



Board of Trustees Committee Meetings - WEDNESDAY, MARCH 6, 2024 Minutes

Youngstown State University - Board of Trustees

Mar 6, 2024 at 10:00 AM EST

@ Board Meeting Room, 1st Floor, Tod Hall

MEETING MATERIALS ARE IN THE SUPPLEMENTAL SECTION OF THIS DOCUMENT

Attendance

Present:

Members: Julie Centofanti, Eric Spiegel, Natalie Dando, Sergul Erzurum, Richard Fryda, Charles T. George, Allen L. Ryan, Jr., J.D., Bill Johnson, Joseph J. Kerola, Jocelyne Linsalata, Laura Lyden, Anita A. Hackstedde, M.D., Michael A. Peterson, Molly S. Seals

Guests: John Colla, Clearstead, Chet Cooper, Michelle DiLullo, Rebecca Fink, Barbara Flinn, Holly Jacobs, Bill Johnson, Dana Lantz, Neal McNally, Jennifer Pintar, Mike Sherman, Jaysen Spencer, Ron Strollo

I. Meeting Schedule and Committee Listing

[BOT Meeting Schedule March 2024 revised 2-28-24.pdf](#)

[Board Committee Listing 2023-24.pdf](#)

II. INVESTMENT COMMITTEE

Allen L. Ryan, Jr., Chair

Charles T. George, Vice Chair

All Trustees are Members

A. Disposition of the Minutes for the Previous Meeting – Approved

B. Old Business

C. Committee Items

1. Investment Discussion Items

a. Annual Disclosure of Trustee Relationships with University-Affiliated Financial Institutions (Presenter: Neal McNally, Vice President for Finance and Business Operations)

Vice President McNally reported on the Annual Disclosure of Trustee Relationships with University-Affiliated Financial Institutions. He reminded trustees that this document needs to be completed yearly.

[Disclosure of relationships with financial institutions form FY24.pdf](#)

b. March 6, 2024 Quarterly Portfolio Asset Allocation and Investment Performance Review (Presenter: John Colla, Clearstead)

Mr. John Cola reviewed the university's quarterly portfolio asset allocation and investment performance report.

Colla opened sharing that Clearstead is always looking to add new talent to the team and would welcome recommendations of students looking for jobs.

Colla shared that YSU's total non-endowments ended with just shy of \$72 million in market values and ended the calendar year with returns close to 6% for the quarter. For the six-month period, fiscal year-to-date through 12/31 there was a 4.7% return and for the full calendar year, there was a double-digit result, 11% return

[Clearstead report - March 2024.pdf](#)

2. Background Materials

- D. New Business
- E. Adjournment

III. AUDIT SUBCOMMITTEE

Molly S. Seals, Chair
Richard C. Fryda, Vice Chair
Laura A. Lyden
Anita A. Hackstedde
Joseph J. Kerola

- A. Disposition of the Minutes for the Previous Meeting - Approved
- B. Old Business
- C. Committee Items

1. Audit Discussion Items

- a. Anonymous Reporting Hotline Stats Update (Presenter: Michelle DiLullo, Staff Auditor)

[Hotline Stats Report FY24Q2.pdf](#)

- b. FY24 Second Quarter Internal Audit Plan Update (Presenter: Michelle DiLullo, Staff Auditor)

[Quarterly Audit Plan Update FY24Q2.pdf](#)

- c. Audit Matrix Open Audit Recommendations Update (Presenters: Michelle DiLullo, Staff Auditor)

[Audit Recommendations Status FY24Q2.pdf](#)

- d. Kent State IT General Controls Audit Report on Workforce Education and Innovation (Presenter: Michelle DiLullo, Staff Auditor)

Ms. DiLullo indicated that based on the results of audit procedures performed, General Controls within Workforce Education and Innovation and IT environment are not all present and operating and Require Improvement.

A Require Improvement Opinion necessitates that Internal Audit perform follow-up on corrective actions noted in management responses based on timeframes provided.

[Kent State Audit Report - YSU Workforce Education & Innovation Feb. 2024.pdf](#)

- e. Update on Enterprise Risk Management (Presenter: Julie Gentile, Director Environment and Occupational Health & Safety)

Ms. Gentile presented an update on YSU's Enterprise Risk Management. Gentile shared that in 2023 the university had six insurance claims with three remaining open at that point. She acknowledged that the largest of those was the Planetarium fire from January 2023. She said the office is in the beginning stages of the renewal process for insurance that would begin in July 2024. She shared that they have "started looking at infrastructure policy review, as well as training and education, all surrounding safety and security on campus."

- f. Sunshine Law Star Rating, FY 2023 (Presenter: Neal McNally, Vice President for Finance and Business Operations)

Vice President McNally reported on the university's Sunshine Law Star Rating for FY23. He stated that for the fourth straight year YSU received the highest possible score from the Ohio Auditor of State, with a rating of four stars. This score indicates that YSU met the five best practices that are applicable to higher education.

[Auditor of State - Sunshine Law Star Rating FY23.pdf](#)

- g. NCAA Agreed Upon Procedures Report, FY 2023 (Presenter: Neal McNally, Vice President for Finance and Business Operations)

[NCAA agreed upon procedures report - FY 2023.pdf](#)

- h. WYSU-FM Radio Station Audit Report, FY 2023 (Presenter: Neal McNally, Vice President for Finance and Business Operations)

2. Background Materials

- D. New Business
- E. Adjournment

IV. GOVERNANCE COMMITTEE

Michael A. Peterson, Chair
Charles T. George, Vice Chair
All Trustees Are Members

- A. Disposition of the Minutes for the Previous Meeting - Approved
- B. Old Business
- C. Committee Items

1. Governance Discussion Items

- a. Enrollment Optimization (Presenters: Jennifer Pintar, Mike Sherman, Guest: Charles Ramos, Ruffalo Noel Levitz)

Mike Sherman, vice president for Student Affairs, Institutional Effectiveness, and Board Professional spoke on the Enrollment Enterprise strategy. He explained that the Enrollment Enterprise is “intended to get everybody on the same wavelength, rowing in the same direction, doing what needs to be done. Reducing redundancies in communications and making sure that every yield point for enrollment and student success is optimized.” Jenn Pintar, interim provost and vice president for Academic Affairs, discussed the RFP process and review that led to YSU choosing Ruffalo, Noel, Levitz (RNL) as its partner in the Enrollment Enterprise initiative. Jennifer Pintar, Interim Provost and Vice President for Academic Affairs, then introduced Charles Ramos from RNL who presented to the board on the approach that will be taken and provided insight around RNL’s philosophy and approach.

[ENROLLMENT ENTERPRISE - Marketing and Enrollment Transformation.pdf](#)

- b. 2023 IPEDS Feedback Report and 2023 Board Level KPIs (Presenters: Jennifer Pintar, Mike Sherman)

Sherman and Pintar shared the highlights from the annual IPEDS report. Sherman then discussed the data surrounding the 2023 Board Level Key Performance Indicators for the strategic plan.

