

January 28, 2022

Dear Appropriations and Education Committee Chairs,

Attached you will find the quarterly report on our integrations' implementation progress to date. This report shows what we have accomplished in the last quarter, and what we plan to achieve in the next quarter. It is a roadmap that you can expect to receive at each quarterly meeting as required by Act 50. You will also find high-level milestones, timeline revisions, and plan updates associated with our progress.

As outlined in July 2021, the final implementation plans are living documents that we are being adjusted as the universities progress through the implementation process. Specifically, the West and Northeast have taken different approaches to supporting information technology systems based on the phased-in curriculum development, the rollout of the new universities' cabinet and organization structures, and their approach to marketing and branding.

The **Northeast's** progress against the significant actions outlined for the second quarter FY 21/22 is noted below:

- 1) Academic Establish the Interim Curriculum Committee and begin receiving, reviewing and aligning the academic programs as specified by our phased academic array approach.
 - Status On track. The Interim Curriculum Committee (ICC) has been established and has
 developed adoption and review procedures for curriculum, per the program array
 announced in November. We have achieved agreement at the local level for curriculumrelated actions, and are currently in the state meet-and-discuss review and endorsement
 process. The current status is not anticipated to impact the timeline for the planned phasein of the integrated curriculum.
 - As part of the Middle States Commission on Higher Education (MSCHE) accreditation process, additional information was submitted in response to the peer review team requests and other updates were provided as appropriate.
- Communications Solicit feedback from key stakeholders and determine an integrated university name. Begin updating marketing collateral and recruitment materials for the integrated university.
 - Status On track. The activities associated with establishing the new university name are scheduled to be completed by early February. Marketing and recruitment material development has been completed pending name change.
- 3) Finance and Administration Develop enhanced budgeting and financial processes and finalize contract synthesis to achieve financial benefit.
 - Status On track. End-to-end process flows for functions have been created. Contract
 inventory has been created. Created financial accounting structure for consistent reporting
 and transition to the integrated university financial system.
- 4) Technology Begin conversations with core Student Information System (SIS) vendor on migration plans. Establish initial plans and alternative operating models for academic year 2022–2023 within existing applications.
 - Status On track. Conversations and contracts with the SIS vendor have been finalized and planning for implementation is ongoing. Ancillary system (non-SIS) migration plans have been reviewed for functionality and timing, and key operational changes have been identified for the 2022–2023 academic year to ensure a seamless experience for our students.

- 5) Governance Fully develop the management organizational chart, including departments and positions to properly support the integrated university.
 - Status Completed Organization charts to the department and position have been completed and communicated to the university communities throughout the first months of 2022.

In addition, the integrating university continues to communicate with its key stakeholders, engaging them via multiple channels to provide updates and solicit feedback. This effort will continue as the teams are focused on ways to create a consistent and enhanced student experience as they design the integrated university.

The significant activities planned for the next quarter include:

- 1) Academic Middle States peer-review team report was received January 7 and institutional response was submitted January 14. Commission accreditation decision scheduled for March 2022. Approve interim curriculum procedures and begin the curriculum synthesis process aligned with the integrated academic program array. Publish the integrated academic calendar for Fall 2022.
- 2) Communications Establish, and begin executing, a comprehensive marketing and communications strategy for the integrated entity to provide students, faculty, staff and community with the information needed to enhance their experience with the university.
- 3) Finance and Administration Develop a set of common procedures within the integrated university's accounting and finance function(s) to improve operations and streamline processes. Finalize the cutover plans to transition the HR, payroll, finance, budget and procurement activities from three (3) universities to the new university to close out financial activity for FY 21/22 and create the new university.
- 4) Technology Standardize key ancillary (e.g., non-Student Information System) technologies to support our students, faculty and staff through a consistent technology experience for student services as well as academics delivery. Continue executing migration plan for the OneSIS (Banner) upgrade to align with System strategy and enable scalability. Launch a new technology platform to support employees and their interactions with the integrated HR office as well as the shared services HR office.
- 5) Governance Continue transition of university leadership to the integrated cabinet/leadership team. Continue executing on our functional/divisional consolidation strategy through a phased implementation (e.g., Information Technology division is operating as an integrated unit effective December 2021).
- 6) Student experience Finalize the new student fee structure. Develop and provide recommendations for the new student governance structure and timeline for implementation. Establish common practices for behavioral intervention teams on all campuses.

