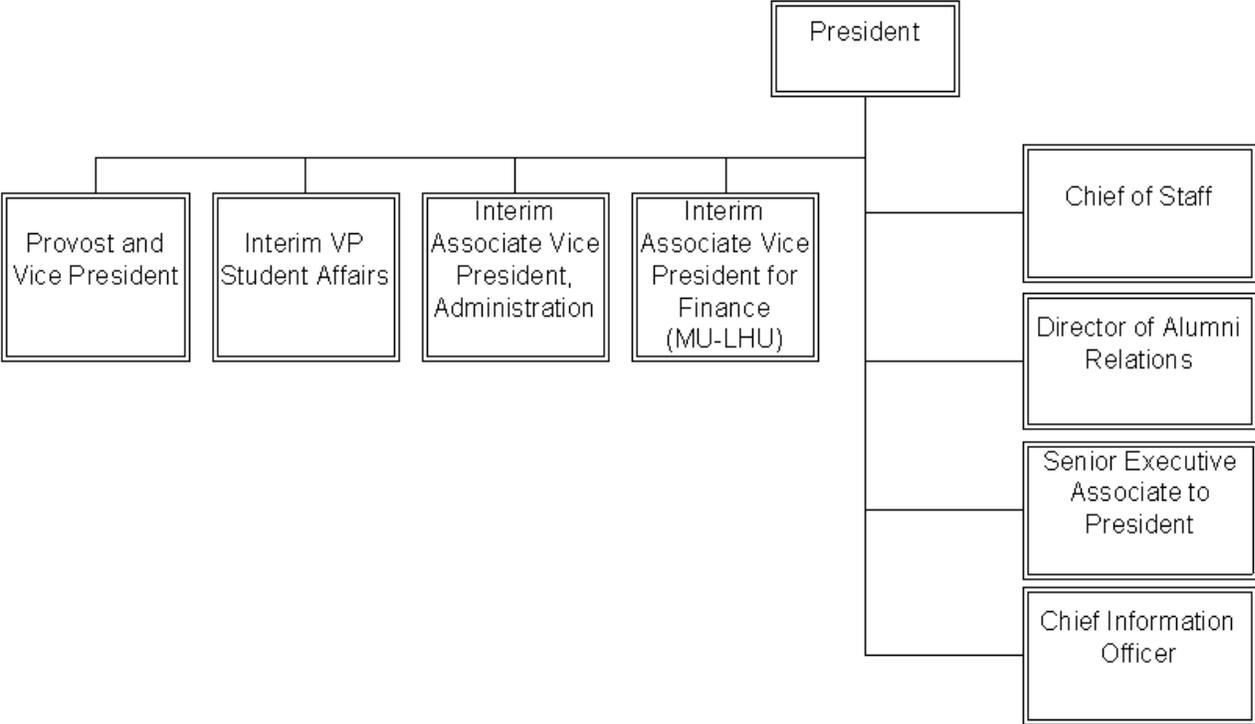
Pre-Transition Bloomsburg Leadership Organizational Chart



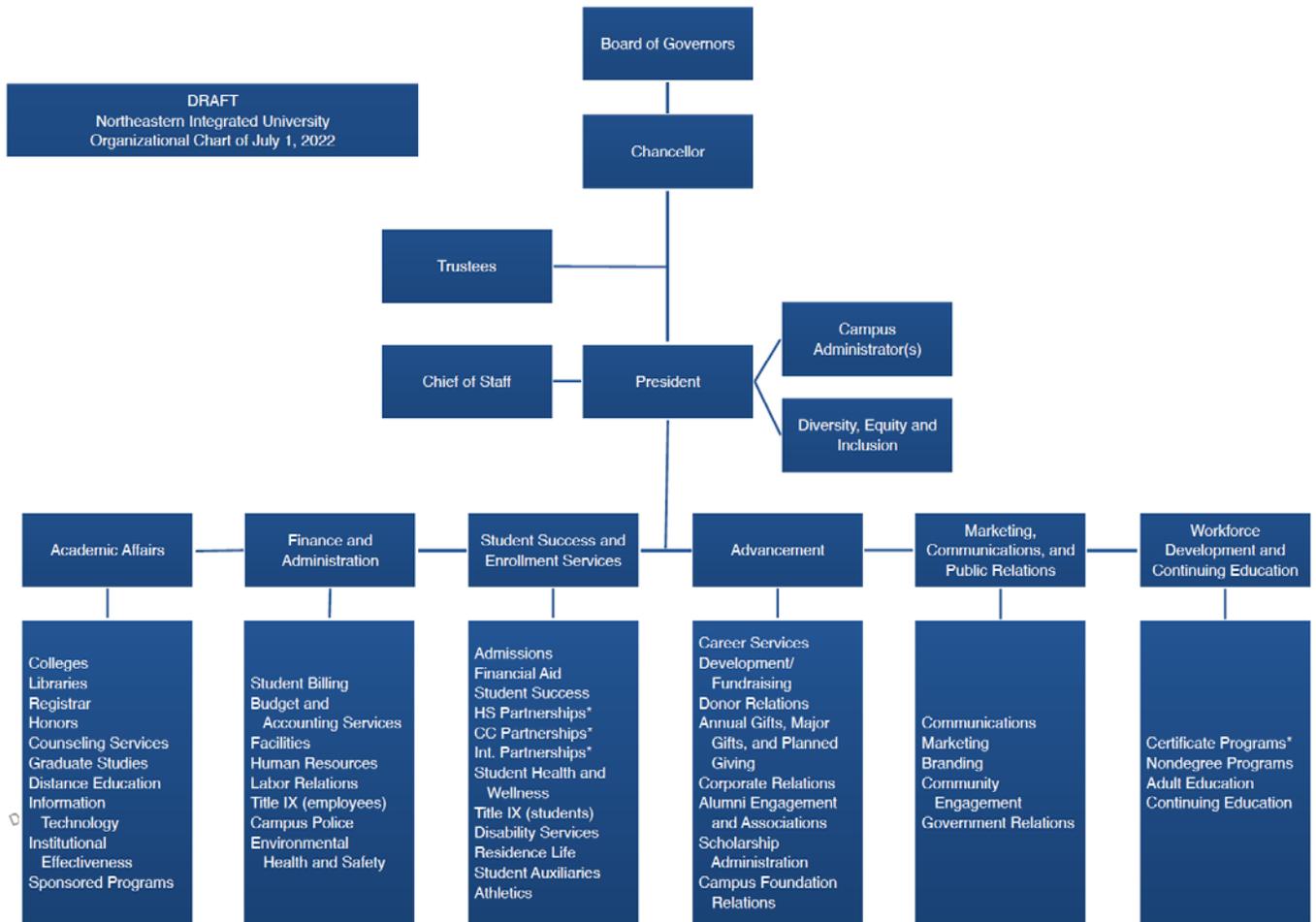
Pre-Transition Lock Haven Leadership Organizational Chart



Pre-Transition Mansfield Leadership Organizational Chart



Draft Integrated University Organizational Chart



* Shared responsibility with Academic Affairs to ensure enrollment and academic outcomes are realized.

Note: Not all functional areas may be represented due to limitations of space and should not infer elimination of departments, services or functions.

Appendix T: October 2020 Board of Governors Report

The full October 2020 Board of Governors Report – System Redesign, Institutional Integrations Update on Financial Review/Next Steps is available on:

<https://www.passhe.edu/SystemRedesign/Documents/University%20Integrations%20Financial%20Review.pdf>.

Appendix U: Financial Sustainability Analysis

An overview of the financial position of each of the integrating universities is available within the financial statements published on the State System's website: [Financial Statements | PA State System of Higher Education \(passhe.edu\)](https://www.passhe.edu/inside/anf/accounting/Pages/Financial-Statements.aspx)¹¹.

The following slides were provided to the Board in advance of the April 2021 Board meeting. These slides focus on the financial analysis of the Northeast integration and include:

- Operating budgets and projections for the current year plus five years (reference slides 10-12).
- Administrative savings assumed from the integrations (reference slide 9).

DRAFT

Proposed Implementation Plan Financial Analysis Update

Per Act 50, information included in the report and recommendations from the October review of financial stability were updated for the proposed integrated universities, specifically:



Enrollment Projections

Review of annualized FTE enrollment based on historical trends, demographic shifts, and institutional enrollment management initiatives were reviewed.

Enrollment was updated based on program array and student success working group recommendations as well as enrollment for the online initiative in the West.



Financial Viability

Analysis of revenues, expenditures, and net assets to determine the integrated institutional financial viability was conducted.

The projected net financial viability varies between the regions given the variability in each university's entering position.

6

¹¹ <https://www.passhe.edu/inside/anf/accounting/Pages/Financial-Statements.aspx>

Requirements and Approach

1. Act 50 Requirements – Current year (FY 20-21 plus 5 through FY 25-26)
2. Financial Baseline
 - FY 20-21 and FY 21-22 individual university projections (university provided data)
 - FY 22-23 integrated university projections (university provided data to begin baseline)
3. Proposed Implementation Plan Inputs
 - Program array and student success working group recommendations for enrollment, including faculty complement necessary to meet program array/student demand
 - Online incremental revenue included in the projections for West; no incremental revenue for Workforce Development in the Northeast
 - Nonfaculty personnel and administrative support savings estimates
 - Strategic sourcing savings in several commodity areas
 - Changes to existing athletic programs (new growth/costs) were not included
4. Standard Assumptions
 - Appropriation/tuition/fee/student aid changes
 - Negotiated personnel salary/benefit changes
5. One time start-up costs separately funded through System Redesign and not within projections – ongoing costs are assumed and included
6. Iterative approach with updates to be incorporated in the September CPP
 - CRRSAA (HEERF II) expenditure determinations are still underway and additional federal dollars from American Rescue Plan from March 2021 are not yet available.

Enrollment Trends – Northeast (April 2021 Projections)

	Current Year FY 2020-21			Revised FY 2021-22		
	BL	LO	MA	BL	LO	MA
Annualized FTE Enrollment						
Undergraduate (includes clock hour)	7,236.43	2,464.01	1,590.41	7,442.87	2,453.47	1,696.37
Graduate	594.50	506.00	5.24	619.80	506.00	5.58
Total Annualized FTE Enrollment	7,830.93	2,970.01	1,595.65	8,062.67	2,959.47	1,701.95
Total Annualized FTE Enrollment for Three Universities			12,396.59			12,724.09

	FY 2022-23 Projections	FY 2023-24 Projections			FY 2024-25 Projections			FY 2025-26 Projections		
	Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University
Annualized FTE Enrollment										
Undergraduate (includes clock hour)	12,074.15	12,074.15	121.00	12,195.15	12,195.15	121.95	12,317.10	12,317.10	123.17	12,440.27
Graduate	1,133.51	1,133.51	12.00	1,145.51	1,145.51	11.45	1,156.96	1,156.96	11.55	1,168.51
Total Annualized FTE Enrollment	13,207.66	13,207.66	133.00	13,340.66	13,340.66	133.40	13,474.06	13,474.06	134.72	13,608.78
% Change				1%			1%			1%

Assumptions:

- Enrollment** – CPP enrollment was provided by the universities through 2022-23. FY 2023-24 through FY 2025-26 projections are derived from the application of adjustments associated with program array and student success recommendations. Annualized FTE counts are used when calculating financial impact. It is a key driver for tuition and auxiliary revenue.
- Adjustment** for recommendations for program array and student success (average of the 3 years was approximately 1.25% so 1% was used for conservative modeling)
Resulting in additional enrollment of 400 FTE from the time of initial integration.

Source: PASSHE university CPP projections April 2021

Key Assumptions – Northeast

Revenues:

- ◆ 1% enrollment growth from program array and student success initiatives and 1% tuition and fee rate increase
- ◆ 1% increase in state appropriation

Expenditures:

- ◆ Faculty complement needed to meet program array/student demand
- ◆ Strategic Sourcing Savings
- ◆ Executive Leadership, Management, and Administrative Support Staffing Efficiencies
- ◆ Negotiated Salary and benefit rate increases (2%/3%) (includes estimated turnover)
- ◆ Institutional Aid for Students
- ◆ Adjustments to debt service payments (to match actual payments in debt schedule)
- ◆ Targeted investment in student success (retention, technology, and support services)

Net Positive Impacts

Notes:

- Same key assumptions are incorporated into the E&G fund and the Auxiliary fund, where applicable;
- Assumes Mansfield loan funded through alternative source;
- Assumes no workforce development revenue contribution;
- Turnover assumed to be realized in accordance with historical patterns

	FY 2022-23	FY 2023-24	FY 2024-25	FY 2025-26
	\$0	\$4,435,882	\$4,525,045	\$4,552,460
	0	822,267	830,490	838,795
	\$0	\$5,258,149	\$5,355,535	\$5,391,255
	\$0	\$1,855,106	\$893,042	\$799,380
	(1,813,279)	Savings Maintained Annually		
	(2,667,388)	(2,827,978)	(2,827,978)	(2,827,978)
	0	4,502,355	4,618,694	4,702,201
	0	300,704	306,748	312,913
	0	(637,179)	(3,470,233)	(159,466)
	429,848	34,258	20,000	
	(\$4,050,819)	\$3,227,266	(\$459,727)	\$2,827,050
	\$4,050,819	\$2,030,883	\$5,815,262	\$2,564,205

Financial Results – Northeast (April 2021 Projections)

UNRESTRICTED BUDGET (EDUCATIONAL AND GENERAL AND AUXILIARY)