2023 IPEDS Feedback Report plus Summary for March 2024
BOT.pdf
Board Level Key Performance Indicators for 2023.pdf

D. New Business

1. Executive Session

Trustee Peterson: I move that the Board enter Executive Session for the purposes of, " consideration of the appointment, employment, dismissal, discipline, promotion, demotion, or compensation of one or more public employees or officials (O.R.C. 121.22(G) (1)) and/or preparing for, conducting, and/or reviewing negotiations or bargaining sessions with public employees concerning their compensation, or other terms and conditions of their employment (O.R.C. 121.11 (G) (4))."

Trustee Hackstedde please conduct a roll-call vote and record the time-of-day entered into and exited from Executive Session.

1. Trustee Erzurum
2. Trustee Fryda
3. Trustee George
4. Trustee Hackstedde - I am recording myself as yes
5. Trustee Kerola
6. Trustee Lyden
7. Trustee Peterson
8. Trustee Ryan
9. Trustee Seals

Passed unanimously: Yes

Trustee Peterson: Please assure the appropriate steps are taken for Executive Session.

Time entered Executive Session: 11:14 a.m.

Time exited Executive Session: 12:02 p.m.

E. Background Materials

F. Adjournment

V. Break for Lunch

VI. INTERCOLLEGIATE ATHLETICS COMMITTEE

Joseph J. Kerola, Chair

Richard C. Fryda, Vice Chair

All Trustees are Members

A. Disposition of the Minutes for the Previous Meeting - Approved

B. Old Business

C. Committee Items

1. Intercollegiate Athletics Discussion Items

- a. Overview of Athletics Personnel Actions (Presenter: Ron Strollo, Director of Athletics)

[Board Summary 1-15-2024 Athletics.pdf](#)

[Board Report 1-15-2024 Athletics.pdf](#)

- b. Report on the Educational Outcome of Student-Athletes (Presenter: Rebecca Fink, Senior Associate Athletics Director)

Rebecca Fink, Senior Associate Athletics Director, reported on the educational outcomes of YSU's student athletes, which looks at the federal graduation rate, as well as the graduation success rate, which is an NCAA rate.

Strollo shared that the NCAA is starting to reward academic success. He indicated that the NCAA distribution of funds to YSU this year of about \$140,000 will grow to between \$300,000 and \$350,000 over the next three years.

[Educational Outcomes.pdf](#)

- c. Report of the Academic Progress Rate (APR) Figures (Presenter: Jaysen Spencer, Director of Athletic Academic Services)

Jaysen Spencer, Director of Athletic Academic Services, reported on the Academic Progress Rate (APR) for YSU athletes. He shared that four teams, men's golf, women's bowling, women's tennis and volleyball that have earned a multi-year perfect score of 1,000. For the 2022-23 AY, YSU had 13 of their 21 teams score 1,000 for the annual APR.

[Academic Progress Rate.pdf](#)

- d. Report on the Average Cumulative GPA's by Term (Presenter: Barbara Flinn, Lecturer, English and World Languages)

Barbara Flinn, Lecturer, English and World Languages, reported on the Average Cumulative GPAs by Term by team, spotlighting the women's basketball, women's golf, women's tennis and women's bowling teams for leading the way with cumulative GPAs of 3.73 or better for Fall 2023. The women's golf team led the way with a GPA of 3.94. For the F23 semester the average cumulative GPA for all student-athletes was 3.49.

Grade Point Averages.pdf

- e. Report on the Number of Athletes by Academic Major (Presenter: Chet Cooper, Faculty Athletic Representative)

Chet Cooper, Faculty Athletic Representative, reported on the number of athletes by academic major, pointing out that in the last five years, YSU athletics has added 90 student athletes and over the last three years, approximately 1/3 of student athletes have declared majors within the Williamson College of Business Administration.

Academic Majors.pdf

2. Background Materials

- D. New Business
- E. Adjournment

VII. UNIVERSITY AFFAIRS COMMITTEE

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

- A. Disposition of the Minutes for the Previous Meeting - Approved
- B. Old Business
- C. Committee Items

1. University Affairs Consent Items

Items listed under the Consent Agenda require Board approval; however, they may be presented without discussion as the items include only non-substantive changes.

Motion:

Motion to approve Consent Agenda Resolutions

Motion moved by Charles T. George and motion seconded by Michael A. Peterson. Motion passed unanimously.

Resolution to Modify Vacation Leave, Professional/Administrative Staff and Department Chairpersons Not Covered by a Collective Bargaining Agreement Policy, 3356-7-09

Resolution to Modify - Vacation leave PA staff & dept. chairpersons not covered by collective barg. policy.pdf

[Resolution to Modify University Holidays Policy, 3356-7-21](#)

[Resolution to Modify - University Holidays policy.pdf](#)

[Resolution to Modify Collective Bargaining and Negotiations Policy, 3356-7-23](#)

[Resolution to Modify - Collective Bargaining & Negotiations policy.pdf](#)

2. University Affairs Action Items

- a. Resolution to Modify and Retitle Supplemental Pay for Faculty and Professional/Administrative Staff Policy, 3356-7-46 (Presenter: Jennifer Lewis-Aey, Executive Director and Chief Human Resources Officer)

[Explanation sheet - Supplemental Pay for Faculty and PA Staff policy.pdf](#)

[Resolution to Modify & Retitle- Supplemental Pay for Faculty & PA staff policy.pdf](#)

Motion:

Motion to adopt the Resolution

Motion moved by Molly S. Seals and motion seconded by Joseph J. Kerola. Motion passed unanimously

- b. Resolution to Ratify Personnel Actions (Presenter: Jennifer Lewis-Aey, Executive Director and Chief Human Resources Officer)

University policies require that the Chief Human Resources Officer provide a summary of appointments, promotions, and other personnel actions for faculty and professional/administrative staff, including intercollegiate athletics coaching positions for October 16, 2023, through January 15, 2024. Personnel actions for faculty and professional/administrative staff are contingent upon approval of the Board of Trustees.

[Resolution to Ratify Personnel Actions - Faculty & PA Staff including Athletics.pdf](#)

[Board Summary 1-15-2024 Faculty.pdf](#)

[Board Report 1-15-2024 Faculty.pdf](#)

[Board Summary 1-15-2024 PA.pdf](#)

[Board Report 1-15-2024 PA.pdf](#)

[Board Summary 1-15-2024 Athletics.pdf](#)

[Board Report 1-15-2024 Athletics.pdf](#)

Motion:

Motion to approve the actions.

Motion moved by Charles T. George and motion seconded by Michael A. Peterson. Passed unanimously

3. University Affairs Discussion Item

- a. Succession Planning (Presenters: Dana Lantz, Executive Director, Equal Opportunity and Human Resources, Jennifer Lewis-Aey, Executive Director and Chief Human Resources Officer)

4. University Affairs Executive Session

- a. Litigation, Personnel and Collective Bargaining Update (Presenter: Holly Jacobs, Vice President for Legal Affairs and Human Resources)

A summary of current litigation and personnel matters, as well as a collective bargaining update.

Trustee Peterson: I move that the Board enter Executive Session for the purposes of, " consideration of the appointment, employment, dismissal, discipline, promotion, demotion, or compensation of one or more public employees or officials (O.R.C. 121.22(G) (1)) and/or preparing for, conducting, and/or reviewing negotiations or bargaining sessions with public employees concerning their compensation, or other terms and conditions of their employment (O.R.C. 121.11 (G) (4))."