Finally, as part of University Financial Sustainability and the Comprehensive Planning Process, the integrated university will be submitting updated financials in late February for review.

Since July of 2020, our students, faculty, staff and stakeholders have poured their hearts and souls into the work we are collectively undertaking. I believe that thoughtful effort is evident in the continued progress you continue to see as these plans move forward and evolve. There is still much to do, but they deserve much credit and appreciation for what we have achieved so far. We are also appreciative of your consideration of and attention to these plans. The partnership we have developed has made this redesign possible, and I look forward to continuing our collective work as we build a better future for Pennsylvania students and our commonwealth.

Thank You,

Dan Greenstein Chancellor

Act 50 Requirement	Appendix	January 2022 Updates	Timing for continued data transmissions
(1) An overview of the financial position of the respective universities at the time of plan approval and the time of the report.	Appendix V: Financial Sustainability Analysis	• Updated	 Updated annually (Quarter 2) Audited financial statements available in November annually
(2) The operating budget and total budget for each university at the time of plan approval and at the time of the report.	Appendix V: Financial Sustainability Analysis	No Updates	Updated annually (October)
(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	• Updated	Updated quarterly
(4) The applicable organizational charts at the time of plan approval and at the time of the report.	Appendix T: Organizational Charts	No Updates	 Updated based on organizational implementations
(5) Full-time enrollments at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	No Updates	Updated in April and October
(6) Graduation outcomes at the time of plan approval and at the item of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	No Updates	Updated annually (April)
(7) The cost of tuition, room and board and fees at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	No Updates	Updated annually (October)
(8) The average cost of attendance at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	No Updates	Updated annually (October)
(9) The number of faculty and non- faculty employees at the time of plan approval and at the time of the report.	Appendix P: Act 50 Reporting on Faculty Appendix Q: Act 50 Reporting on Staff	• Updated	Updated quarterly
(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 P: Act 50 Reporting on Faculty Appendix Q: Act 50 Reporting on Staff	Updated	Updated quarterly
(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 P: Act 50 Reporting on Faculty Appendix Q: Act 50 Reporting on Staff	No Updates	Updated annually (July)

(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 P: Act 50 Reporting on Faculty	Updated	Updated annually (January)
(13) A list of academic programs that have been terminated or consolidated and an explanation of the reasons for termination or consolidation.	Appendix L: Act 50 Reporting on Academic Programs	• Updated	 Quarterly updates based on activity
(14) A list of new academic programs that have been approved and an explanation of the need for the programs.	Appendix L: Act 50 Reporting on Academic Programs	No Updates	 Quarterly updates based on activity
(15) The number of academic programs by location at the time of plan approval and at the time of the report.	Appendix L: Act 50 Reporting on Academic Programs	• Updated	 Quarterly updates based on activity
(16) A list of property that is for sale or has been sold and the value of the proceeds from the sale.	Appendix J: Act 50 Reporting on Property for Sale	West only	 Quarterly updates based on activity
(17) A list of administrative service consolidations and the value of savings resulting from the consolidations.	Appendix V: Financial Sustainability Analysis	No updates	 Quarterly updates based on activity
(18) A list of outlining concerns related to the implementation of the plan on the community and affiliated organizations.	Appendix R: Act 50 Reporting on Affiliated Entities' and Communities' Concerns	No updates	 Quarterly report on affiliated and community organizations concerns and mitigations
(19) Any other information as requested by the chairpersons enumerated under this subsection.	N/A	 Spring enrollment data to be provided in April updates 	