Revenues	Current Year FY 2020-21			Revised FY 2021-22			FY 2022-23 Projections						FY 2023-24 Projections			FY 2024-25 Projections			FY 2025-26 Projections		
	BL	LO	MA	BL	LO	MA	BL	LO	MA	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University
Tuition	\$71.9	\$27.6	\$12.9	\$75.0	\$27.7	\$14.1	\$78.6	\$29.1	\$14.3	\$122.0	\$0.0	\$122.0	\$122.0	\$2.4	\$124.4	\$124.4	\$2.5	\$126.9	\$126.9	\$2.5	\$129.4
Fees	15.7	6.8	2.7	25.1	8.4	3.2	26.4	8.7	3.5	38.6	0.0	38.6	38.6	0.8	39.4	39.4	0.8	40.2	40.2	0.8	41.0
State Appropriation	38.4	25.7	18.1	38.4	25.7	18.1	38.4	25.7	18.1	82.2	0.0	82.2	82.2	0.8	83.0	83.0	0.8	83.9	83.9	0.8	84.7
Auxiliary Sales	19.2	2.8	5.2	35.1	10.4	10.9	38.7	11.0	11.1	60.8	0.0	60.8	60.8	1.2	62.0	62.0	1.2	63.2	63.2	1.3	64.5
All Other Revenue	6.3	3.9	1.1	5.4	3.9	2.5	6.0	3.9	2.8	12.7	0.0	12.7	12.7	0.0	12.7	12.7	0.0	12.7	12.7	0.0	12.7
Total Revenues	\$151.5	\$66.9	\$40.0	\$179.0	\$76.2	\$48.8	\$188.1	\$78.4	\$49.8	\$316.3	\$0.0	\$316.3	\$316.3	\$5.3	\$321.6	\$321.6	\$5.4	\$326.9	\$326.9	\$5.5	\$332.4
Expenditures																					
Compensation Summary:																					
Salaries and Wages	\$77.9	\$38.5	\$22.3	\$75.1	\$38.7	\$20.8	\$77.7	\$36.3	\$19.9	\$133.9	(\$1.9)	\$132.0	\$132.0	\$1.9	\$133.9	\$133.9	\$1.3	\$135.3	\$135.3	\$1.3	\$136.6
Benefits	38.7	19.3	10.8	39.6	20.3	10.3	41.5	19.8	10.2	71.5	(0.5)	71.0	71.0	1.6	72.7	72.7	1.3	74.0	74.0	1.3	75.3
Subtotal, Compensation	\$116.7	\$57.8	\$33.1	\$114.7	\$58.9	\$31.0	\$119.2	\$56.2	\$30.1	\$205.4	(\$2.3)	\$203.1	\$203.1	\$3.5	\$206.6	\$206.6	\$2.7	\$209.3	\$209.3	\$2.7	\$212.0
Student Financial Aid	5.5	3.7	4.7	6.5	3.5	5.0	7.0	3.8	4.2	15.0	0.0	15.0	15.0	0.3	15.3	15.3	0.3	15.6	15.6	0.3	15.9
Other Services and Supplies	40.6	12.7	12.9	46.6	14.6	15.5	50.0	14.5	15.8	80.3	(1.7)	78.6	78.6	(0.5)	78.1	78.1	(0.6)	77.5	77.5	(0.5)	77.0
Subtotal, Services and Supplies	\$46.1	\$16.3	\$17.5	\$53.1	\$18.0	\$20.5	\$56.9	\$18.3	\$20.1	\$95.3	(\$1.7)	\$93.6	\$93.6	(\$0.2)	\$93.3	\$93.3	(\$0.3)	\$93.1	\$93.1	(\$0.1)	\$92.9
Capital Expenditures and Debt Principal Payments	6.6	3.5	3.2	7.8	3.3	3.6	8.2	3.2	3.5	14.8	0.0	14.8	14.8	(0.1)	14.8	14.8	(2.9)	11.9	11.9	0.3	12.2
Total Expenditures	\$169.4	\$77.6	\$53.9	\$175.6	\$80.3	\$55.2	\$184.2	\$77.7	\$53.6	\$315.5	(\$4.1)	\$311.5	\$311.5	\$3.2	\$314.7	\$314.7	(\$0.5)	\$314.2	\$314.2	\$2.8	\$317.1
Revenues Less Expenditures	(\$17.9)	(\$10.7)	(\$13.9)	\$3.5	(\$4.1)	(\$6.4)	\$3.9	\$0.7	(\$3.8)	\$0.8	\$4.1	\$4.8	\$4.8	\$2.0	\$6.9	\$6.9	\$5.8	\$12.7	\$12.7	\$2.6	\$15.3
Transfers to Plant Fund	(\$1.6)	(\$6.2)	\$0.4	\$4.0	(\$1.3)	(\$0.2)	\$4.4	\$0.7	(\$0.2)	\$4.9	\$0.0	\$4.9	\$0.0	\$6.7	\$6.7	\$0.0	\$10.6	\$10.6	\$0.0	\$10.6	\$10.6
Revenues Less Expenditures and Transfers	(\$16)	(\$4.5)	(\$14.2)	(\$0.5)	(\$2.7)	(\$6.2)	(\$0.4)	\$0.0	(\$3.7)	(\$4.1)	\$4.1	(\$0.1)	\$4.8	(\$4.6)	\$0.2	\$6.9	(\$4.8)	\$2.1	\$12.7	(\$7.9)	\$4.8
Loans To/From Auxiliary Fund	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Total Unrestricted Net Assets, Estimated End of Year Balance	\$40.0	\$37.3	(\$19.8)	\$41.3	\$32.7	(\$26.2)	\$44.4	\$33.1	(\$30.0)	\$47.5	\$4.1	\$51.6	\$56.4	\$2.0	\$58.4	\$65.3	\$5.8	\$71.1	\$83.8	\$2.6	\$86.4
Total Unrestricted Cash, Estimated Beginning of Year Balance																					
Total Unrestricted Cash, Estimated End of Year Balance	\$84.3	\$58.0	\$2.4	\$56.4	\$42.7	(\$11.4)	\$57.7	\$38.1	(\$17.8)	\$78.0	\$0.0	\$78.0	\$81.7	\$0.0	\$81.7	\$88.6	\$0.0	\$88.6	\$101.3	\$0.0	\$101.3
Total Unrestricted Cash, Estimated End of Year Balance	\$56.4	\$42.7	(\$11.4)	\$57.7	\$38.1	(\$17.8)	\$60.8	\$38.5	(\$21.6)	\$77.7	\$4.1	\$81.7	\$86.6	\$2.0	\$88.6	\$95.5	\$5.8	\$101.3	\$114.0	\$2.6	\$116.6

Notes:

FY 20-21 depict the estimated impacts of COVID. CRRSAA (HEERF II) expenditure determinations are still underway and additional federal dollars from American Rescue Plan from March 2021 are not yet available. As such, neither are included. FY 21-22 assumes return to on-campus instruction.

Source: PASSHE university CPP projections April 2021

Financial Viability (E&G and Auxiliary) Northeast – April 2021 Projection

Northeast

	Annual Integrated Ratios			
	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026
Operating Margin	1.5%	2.1%	3.9%	4.6%
Primary Reserve Ratio	16.6%	18.6%	22.6%	27.3%

Strong Improvement in key ratios

- Operating Margin achieves goals established by Financial Sustainability Policy
- Primary Reserve achieves steady improvements, inclusive of recommended minimum annual investment in physical plant

1: Operating Margin Ratio = (Total Revenues – Total Expenditures) / Total Revenues

2: Primary Reserve Ratio = (EOY Net Asset Balance) / Total Expenditures

3: 2023-2026 financial viability metrics include operational savings in combined institution set

Results Summary – Northeast

- Enrollment will increase by 1% annually, resulting in 400 additional FTE
- Projected to achieve the System’s goal of a 2% operating margin by FY24 and exceeding a 4% operating margin by FY26
- Projected to achieve 27% primary reserve ratio by FY26; System’s goal for ratio is 40%.
 - Mansfield’s System issued debt will be addressed through alternative means which will also result in improved unrestricted net assets and primary reserve ratio
- Contains investments of almost \$500,000 for student success
- Based on enrollment growth projections, includes faculty growth aligned with student programmatic demand
- Projected surpluses allow for reinvestment in students and physical plant and the creation of reserves to fund future debt service obligations
- Following a projected return to on-campus instruction in fall 2021, Mansfield’s auxiliary operations are nearly balanced. Separate E&G and Auxiliary projections are included within the Appendix

Conclusion

Overall:

- Programmatic breadth for integrating universities reduces risk of continued enrollment decline and expands competitive advantage by preserving access to comprehensive post-secondary education at all partner campuses within the integration.
- Total executive leadership, management, and administrative support staff savings phased-in over time for both regions, resulting in a total of \$18.4M at the conclusion of the five-year period and sustained over time, which would not be realized as standalone entities.
- Key constraints to sustainability:
 - Impediments to online growth
 - Debt service/physical plant

E&G Financial Results – Northeast (April 2021)

(\$ in Millions)

Revenues	Current Year FY 2020-21			Revised FY 2021-22			FY 2022-23 Projections					FY 2023-24 Projections			FY 2024-25 Projections			FY 2025-26 Projections			
	BL	LO	MA	BL	LO	MA	BL	LO	MA	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University
Tuition	\$71.9	\$27.6	\$12.9	\$75.0	\$27.7	\$14.1	\$78.6	\$29.1	\$14.3	\$122.0	\$0.0	\$122.0	\$122.0	\$2.4	\$124.4	\$124.4	\$2.5	\$126.9	\$126.9	\$2.5	\$129.4
Fees	19.5	6.6	2.4	21.1	7.3	2.8	22.2	7.5	3.1	32.9	0.0	32.9	32.9	0.7	33.6	33.6	0.7	34.2	34.2	0.7	34.9
State Appropriation	38.4	25.7	18.1	38.4	25.7	18.1	38.4	25.7	18.1	82.2	0.0	82.2	82.2	0.8	83.0	83.0	0.8	83.9	83.9	0.8	84.7
All Other Revenue	5.3	3.3	1.1	4.7	3.5	1.8	5.1	3.5	1.9	10.5	0.0	10.5	10.5	0.0	10.5	10.5	0.0	10.5	10.5	0.0	10.5
Total Revenues	\$135.2	\$63.2	\$34.4	\$139.2	\$64.3	\$36.8	\$144.3	\$65.9	\$37.4	\$247.6	\$0.0	\$247.6	\$247.6	\$3.9	\$251.5	\$251.5	\$4.0	\$255.5	\$255.5	\$4.1	\$259.6
Expenditures																					
Compensation Summary:																					
Salaries and Wages	\$71.8	\$38.7	\$20.7	\$69.0	\$35.8	\$18.8	\$71.2	\$33.6	\$17.9	\$122.7	(\$1.9)	\$120.8	\$120.8	\$1.7	\$122.5	\$122.5	\$1.1	\$123.6	\$123.6	\$1.1	\$124.7
Benefits	34.6	18.4	9.8	35.3	18.8	9.0	36.8	18.4	8.9	64.1	(0.5)	63.6	63.6	1.5	65.1	65.1	1.2	66.2	66.2	1.1	67.4
Subtotal, Compensation	\$106.5	\$55.1	\$30.5	\$104.3	\$54.6	\$27.8	\$108.0	\$51.9	\$26.8	\$186.7	(\$2.3)	\$184.4	\$184.4	\$3.1	\$187.5	\$187.5	\$2.3	\$189.8	\$189.8	\$2.2	\$192.1
Student Financial Aid	5.5	3.4	4.6	6.5	3.2	4.8	7.0	3.5	4.0	14.4	0.0	14.4	14.4	0.3	14.7	14.7	0.3	15.0	15.0	0.3	15.3
Other Services and Supplies	25.6	8.7	6.3	26.4	8.7	6.3	27.0	8.6	9.0	44.6	(0.2)	44.4	44.4	(0.1)	44.3	44.3	(0.1)	44.1	44.1	(0.0)	44.1
Subtotal, Services and Supplies	\$31.1	\$12.1	\$10.9	\$32.9	\$11.9	\$13.1	\$33.9	\$12.1	\$13.0	\$59.0	(\$0.2)	\$58.9	\$58.9	\$0.2	\$59.0	\$59.0	\$0.2	\$59.2	\$59.2	\$0.3	\$59.5
Capital Expenditures and Debt Principal Payments	1.7	1.4	0.8	1.8	1.5	1.1	2.0	1.6	1.1	4.7	0.0	4.7	4.7	0.1	4.8	4.8	(2.7)	2.1	2.1	0.0	2.1
Total Expenditures	\$139.3	\$68.5	\$42.2	\$138.9	\$68.1	\$42.0	\$143.9	\$65.7	\$40.9	\$250.5	(\$2.5)	\$247.9	\$247.9	\$3.4	\$251.3	\$251.3	(\$0.3)	\$251.1	\$251.1	\$2.6	\$253.6
Revenues Less Expenditures	(\$4.1)	(\$5.4)	(\$7.7)	\$0.3	(\$3.8)	(\$5.3)	\$0.4	\$0.2	(\$3.4)	(\$2.9)	\$2.5	(\$0.4)	(\$0.4)	\$0.5	\$0.2	\$0.2	\$4.3	\$4.4	\$4.4	\$1.5	\$5.9
Transfers to Plant Fund	2.3	(0.9)	0.4	0.8	(1.0)	0.0	0.8	0.2	0.0	1.0	0.0	1.0	0.0	0.2	0.2	0.0	4.1	4.1	0.0	4.1	4.1
Revenues Less Expenditures and Transfers	(\$6.4)	(\$4.5)	(\$8.1)	(\$0.5)	(\$2.7)	(\$5.3)	(\$0.4)	\$0.0	(\$3.4)	(\$3.9)	\$2.5	(\$1.4)	(\$0.4)	\$0.4	(\$0.0)	\$0.2	\$0.2	\$0.4	\$4.4	(\$2.6)	\$1.9
Loans To/From Auxiliary Fund	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total E&G/Plant Net Assets, Estimated End of Year Balance	\$26.6	\$33.5	(\$12.7)	\$24.9	\$29.3	(\$17.9)	\$24.6	\$29.3	(\$21.4)	\$32.5	\$2.5	\$35.0	\$34.7	\$0.5	\$35.2	\$35.4	\$4.3	\$39.7	\$44.1	\$1.5	\$45.6
E&G and Plant Cash, Estimated Beginning of Year Balance	\$54.6	\$48.2	\$2.7	\$42.9	\$38.3	(\$5.1)	\$41.1	\$34.1	(\$10.3)	\$64.9	\$0.0	\$64.9	\$63.8	\$0.0	\$63.8	\$64.0	\$0.0	\$64.0	\$68.4	\$0.0	\$68.4
E&G and Plant Cash, Estimated End of Year Balance	\$42.9	\$38.3	(\$5.1)	\$41.1	\$34.1	(\$10.3)	\$40.9	\$34.2	(\$13.7)	\$61.3	\$2.5	\$63.8	\$63.4	\$0.5	\$64.0	\$64.1	\$4.3	\$68.4	\$72.8	\$1.5	\$74.3

Source: PASSHE university CPP projections April 2021

Auxiliary Financial Results – Northeast (April 2021)

(\$ in Millions)

Revenues	Current Year FY 2020-21			Revised FY 2021-22			FY 2022-23 Projections					FY 2023-24 Projections			FY 2024-25 Projections			FY 2025-26 Projections				
	BL	LO	MA	BL	LO	MA	BL	LO	MA	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	
																						BL
Tuition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Fees	(3.8)	0.3	0.3	4.0	1.1	0.4	4.2	1.2	0.4	5.7	0.0	5.7	5.7	0.1	5.9	5.9	0.1	6.0	6.0	0.1	6.1	6.1
State Appropriation	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Auxiliary Sales	19.2	2.8	5.2	35.1	10.4	10.9	38.7	11.0	11.1	60.8	0.0	60.8	60.8	1.2	62.0	62.0	1.2	63.2	63.2	1.3	64.5	64.5
All Other Revenue	1.0	0.6	0.1	0.8	0.4	0.7	0.9	0.4	0.9	2.2	0.0	2.2	2.2	0.0	2.2	2.2	0.0	2.2	2.2	0.0	2.2	2.2
Total Revenues	\$16.4	\$3.7	\$5.6	\$39.9	\$11.9	\$12.0	\$43.9	\$12.5	\$12.4	\$68.7	\$0.0	\$68.7	\$68.7	\$1.3	\$70.1	\$70.1	\$1.4	\$71.4	\$71.4	\$1.4	\$72.8	\$72.8
Expenditures																						
Compensation Summary:																						
Salaries and Wages	\$6.1	\$1.8	\$1.6	\$6.1	\$2.8	\$2.0	\$6.5	\$2.8	\$2.0	\$11.2	\$0.0	\$11.2	\$11.2	\$0.2	\$11.5	\$11.5	\$0.2	\$11.7	\$11.7	\$0.2	\$11.9	\$11.9
Benefits	4.1	0.9	1.0	4.3	1.4	1.3	4.6	1.5	1.3	7.4	0.0	7.4	7.4	0.2	7.6	7.6	0.2	7.8	7.8	0.2	8.0	8.0
Subtotal, Compensation	\$10.2	\$2.7	\$2.6	\$10.4	\$4.3	\$3.3	\$11.1	\$4.2	\$3.3	\$18.7	\$0.0	\$18.7	\$18.7	\$0.4	\$19.1	\$19.1	\$0.4	\$19.5	\$19.5	\$0.4	\$19.9	\$19.9
Student Financial Aid	0.0	0.2	0.1	0.0	0.3	0.2	0.0	0.3	0.2	0.5	0.0	0.5	0.5	0.0	0.5	0.5	0.0	0.5	0.5	0.0	0.5	0.5
Other Services and Supplies	15.0	4.0	6.6	20.2	5.8	7.2	23.0	5.9	6.8	35.7	(1.5)	34.2	34.2	(0.4)	33.8	33.8	(0.4)	33.3	33.3	(0.4)	32.9	32.9
Subtotal, Services and Supplies	\$15.0	\$4.2	\$6.7	\$20.2	\$6.1	\$7.4	\$23.0	\$6.2	\$7.0	\$36.2	(\$1.5)	\$34.7	\$34.7	(\$0.4)	\$34.3	\$34.3	(\$0.4)	\$33.9	\$33.9	(\$0.4)	\$33.4	\$33.4
Capital Expenditures and Debt Principal Payments	4.9	2.1	2.4	6.1	1.8	2.5	6.1	1.6	2.4	10.2	0.0	10.2	10.2	(0.2)	10.0	10.0	(0.2)	9.8	9.8	0.3	10.1	10.1
Total Expenditures	\$30.1	\$9.1	\$11.7	\$36.7	\$12.2	\$13.2	\$40.3	\$12.0	\$12.8	\$65.1	(\$1.5)	\$63.5	\$63.5	(\$0.2)	\$63.4	\$63.4	(\$0.2)	\$63.2	\$63.2	\$0.3	\$63.4	\$63.4
Revenues Less Expenditures	(\$13.7)	(\$5.3)	(\$6.1)	\$3.2	(\$0.3)	(\$1.1)	\$3.6	\$0.5	(\$0.4)	\$3.7	\$1.5	\$5.2	\$5.2	\$1.5	\$6.7	\$6.7	\$1.6	\$8.3	\$8.3	\$1.1	\$9.4	\$9.4
Transfers to Plant Fund	(3.9)	(5.3)	(0.0)	3.2	(0.3)	(0.2)	3.8	0.5	(0.2)	3.9	0.0	3.9	0.0	6.5	6.5	0.0	6.5	6.5	0.0	6.5	6.5	
Revenues Less Expenditures and Transfers	(\$9.8)	\$0.0	(\$6.1)	\$0.0	\$0.0	(\$0.9)	(\$0.0)	\$0.0	(\$0.2)	(\$0.2)	\$1.5	\$1.3	\$5.2	(\$5.0)	\$0.2	\$6.7	(\$4.9)	\$1.8	\$8.3	(\$5.4)	\$2.9	\$2.9
Loans To/From E&G Fund	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Auxiliary/Plant Net Assets, Estimated End of Year Balance	\$13.4	\$3.8	(\$7.1)	\$16.4	\$3.4	(\$8.2)	\$19.8	\$3.8	(\$8.6)	\$15.0	\$1.5	\$16.5	\$21.7	\$1.5	\$23.2	\$29.9	\$1.6	\$31.5	\$39.7	\$1.1	\$40.8	\$40.8
Auxiliary and Plant Cash, Estimated Beginning of Year Balance	\$29.7	\$9.8	(\$0.2)	\$13.5	\$4.4	(\$6.4)	\$16.5	\$4.0	(\$7.5)	\$13.0	\$0.0	\$13.0	\$17.9	\$0.0	\$17.9	\$24.6	\$0.0	\$24.6	\$32.9	\$0.0	\$32.9	\$32.9
Auxiliary and Plant Cash, Estimated End of Year Balance	\$13.5	\$4.4	(\$6.4)	\$16.5	\$4.0	(\$7.5)	\$19.9	\$4.3	(\$7.9)	\$16.4	\$1.5	\$17.9	\$23.1	\$1.5	\$24.6	\$31.3	\$1.6	\$32.9	\$41.1	\$1.1	\$42.2	\$42.2