Trustee Hackstedde please conduct a roll-call vote and record the time-of-day entered into and exited from Executive Session.

1. Trustee Erzurum
2. Trustee Fryda
3. Trustee George
4. Trustee Hackstedde - I am recording myself as yes
5. Trustee Kerola
6. Trustee Lyden
7. Trustee Peterson
8. Trustee Ryan
9. Trustee Seals

Passed unanimously: Yes

Trustee Peterson: Please assure the appropriate steps are taken for Executive Session.

Time entered Executive Session: 12:51 p.m.

Time exited Executive Session: 1:11 p.m.

5. Background Materials

- a. Human Resources Update

[HR Update - March 2024.pdf](#)

- b. Human Resources Update on Position Searches

[Current Job Postings 2-12-2024.pdf](#)

- c. Classified Civil Service Personnel Actions

[Board Summary 1-15-2024 Classified.pdf](#)

[Board Report 1-15-24 Classified.pdf](#)

- d. Supplemental Pay Assignments and Secondary Appointments

[Board Summary 1-15-2024 Supplemental and Secondary Pay Assignments.pdf](#)

[Board Report 1-15-2024 Supplemental Pay & Secondary Assignments.pdf](#)

[HR Administrative policy - Supplemental Pay Assignment 2.28.24.pdf](#)

[HR Administrative policy - Secondary Faculty Appointment 2.27.24.pdf](#)

- e. Report on Search Waivers

[Search Waiver Report - March 2024.pdf](#)

- f. Retirement Plan Committee Report of ARP, 403(b) and 457(b)

[YSU ARP, 403b, & 457b Retirement Plans activity report.pdf](#)

D. New Business

E. Adjournment

VIII. INSTITUTIONAL ENGAGEMENT COMMITTEE

Anita A. Hackstedde, Chair

Allen L. Ryan, Jr., Vice Chair

All Trustees are Members

- A. Disposition of the Minutes for the Previous Meeting - Approved
- B. Old Business
- C. Committee Items

- 1. Institutional Engagement Consent Item*

Items listed under the Consent Agenda require Board approval; however, they may be presented without discussion as the items include only non-substantive changes.

Motion:

Motion to adopt the Resolution.

Motion moved by Charles T. George and motion seconded by Michael A. Peterson. Passes unanimously.

- a. Resolution to Modify Social Media Use on Official and Affiliated University Sites, Policy 3356-4-09.1 (Presenter: Shannon Tirone, Associate Vice President University Relations)

Approved a resolution to Modify Social Media Use on Official and Affiliated University Sites Policy. This policy was reviewed as part of the university's regular review cycle.

[BOT Resolution - 3356-4-09.1 - Modify.pdf](#)

[Policy 3356-4-09.1 Modify - Redline.pdf](#)

- 2. Institutional Engagement Discussion Item

- a. YSU Foundation Quarterly Gift Report (Presenter: Paul McFadden, President YSU Foundation)

[October, 2023 - December, 2023 YSUF Quarterly Summary Gift Processing.pdf](#)

- 3. Background Materials

- D. New Business
- E. Adjournment

IX. ACADEMIC EXCELLENCE AND STUDENT SUCCESS COMMITTEE

Molly S. Seals, Chair

Joseph J. Kerola, Vice Chair

All Trustees are Members

- A. Disposition of the Minutes for the Previous Meeting - Approved
- B. Old Business

C. Committee Items

1. Academic Excellence and Student Success Consent Item

Items listed under the Consent Agenda require Board approval; however, they may be presented without discussion as the items include only non-substantive changes.

2. Academic Excellence and Student Success Action Items

- a. Resolution to Modify Faculty Tenure Policy, 3356-1-02 (Presenter: Jennifer Pintar, Interim Provost and VP for Academic Affairs)

[Resolution Faculty Tenure 3356-1-02.pdf](#)

Motion:

Motion to adopt the Resolution

Motion moved by Anita A. Hackstedde, M.D. and motion seconded by Laura Lyden. Passed unanimously

- b. Resolution to Authorize Recommendation of Candidates for Honorary Degrees /Commencement Speakers (Presenter: Shannon Tirone, Associate Vice President, University Relations)

[Resolution AESS Honorary Degree Candidates Commencement Speakers 03-24 Tab 2 FINAL.pdf](#)

Motion:

Motion to adopt the Resolution.

Motion moved by Laura Lyden and motion seconded by Sergul Erzurum. Passed unanimously.

3. Academic Excellence and Student Success Discussion Items

- a. Academic Master Plan Implementation Follow-up (Presenter: Jennifer Pintar, Interim Provost and VP for Academic Affairs)

Pintar presented a follow up to the Academic Master Plan Implementation. She updated the Board on the 12 accepted VSRP applications and the establishment and implementation of position and program request forms. She also discussed the development of an RFP to help supplement the World Languages offerings on campus to be able to offer a wider variety of language classes at YSU. She also updated the Board on the Academic Partnership move for nine YSU undergraduate programs to move online.

Pintar shared that and AI (artificial intelligence) Think Tank has been developed. A group of faculty, staff and administrators are working together to develop active learning models and explore ethical AI usage on campus. They have also engaged the Institute for Teaching and Learning to try and talk about how to engage faculty to incorporate artificial intelligence into their programs. She also let the board know that the general education transformation would be on the agenda for the March 13 meeting of the Academic Senate.

[Update: Academic Master Plan Implementation.pdf](#)

- b. Academic Senate Update (Presenter: Chet Cooper, President, Academic Senate)

Chet Cooper, chair of the Academic Senate gave an Academic Senate update, he shared that the special meeting, held virtually in January, where Dr. Pintar presented the academic programmatic changes had more than 280 attendees and was well received.

He also reported that he expected the Senate to pass the General Education Transformation at the next meeting. He also outlined the work the Senate had been doing to assist in making it a seamless transition for EGCC students to enroll at YSU to finish their degrees.

4. Background Materials

- a. Office of Research Services Quarterly Report

The Quarterly Report from the Office of Research Services is presented for the Board of Trustees' information.

[ORS Q2 Report.pdf](#)

- b. Current Accreditation Activity

The report on accreditation activity shows recent accreditations and upcoming site visits and documents submitted.

[March 2024 Current Accreditation Activity FINAL.pdf](#)

- c. Academic Programs Update

The report outlines new program development.

[Program Updates March 2024 FINAL.pdf](#)

- d. Sabbatical and Faculty Improvement Leaves for AY 2024-2025

A list of faculty members who were granted sabbaticals and faculty improvement leaves for the 2024-2025 academic year is provided.

[Approved Sabbatical and Faculty Improvement Leaves 2024-2025.pdf](#)

e. Research Professorship List

A list of faculty members who were granted research professorships for 2024-2025 is provided.

No fewer than twelve (12) Research Professorships shall be awarded, provided there are sufficient applicants deemed meritorious of support. The Research Professorship Committee may recommend an award of a minimum of three (3) hours to a maximum of nine (9) hours in whole number increments.