Integration Pillars	Quarter 4 - 2021 (Oct, Nov, Dec)	Quarter 1 -2022 Northeast Regio (Jan, Feb, March) Integration		
Student Experience	 ■ Began review and design of the integrated university's student facing activities (orig. Q1-2021) ■ Determined scholarship options and budget while staying in NCAA compliance (orig. Q2-2022) 	 Enhance and improve the integrated university's student facing activities Establish a comprehensive, integrated marketing and communications strategy (orig. Q4-20 Determine communication function and needs (orig. Q4-2021) Implement a unified Title IX, Sexual Misconduct process and structure Ensure availability and consistency of disability, accessibility and military benefits services 		
Academics	Communicated academic structure and faculty placements Began process to establish interim curriculum committee for curriculum approval Began academic program development across campuses to enable academic phase- in approach	 Establish approach for, and begin, academic curriculum synthesis and student cross walks (orig. Q3-2021) Establish guidelines for curriculum development within new departments Meet & Discuss reviews and approves the interim curriculum committee's curriculum approva process Establish an integrated academic catalog for Fall 2022 (orig. Q3-2021) 		
Institutional Accreditation	■ Reviewed and responded to accrediting body's (MSCHE 's) requests for additional information during accreditation review	☐ Continue to respond to accrediting body as requested to facilitate accreditation decision ☐ Receive accrediting body decision on integrated university accreditation		
Enrollment	Developed common admissions applications, standards, and communications for freshmen and transfer students (orig. Q2-2021) Enabled students' ability to complete Free Application for Federal Student Aid (FAFSA) for Fall 2022 eligibility (orig. Q3-2022) Review aid applications, package and process financial aid for Fall 2022 new students (orig. Q2-2022) Review aid applications, package and process financial aid for Fall 2022 new students (orig. Q2-2022) Began planning integrated recruitment strategy for the integrated university (orig. Q3-2021) Determined impact of integration to contracts/affiliation agreements related to marketing & communications (orig. Q3-2021)			
Finance and Infrastructure	Aligned and established accounting structure, chart of accounts and other functional needs for financial reporting within the integrated university	☐ Develop and implement common procedures for all accounting functions within the integrated university (orig. Q4-2021)		
Human Resources	■ Established integrated university organizational structure ■ Established initial Workforce Development organizational chart	Evolve Workforce Development organizational chart to align with regional recruitment and delivery strategy.		
Technology	 ✓ Determined an approach to utilize classrooms synchronously, asynchronously and in-person ✓ Identified and established an approach to align network credentialling across the campuses (and with new domain) 	 Standardized and implement various ancillary applications to support students (e.g. disability software, financial aid software, student conduct / services software) Standardized and implement ancillary applications to support faculty and education delivery (e.g. faculty management and planning software) 		

January 1, 2022 updates to Appendix V: Financial Sustainability Analysis

The information below reflects the Act 50 reporting requirements related to financial position as of December 20, 2021.

• Links to university financial statements

Bloomsburg

Bloomsburg University FY 2020-21 Financial Statements

Lock Haven

Lock Haven University FY 2020-21 Financial Statements

Mansfield

Mansfield University FY 2020-21 Financial Statements

January 1, 2022 updates to Appendix X: Implementation Costs

The table below reflects the Act 50 reporting requirements related to estimated and cumulative expenditures as of December 20, 2021.

• Integration budget and cumulative expenditures

Integration Budget and Cumulative Expenditures FY 2021/22 First Quarter Report Northeast Integration									
			Budget by F	iscal Year				Less	
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	Total Budget	Cumulative Expenditures	Remaining Budget
Consulting/Personnel	\$584,588	\$326,600	\$87,500	\$87,500	\$0	\$0	\$1,086,188	(\$390,957)	\$695,231
IT – SIS	330,000	700,000	0	0	0	0	1,070,000	(323,393)	746,607
IT – Software	44,704	968,816	42,000	40,000	0	0	1,055,520	(175,943)	879,577
IT – Technology Upgrades	0	603,640	603,640	603,640	603,640	603,640	3,018,200	0	3,018,200
Middle States	112,825	0	0	0	0	0	112,825	0	112,825
Faculty	0	2,309,844	0	0	0	0	2,309,844	0	2,309,844
Average	\$1,072,117	\$4,908,900	\$733,140	\$731,140	\$603,640	\$603,640	\$8,652,577	(\$890,293)	\$7,762,284