Source: PASSHE university CPP projections April 2021

Financial Results – Northeast (April 2021 Projections)

(\$ in Millions)

Revenues	Current Year FY 2020-21			Revised FY 2021-22			FY 2022-23 Projections					FY 2023-24 Projections			FY 2024-25 Projections			FY 2025-26 Projections			
	BL	LO	MA	BL	LO	MA	BL	LO	MA	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University
Tuition	\$71.9	\$27.6	\$12.9	\$75.0	\$27.7	\$14.1	\$78.6	\$29.1	\$14.3	\$122.0	\$0.0	\$122.0	\$122.0	\$2.4	\$124.4	\$124.4	\$2.5	\$126.9	\$126.9	\$2.5	\$129.4
Fees	15.7	6.8	2.7	25.1	8.4	3.2	26.4	8.7	3.5	38.6	0.0	38.6	38.6	0.8	39.4	39.4	0.8	40.2	40.2	0.8	41.0
State Appropriation	38.4	25.7	18.1	38.4	25.7	18.1	38.4	25.7	18.1	82.2	0.0	82.2	82.2	0.8	83.0	83.0	0.8	83.9	83.9	0.8	84.7
Auxiliary Sales	19.2	2.8	5.2	35.1	10.4	10.9	38.7	11.0	11.1	60.8	0.0	60.8	60.8	1.2	62.0	62.0	1.2	63.2	63.2	1.3	64.5
All Other Revenue	6.3	3.9	1.1	5.4	3.9	2.5	6.0	3.9	2.8	12.7	0.0	12.7	12.7	0.0	12.7	12.7	0.0	12.7	12.7	0.0	12.7
Total Revenues	\$151.5	\$66.9	\$40.0	\$179.0	\$76.2	\$48.8	\$188.1	\$78.4	\$49.8	\$316.3	\$0.0	\$316.3	\$316.3	\$5.3	\$321.6	\$321.6	\$5.4	\$326.9	\$326.9	\$5.5	\$332.4
Expenditures																					
Compensation Summary:																					
Salaries and Wages	\$77.9	\$38.5	\$22.3	\$75.1	\$38.7	\$20.8	\$77.7	\$36.3	\$19.9	\$133.9	(\$1.9)	\$132.0	\$132.0	\$1.9	\$133.9	\$133.9	\$1.3	\$135.3	\$135.3	\$1.3	\$136.6
Benefits	38.7	19.3	10.8	39.6	20.3	10.3	41.5	19.8	10.2	71.5	(0.5)	71.0	71.0	1.6	72.7	72.7	1.3	74.0	74.0	1.3	75.3
Subtotal, Compensation	\$116.7	\$57.8	\$33.1	\$114.7	\$58.9	\$31.0	\$119.2	\$56.2	\$30.1	\$205.4	(\$2.3)	\$203.1	\$203.1	\$3.5	\$206.6	\$206.6	\$2.7	\$209.3	\$209.3	\$2.7	\$212.0
Student Financial Aid	5.5	3.7	4.7	6.5	3.5	5.0	7.0	3.8	4.2	15.0	0.0	15.0	15.0	0.3	15.3	15.3	0.3	15.6	15.6	0.3	15.9
Other Services and Supplies	40.6	12.7	12.9	46.6	14.6	15.5	50.0	14.5	15.8	80.3	(1.7)	78.6	78.6	(0.5)	78.1	78.1	(0.6)	77.5	77.5	(0.5)	77.0
Subtotal, Services and Supplies	\$46.1	\$16.3	\$17.5	\$53.1	\$18.0	\$20.5	\$56.9	\$18.3	\$20.1	\$95.3	(\$1.7)	\$93.6	\$93.6	(\$0.2)	\$93.3	\$93.3	(\$0.3)	\$93.1	\$93.1	(\$0.1)	\$92.9
Capital Expenditures and Debt Principal Payments	6.6	3.5	3.2	7.8	3.3	3.6	8.2	3.2	3.5	14.8	0.0	14.8	14.8	(0.1)	14.8	14.8	(2.9)	11.9	11.9	0.3	12.2
Total Expenditures	\$169.4	\$77.6	\$53.9	\$175.6	\$80.3	\$55.2	\$184.2	\$77.7	\$53.6	\$315.5	(\$4.1)	\$311.5	\$311.5	\$3.2	\$314.7	\$314.7	(\$0.5)	\$314.2	\$314.2	\$2.8	\$317.1
Revenues Less Expenditures	(\$17.9)	(\$10.7)	(\$13.9)	\$3.5	(\$4.1)	(\$6.4)	\$3.9	\$0.7	(\$3.8)	\$0.8	\$4.1	\$4.8	\$4.8	\$2.0	\$6.9	\$6.9	\$5.8	\$12.7	\$12.7	\$2.6	\$15.3
Transfers to Plant Fund	(\$1.6)	(\$6.2)	\$0.4	\$4.0	(\$1.3)	(\$0.2)	\$4.4	\$0.7	(\$0.2)	\$4.9	\$0.0	\$4.9	\$0.0	\$6.7	\$6.7	\$0.0	\$10.6	\$10.6	\$0.0	\$10.6	\$10.6
Revenues Less Expenditures and Transfers	(\$16)	(\$4.5)	(\$14.2)	(\$0.5)	(\$2.7)	(\$6.2)	(\$0.4)	\$0.0	(\$3.7)	(\$4.1)	\$4.1	(\$0.1)	\$4.8	(\$4.6)	\$0.2	\$6.9	(\$4.8)	\$2.1	\$12.7	(\$7.9)	\$4.8
Loans To/From Auxiliary Fund	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Total Unrestricted Net Assets, Estimated End of Year Balance	\$40.0	\$37.3	(\$19.8)	\$41.3	\$32.7	(\$26.2)	\$44.4	\$33.1	(\$30.0)	\$47.5	\$4.1	\$51.6	\$56.4	\$2.0	\$58.4	\$65.3	\$5.8	\$71.1	\$83.8	\$2.6	\$86.4
Total Unrestricted Cash, Estimated Beginning of Year Balance	\$84.3	\$58.0	\$2.4	\$56.4	\$42.7	(\$11.4)	\$57.7	\$38.1	(\$17.8)	\$78.0	\$0.0	\$78.0	\$81.7	\$0.0	\$81.7	\$88.6	\$0.0	\$88.6	\$101.3	\$0.0	\$101.3
Total Unrestricted Cash, Estimated End of Year Balance	\$56.4	\$42.7	(\$11.4)	\$57.7	\$38.1	(\$17.8)	\$60.8	\$38.5	(\$21.6)	\$77.7	\$4.1	\$81.7	\$86.6	\$2.0	\$88.6	\$95.5	\$5.8	\$101.3	\$114.0	\$2.6	\$116.6

Notes:

FY 20/21 depict the impacts of COVID. Additional federal dollars from American Rescue Plan from March are not yet available or included.

FY 21/22 assumes return to on-campus instruction.

Source: PASSHE university CPP projections April 2021

Appendix V: Critical Path Timeline

The following table shows the major work streams within the implementation plan. The implementation plan is built upon a timeline to launch the integrated university by July 2022 with a phased implementation for continuous improvement. The integration effort will be executed through a phased approach instituting shared services support opportunities as they become functionally ready through the July 2021 to June 2022 time period.

As part of the phased-in curriculum process a detailed plan for phased-in curriculum development and implementation will be developed by September 2021. The academic curriculum is being reviewed and adjusted for phased implementation to allow for increased faculty engagement with full implementation of integrated curriculum targeted by August 2024. Any related system or support services listed in the timeline below that are linked to the curriculum will be adjusted accordingly to enable the implementation.

	Quarter 1 – 2021 Jan, Feb, Mar	Quarter 2 – 2021 Apr, May, Jun	Quarter 3 – 2021 July, Aug, Sep	Quarter 4 – 2021 Oct, Nov, Dec	Quarter 1 – 2022 Jan, Feb, Mar	Quarter 2 – 2022 Apr, May, Jun	Quarter 3 – 2022 Jul, Aug, Sep	Quarter 4 – 2022 + ¹² Oct, Nov, Dec
Student Lifecycle (2021)	<ul style="list-style-type: none"> Prospect: Grad students inquire about admissions information for Fall 2022 (12/31/2020 – 1/31/2021) Student-athletes inquire about athletics, admissions recruitment, and institutional scholarship information for Fall 2022 (12/31/2020 – 8/1/2021) 	<ul style="list-style-type: none"> Prospect: UG students inquire about admissions information for Fall 2022 (6/1/2021 – 8/1/2021) 	<ul style="list-style-type: none"> Prospect: Students consider potential institutions (8/1/2021) Applicant: Students begin submitting their applications on a rolling basis (9/1/2021 – 1/31/2022) Admitted: Students receive admissions decisions for Fall 2022 (9/1/2021 – 6/1/2022) 	<ul style="list-style-type: none"> Applicant: Students begin submitting their financial aid applications (10/1/2021 – 5/31/2022) Admitted: UG students receive financial aid offer letters (12/1/2021 – 1/31/2022) 	<ul style="list-style-type: none"> Applicant: Students begin applying for scholarships (1/1/2022 – 3/31/2022) 	<ul style="list-style-type: none"> Admitted: Grad students receive financial aid offer letters (4/1/2022 – 4/30/2022) Enrolled: New students register for Fall 2022 courses (4/1/2022 – 7/10/2022) Enrolled: UG students' deadline to submit housing deposits (4/1/2022 – 7/15/2022) Enrolled: Students participate in orientation (6/1/2022 – 7/31/2022) 	<ul style="list-style-type: none"> Academics: Students arrive on campus (8/1/2022 – 8/20/2022) 	<ul style="list-style-type: none"> Academics: Students' deadline to withdrawal without penalty (10/1/2022) Graduation (5/2/2023) Alumni Engagement (5/2/2023 – 5/26/2023)
Student Experience Working Groups included: <ul style="list-style-type: none"> Student Success, Services, & Campus Life) (Student) Athletics Marketing and Communicati 	<ul style="list-style-type: none"> Develop a common timeline and editorial calendar by 2/28/2021 (<i>MarComm</i>) 	<ul style="list-style-type: none"> Develop brand identity by 4/12/2021 (<i>MarComm</i>) Provide international services and opportunities (e.g., study abroad) by 4/30/2021 (<i>Student</i>) Provide prevention, intervention, 	<ul style="list-style-type: none"> Provide services around student of particular concern (i.e., Behavior Intervention Teams, Red Folder resources, clear emergency/crisis policies and procedures, gatekeeper training) by 8/1/2021 (<i>Student</i>) 	<ul style="list-style-type: none"> Integrated marketing and communications strategy by 10/31/2021 (<i>MarComm</i>) Determine communication functions and needs by 11/2/2021 (<i>MarComm</i>) 	<ul style="list-style-type: none"> Ensure availability of disability/accessibility services (including access, accommodation protocols, resources) by 1/1/2022 (<i>Student</i>) 	<ul style="list-style-type: none"> Ensure testing resources and procedures are in place (includes standardized testing processes, College Level Examination Program/ DANTES Subject Standardized Test) by 4/1/2022 (<i>Student</i>) Determine and finalize scholarship options (cash, waivers, etc.) and budget, while staying in compliance with NCAA by 4/1/2022 (<i>Athletics</i>) 	<ul style="list-style-type: none"> Provide access to tutoring resources by 8/1/2022 (<i>Student</i>) Provide holistic advising resources (includes early alert notification system, degree planner system, coordination of faculty and staff support) by 8/1/2022 (<i>Student</i>) Designate DEI division staff and affiliates as DEI trainers for all members of the campus community and secure time in student and employee orientations to 	<ul style="list-style-type: none"> Inventory and consolidate vendor contracts by 10/1/2022 (<i>MarComm</i>)

¹² Quarter 4 – 2022 also includes 2023 milestones.

	Quarter 1 – 2021 Jan, Feb, Mar	Quarter 2 - 2021 Apr, May, Jun	Quarter 3 - 2021 July, Aug, Sep	Quarter 4 - 2021 Oct, Nov, Dec	Quarter 1 - 2022 Jan, Feb, Mar	Quarter 2 - 2022 Apr, May, Jun	Quarter 3 – 2022 Jul, Aug, Sep	Quarter 4 – 2022 + ¹² Oct, Nov, Dec
on (MarComm)		<p>and postvention services that support wellness (i.e., mental health and counseling, AOD, health) by 4/30/2021 (<i>Student</i>)</p> <ul style="list-style-type: none"> • Provide equal access to Career Services across campuses by 4/30/2021 (<i>Student</i>) • NCAA decision on athletics program structure (<i>Athletics</i>) • Provide consistent financial literacy programs and financial counseling services by 4/30/2021 (<i>Student</i>) • Create a method for determining the student fee budget 	<ul style="list-style-type: none"> • Develop DEI (includes training, recruitment, policy, culture) by 8/1/2021 (<i>Student</i>) • Introduce future students to plans by 8/1/2021 (<i>MarComm</i>) 			<ul style="list-style-type: none"> • Developing a campus admissions process for student-athletes (i.e., how to distinguish campus/sport of interest) by 4/1/2022 (<i>Athletics</i>) • Determine integrated Student Code of Conduct by 5/1/2022 (<i>Student</i>) • Evolve infrastructure for Title IX compliance (including staffing, training, and protocols) for students and employees by 5/1/2022 (<i>Student</i>) • One overarching Student Handbook to present to all students by 5/1/2022 (<i>Student</i>) • Consistency of residence life offerings (including fees, services, utilities, costing structure) by 5/4/2022 (<i>Student</i>) • Integrate approach to compliance with Federal Drug Free Schools and Campuses Act for Alcohol and Other Drugs by 6/1/2022 (<i>Student</i>) • Integrate approach to compliance with State Hazing Regulations by 6/1/2022 (<i>Student</i>) • Integrate approach to compliance with federal 	<p>discuss the DEI resources and opportunities provided by 8/1/2022 (<i>Student</i>)</p> <ul style="list-style-type: none"> • Determine diversity demographics by 8/1/2022 (<i>Athletics</i>) 	