[Research Professorships List 32024.pdf](#)

f. Spring Activities offered by YSU Student Experience

[Student Affairs Events February 2024 sharable.pdf](#)

D. New Business

[AP - YSU Winter 2024 Semi-Annual Review MS abrv Resource Item.pdf](#)

[Program Scorecard.xlsx](#)

[Program Proposal Policy.pdf](#)

E. Old Business

1. Focus + Programs (Presenter: Jennifer A. Pintar, Interim Provost and VP for Academic Affairs will report)

Pintar discussed the progress being made with the meetings being held with the faculty in the Focus + programs. She spoke about the faculty's passion and how hard everyone is working together to increase enrollment in these programs.

F. Adjournment

X. FINANCE AND FACILITIES COMMITTEE

Allen L. Ryan, Jr., Chair

Sergul A. Erzurum, Vice Chair

All Trustees are Members

- A. Disposition of the Minutes for the Previous Meeting - Approved
- B. Old Business
- C. Committee Items

1. Finance and Facilities Consent Items

Items listed under the Consent Agenda require Board approval; however, they may be presented without discussion as the items include only non-substantive changes.

Motion:

Motion to adopt Consent Agenda.

Motion moved by Charles T. George and motion seconded by Joseph J. Kerola. Passed unanimously.

- a. Resolution to Modify Closed Circuit Television System Use Policy, 3356-4-11

[Resolution to Modify - Closed Circuit Television System Use policy.pdf](#)

- b. Resolution to Modify Emergency Response Policy, 3356-4-20

[Resolution to Modify - Emergency Response policy.pdf](#)

2. Finance and Facilities Action Item

- a. Resolution to Approve Interfund Transfers (Presenter: Katrena Davidson, Associate Vice President for Finance and Controller)

Approved a Resolution to Approve Interfund Transfers. This resolution was to transfer just over \$705,000 to provide interim funding for the bleacher replacement project in Beeghly Center.

[Resolution to Approve Interfund Transfers.pdf](#)

Motion:

Motion to adopt Resolution.

Motion moved by Charles T. George and motion seconded by Richard Fryda. Passed unanimously.

3. Finance and Facilities Discussion Items

- a. Quarterly Update on the FY 2024 Operating Budget (Presenter: Neal McNally, Vice President for Finance and Business Operations)

McNally updated the board on the university's FY2024 operating budget, indicating that actual revenues and expenses are on budget through the first half FY 24 and that revenues, in aggregate, are up by 4% on a one-year basis. McNally also shared a brief update on the finance and planning for the Student Center renovation project. "Where things stand today,

just about one year out from the planned start of construction, the renovation costs that are summarized total \$43.9 million,” stated McNally. “This is up from the original four-year \$41 million estimate, mainly due to the need to factor in temporary accommodations that will be necessary during the two-year construction period.”

[Budget to Actual 12.31.23.pdf](#)

- b. Student Center Renovation Financing Update (Presenter: Neal McNally, Vice President for Finance and Business Operations)

[Student Center financing plan.pdf](#)

- c. Planning and Construction Projects Update (Presenters: John Hyden, Associate Vice President for Facilities & Support Services, Rich White, Director of Planning and Construction)

Rich White, director of Planning and Construction, updated the board on several capital projects, including the exterior door and window project that was to go out for bid the following week, the Lyden House elevator replacement, the building envelop project, the Ward Beecher Planetarium, and the relocation of the Accessibility Services relocation. He also mentioned that the design work is going well on for the Student Center renovation project.

[Projects Update - BOT March 2024.pdf](#)

- d. Gratitude Markers (Presenter: Greg Morgione, Associate General Counsel)

Greg Morgione, Associate General Counsel, presented on the progress of the gratitude project marker project with the YSU Foundation. Questions were raised about size, location(s) and quantity of markers on campus. After the discussion, it was decided that additional information is needed.

[Gratitude Marker gift agreement \(clean\).pdf](#)

[Gratitude Marker Mockup Updated 1-17-2024.pdf](#)

[Gratitude Markers working draft 12-1-2023.pdf](#)

- e. Report of Audit Subcommittee

A verbal report of the Audit Subcommittee will be presented.

4. Background Materials

- a. Reportable Budget and Interfund Transfers for the Quarter Ending December 31, 2023

[Reportable transfers report 12-31-23.pdf](#)

- b. Second Quarter Diversity and EDGE Spend Report

[Diversity Report FY2024 Second Quarter.pdf](#)

D. New Business

E. Adjournment

XI. WORKFORCE EDUCATION AND INNOVATION

Charles T. George, Chair

Laura A. Lyden, Vice Chair

All Trustees are Members

A. Disposition of the Minutes for the Previous Meeting - Approved

B. Old Business

C. Committee Items

1. Workforce Education and Innovation Discussion Items

- a. Workforce Education and Innovation Update Presenter: Jennifer A. Pinter, Interim Provost and VP for Academic Affairs

Pintar presented the reorganization of Workforce Innovation and Education. She shared that the Tressel Institute for Leadership and Teamwork will be moving under the Sokolov Honors College and the Data Mine, IT Workforce Accelerator, Foxconn, Excellence Training Center, Williamson Innovation Park and the Online Skills Accelerator will all move under the College of Science, Technology, Engineering and Mathematics. She noted that this reorganization is “a wonderful opportunity for Youngstown State University and Workforce Innovation and Education to be more integrated within the community, with industry and with K through 12.”

[DWEI BOT March 6.pptx](#)

2. Background Materials

D. New Business

E. Adjournment

XII. EXECUTIVE COMMITTEE

Michael A. Peterson, Chair

Charles T. George, Vice Chair
Joseph J. Kerola
Anita A. Hackstedde
Molly S. Seals
Allen L. Ryan

- A. Disposition of the Minutes for the Previous Meeting - Approved
- B. Old Business
- C. Committee Item
 - 1. Executive Committee Action Item
 - 2. Executive Committee Discussion Item
 - a. Executive Session

Discuss Personnel matters

Trustee Peterson: I move that the Board enter Executive Session for the purposes of, " consideration of the appointment, employment, dismissal, discipline, promotion, demotion, or compensation of one or more public employees or officials (O.R.C. 121.22(G) (1)).

Trustee Hackstedde please conduct a roll-call vote and record the time-of-day entered into and exited from Executive Session.

- 10. Trustee Erzurum
- 11. Trustee Fryda
- 12. Trustee George
- 13. Trustee Hackstedde - I am recording myself as yes
- 14. Trustee Kerola
- 15. Trustee Lyden
- 16. Trustee Peterson
- 17. Trustee Ryan
- 18. Trustee Seals

Passed unanimously: Yes

Trustee Peterson: Please assure the appropriate steps are taken for Executive Session.

Time entered Executive Session: 2:42 p.m.

Time exited Executive Session: 3:24 p.m.