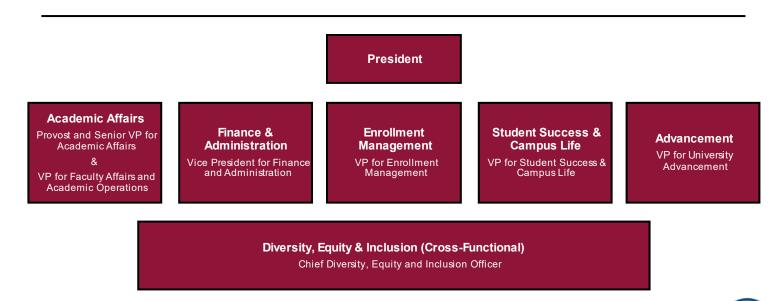
Integration Budget and Cumulative Expenditures FY 2021/22 First Quarter Report Whole Integration									
	Budget by Fiscal Year Less								
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	Total Budget	Cumulative Expenditures	Remaining Budget
Northeast Integration	\$1,072,117	\$4,908,900	\$733,140	\$731,140	\$603,640	\$603,640	\$8,652,577	(\$890,293)	\$7,762,284
West Integration	1,915,545	7,811,072	2,261,875	2,087,500	0	0	14,075,992	(2,254,171)	11,821,821
Both Integrations	1,261,000	5,600,000	0	0	0	0	6,861,000	(3,518,430)	3,342,570
Average	\$4,248,662	\$18,319,972	\$2,995,015	\$2,818,640	\$603,640	\$603,640	\$29,589,569	(\$6,662,894)	\$22,926,675

January 1, 2022 updates to Appendix T: Organizational Charts

The information below reflects Act 50 reporting requirements related to organizational structure.

Established December 20, 2021

NE Region Senior Leadership





Academic Affairs Functional Area Leadership

Academic Affairs

Provost and Senior VP for Academic Affairs & VP for Faculty Affairs and Academic Operations

Academics (College Deans)

Registrar's Office

Institutional Effectiveness

Libraries

Workforce Development



Finance & Administration Functional Area Leadership



Vice President for Finance and Administration

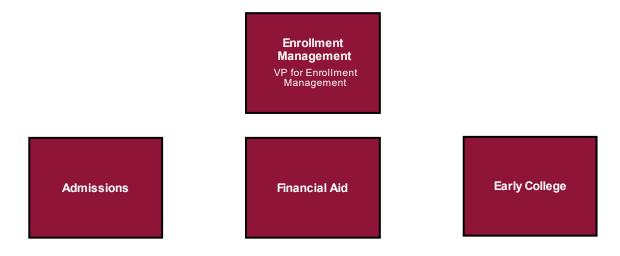
Facilities, Police, & Safety

Finance

Human Resources and Workplace Change



Enrollment Management Functional Area Leadership





Student Success & Campus Life Functional Area Leadership



Student Success

Campus Life

Auxiliary Services

Student Health Center



Advancement Functional Area Leadership

Advancement

VP for University Advancement (Role Includes BU Advancement)