	Quarter 1 – 2021 Jan, Feb, Mar	Quarter 2 - 2021 Apr, May, Jun	Quarter 3 - 2021 July, Aug, Sep	Quarter 4 - 2021 Oct, Nov, Dec	Quarter 1 - 2022 Jan, Feb, Mar	Quarter 2 - 2022 Apr, May, Jun	Quarter 3 – 2022 Jul, Aug, Sep	Quarter 4 – 2022 + ¹² Oct, Nov, Dec	
		allocation, E&G allotment, as well determining allowable purchases by 5/4/2021 (<i>Athletics</i>)				Clery Act regulations by 6/1/2022 (<i>Student</i>) <ul style="list-style-type: none"> • Include requirement that all students must see Academic Advisor prior to semester scheduling by 6/1/2022 (<i>Student</i>) • Create a unified Writing Center Consultant Training Model by 6/1/2022 (<i>Student</i>) • Work with the Dean of Students/other offices to author unified DEI policy, procedures, an incident reporting/response by 6/1/2022 (<i>Student</i>) 			
Academics Working Groups included: • Academics	<ul style="list-style-type: none"> • Develop common academic calendar for AY 21-22 by 3/5/2021 (<i>Academics</i>) • Establish integrated academic program array by 3/31/2021 (<i>Academics</i>) 	<ul style="list-style-type: none"> • Recommend academic structure (colleges and departments) by 4/15/2021 (<i>Academics</i>) • CBA negotiations (<i>Academics</i>) 	<ul style="list-style-type: none"> • Decision on academic program synthesis released and student cross-walks by 9/1/2021 (<i>Academics</i>) • Develop an integrated academic catalog by 8/30/2021 (<i>Academics</i>) 	<ul style="list-style-type: none"> • Curriculum committee recommendation • Submission of revised curriculum to accreditation bodies by 10/15/2021 (<i>Academics</i>) 					
Institutional Accreditation Working Groups included: • Accreditation (Accr)		<ul style="list-style-type: none"> • CSC Preliminary Review is estimated to be submitted by 4/30/2021 (Accr) 	<ul style="list-style-type: none"> • CSC request form is estimated to be submitted by 9/1/2021 (Accr) 		<ul style="list-style-type: none"> • MSCHE approval of CSC request by 3/30/2022 (Accr) 			<ul style="list-style-type: none"> • MSCHE site visit by no later than 2/28/2023 (Accr) 	

	Quarter 1 – 2021 Jan, Feb, Mar	Quarter 2 - 2021 Apr, May, Jun	Quarter 3 - 2021 July, Aug, Sep	Quarter 4 - 2021 Oct, Nov, Dec	Quarter 1 - 2022 Jan, Feb, Mar	Quarter 2 - 2022 Apr, May, Jun	Quarter 3 – 2022 Jul, Aug, Sep	Quarter 4 – 2022 + ¹² Oct, Nov, Dec
<p>Regional SIS and Enrollment</p> <p>Working Groups included:</p> <ul style="list-style-type: none"> Enrollment Management (EM) Financial Aid (FinAid) Technology (Tech) 		<ul style="list-style-type: none"> Determine ED requirements for new financial aid identification (i.e., OPEID) by 4/30/2021 (FinAid) Develop common admissions deadlines by 6/30/2021 (EM) 	<ul style="list-style-type: none"> Institution receives allocation/modifications from US ED by 7/1/2021 (FinAid) Regional CRM (Tech) Integrated recruitment strategy for the integrated university and virtual campus by 8/1/2021 (EM) Consolidate technology platforms and systems – functionality recommendations and initial implementation by 8/1/2021 (EM) Determine PHEAA requirements/changes with programs for implementation by 8/1/2021 (FinAid) Determine the impact of integration on all existing MOUs and affiliation agreements for dual enrollment 	<ul style="list-style-type: none"> Implement technology for FAFSA by 10/31/2021 (Tech) Establish standardization of scholarships and criteria and determine financial aid leveraging strategy by 12/1/2021 (EM) CRM used for Application, Admissions communications, and all other pre-enrollment items through 12/21 by 12/31/2021 (Tech) 	<ul style="list-style-type: none"> IT Governance IT Policy Alignment (data retention, email retention, equipment replacement plan, cloud service policy, Security information security policy, AU policy) by 2/1/2022 (Tech) Transcript development by 3/1/2022 (Tech) Student and course data conversions by 3/1/2022 (Tech) Complete Degree Audit by 3/1/2022 (Tech) 	<ul style="list-style-type: none"> Determine tuition and fee structures for AY 22/23 and AY 23/24 by 4/1/2022 (EM) Reviews FAFSA/Financial Aid applications and send package details by 6/1/2022 (FinAid) 	<ul style="list-style-type: none"> One unified Financial Aid structure by 7/1/2022 (FinAid) Financial aid disbursed to students by 9/30/2022 (FinAid) Students are able to complete FAFSAs for upcoming school year to be eligible for federal financial aid by 7/31/2023 (FinAid) Prepare financial aid verification process for new students by 8/1/2022 (Tech) 	<ul style="list-style-type: none"> Conversion/integration to regional SIS by 12/1/2022 (Tech) Course schedule development for Fall 2022 by 12/31/2022 (Tech) Bill and payment by 12/31/2022 (Tech)

	Quarter 1 – 2021 Jan, Feb, Mar	Quarter 2 - 2021 Apr, May, Jun	Quarter 3 - 2021 July, Aug, Sep	Quarter 4 - 2021 Oct, Nov, Dec	Quarter 1 - 2022 Jan, Feb, Mar	Quarter 2 - 2022 Apr, May, Jun	Quarter 3 – 2022 Jul, Aug, Sep	Quarter 4 – 2022 + ¹² Oct, Nov, Dec
			programs by 9/1/2021 (<i>EM</i>) <ul style="list-style-type: none"> • Application launch for new admissions by 9/1/2021 (<i>Tech</i>) • Packaging and aid processing returning students by 9/1/2022 (<i>Tech</i>) • Students start scheduling classes for Summer and Fall 2022 by 9/1/2022 (<i>Tech</i>) 					
Finance and Infrastructure Working Groups included: <ul style="list-style-type: none"> • Finance and Administration (F&A) • Facilities and Infrastructure (Facilities) • Donors, Alumni Relations, and Foundations (Donor/Alumni) 	<ul style="list-style-type: none"> • Review and recommend shared services models where possible by 1/29/2021 (<i>Facilities</i>) • Merge purchasing processes and procedures by 1/1/2021 (<i>F&A</i>) 	<ul style="list-style-type: none"> • Develop integrated facilities staffing management plan by 4/1/2021 (<i>Facilities</i>) • Review and recommend shared services models where possible by 4/1/2021 (<i>Facilities</i>) 	<ul style="list-style-type: none"> • Develop financial and enrollment projections (first formal budget submission) by 9/15/2021 (<i>F&A</i>) • Assess vendor contracts for potential savings opportunities by 7/1/2021 (<i>F&A</i>) 	<ul style="list-style-type: none"> • Conduct a pricing (out of state tuition (UG and Grad) and basic fees)/financial aid leveraging study by 11/30/2021 (<i>F&A</i>) • Develop and implement a singular budget process by 12/31/2021 (<i>F&A</i>) 	<ul style="list-style-type: none"> • Distribute AY 22-23 budget preparation manual by 1/15/2022 (<i>F&A</i>) 	<ul style="list-style-type: none"> • Retain separate foundations and alumni associations while identifying collaborations and shared services opportunities by 6/30/2022 (<i>Donor/Alumni</i>) • Determine tuition and fee structures for AY 22-23 and AY 23-24 by 4/1/2022 (<i>F&A</i>) 	<ul style="list-style-type: none"> • Recommend an integrated career and professional engagement model to maximize student success by leveraging collaborative employer, faculty, and alumni partnerships by 7/1/2022 (<i>Donor/Alumni</i>) • Adopt a structure whereby service(s) to the combined university are provided by "service centers", not to be confused with State System shared services. This could include pooled vendor agreements for multiple campuses by 7/1/2022 (<i>F&A</i>) • Combine the entities into a new SAP business area, determine financial reporting needs, and coordinate the cutover by 7/1/2022 (<i>F&A</i>) 	<ul style="list-style-type: none"> • Coordinate with rating and lending agencies, including bond disclosures, by 10/1/2022 (<i>F&A</i>) • Financial statement audit (FY 22/23) due by 10/31/2023 • Single Audit due by 3/31/2024

	Quarter 1 – 2021 Jan, Feb, Mar	Quarter 2 - 2021 Apr, May, Jun	Quarter 3 - 2021 July, Aug, Sep	Quarter 4 - 2021 Oct, Nov, Dec	Quarter 1 - 2022 Jan, Feb, Mar	Quarter 2 - 2022 Apr, May, Jun	Quarter 3 – 2022 Jul, Aug, Sep	Quarter 4 – 2022 + ¹² Oct, Nov, Dec
							<ul style="list-style-type: none"> Load single budget into SAP by 7/1/2022 (F&A) 	
Human Resources Working Groups included: <ul style="list-style-type: none"> Human Resources & Labor Relations (HR) 			<ul style="list-style-type: none"> Create integrated HR structure consisting of campus-based staff reporting to single leadership position by 7/1/2021 (HR) 	<ul style="list-style-type: none"> Determine recommended organizational structure by 10/1/2021 (HR) 				

The following are the detailed implementation plans for each integration area.

Key Definitions

- **Student Lifecycle:** Represents key items for prospective students, applicants, enrolled students, academics (e.g., returning students), graduation, and alumni giving.
- **Milestone:** High-level activities that need to be completed by a specific date in the Student Lifecycle (e.g., establish standardization of scholarships and criteria prior to students applying for financial aid). For purposes of the high-level visual, the milestones are shown with a date range that encompasses the necessary activities for completion.
- **Predecessor (i.e., dependency):** Milestones from other areas that are required to be completed in order to finish the activities related to another milestone (e.g., establish integrated academic program array before new student register for Fall 2022 courses). In other words, the end date of the predecessor is before the end date of the next milestone.

Visual Description

Each working group has their own critical path plan with the following elements in sequential order:

- Student Lifecycle
- Milestones (i.e., the WGs' Critical Path Plan)
- Predecessors (i.e., milestones from other WGs' Critical Path Plan that are required to be completed in order to start a milestone)

Color Key: Milestones are color-coded by WG

Student Lifecycle
Academics
Accreditation
Finance & Administration
Human Resources & Labor Relations
Technology
Communications & Marketing
Donors/Alumni Relations/Foundations
Student Affairs & Supports (includes Student Success and Retention)
Financial Aid
Enrollment Management
Facilities & Infrastructure
Athletics
Online (Western Only)

Appendix W: Sources of Data, Documentation, and Leading Practices Reviewed

The working groups and regional integration project managers created and reviewed trackers of data requested and reviewed, including documentation reviewed and leading practices considered, that the groups leveraged when drafting Phase 1, high-priority recommendations and impacts. The primary sources of this information are listed below, but should not be considered an all-inclusive list:

- Act 110 of 2018, Title 24 of PA Statutes: Suicide Prevention in Institutions of Higher Education (Pennsylvania General Assembly, 2018)
- Association of University and College Counseling Center Directors Annual Surveys
- Bureau of Labor Statistics Occupational Outlook Handbook – Regional Data
- Council for the Advancement of Standards in Higher Education - Standards for Student Activities
- Center for Collegiate Mental Health Data
- Department of Education Equity and Athletics Disclosure Act
- EAB Starfish Proposal
- Federal Clery Regulations
- Hanover Research – Classification of Instructional Programs – Student and Labor Demand
- Hanover Research – Workforce Labor Trends
- International Accreditation for Counseling Services Standards
- K-12 Teacher Supply, Demand, and Shortages in Pennsylvania (July 2020) PSU Report
- Mission/Vision Statements for Bloomsburg, Lock Haven, Mansfield Universities
- NACADA Resource Handbook
- National Center for Education Statistics
- NCAA Institutional Performance Program (IPP)
- NCAA Model Athletic Department Document
- NCAA Sports Sponsorship Data Report
- State System Business Information (BI), Functional Costs, Academic Financial Details, Academic Program Summary for 2019-20.
- State System CPP Submissions
- State System Enrollment – 2010-2020
- State System Model Code of Conduct
- State System Model Policy for Sexual Misconduct
- State System National Center for Educational Statistics- Integrated Postsecondary Education Data System (IPEDS) Tuition and Cost of Attendance
- Pennsylvania Licensing Board Requirements for Counselors
- Prepared4PA Competency Maps
- Risk Management Standards from American Association of University Administrators, National Association of Student Personnel Administrators
- National Association for Behavioral Intervention and Threat Assessment, PSU Redfolder
- Sightlines FY2020 State System Facilities Assessment Report
- Title IX Final Rule
- University of South Carolina Academic Advising Guidebook
- University of North Carolina-Charlotte Advisor Manual

Appendix X: Implementation Costs

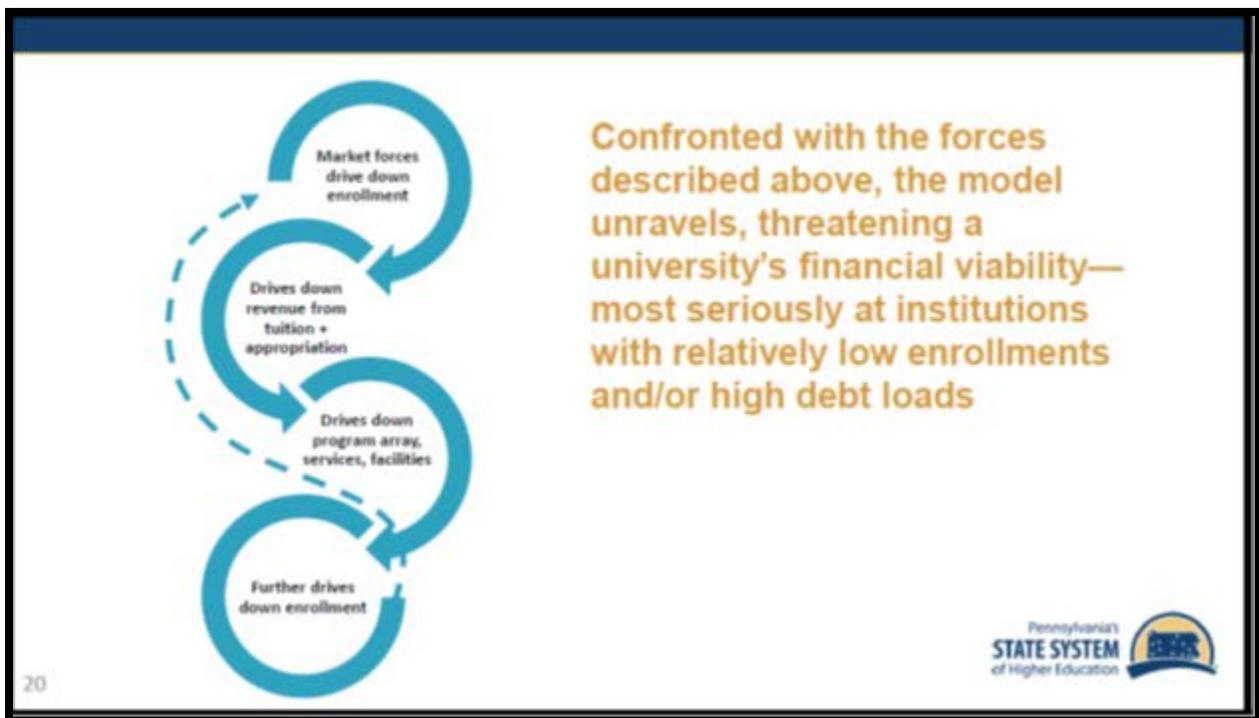
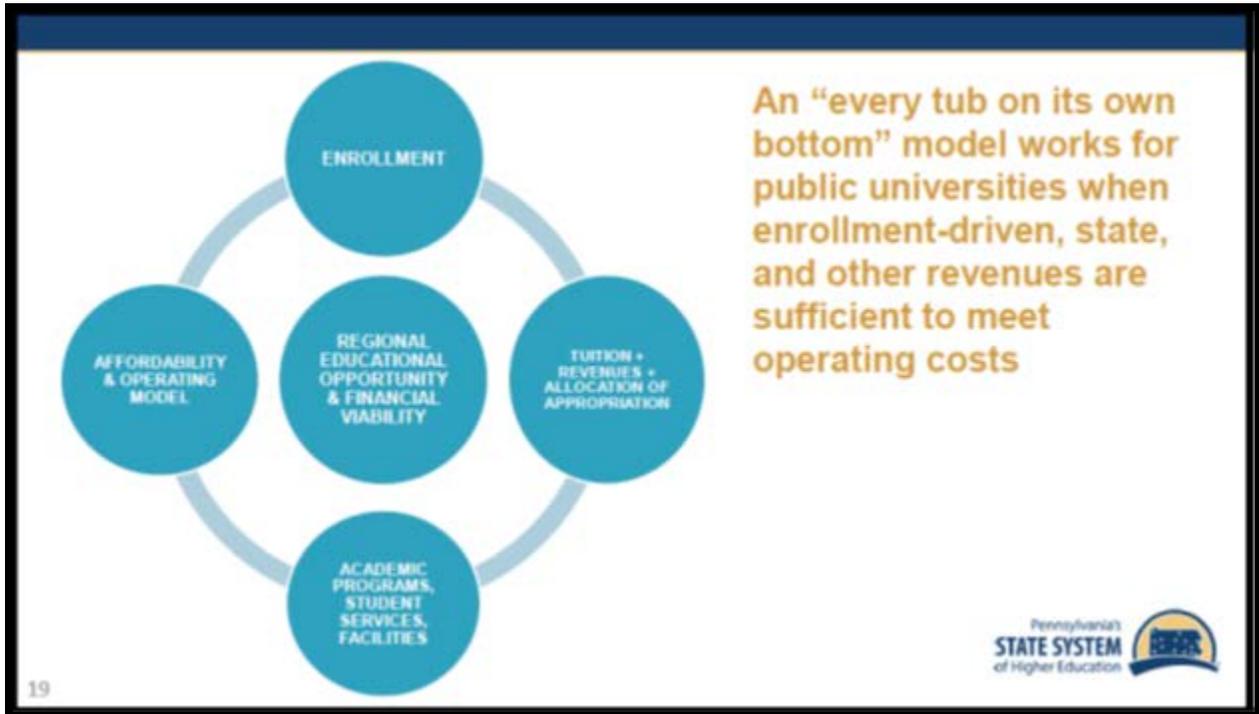
The following tables estimate the implementation start-up budgets required for the Northeast integration and summarize the implementation costs for both integrations, over a five-year period, if approved by the Board.