- D. New Business
- E. Adjournment



APPENDIX

YSU Board of Trustees

Committee Meetings

March 6, 2024

*Resolutions, Supporting
Documents and Background
Materials*

BOARD OF TRUSTEES Meeting Schedule

Thursday, June 6, 2024

10:00 a.m.	Investment Committee	Board Meeting Room 1st Floor, Tod Hall
10:15 a.m.*	Audit Subcommittee	Board Meeting Room 1st Floor, Tod Hall
11:00 a.m.*	Governance Committee	Board Meeting Room 1st Floor, Tod Hall
12:30 p.m.	Lunch	Leaders' Conference Room #236 2nd Floor, Tod Hall
1:00 p.m.*	Intercollegiate Athletics Committee	Board Meeting Room 1st Floor, Tod Hall
1:30 p.m.*	University Affairs Committee	Board Meeting Room 1st Floor, Tod Hall
2:30 p.m.*	Institutional Engagement Committee	Board Meeting Room 1st Floor, Tod Hall
3:00 p.m.*	Academic Excellence and Student Success Committee	Board Meeting Room 1st Floor, Tod Hall
3:45 p.m.*	Finance & Facilities Committee	Board Meeting Room 1st Floor, Tod Hall
4:15 p.m.*	Workforce Education and Innovation Committee	Board Meeting Room 1st Floor, Tod Hall
4:45 p.m.*	Executive Committee	Board Meeting Room 1st Floor, Tod Hall

Friday, June 7, 2024

10:00 a.m.	Board Meeting	Board Meeting Room 1st Floor, Tod Hall
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*Approximate time for start of the meeting; the meeting will start immediately following preceding committee meeting.



YOUNGSTOWN STATE UNIVERSITY BOARD OF TRUSTEES COMMITTEES

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

2023-2024 STANDING COMMITTEES

ACADEMIC EXCELLENCE AND STUDENT SUCCESS COMMITTEE

Molly S. Seals, Chair
Joseph J. Kerola, Vice Chair
All Trustees are members

FINANCE AND FACILITIES COMMITTEE

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

AUDIT SUBCOMMITTEE

Molly S. Seals, Chair
Richard C. Fryda, Vice Chair
Laura A. Lyden
Anita A. Hackstedde
Joseph J. Kerola

INVESTMENT COMMITTEE

Allen L. Ryan, Jr., Chair
Charles T. George, Vice Chair
All Trustees are members

INTERCOLLEGIATE ATHLETICS COMMITTEE

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

INSTITUTIONAL ENGAGEMENT COMMITTEE

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

WORKFORCE EDUCATION AND INNOVATION COMMITTEE

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

UNIVERSITY AFFAIRS COMMITTEE

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

GOVERNANCE COMMITTEE

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

EXECUTIVE COMMITTEE

Michael A. Peterson, Chair
Charles T. George, Vice Chair
Joseph J. Kerola
Anita A. Hackstedde
Molly S. Seals
Allen L. Ryan, Jr.



Disclosure of Relationships with University-Affiliated Financial Institutions

(Updated February 7, 2024)

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

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

- Clearstead _____
- Cliffwater _____
- Diamond Hill _____
- Dimensional Fund Advisors (DFA) _____
- Dodge & Cox _____
- Evanston Capital _____
- Federated _____
- Fidelity _____
- H.I.G. Capital _____
- J.P. Morgan _____
- Loomis Sayles _____
- Lord Abbett _____
- PNC _____
- State Treasury Asset Reserve of Ohio (STAR Ohio) _____
- Vanguard _____
- Victory _____
- William Blair _____
- I have no business or familial relationship with the above institutions that require disclosure

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

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

SIGNED: _____ DATED: _____

For audit and compliance purposes, please email completed form to npmcnally@ysu.edu, or send to YSU, Tod Hall 223, Office of the Vice President for Finance & Business Operations, by June 30, 2024.



March 6, 2024

YOUNGSTOWN STATE UNIVERSITY



*1100 Superior Avenue East Suite 700
Cleveland, Ohio 44114
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CLEARSTEAD OVERVIEW

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FIRM DEVELOPMENTS

Acquisitions & Growth

- ▶ Acquisition of Investment / Trust Company in the Southwest
- ▶ Business of CLS Consulting
- ▶ Lift Out of Prominent Institutional and Private Wealth Team in the Midwest
- ▶ Successful Implementation of Leadership Succession
- ▶ Senior Professionals join Clearstead in 2023

Supporting Our Mission



Expansion of Client Services

- ▶ Investing in technology to enhance services



2023 Impact Report



*Approximate as of 12/31/2023; Employees and assets of Clearstead Trust and Avalon Trust included, which are not registered by the SEC

PUBLICATIONS



RESEARCH CORNER

Weekly economic and investment insights - including current observations and expectations for investors.



MARKET MINUTE

Monthly market reviews, with detailed observations on various asset classes.



CLEARPOINT

Monthly articles that cover a variety of financial topics from market trends and alternative investment insights to tax planning strategies and portfolio management tips.



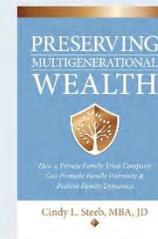
PENSION INDICATOR

Monthly reviews of financial and market trends that effect pension funds and tips for plan sponsors.

UPDATES & NEWS



ANNUAL FIRM UPDATE
READ THE FULL UPDATE HERE



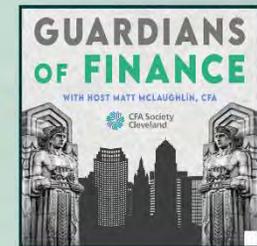
JOIN THE LIST TO BE NOTIFIED WHEN CINDY STEEB'S BOOK ON FTCS IS AVAILABLE TO ORDER

Cindy L. Steeb, JD
Senior Managing Director
Trust Administration Services



LISTEN TO
DAVE FULTON, CFA,
CO-CHAIRMAN AND CEO
OF CLEARSTEAD

ON THE LATEST EPISODE OF
CFA SOCIETY OF CLEVELAND'S PODCAST:
GUARDIANS OF FINANCE



CONTENTS

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

APPENDIX

Endowment Assets: Performance & Asset Allocation Review

Detailed Performance

Supporting Information



INITIATIVES

2024 CALENDAR YEAR INITIATIVES

		1Q	2Q	3Q	4Q	COMMENTS:
STRATEGIC / ADMINISTRATIVE	Investment Policy Review				<input type="checkbox"/>	
	Strategic Asset Allocation Review			<input type="checkbox"/>		
	Peer Review		<input type="checkbox"/>			
	2025 Oversight Dashboard				<input type="checkbox"/>	
	STAR Ohio/Plus Annual Review					
PORTFOLIO	Fixed Income Review				<input type="checkbox"/>	
	Alternative Investments Review		<input type="checkbox"/>			
	Global Equity Review				<input type="checkbox"/>	
PERFORMANCE	Capital Markets Review	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Quarterly Performance Review	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Endowed Account Review / Oversight	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OTHER	Fee Review			<input type="checkbox"/>		
	ORC Compliance Review			<input type="checkbox"/>		
	Clearstead Firm Update	✓				

LAST REVIEWED
 Investment Policy: 06/21/2023
 Strategic Asset Allocation: 09/19/2023
 Fee Review: 09/19/2023

MEETING SCHEDULE
 1Q: March 6, 2024
 2Q: June 5, 2024
 3Q: September 18, 2024
 4Q: December 4, 2024

FOLLOW UP / INITIATIVES



CAPITAL MARKETS UPDATE

QUARTERLY THEMES

WHAT HAPPENED LAST QUARTER?