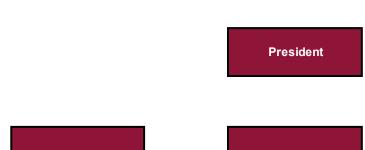
Alumni and Professional Engagement

Advancement - LHU

Advancement - MU



President's Office Functional Area Leadership



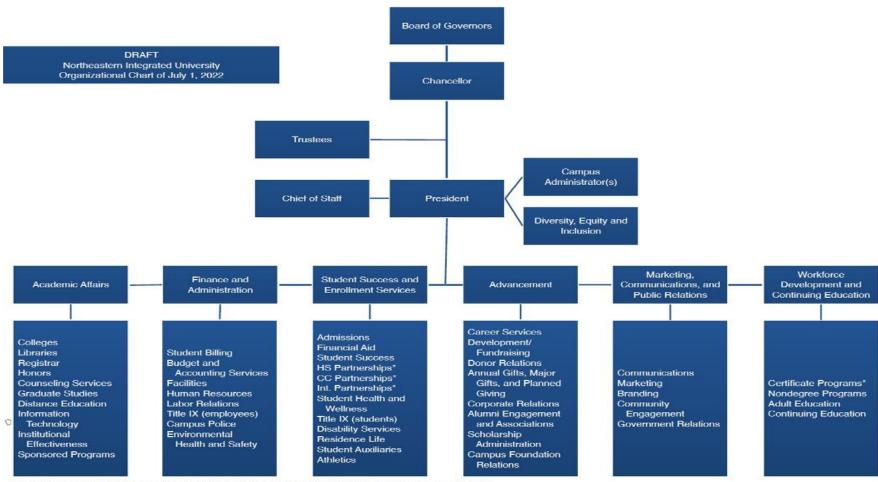
Diversity, Equity, & Inclusion

Marketing & Communications Workforce Development



As of July 2021

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^{*} 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.

January 1, 2022 updates to Appendix P: Act 50 Reporting on Faculty; Appendix Q: Act 50 Reporting on Staff

The tables below reflect Act 50 reporting requirements related to staff as of December 20, 2021.

• Number of faculty and non-faculty employees by location – January 2022 Update

Employee Headcount as of 12/20/2021							
	Total Employee Headcount Faculty Total Nonfact						
Bloomsburg	950	443	507				
Lock Haven	456	198	258				
Mansfield	290	126	164				
Integrations Result	1,696	767	929				

Employee Headcount as of 12/20/2021								
	AFSCME	Nonrepresented	SCUPA	SPFPA & POA	Coaches	Cheer Adviser	OPEIU	
Bloomsburg	283	89	70	20	30	1	14	
Lock Haven	141	49	29	7	32			
Mansfield	91	30	13	10	20			
Integrations Result	515	168	112	37	82	1	14	

^{*}See Footnotes on following page

January 1, 2022 updates to Appendix P: Act 50 Reporting on Faculty; Appendix Q: Act 50 Reporting on Staff, Continued

Number of faculty and non-faculty employees by location – July 2021 Update (At plan approval)

Employee Headcount as of 04/01/2021							
	Total Employee Headcount Faculty Total Nonfacult						
Bloomsburg	1,019	467	552				
Lock Haven	484	213	271				
Mansfield	307	137	170				
Integrations Result	1,810	817	993				

Employee Headcount as of 04/01/2021								
	AFSCME	Nonrepresented	SCUPA	SPFPA & POA	Coaches	Cheer Adviser	OPEIU	
Bloomsburg	312	97	76	22	28	1	16	
Lock Haven	152	56	27	9	27			
Mansfield	92	36	14	10	18			
Integrations Result	556	189	117	41	73	1	16	

FOOTNOTES:

- 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 Nonfaculty figures are the sum of all non-APSCUF units: AFSCME, Nonrepresented, SCUPA, SPFPA & POA, Coaches, Cheer Advisors, OPEIU
- Current Employee Complement for April 2021 and December 20, 2021 (will be subject to retro-activity)

January 1, 2022 updates to Appendix P: Act 50 Reporting on Faculty

The tables below reflect Act 50 reporting requirements related to staff as of December 20, 2021.

• The faculty-to-student ratio and the faculty and non-faculty employee-to-student ratio.