Northeast Integration – Budget Summary							
Fiscal Year							
	20/21	21/22	22/23	23/24	24/25	25/26	Total
<i>Consulting/Personnel</i>	\$584,588	\$326,600	\$87,500	\$87,500	\$0	\$0	\$1,086,188
<i>IT – SIS</i>	\$330,000	\$700,000	\$0	\$40,000	\$0	\$0	\$1,070,000
<i>IT – Software</i>	\$44,704	\$968,816	\$42,000	\$0	\$0	\$0	\$1,055,520
<i>IT – Technology Upgrades</i>	\$0	\$603,640	\$603,640	\$603,640	\$603,640	\$603,640	\$3,018,200
<i>Middle States</i>	\$112,825	\$0	\$0	\$0	\$0	\$0	\$112,825
<i>Faculty</i>	\$0	\$2,309,844	\$0	\$0	\$0	\$0	\$2,309,844
Total	\$1,072,117	\$4,908,900	\$733,140	\$731,140	\$603,640	\$603,640	\$8,652,577

Whole Integration – Budget Summary							
Fiscal Year							
	20/21	21/22	22/23	23/24	24/25	25/26	Total
<i>Northeast Integration</i>	\$1,072,117	\$4,908,900	\$733,140	\$731,140	\$603,640	\$603,640	\$8,652,577
<i>West Integration</i>	1,915,545	7,811,072	2,261,875	2,087,500	0	0	14,075,992
<i>Both Integrations</i>	1,261,000	5,600,000	0	0	0	0	6,861,000
Total	\$4,248,662	\$18,319,971	\$2,995,015	\$2,818,640	\$603,640	\$603,640	\$29,589,568

Appendix Y.1: Diligence on Possible System Trajectories

Excerpt from presentation to the Board of Governors, July 2020, outlining possible System responses to the System's financial challenges.



Resulting Assumptions to Guide Planning and Decision Making

- Not enough enrollments to support 14 comprehensive universities operating as stand-alone entities in a shrinking market for traditional, residential, baccalaureate education where we are losing our affordability advantage
- Current operating model is unsustainable—employee headcount not aligned with enrollments; too many redundant, sub-optimized, and/or competing academic programs; housing debt challenges some universities with declining enrollment
- Limited agility with respect of new educational opportunities
- Financially weaker institutions put financial pressure on others at a time they can least afford it
- Aggressive advocacy for state support is critical, but so is pragmatism about the level of support needed to sustain current operating model and restore affordability advantage
- Challenges were urgent before pandemic; even more so now
- We have an obligation to find a way to fulfill our historic mission (high-quality and affordable education)

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How to sustain
affordable,
high-quality,
education for all
Pennsylvanians?

22



Defining and evaluating possible responses



Pennsylvania's
STATE SYSTEM
of Higher Education

Trajectories:

- 1** Dissolve the System
- 2** Cease operations at some universities
- 3** Substantially increase state funding
- 4** Maintain the current path
(financial sustainability plans, shared services)
- 5** Pursue university integrations

#1. Dissolve the System:

Dissolution is either...

- De jure – requiring act(s) of legislation or
- De facto – results over time from un-arrested financial decline

And it...

- Ends universities' financial interdependence, but creates uncertainty about where responsibility lies for universities' unmet financial obligations
- Likely puts upward pressure on net average price
- Creates greater uncertainty for financially challenged universities
- Potentially addresses oversaturation of higher education market



#2. Cease Operations at Some Universities

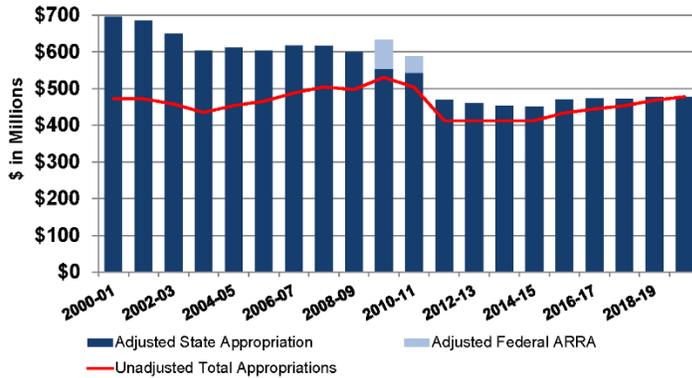
- Requires serial exercise of Board Authority as specified in the Financial Sustainability Policy; actual closures require act(s) of legislation
- Creates "education deserts" in Western Pennsylvania
- Creates even greater financial burden for remaining universities (and/or the State)



#3. Substantially Increase State Funding

Requires a sustained funding commitment from the General Assembly, including through periods of statewide fiscal constraint

Current state funding is down \$220 million (32%) from 2000-01 inflation-adjusted dollars



*Inflation adjustment based on CPI-U through 2018-19, and 2019-20 inflation of 2.0% per Congressional Budget Office projection.

Public Higher Education Appropriations per FTE Student 2018-19

State System: \$5,208
National average: \$8,196
Top-funded (WY): \$18,960

57% increase required to reach the national average (additional \$269 million recurring)

264% increase required to reach the top (additional \$1.2 billion recurring)

#4. Maintain the Current Path (1 of 3)

Sustainability plans submitted June 2020 (v2) by **nine universities** show five universities with balanced budgets by FY 2021-22, and:

(1) Net assets of the nine reduced by \$90 million over 3 years

Version 2 Plans	FY2019-20	FY 2020-21	FY 2021-22	Cumulative Total
TOTAL	(\$38,731,707)	(\$58,163,016)	\$6,714,743	(\$90,179,980)

(2) One university with a \$23 million cash gap (before System loans)

Version 2 Plans	FY2019-20	FY 2020-21	FY 2021-22	Cumulative Total
TOTAL	(\$4,000,000)	(\$11,857,299)	(\$7,587,505)	(\$23,444,804)

Systemwide (all 14 universities), net assets reduced by \$263 million*

Version 2 Plans	FY2019-20	FY 2020-21	FY 2021-22	Cumulative Total
TOTAL	(\$67,714,409)	(\$144,636,609)	(\$50,835,864)	(\$263,186,883)

*Net assets are projected to be used to balance the E&G and Auxiliary budgets, as well as fund capital projects.

#4. Maintain the Current Path (2 of 3)

Universities relying on aligning faculty and staff complement to overall lower enrollment levels

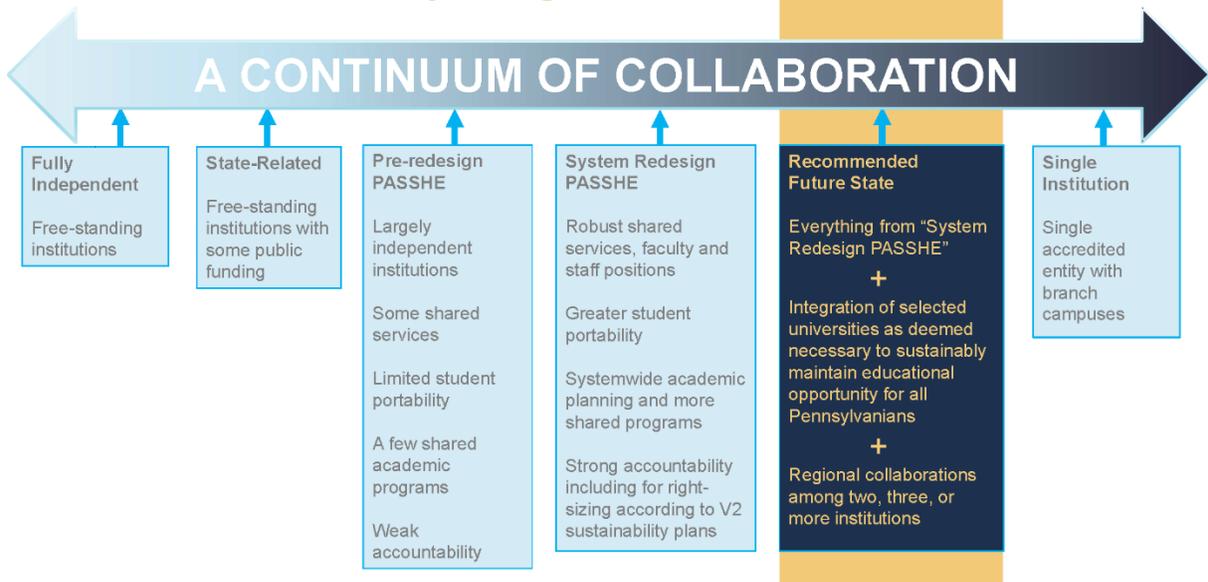
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	3-year % Change
Annualized FTE Enrollment ¹	90,629.61	88,338.77	85,816.29	86,397.27	-4.7%
Annualized FTE Faculty ²	5,068.38	5,023.79	4,733.11	4,363.47	-13.9%
Annualized FTE Nonfaculty ²	5,999.44	5,935.96	5,766.21	5,559.91	-7.3%
Annual Use of Net Assets		(\$67,714,409)	(\$144,636,609)	(\$50,835,864)	
Student/Faculty Ratio ³	16.7	16.4	16.9	18.4	
Student/Faculty Ratio Target ³				19.4	

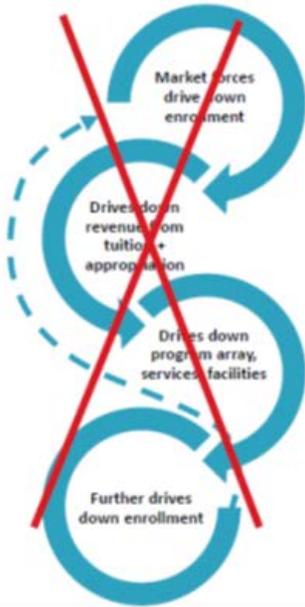
¹ Includes clock hour students for Indiana University of Pennsylvania

² Unrestricted, includes E&G and Auxiliary

³ Based on fall FTE faculty and fall FTE student enrollment, as reported in sustainability plans v2.

#5. Pursue University Integrations





Goals of University Integrations

- Maintain or expand high-quality educational opportunities for students across PA
- Honor and engage local identity and key stakeholders (COTs, alumni, affiliates, donors, etc.)
- Meet regional economic and workforce needs
- Position institutions for growth including in new markets
- Realize cost-savings
- Leverage talented faculty and staff

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Appendix Y.2: System Cross-Subsidies and Their Impacts

Cross-subsidies are achieved by the system in two ways: through the use of “system loans” and through differential allocation of state appropriate dollars.

System loans are loans made by all universities collectively to those universities that are unable for whatever reason to meet their operating costs. Since 2013, \$58M of system loans have been issued to Cheyney and Mansfield universities (the \$45M in loans made to Cheyney are being repaid through allocation of DGS capital dollars as a one-time, three-year investment made by Governor Wolf).

Loans on this scale are not practically repayable by the university that receives them since they require universities that are operating in the most challenged circumstances to generate the additional revenues necessary to pay them off.

Differential allocation of state-appropriated dollars entails the Board’s allocation of state-appropriated dollars using a formula that gives some universities more money per enrolled student FTE than others. Our current formula contains a fixed-cost component and a portion associated with student enrollment levels.

Cross-subsidies achieved in this way are shown in Table 1 below, where we see the variance from average per student FTE allocation for the year 2019/20 as well as the ten-year cumulative variance for the period 2010/11 to 2019/20. (It is important to note that Indiana University of Pennsylvania (IUP) is funded at a higher rate per student than other universities, reflecting the fact that it is the System’s research university and that graduate academic research is more costly. Accordingly, IUP cannot be considered as a school that is subsidized by others.)

University	Fall Student/Faculty Ratio		2019 % of sections with < 21	Variance from Average Allocation	
	Fall 2010	Fall 2019		2019/2020*	Cumulative since 2010/2011 ^{a,b}
West Chester	17.8	18.0	35%	(\$28,161,797)	(\$140,694,443)
Slippery Rock	20.7	18.7	35%	(\$8,445,166)	(\$28,879,216)
Bloomsburg	19.8	17.9	40%	(\$5,028,634)	(\$45,869,322)
Millersville	20.4	17.3	43%	(\$1,971,303)	\$8,855,884
East Stroudsburg	18.9	19.0	53%	(\$1,748,315)	(\$29,888,751)
Kutztown	20.4	16.7	47%	(\$1,371,543)	(\$8,091,766)
California	25.4	17.1	45%	\$981,856	(\$9,681,551)
Shippensburg	19.0	15.0	53%	\$1,887,385	\$16,118,159
Indiana	19.2	14.8	52%	\$4,166,138	(\$25,985,315)
Edinboro	18.1	13.2	59%	\$5,125,844	\$15,268,046
Clarion	18.9	14.5	58%	\$5,209,068	\$29,841,860
Lock Haven	19.2	13.9	63%	\$9,517,852	\$41,055,043
Mansfield	16.2	13.0	60%	\$9,586,326	\$79,768,693
Cheyney	15.4	13.2	65%	\$10,252,289	\$98,184,947

^a Allocation normalized to current formula base fixed component

^b In 2019 dollars

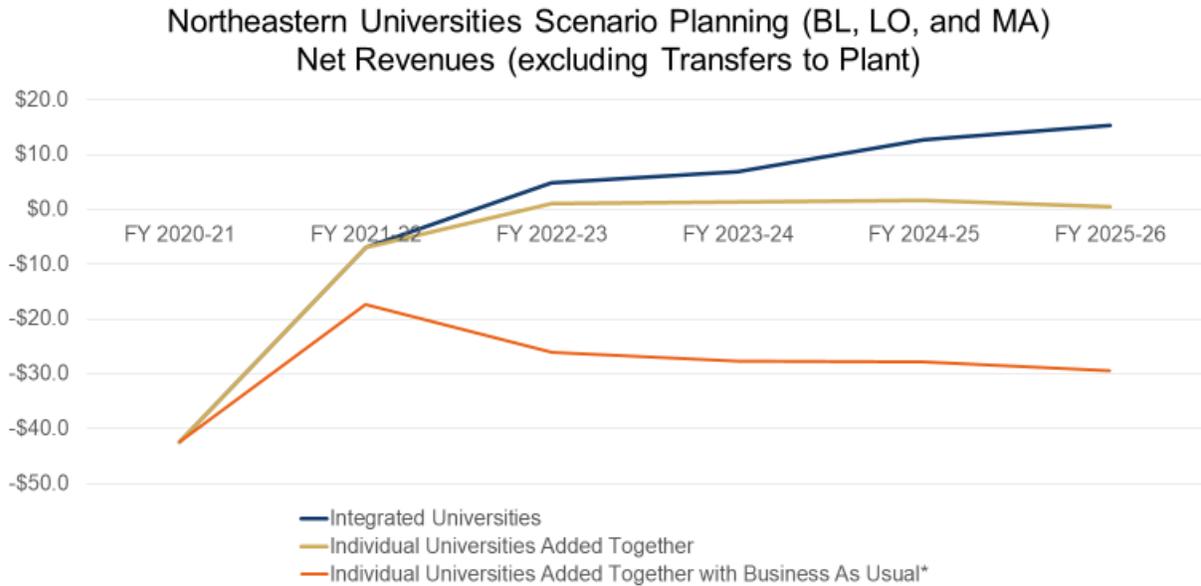
The table also shows how subsidized universities are able to offer more programs than their enrollments support, resulting in lower student-faculty ratios and smaller class sizes.