- Positive quarter across all major asset classes fueled by anticipated interest rate cuts in CY2024
 - Energy was the only negative performing sector as commodity prices fell
- Growth equities, specifically the “Magnificent Seven”, outperformed value-oriented equities
 - Market returns broadened, but mega-cap tech names drove 80% of S&P 500 returns
- Global equities experienced double digit returns following strong 4th quarter rebound:
 - **Quarter:** S&P 500 +11.7%; MSCI EAFE +10.4%; MSCI Emerging Markets +7.9%; Bloomberg US Agg +6.8%
 - **2023:** S&P 500 +26.3%; MSCI EAFE +18.2%; MSCI Emerging Markets +9.8%; Bloomberg US Agg +5.5%

LOOKING FORWARD:

- Fundamentals support potential “soft landing” for global economy
 - Expect slower growth and moderating inflation to continue
 - Potential shocks - U.S. election, higher policy rates, or significant geopolitical tension
- Corporate earnings and profit margin resiliency will be tested
- Wage growth is the largest risk to disinflationary trends and corporate margins
- Continued labor market strength and consumer/business spending warranted for market support
- Fixed Income and Cash yields remain attractive

Source: Clearstead, Federal Reserve, Bloomberg LP. As of 12/31/2023. Past performance is not an indicator of future results.

HISTORICAL ASSET CLASS RETURNS

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	2023 YTD
Sm/Mid 36.8%	Large Cap 13.7%	Large Cap 1.4%	Sm/Mid 17.6%	Em Mkt 37.3%	Cash 1.9%	Large Cap 31.5%	Sm/Mid 20.0%	Large Cap 28.7%	Cash 1.5%	Dev Intl 8.5%	Large Cap 8.7%	Cash 1.3%	Sm/Mid 13.4%	Large Cap 26.3%
Large Cap 32.4%	Sm/Mid 7.1%	US Bonds 0.6%	Hi Yld 17.5%	Dev Intl 25.0%	US Bonds 0.0%	Sm/Mid 27.8%	Large Cap 18.4%	Sm/Mid 18.2%	Hdg Fnds -4.7%	Large Cap 7.5%	Sm/Mid 5.2%	Hdg Fnds 0.7%	Large Cap 11.7%	Dev Intl 18.2%
Dev Intl 22.8%	US Bonds 6.0%	Cash 0.1%	Large Cap 12.0%	Large Cap 21.8%	Glb Bond -0.9%	Dev Intl 22.0%	Em Mkt 18.3%	Dev Intl 11.3%	Hi Yld -11.2%	Em Mkt 4.0%	Dev Intl 3.0%	Hi Yld 0.5%	Dev Intl 10.4%	Sm/Mid 17.4%
Hdg Fnds 9.0%	Hdg Fnds 3.4%	Hdg Fnds -0.3%	Em Mkt 11.2%	Sm/Mid 16.8%	Hi Yld -2.3%	Em Mkt 18.4%	Hdg Fnds 10.9%	Hdg Fnds 6.5%	US Bonds -13.0%	Hi Yld 3.7%	Hi Yld 1.6%	Em Mkt -2.9%	Glb Bonds 9.3%	Hi Yld 13.5%
Hi Yld 7.4%	Hi Yld 2.5%	Dev Intl -0.8%	US Bonds 2.7%	Glb Bond 9.3%	Hdg Fnds -4.0%	Hi Yld 14.4%	Glb Bond 9.5%	Hi Yld 5.4%	Dev Intl -14.5%	Sm/Mid 3.4%	Hdg Fnds 1.5%	US Bonds -3.2%	EM Mkt 7.9%	EM Mkt 9.8%
Cash 0.1%	Cash 0.0%	Sm/Mid -2.9%	Glb Bond 1.9%	Hdg Fnds 7.8%	Large Cap -4.4%	US Bonds 8.8%	Dev Intl 7.8%	Cash 0.1%	Large Cap -18.1%	Glb Bond 3.1%	Cash 1.2%	Large Cap -3.3%	Hi Yld 7.1%	Hdg Funds 6.3%
US Bonds -2.0%	Em Mkt -2.2%	Hi Yld -4.6%	Dev Intl 1.0%	Hi Yld 7.5%	Sm/Mid -10.0%	Hdg Fnds 8.4%	US Bonds 7.5%	US Bonds -1.5%	Sm/Mid -18.4%	US Bonds 3.0%	EM Mkt 0.9%	Dev Intl -4.4%	US Bonds 6.8%	US Bonds 5.5%
Em Mkt -2.6%	Glb Bond -2.8%	Glb Bond -4.8%	Hdg Fnds 0.5%	US Bonds 3.5%	Dev Intl -13.8%	Glb Bond 5.0%	Hi Yld 6.2%	Em Mkt -2.5%	Glb Bond -19.6%	Hdg Fnds 1.6%	US Bonds -0.8%	Glb Bond -4.7%	Hdg Funds 3.4%	Cash 5.1%
Glb Bond -4.9%	Dev Intl -4.5%	Em Mkt -14.9%	Cash 0.3%	Cash 0.9%	Em Mkt -14.6%	Cash 2.3%	Cash 0.5%	Glb Bond -8.2%	Em Mkt -20.1%	Cash 1.1%	Glb Bonds -2.9%	Sm/Mid -4.8%	Cash 1.4%	Glb Bonds 4.2%