January 2022 Update

	Annualized 202	0-21 Student to Non	faculty FTE Ratio	Fall 2021 Student-to-Faculty Ratio			
	Annualized FTE Student	Nonfaculty Annualized FTE	Annualized FTE Student/Nonfaculty Ratio	Fall FTE Enrollment	Fall Faculty FTE**	Fall FTE Student to Faculty Ratio	
Bloomsburg	7,835	522.32	15	6,949	390.2	17.8	
Lock Haven	2,953	263.8	11.2	2,654	184.6	14.4	
Mansfield	1,590	168.22	9.5	1,508	101.5	14.9	
Integrations Result	12,377	954.35	13	11,112	676.3	16.4	

July 2021 Update (At plan approval)

	Annualized 201	9-20 Student to Non	faculty FTE Ratio	Fall 2020 Student-to-Faculty Ratio			
	Annualized FTE Student	Nonfaculty Annualized FTE	Annualized FTE Student/Nonfaculty Ratio	Fall FTE Enrollment	Fall Faculty FTE**	Fall FTE Student to Faculty Ratio	
Bloomsburg	8,131	554.22	14.7	7,504	406	18.5	
Lock Haven	3,038	282.84	10.7	2,858	200.6	14.2	
Mansfield	1,589	176.16	9	1,604	112.7	14.2	
Integrations Result	12,758	1,013.22	12.6	11,966	719.2	6.6	

^{*}See Footnotes on following page

January 1, 2022 updates to Appendix P: Act 50 Reporting on Faculty, Continued

FOOTNOTES for Annualized Student to Nonfaculty and Faculty Ratios:

Annualized Student to Nonfaculty FTE Ratio

- Based on Fall and Spring Freeze and Winter and Summer End of Term Student Enrollment Submissions (Active Data)
- All Nonfaculty 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: UG Attempted Credits/30
- Graduate FTE: Grad Attempted Credits/24
- Annualized FTE Student to Nonfaculty Ratio: Annualized FTE Students/Nonfaculty Annualized FTE

Fall Student to Faculty Ratio

- Based on Fall Freeze Student Enrollment Submission (Active Data)
- All faculty FTEs reflect those in 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

	Fall 2020 Faculty Sharing **	Fall 2021 Faculty Sharing
Bloomsburg	0.25	0.13
Lock Haven	0	-0.13
Mansfield	-0.5	-0.25

As of 12/20/2021

^{**}Faculty Sharing applied to Fall 2021: 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 on 9/4/2020 and 9/10/2021)

January 1, 2022 updates to Appendix L: Act 50 Reporting on Academic Programs

The tables below reflect Act 50 reporting requirements related to academic programs as of December 20, 2021.

• List of academic programs that have been terminated or consolidated and an explanation of the reasons for termination or consolidation.

Programs are put into moratorium primarily due to low-enrollments, lack of career relevancy, high cost, or a combination of all. Programs in moratorium for 5 years are terminated unless the university has specific plans to reorganize.

Degree Programs and Concentrations Put into Moratorium or Terminated (July 1, 2021 – December 20, 2021) *Does not include minors and certificates					
	Award	Program Name	Concentration		
Bloomsburg	MSN	Nursing	Adult Nurse Practitioner		
Mansfield	BSN	Nursing	RN to BSN		
	BSED	Earth and Space Science Education			
	BA	German			
	BA	French			
	BA	Spanish			
	BA	Sociology/Anthropology			
P	rograms terminated as part of Off	ice of the Chancellor Processes; In mor	ratorium five years.		
Lock Haven	ВА	Communication	 Communication and Culture Public Discourse and Performance Professional Communication 		
	ВА	Theatre	Degree is terminated with termination of listed concentrations: • Musical Theatre • Performance		
	BS	Athletic Training			
	MS	Clinical Mental Health Counseling	Rural Mental Health		
Mansfield	BA	History	Public History		
	BSED	Social Studies: History			
	BSED	English Education			
	BSED	Mathematics Education			

January 1, 2022 updates to Appendix L: Act 50 Reporting on Academic Programs, Continued

The tables below reflect Act 50 reporting requirements related to academic programs as of December 20, 2021.

• The number of academic programs by location.

January 2022 Update

Number of Degree Programs by Location December 20, 2021						
	Undergraduate	Graduate	Total			
Bloomsburg	57	20	77			
Lock Haven	43	7	50			
Mansfield	29	2	31			

July 2021 Update (At plan approval)

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