While subsidies make good sense from a policy perspective, they are not possible when subsidizing institutions are themselves experiencing significant financial pressures. They are also inequitable to faculty (whose workload at subsidizing universities is significantly higher than that of faculty at subsidized universities) and ultimately to students who pay the opportunity costs entailed in their universities’ foregoing significant state funding.

Financial Sustainability Impacts are shown in [Appendix C](#) using data that are published annually in the System's Appropriations book and Accountability Report ([Appendix B](#)). There we see steep year-on-year declines in key indicators of the System's financial health, including:

- Annual operating margin (In 2019/20, 11 universities were below the 2% recommended industry-standard compared to five in 2015/16.)
- Primary reserve ratios (In 2019/20, nine universities were below the 40% recommended industry standard, compared to five in 2015/16.)
- Minimum reserves – days cash on hand (In 2019/20, 10 universities have lower reserves than in 2015/16, 7 are below the 180-day recommended industry standard, three have less than 90 days.)

Appendix Y.3: Integration Compared with Other Trajectories' Financial Projections



**Business As Usual = flat enrollment beyond FY 2020/21 and universities do not address sustainability goals (i.e., student/faculty ratio target and/or a balanced unrestricted budget FY 2022/23).*

Key Assumptions

Integrated Universities	<ul style="list-style-type: none"> • 1% annual increase in enrollment • 1% annual increase in tuition/fees/aid • 1% annual increase in appropriations • 2% annual increase in pay • 3% annual increase in benefits • Savings from strategic sourcing • Mansfield loan repayment alternative source • Integrated personnel efficiencies
Individual Universities	<ul style="list-style-type: none"> • Flat enrollment beyond 2022-2023 • 1% annual increase in tuition/fees/aid • 1% annual increase in appropriations • 2% annual increase in pay • 3% annual increase in benefits • Savings from strategic sourcing • Required repayment of Mansfield's loan
Individual Universities with Business as Usual	<ul style="list-style-type: none"> • Same as Individual Universities, except: <ul style="list-style-type: none"> ○ Flat enrollment beyond 2020-2021 ○ No efficiencies to address sustainability (e.g., student/faculty ratio or balanced unrestricted budget)

Appendix Z: June 30, 2021 BOG Presentation

The June 30, 2021 BOG Presentation includes activities that occurred since May 2021 related to the integration, public comment updates plan updates, and additional information about the integration. Refer to

[https://www.passhe.edu/SystemRedesign/Documents/June%2030%202021%20BOG%20Workshop%20\(slides\).pdf](https://www.passhe.edu/SystemRedesign/Documents/June%2030%202021%20BOG%20Workshop%20(slides).pdf)

Appendix A.A: Northeast Integration Student Survey

Note: Updated surveys will be available and provided on 7/9/2021.

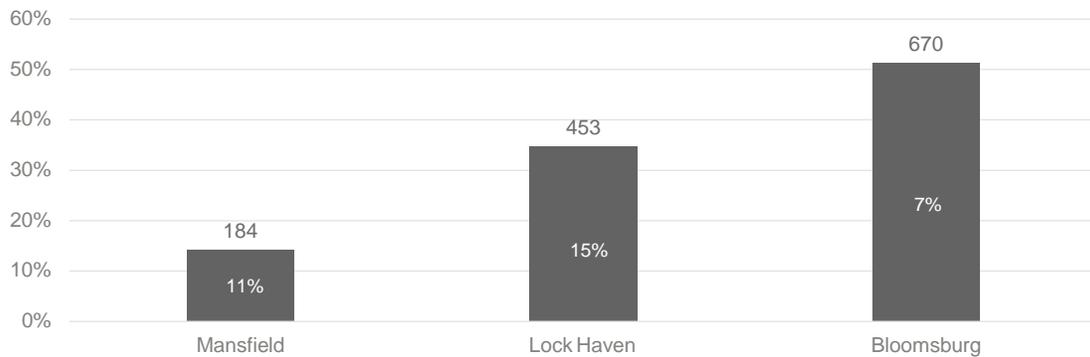
Student Survey Data

By Campus

April 2021

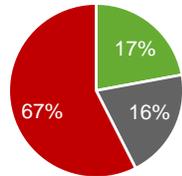


Which campus do you currently attend?

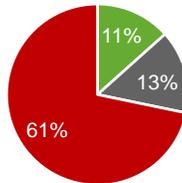


Imagine you are a potential incoming student for Fall 2022. With the new integrated university, you would have an expanded selection of majors to choose from but may have to take some classes via distance learning. How might the new array of offered programs and majors affect your decision to attend the integrated university?

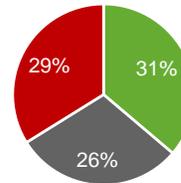
Bloomsburg



Lock Haven



Mansfield



- Increase interest and likelihood of attendance
- Not impact my decision
- Decrease interest and likelihood of attendance

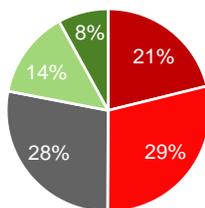
3

*Does not add up to 100% as some students didn't respond to questions.

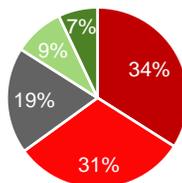
Northeast Integration Survey Data | Blue Beyond Consulting

How likely would you be to pursue a major if you had to take some percentage of required courses in a distance learning format?

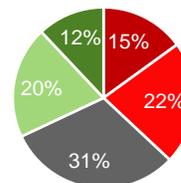
Bloomsburg



Lock Haven



Mansfield

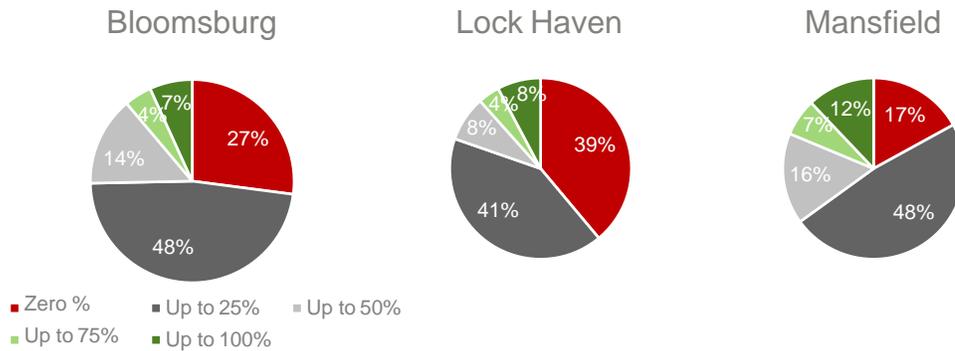


- Very Unlikely
- Unlikely
- Neutral
- Likely
- Very Likely

4

Northeast Integration Survey Data | Blue Beyond Consulting

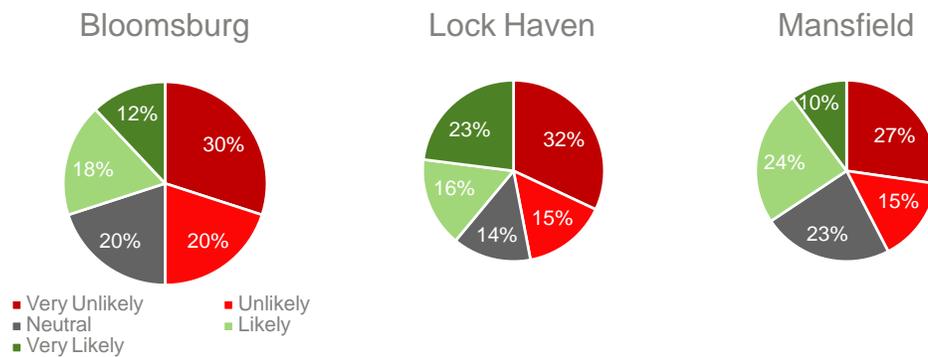
What percentage of your courses would you be willing to take in a distance learning format (including general education, major requirements, and electives)?



5

Northeast Integration Survey Data | Blue Beyond Consulting

If you prefer to take all or most of your courses face to face, how likely would you be to transfer to a different campus to complete your degree if your “home” campus did not offer your required courses in a face-to-face format?



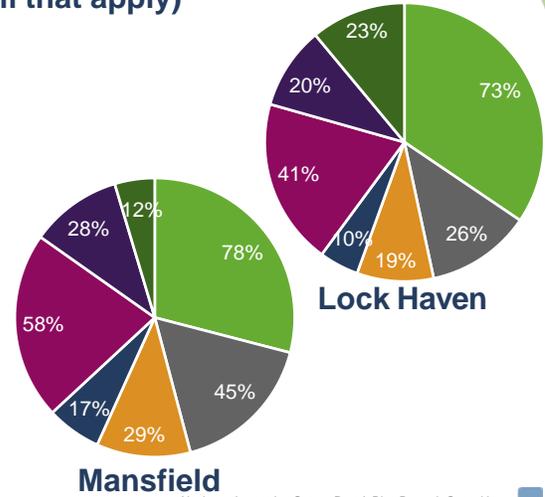
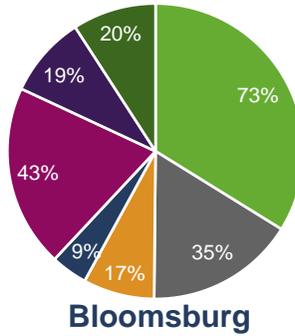
6

*Does not add up to 100% as some students didn't respond to questions.

Northeast Integration Survey Data | Blue Beyond Consulting

Which level of courses would you feel comfortable taking in a full or partial distance learning format? (check all that apply)

- General education courses, lower division
- General education courses, upper division
- Major courses, lower division
- Major courses, upper division
- Elective courses, lower division
- Elective courses, upper division
- I don't know



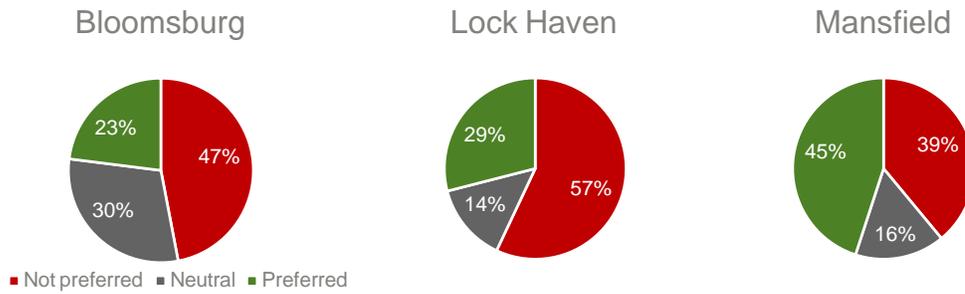
*Please note that this question allowed individuals to choose multiple options (check all that apply), therefore the percentage sums add up to more than 100%

7

Northeast Integration Survey Data | Blue Beyond Consulting

Please rate your preferences for distance learning distance learning formats.

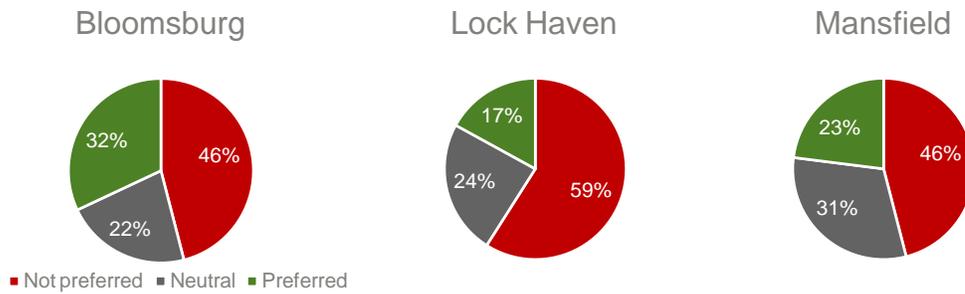
Fully asynchronous online — students complete required coursework at the times convenient to them; lectures are pre-recorded



9

Northeast Integration Survey Data | Blue Beyond Consulting

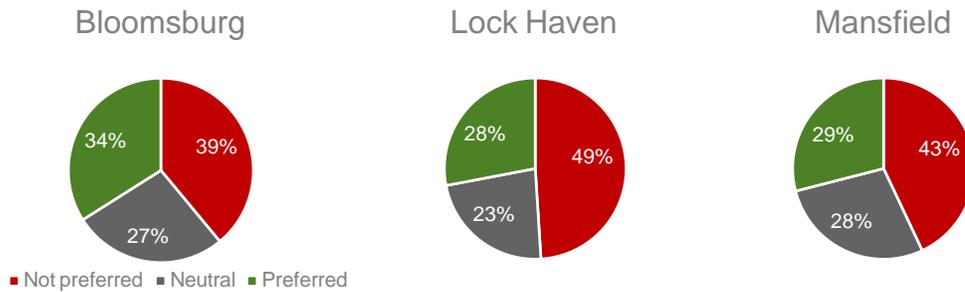
Partially asynchronous online — lectures are pre-recorded, but students regularly participate in live small group activities



10

Northeast Integration Survey Data | Blue Beyond Consulting

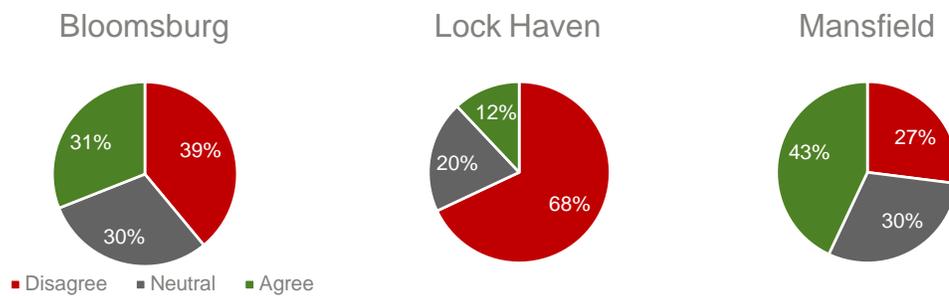
Fully synchronous online — students participate in live online lectures, discussions, and activities from their location of choice (e.g., home, dorm room)



11

Northeast Integration Survey Data | Blue Beyond Consulting

I believe the integration of the three universities will benefit future students (e.g., access to more majors, increased accelerated degree programs).