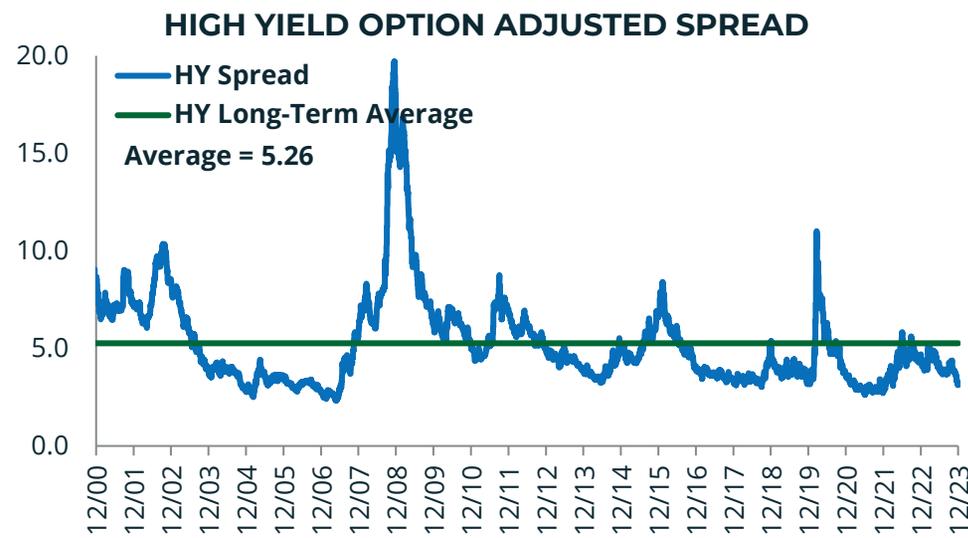
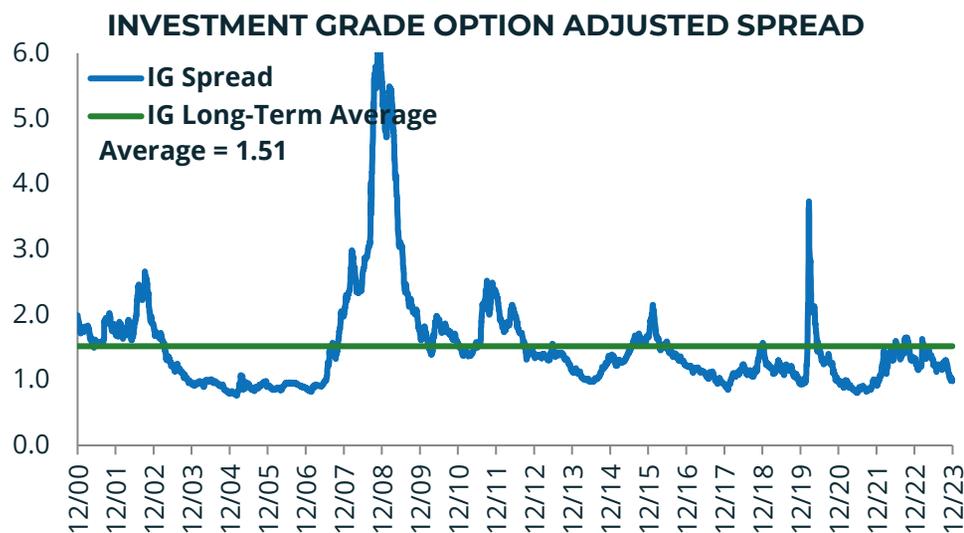
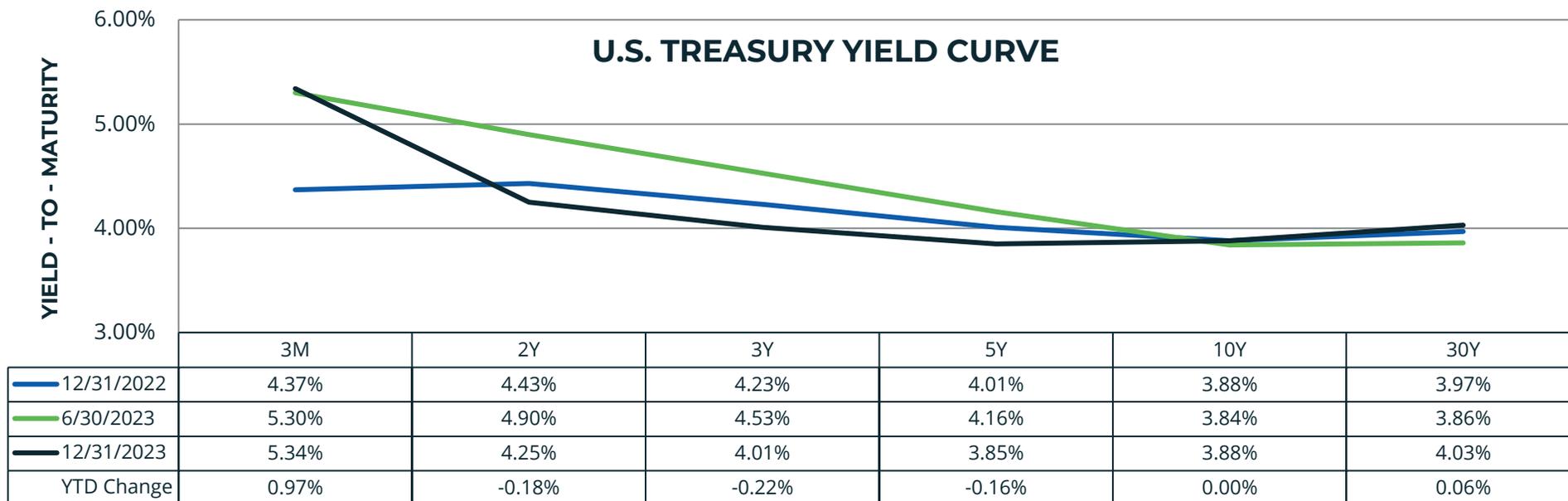
Past performance is not an indicator of future results. Asset classes represented by: Large Cap – S&P 500 Index; Sm/Mid – Russell 2500 Index; Dev Intl – MSCI EAFE Index; Em Mkt – MSCI Emerging Markets Index; Hi Yld – Bank of America Merrill Lynch U.S. High Yield Master II; US Bonds – Barclays Capital U.S. Aggregate; Glb Bond – Barclays Capital Global Treasury ex US; Hdg Fnds – HFRI FOF: Diversified Index; Cash – Merrill Lynch 91-day Tbill . Data as of 12/30/2023. Source: Morningstar Direct.

U.S. ECONOMIC PROJECTIONS

		2023	2024	2025	2026	LONG RUN*
GDP	December 2023	2.6%	1.4%	1.8%	1.9%	1.8%
	September 2023	2.1%	1.5%	1.8%	1.8%	1.8%
	June 2023	1.0%	1.1%	1.8%		1.8%
	March 2023	0.4%	1.2%	1.9%		1.8%
Unemployment Rate	December 2023	3.8%	4.1%	4.1%	4.1%	4.1%
	September 2023	3.8%	4.1%	4.1%	4.0%	4.0%
	June 2023	4.1%	4.5%	4.5%		4.0%
	March 2023	4.5%	4.6%	4.6%		4.0%
Core PCE Inflation	December 2023	3.2%	2.4%	2.2%	2.0%	
	September 2023	3.7%	2.6%	2.3%	2.0%	
	June 2023	3.9%	2.6%	2.2%		
	March 2023	3.6%	2.6%	2.1%		
Federal Funds Rate	December 2023	5.4%	4.6%	3.6%	2.9%	2.5%
	September 2023	5.6%	5.1%	3.9%	2.9%	2.5%
	June 2023	5.6%	4.6%	3.4%		2.5%
	March 2023	5.1%	4.3%	3.1%		2.5%
# of implied 25 bps rate changes year	December 2023	5	-3	-4	-3	
	September 2023	5	-2	-5	-4	
	June 2023	5	-4	-5		
	March 2023	3	-3	-5		

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

Source: Clearstead, U.S. Federal Reserve. Expectations of Fed board members/bank presidents. Data as of 12/31/2023. Past performance is not an indicator of future results.



Source: Bloomberg. Data as of 12/31/2023. Past performance is not an indicator of future results.



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

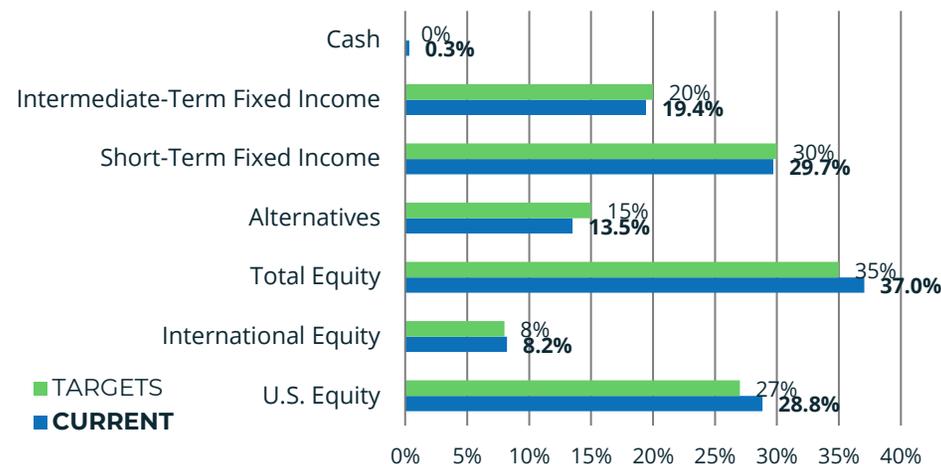
NON-ENDOWMENT PERFORMANCE REVIEW (AS OF 12/31/2023)