13

Northeast Integration Survey Data | Blue Beyond Consulting

Appendix A.B: Economic Impact Study

An Economic Impact Study was conducted and presented to the Board of Governors on June 30, 2021. This report updates the study conducted in 2015 and, using an industry accepted economic impact methodology, also estimates the impact of State System Redesign and the proposed integrations on the state and regional economies. The report can be found here:

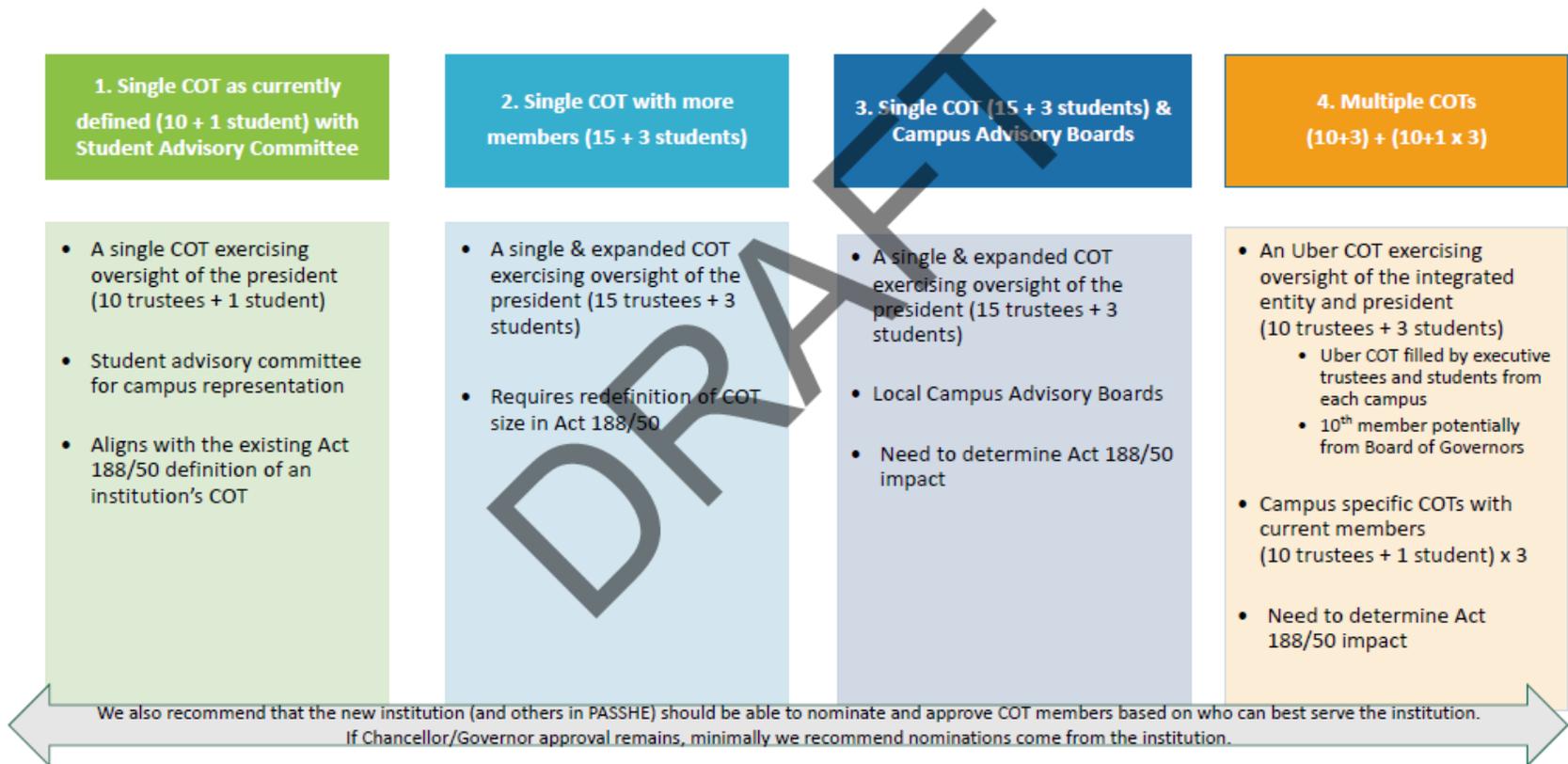
[https://www.passhe.edu/SystemRedesign/Documents/PASSHE-Econ-Impact-\(2021\).pdf](https://www.passhe.edu/SystemRedesign/Documents/PASSHE-Econ-Impact-(2021).pdf)

Appendix A.C: NE Governance Leadership – Integrated COT Structure Recommendation

The following are the draft recommendation options for the Northeast COT structure:

Draft recommendations

COT Integrated Design Options



Appendix A.D.1: Financial Updates

The following information reflects revised financial projections that were updated with information available subsequent to the April timeframe. Additional information associated with the projection process is provided including results of an independent third-party review and additional information regarding deferred maintenance.

AD.1 Updated CPPs

Subsequent to the April timeframe, new information was available and incorporated in the financial projections as follows:

- In April 2021, the board voted to freeze tuition for the 2021-2022 fiscal year. As such, the 1% tuition increase planning assumption that was included was removed from the 2021-2022 fiscal year, which also reduced the revenues for each subsequent year. The impact of this adjustment was a reduction in net revenue of approximately \$2.3million for each year of the plan.
- In May 2021, further guidance was issued from the Department of Education regarding the allowable uses and regulations surrounding the COVID-19 Stimulus funds received from the Coronavirus Response and Relief Supplemental Appropriations Act, 2021 (CRRSAA) and American Rescue Plan Act of 2021 (ARPA). The Northeast was awarded approximately \$32.3million of institutional funds in total for these two programs and the estimated distribution and recognition of these funds was determined and incorporated for both fiscal 2021 and 2022. Further, additional expenses in connection to the response to COVID-19 continue to be identified and confirmed.

Enrollment remains as provided in the April 2021 projections. The System is actively monitoring negative Fall enrollment trends in light of the evolving circumstances with COVID-19 for prospective students and their families across integrating and non-integrating universities. Updates to enrollment and revenue will be incorporated with the CPP submission in September 2021.

The following information reflects the updated financial position of the Northeast integration:

Updated Financial Projections

June 2021



Approach - Financial Update – June 2021

Per Act 50, information included in the report and recommendations from the October review of financial stability were updated for the proposed integrated universities, specifically:



Enrollment Projections

Review of annualized FTE enrollment based on historical trends, demographic shifts, and institutional enrollment management initiatives were reviewed.

Enrollment was updated based on program array and student success working group recommendations as well as enrollment for the online initiative in the West.



Financial Viability

Analysis of revenues, expenditures, and net assets to determine the integrated institutional financial viability was conducted.

The projected net financial viability varies between the regions given the variability in each university's entering position.

Approach and June Update Summary

- See Appendix U: Financial Sustainability Analysis for full description of projection approach and Act 50 requirements
- Subsequent to the April timeframe, new information was available and incorporated in the financial projections:
 - In April 2021, the board voted to freeze tuition for the 2021 – 2022 fiscal year. As such, the 1% tuition increase planning assumption that was included was removed from the 2021 -2022 fiscal year, which also reduced the revenues for each subsequent year.
 - In May 2021, further guidance was issued from the Department of Education surrounding the COVID stimulus funds received from CRRSAA and ARPA aid packages. Approximately \$32.3M for these two programs is incorporated for both fiscal years 2020 - 2021 and 2021 - 2022.

Enrollment Trends – Northeast

	Current Year FY 2020-21			Revised FY 2021-22			
	BL	LO	MA	BL	LO	MA	
Annualized FTE Enrollment							Enrollment reflected as of April 2021 Projections
Undergraduate (includes clock hour)	7,236.43	2,464.01	1,590.41	7,442.87	2,453.47	1,696.37	
Graduate	594.50	506.00	5.24	619.80	506.00	5.58	
Total Annualized FTE Enrollment	7,830.93	2,970.01	1,595.65	8,062.67	2,959.47	1,701.95	
Total Annualized FTE Enrollment for Three Universities			12,396.59			12,724.09	

	FY 2022-23 Projections	FY 2023-24 Projections		FY 2024-25 Projections			FY 2025-26 Projections			
	Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University	Integrated University	Adjustments from Assumptions	Revised Integrated University
Annualized FTE Enrollment										
Undergraduate (includes clock hour)	12,074.15	12,074.15	121.00	12,195.15	12,195.15	121.95	12,317.10	12,317.10	123.17	12,440.27
Graduate	1,133.51	1,133.51	12.00	1,145.51	1,145.51	11.45	1,156.96	1,156.96	11.55	1,168.51
Total Annualized FTE Enrollment	13,207.66	13,207.66	133.00	13,340.66	13,340.66	133.40	13,474.06	13,474.06	134.72	13,608.78
% Change				1%			1%			1%

Assumptions:

- Enrollment** – CPP enrollment was provided by the universities through 2022-23. FY 2023-24 through FY 2025-26 projections are derived from the application of adjustments associated with program array and student success recommendations. Annualized FTE counts are used when calculating financial impact. It is a key driver for tuition and auxiliary revenue.
- Adjustment** for recommendations for program array and student success (average of the 3 years was approximately 1.25% so 1% was used for conservative modeling)
Resulting in additional enrollment of 400 FTE from the time of initial integration.

Source: PASSHE university CPP projections April 2021

Key Assumptions – Northeast (June 2021 Projections)

Revenues:

- ◆ 1% enrollment growth from program array and student success initiatives and 1% tuition and fee rate increase
- ◆ 1% increase in state appropriation

Expenditures:

- ◆ Faculty complement needed to meet program array/student demand
- ◆ Strategic Sourcing Savings
- ◆ Executive Leadership, Management, and Administrative Support Staffing Efficiencies
- ◆ Negotiated Salary and benefit rate increases (2%/3%) (includes estimated turnover)
- ◆ Institutional Aid for Students
- ◆ Adjustments to debt service payments (to match actual payments in debt schedule)
- ◆ Targeted investment in student success (retention, technology, and support services)

	FY 2022-23	FY 2023-24	FY 2024-25	FY 2025-26
Revenues:				
◆ 1% enrollment growth from program array and student success initiatives and 1% tuition and fee rate increase	\$0	\$3,182,196	\$3,246,163	\$3,311,906
◆ 1% increase in state appropriation	0	822,267	830,490	838,795
	\$0	\$4,004,463	\$4,076,653	\$4,150,701
Expenditures:				
◆ Faculty complement needed to meet program array/student demand	\$0	\$1,855,106	\$893,042	\$799,380
◆ Strategic Sourcing Savings	(1,813,279)	Savings Maintained Annually		
◆ Executive Leadership, Management, and Administrative Support Staffing Efficiencies	(2,667,388)	(2,827,978)	(2,827,978)	(2,827,978)
◆ Negotiated Salary and benefit rate increases (2%/3%) (includes estimated turnover)	0	4,502,355	4,618,694	4,701,285
◆ Institutional Aid for Students	0	300,704	306,748	312,913
◆ Adjustments to debt service payments (to match actual payments in debt schedule)	0	(637,179)	(3,470,233)	(159,466)
◆ Targeted investment in student success (retention, technology, and support services)	429,848	34,258	20,000	
	(\$4,050,819)	\$3,227,266	(\$459,727)	\$2,826,134
Net Positive Impacts	\$4,050,819	\$777,197	\$4,536,380	\$1,324,567

Notes:

Same assumptions are incorporated into the E&G fund and the Auxiliary fund, where applicable;
Assumes Mansfield loan funded through alternative source;
Assumes no workforce development revenue contribution;
Turnover assumed to be realized in accordance with historical patterns

Source: PASSHE university CPP projections June 2021

Financial Results – Northeast (June 2021 Projections)

UNRESTRICTED BUDGET (EDUCATIONAL AND GENERAL AND AUXILIARY)

Revenues	Current Year FY 2020-21			Revised FY 2021-22			FY 2022-23 Projections						FY 2023-24 Projections			FY 2024-25 Projections			FY 2025-26 Projections			
	BL	LO	MA	BL	LO	MA	BL	LO	MA	Integrated University	Adjusted from Assumptions	Revised Integrated University	Integrated University	Adjusted from Assumptions	Revised Integrated University	Integrated University	Adjusted from Assumptions	Revised Integrated University	Integrated University	Adjusted from Assumptions	Revised Integrated University	
Tuition	\$71.9	\$27.6	\$12.9	\$74.3	\$27.5	\$13.9	\$77.8	\$28.8	\$14.2	\$120.8	\$0.0	\$120.8	\$120.8	\$2.4	\$123.2	\$123.2	\$2.5	\$125.6	\$125.6	\$2.5	\$128.1	
Fees	15.7	6.8	2.7	24.9	8.3	3.1	26.2	8.6	3.5	38.3	0.0	38.3	38.3	0.8	39.0	39.0	0.8	39.8	39.8	0.8	40.6	
State Appropriation	38.4	25.7	18.1	38.4	25.7	18.1	38.4	25.7	18.1	82.2	0.0	82.2	82.2	0.8	83.0	83.0	0.8	83.9	83.9	0.8	84.7	
Auxiliary Sales	19.2	2.8	5.2	34.7	10.3	10.8	38.3	10.9	11.0	60.2	0.0	60.2	60.2	1.2	61.4	61.4	1.2	62.6	62.6	1.3	63.9	
All Other Revenue	13.7	7.6	3.2	16.5	8.8	5.3	6.0	3.9	2.8	12.7	0.0	12.7	12.7	0.0	12.7	12.7	0.0	12.7	12.7	0.0	12.7	
Total Revenues	\$159.0	\$70.6	\$42.1	\$188.8	\$80.6	\$51.3	\$186.7	\$77.9	\$49.5	\$314.1	\$0.0	\$314.1	\$314.1	\$5.2	\$319.3	\$319.3	\$5.3	\$324.6	\$324.6	\$5.4	\$330.0	
Expenditures																						
Compensation Summary:																						
Salaries and Wages	\$77.9	\$38.5	\$22.3	\$75.1	\$38.7	\$20.8	\$77.7	\$36.3	\$19.9	\$133.9	(\$1.9)	\$132.0	\$132.0	\$1.9	\$133.9	\$133.9	\$1.3	\$135.3	\$135.3	\$1.3	\$136.6	
Benefits	38.7	19.3	10.8	39.6	20.3	10.3	41.5	19.8	10.2	71.5	(0.5)	71.0	71.0	1.6	72.7	72.7	1.3	74.0	74.0	1.3	75.3	
Subtotal, Compensation	\$116.7	\$57.8	\$33.1	\$114.7	\$58.9	\$31.0	\$119.2	\$56.2	\$30.1	\$205.4	(\$2.3)	\$203.1	\$203.1	\$3.5	\$206.6	\$206.6	\$2.7	\$209.3	\$209.3	\$2.7	\$212.0	
Student Financial Aid	5.5	3.7	4.7	6.5	3.5	5.0	7.0	3.8	4.2	15.0	0.0	15.0	15.0	0.3	15.3	15.3	0.3	15.6	15.6	0.3	15.9	
Other Services and Supplies	40.6	12.7	12.9	46.6	14.6	15.5	50.0	14.5	15.8	80.3	(1.7)	78.6	78.6	(0.5)	78.1	78.1	(0.6)	77.5	77.5	(0.5)	77.0	
Subtotal, Services and Supplies	\$46.1	\$16.3	\$17.5	\$53.1	\$18.0	\$20.5	\$56.9	\$18.3	\$20.1	\$95.3	(\$1.7)	\$93.6	\$93.6	(\$0.2)	\$93.3	\$93.3	(\$0.3)	\$93.1	\$93.1	(\$0.1)	\$92.9	
Capital Expenditures and Debt Principal Payments	6.6	3.5	3.2	7.8	3.3	3.6	8.2	3.2	3.5	14.8	0.0	14.8	14.8	(0.1)	14.8	14.8	(2.9)	11.9	11.9	0.3	12.2	
Total Expenditures	\$169.4	\$77.6	\$53.9	\$175.6	\$80.3	\$55.2	\$184.2	\$77.7	\$53.6	\$315.5	(\$4.1)	\$311.5	\$311.5	\$3.2	\$314.7	\$314.7	(\$0.5)	\$314.2	\$314.2	\$2.8	\$317.1	
Revenues Less Expenditures	(\$10.4)	(\$7.0)	(\$11.8)	\$13.2	\$0.4	(\$3.9)	\$2.5	\$0.2	(\$4.1)	(\$1.4)	\$4.1	\$2.6	\$2.6	\$2.0	\$4.6	\$4.6	\$5.8	\$10.4	\$10.4	\$2.6	\$13.0	
Transfers to Plant Fund	(\$1.6)	(\$6.2)	\$0.4	\$4.0	(\$1.3)	(\$0.2)	\$4.4	\$0.7	(\$0.2)	\$4.9	\$0.0	\$4.9	\$0.0	\$6.7	\$6.7	\$0.0	\$10.6	\$10.6	\$0.0	\$10.6		
Revenues Less Expenditures and Transfers	(\$9)	(\$0.8)	(\$12.2)	\$9.2	\$1.7	(\$3.7)	(\$1.9)	(\$0.5)	(\$4.0)	(\$6.3)	\$4.1	(\$2.3)	\$2.6	(\$4.7)	(\$2.1)	\$4.6	(\$4.8)	(\$0.2)	\$10.4	(\$8.0)	\$2.4	
Loans To/From Auxiliary Fund	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	
Total Unrestricted Net Assets, Estimated End of Year Balance	\$47.4	\$41.0	(\$17.7)	\$58.4	\$40.8	(\$21.6)	\$60.1	\$40.7	(\$25.8)	\$75.1	\$4.1	\$79.1	\$81.8	\$2.0	\$83.8	\$88.4	\$5.8	\$94.2	\$104.5	\$2.6	\$107.1	
Total Unrestricted Cash, Estimated Beginning of Year Balance	\$84.3	\$58.0	\$2.4	\$63.8	\$46.4	(\$9.4)	\$74.8	\$46.2	(\$13.3)	\$107.8	\$0.0	\$107.8	\$109.3	\$0.0	\$109.3	\$113.9	\$0.0	\$113.9	\$124.3	\$0.0	\$124.3	
Total Unrestricted Cash, Estimated End of Year Balance	\$63.8	\$46.4	(\$9.4)	\$74.8	\$46.2	(\$13.3)	\$76.5	\$46.1	(\$17.4)	\$105.2	\$4.1	\$109.3	\$111.9	\$2.0	\$113.9	\$118.5	\$5.8	\$124.3	\$134.7	\$2.6	\$137.3	



Source: PASSHE university CPP projections June 2021

Appendix A.D.2: Administrative Savings Assumed From the Integrations and Assumptions Related to the Personnel Savings and Operating Savings

The information below provides an overview of the approach to develop savings assumptions associated with personnel and operating areas. Additional contextual information surrounding enrollment trends are provided within this analysis.

Integration Financial Projection Background - Savings Assumptions

Updated June 2021



Integration Non-Faculty Personnel Savings Methodology

- Extracted a personnel file from SAP in January 2021 of all nonfaculty employees, by employee group
- Reviewed duplicate positions by organizational unit and position titles to determine a baseline starting point for savings. Given that the current ESLPs, which extend until September 2021 (for participation notification), would impact results prior to integrations, savings were reduced from the baseline calculations.
- For conservative savings estimates, assumed duplicative positions with the lowest salaries would be eliminated due to integration; totaled actual compensation to calculate savings (salary and benefit).
- Assumed no backfilling of duties.
- Positions such as public safety, facilities, athletics, and direct student services staff were specifically excluded, our analysis considered only \$87M out of a potential \$355M of personnel costs for both regions combined.
- Lists and estimated savings were distributed to universities for validation and to determine the phased-in approach of the savings (i.e., how much is spread out over how many years)
- Only known retirements for FY 20/21 and 21/22 were built into the individual university baseline data for the projections. Savings were built into the integrated university projection only.



Integration Non-Faculty Personnel Savings Results - NE

Regions developed their phased-in approach to estimate workforce reductions for integrations

Northeast	22/23		23/24		24/25		25/26		Total	
	\$	FTE	\$	FTE	\$	FTE	\$	FTE	\$	FTE
Executive, Leadership	\$2.7M	13.3	\$1.8M	7.6	\$1.8M	7.6	\$1.8M	7.6	\$8.1M	36 (20% of total group)
Administrative Support Staff	n/a	n/a	\$1.1M	14.5	\$1.1M	14.5	\$1.1M	14.5	\$3.0M	44 (21% of total group)
Total									\$11.2M	80

Preliminary estimates are approximately 80 employee FTEs reduced across the 4 years of the projection period and across the 3 universities. This can be achieved through a variety of methods.



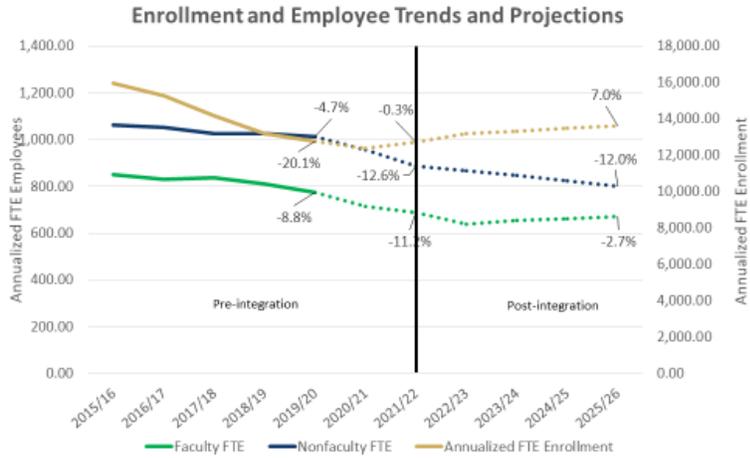
Integration Nonfaculty Compensation Savings Distribution

	Mgmt/Nonrep	Union*
Northeast	73%	27%
West	71%	29%
Average	72%	28%
*Substantially all AFSCME		
About 3/4ths of the administrative Savings (dollars) are from Mgmt/Nonrep		

- Changes in workforce due to integrations represent approximately 2.9% - 4.1% of the total workforce of the integrated entities
- Preliminary estimates are approximately 70 – 80 employee FTEs reduced in each region, post-integration
- Union positions will be least impacted by integration
 - Reductions in nonrepresented (management) workforce comprise approximately 72% of the personnel dollar savings from integration
- Assumes normal turnover achieved annually



Northeast Enrollment and Total Workforce



Percentages in chart are change since year of previous data point.

Pre-Integration

- Most personnel reductions occurred *prior to integration*, as part of sustainability to align revenue and expenses. **7%** reduction in employees from FY15/16 to FY19/20, compared to an **enrollment drop of 20%**.
- Further personnel drops of 12% are projected to occur due to sustainability work before the integration of the universities

Post-integration

- Staffing reductions are isolated to administration functions with efficiencies gained by combining functions; Changes in workforce related to integration represent only **2.9%** of the total workforce of the integrated entity
- Faculty are projected to *grow* slightly during integration as instructional needs increase with higher enrollment
- Enrollment progress with integration is stabilizing faculty jobs and projecting slight growth after sustainability changes implemented
- Enrollment stabilization also has a positive impact on and off campus within the community



Faculty Staffing Considerations

- Faculty reductions as part of the University Sustainability Policy are addressing existing misalignment of instructional resources and enrollment

Trends between FY15/16 and FY19/20		
	Northeast	West
Enrollment Decrease	-20.1%	-19.4%
Faculty Decrease	-8.8%	-4.5%

- Faculty reductions are achieved through several methods, including several that do not involve involuntary separations, such as the several rounds of ESLPs, elimination of unfilled vacancies, and reduction of temporary staff



Integration Operational Savings Methodology

- In late 2019, the State System engaged Treya Partners to assist with strategic sourcing for four commodities with the highest spend within the System.
 - A variety of sourcing events were conducted during 2020 for Office Supplies, MRO (Maintenance, Repair and Operations) and IT hardware.
 - In the West, a group of universities (Slippery Rock, IUP, Clarion, and Edinboro) engaged in a joint procurement for dining services which had been previously outsourced to multiple vendors by individual universities. In the NE, a group of universities (Bloomsburg, Lock Haven, Mansfield, East Stroudsburg, Kutztown) engaged in a joint procurement for dining services which had been previously outsourced to multiple vendors by individual universities.
- The new contracts associated with the spend categories and dining are fully executed.
- The results of the sourcing savings and dining were assumed at a reduced amount (75%) to be conservative and built into the operational savings for E&G and Auxiliary funds.



State System Strategic Sourcing Integration Savings



Savings Summary by Integration / Category

Integration Universities	Category	Addressable Annual Baseline	Total Contract Baseline (5 Years)	Savings %	Estimated Annual Savings	Estimated 5 Year Contract Savings
1 - Clarion, Edinboro, and California	Western Dining ¹	\$5,215,017	\$26,075,087	16%	\$851,167	\$4,255,837
	ITHW - Desktops & Laptops ²	\$967,592	\$4,837,960	6%	\$55,672	\$278,360
	MRO ³	\$643,826	\$3,219,130	9%	\$54,852	\$274,260
	Office Supplies ³	\$382,919	\$1,914,595	20%	\$77,618	\$388,092
	ITHW - Peripherals ²	\$221,000	\$1,105,000	3%	\$6,630	\$33,150
Integration 1 Sub Total		\$7,430,354	\$37,151,772	14%	\$1,045,940	\$5,229,700
2 - Bloomsburg, Lock Haven, and Mansfield	Eastern - Central Dining ¹	\$12,546,445	\$62,732,224	16%	\$2,047,334	\$10,236,671
	ITHW - Desktops & Laptops ²	\$1,126,278	\$5,631,390	15%	\$168,942	\$844,709
	MRO ³	\$720,141	\$3,600,705	9%	\$61,354	\$306,769
	Office Supplies ³	\$652,556	\$3,262,780	20%	\$132,274	\$661,372
	ITHW - Peripherals ²	\$260,000	\$1,300,000	3%	\$7,800	\$39,000
Integration 2 Sub Total		\$15,305,420	\$76,527,099	16%	\$2,417,704	\$12,088,521
Grand Total		\$22,735,774	\$113,678,871	15%	\$3,463,644	\$17,318,220

¹Dining category savings are based on year 1 savings at current enrollments and do not factor CPI increases

²ITHW contract terms are currently set for 3 years, but the analysis above extrapolates the savings for a 5-year period

³Spend for Office Supplies and MRO has been approximated by respective item usage by University

Integration Operational Savings Results

Pennsylvania's State System of Higher Education
 Estimated Savings from Treya Partners for Integrating Universities

Fund	Dining		ITHW - Desktops & Laptops		MRO	Office Supplies		ITHW - Peripherals		Total	
	Auxiliary	E&G	E&G	E&G	E&G	E&G	E&G	Auxiliary	E&G	Auxiliary	E&G
West											
Estimated Annual Savings	\$851,167	\$55,672	\$54,852	\$77,618	\$6,630	\$851,167	\$194,772				
75% of Estimated Savings	\$638,375	\$41,754	\$41,139	\$58,214	\$4,973	\$638,375	\$146,078				
Northeast											
Estimated Annual Savings	\$2,047,334	\$168,942	\$61,354	\$132,274	\$7,800	\$2,047,334	\$370,370				
75% of Estimated Savings	\$1,535,501	\$126,707	\$46,016	\$99,206	\$5,850	\$1,535,501	\$277,778				



Appendix A.D.3: Highlights of Major Changes Between April and June Projections

The following table highlights the specific adjustments between the April and June projections and their impacts for each fiscal year. Further descriptions of the specific adjustments are outlined [in Appendix A.D.1.](#)

Northeast - Highlights of Major Changes – April to June Projections

Revenues Less Expenditures	April	June	Comments
FY 21/22	(\$7.0M)	\$9.6M	Recognition of \$18.7M stimulus funds, partially offset from 1% tuition and fee rate increase removed in 21/22
FY 22/23	\$4.8M	\$2.6M	Reduced revenue from a 1% tuition and fee rate increase removed in 21/22
FY 23/24	\$6.9M	\$4.6M	Reduced revenue from a 1% tuition and fee rate increase removed in 21/22
FY 24/25	\$12.7M	\$10.4M	Reduced revenue from a 1% tuition and fee rate increase removed in 21/22
FY 25/26	\$15.3M	\$13.0M	Reduced revenue from a 1% tuition and fee rate increase removed in 21/22

Source: PASSHE university CPP projections June 2021

Appendix A.D.4: Highlights of the Third-Party Review of the Financial Projections and Assumptions

In May 2021, the State System engaged Clifton Larson Allen (CLA), the Commonwealth and System's auditor, to conduct an independent review of the integration financial projections.

The methodology that CLA followed was to review and score the assumptions including tuition and auxiliary revenue and operating and personnel savings. CLA utilized a scale that is standard for this type of evaluation that placed an assumption between conservative and aggressive with a recommended appropriate range based on best practices.

The conclusion from this review was that overall the assumptions utilized for both regions fall within the appropriate range with those that are more sensitive aligned toward more aggressive based on historical trends and ability to execute against plans.

The following slides were provided to the Board at the June 30 Board meeting to provide an overview of the approach and outcome of the third-party review:

Third Party Financial Review

Third Party Financial Review

Overview

- Engaged Clifton Larson Allen (CLA), the Commonwealth and System's auditor, to conduct a review of the projections.
- CLA reviewed and scored the assumptions including tuition and auxiliary revenue and operating and personnel savings.
- CLA utilized a scale that placed an assumption between conservative and aggressive with a recommended appropriate range (highlighted in blue on the following slides) based on best practices.
- Overall the assumptions utilized for both regions fall within the appropriate range with those that are more sensitive aligned toward more aggressive based on historical trends and ability to execute against plans.

2

Northeast Integration FY23 – FY26

- Based on the historical trends in enrollment, CLA scored undergraduate tuition between moderate and aggressive and graduate tuition as slightly beyond moderate.
- Management assumed an increase of personnel expenditures, due to pay increases. CLA scored the personnel expenditures as moderate, due to the projected increase in personnel expenditures.
- Other expenditure assumptions were scored as moderate, due to there being achievable plans in place.
- Overall projections are scored within the appropriate assumption range for the northeast integration from FY23 – FY26.

Key Assumption	CLA Assessment of Management's Assumptions		
	← Conservative →	← Moderate →	← Aggressive →
OVERALL PROJECTIONS		★	
REVENUE			
Tuition			
<i>Undergraduate Tuition</i>			★
<i>Graduate Tuition</i>		★	
Fees		★	
State Appropriation		★	
Auxiliary Sales		★	
All Other Revenue		★	
EXPENDITURES			
Personnel		★	
Student Financial Aid		★	
Other Services and Supplies		★	
Capital Expenditures and Debt Principal Payments		★	

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Create Opportunities

Third Party Financial Review

Plan Section 10: Financial

Analysis of the Financial Projections: Conclusion

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Scoring of Assumptions

- It appears that sufficient elements have been considered, and all information utilized appears to be reasonable.
- Management's projections for the integration are all within the appropriate assumption range.

Greatest Sensitivities

- CLA has given consideration to all revenue and expenditures.
- Through our analysis it was determined that the assumptions with the greatest sensitivities are undergraduate and graduate tuition revenue driven by enrollment.
- Personnel expenditures was also an assumption CLA considered to have sensitivity.
- Our analysis determined that financial sustainability will be most significantly impacted by the assumptions with the greatest sensitivities.

Initiatives

- Projections are within the appropriate assumption range. However, it is important the following initiative are implemented with success:
 - *Online offerings in the West*
 - *Increased enrollment of 1%*
 - *Increased retention through additional student support*
 - *Implementation of strategic discounting to balance gross revenue and student financial aid*
 - *Projected workforce to achieve student to faculty ratio goals and reduce redundancies in the integrated universities*



Create Opportunities

Appendix A.D.5: Short-term Deferred Maintenance

The financial pressures facing the universities in the Northeast has limited their ability to invest in the physical plant, which has continued to increase the deferred maintenance backlog of the universities.

In total, these short-term priorities are currently estimated at \$128million and are a key area of investment need for the Northeast. These priorities encompass systems that are in a failure state or at high risk of failing.

The chart below reflects the primary categories of deferred maintenance priorities for the Northeast as estimated in April 2021. These continue to be evaluated and refined as part of our financial planning processes.

Northeast - Deferred Maintenance Analysis			
<i>The following reflects the short-term deferred maintenance needs for the Northeast integration, orgnaized by university and fund.</i>			
Current Need - In Thousands			
	E&G	AUX	TOTAL
Bloomsburg	\$ 13,000	\$ 5,775	\$ 18,775
Lock Haven	\$ 33,000	\$ 19,250	\$ 52,250
Mansfield	\$ 45,000	\$ 12,510	\$ 57,510
Total	\$ 91,000	\$ 37,535	\$128,535

Appendix A.D.6: Summary of Implementation Outcomes

The Northeast seeks to improve student outcomes by achieving and maintaining an annual graduate rate improvement, eliminating opportunity gaps, improving overall retention rates, and achieving balanced operations by the 2022-2023 fiscal year.

1. The Northeast plan projects a financially stable university achieved by the fiscal year 2022-2023 resulting in both positive operating margins and primary reserve ratios, which individually would be difficult to achieve, while also providing the necessary breadth of academic programming and students supports. Overall, program array, student success, and online recommendations result in a 1% year-over-year enrollment increase while administrative costs are reduced by \$11.2million. This also aligns to the goal associated with sustainability for enrollment.
2. Investments (approximately \$500,000) that drive enrollments in targeted areas include:
 - improved student retention and graduation rates through a variety of means including
 - predictive analytics and holistic advising
 - supplemental instruction
 - mental health resources
 - behavioral intervention
 - diversity, equity and inclusion support programs
 - identify undeclared students as a cohort
 - establish fully-integrated Living Community Model
 - broaden student orientation programs
 - enrollment growth from students in new or underserved markets
 - strengthening marketing and tuition discounting for students
 - standardizing merit scholarship awards
 - expanded post-baccalaureate programs (online and in-person)
 - streamline community college transfer process
 - adult and other non-traditional learners seeking non-degree credentials
 - military academic credit review board implementation
 - establish fully-integrated Living Community Model
 - expanded recruitment footprint by strategically using recruiters across three campuses
 - enhanced recruitment potential by leveraging a broader academic program array
 - messaging dual enrollment as a means to shorten time to degree completion
3. The total economic impact of the Northeast is projected to be \$573.5 million during fiscal year 2025-2026. This represents a 1.9% increase over the combined three-university impact projected in fiscal year 2022-2023.