14

NON-ENDOWMENT ASSETS	MARKET VALUE (\$MM)	TRAILING PERIODS								CALENDAR YEARS				SINCE INCEPTION ⁴
		QTD	FYTD	CYTD	1 YR	3 YR	5 YR	7 YR	10 YR	2022	2021	2020	2019	
Total Non-Endowment Assets	\$71.759	5.8%	4.7%	11.0%	11.0%	3.3%	6.1%	5.2%	4.3%	-7.8%	7.8%	9.5%	11.5%	4.2%
	<i>Benchmark¹</i>	4.1%	4.1%	8.7%	8.7%	2.6%	4.4%	3.8%	3.2%	-4.7%	4.3%	5.9%	8.7%	3.2%
Operating & Short-Term Pool	\$5.298	1.4%	2.7%	5.0%	5.0%	2.1%	2.0%	1.7%	1.3%	1.4%	0.0%	1.1%	2.4%	1.0%
	<i>Benchmark²</i>	1.4%	2.7%	5.0%	5.0%	2.0%	1.8%	1.7%	1.2%	1.2%	0.0%	0.8%	2.3%	0.9%
Long-Term Pool	\$66.461	6.6%	4.9%	11.8%	11.8%	2.8%	6.4%	5.5%	4.8%	-11.2%	9.5%	8.8%	15.3%	5.1%
	<i>Benchmark³</i>	6.4%	5.3%	11.8%	11.8%	2.9%	6.3%	5.5%	4.7%	-9.7%	8.0%	10.0%	14.2%	4.8%

LONG-TERM POOL ASSET ALLOCATION

	CURRENT	TARGETS	RANGE	+ / -
U.S. Equity	28.8%	27%	20-35%	1.8%
International Equity	8.2%	8%	0-15%	0.2%
Total Equity	37.0%	35%	25-45%	2.0%
Alternatives	13.5%	15%	0-20%	-1.5%
Short-Term Fixed Income	29.7%	30%	25-45%	-0.3%
Intermediate-Term Fixed Income	19.4%	20%	10-30%	-0.6%
Cash	0.3%	0%	0-5%	0.3%



1) 45% BofA Merrill Lynch 91-Day T-Bill / 17% BofA Merrill Lynch US Corp & Gov 1-3 Yrs / 11% BBgBarc US Govt/Credit Int TR / 8% Total Alternatives Benchmark / 15% Russell 3000 / 4% MSCI EAFE.

2) 95% BofA Merrill Lynch 91-Day T-Bill / 5% Barclays 1-3 Yr. Govt.

3) 27% Russell 3000 / 8% MSCI EAFE / 15% Total Alternatives Benchmark / 30% BofA Merrill Lynch US Corp & Gov 1-3 Yrs / 20% BBgBarc US Govt/Credit Int TR.

4) Inception date for Long-Term and Short-Term Pools: June 2010, Inception Date for Total Non-Endowment Assets: March 2004.

LONG-TERM POOL PERFORMANCE REVIEW: JANUARY UPDATE 15

	Market Value 01/01/2024	Market Value 01/31/2024	% of Portfolio	1 Mo (%)	FYTD (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)	Inception (%)	Inception Date
Total University Assets	\$71,803,301	\$72,034,549	100.0	0.3	5.1	7.9	3.5	5.6	4.2	Apr-04
<i>Total Policy Benchmark¹</i>				0.5	4.7	7.1	2.9	4.0	3.2	
Total Operating & Short Term	\$5,297,918	\$5,321,539	7.4	0.4	3.0	4.9	2.2	2.0	1.0	Jul-10
<i>Total Operating & Short Term Benchmark²</i>				0.4	3.2	5.1	2.2	1.9	1.0	
Federated Hermes Government Obligations Fund	\$5,297,918	\$5,321,539	100.0	0.4	3.0	4.8	2.2	1.7	2.9	Oct-21
<i>90 Day U.S. Treasury Bill</i>				0.4	3.1	5.1	2.3	1.9	3.0	
Total Long Term/ Reserves Pool	\$66,505,383	\$66,713,010	92.6	0.3	5.2	7.9	3.0	5.6	5.1	Jul-10
<i>Total Long Term/ Reserves Fund Benchmark³</i>				0.6	5.9	8.7	3.2	5.7	4.8	
Total Equity	\$24,617,323	\$23,943,566	35.9	-0.1	6.9	13.0	7.2	11.6	11.9	Jul-10
Total Domestic Equity	\$19,159,694	\$18,590,886	27.9	0.4	8.1	15.2	8.9	12.8	13.6	Jul-10
<i>Russell 3000 Index</i>				1.1	9.6	19.1	9.1	13.5	13.9	
Vanguard Institutional Index	\$12,992,618	\$13,210,549	19.8	1.7	9.8	20.8	11.0	14.3	14.2	Jul-10
<i>S&P 500 Index</i>				1.7	9.9	20.8	11.0	14.3	14.3	
Vanguard Mid Cap Index Adm	\$3,056,749	\$2,352,110	3.6	-1.5	5.0	5.8	5.1	10.1	11.4	Oct-10
<i>Vanguard Mid Cap Index Benchmark</i>				-1.5	5.0	5.8	5.2	10.2	11.5	
Loomis Sayles Sm Growth N	\$1,539,866	\$1,503,731	2.3	-2.3	0.2	1.5	-2.9	7.6	6.5	Sep-19
<i>Russell 2000 Growth Index</i>				-3.2	1.1	4.5	-6.0	6.2	6.0	
Victory Integrity Small Value Y	\$1,570,461	\$1,524,497	2.3	-2.9	7.1	4.9	11.5	9.4	10.2	Oct-10
<i>Russell 2000 Value Index</i>				-4.5	6.8	-0.1	4.5	6.7	9.0	
Total International Equity	\$5,457,629	\$5,352,679	8.0	-1.9	2.6	5.3	1.2	7.2	5.1	Oct-10
<i>MSCI EAFE (Net)</i>				0.6	6.5	10.0	4.6	6.9	5.6	
William Blair International Growth I	\$2,472,228	\$2,454,120	3.7	-0.7	2.9	6.2	-3.7	7.6	6.7	Jul-12
<i>MSCI AC World ex USA (Net)</i>				-1.0	4.6	5.9	1.1	5.3	5.6	
Dodge & Cox Internat'l Stock	\$2,985,401	\$2,898,559	4.3	-2.9	2.3	4.4	5.7	6.3	5.3	Oct-10
<i>MSCI EAFE (Net)</i>				0.6	6.5	10.0	4.6	6.9	5.6	

LONG-TERM POOL PERFORMANCE REVIEW: JANUARY UPDATE 16

	Market Value 01/01/2024	Market Value 01/31/2024	% of Portfolio	1 Mo (%)	FYTD (%)	1 Yr (%)	3 Yr (%)	5 Yr (%)	Inception (%)	Inception Date
Total Alternatives	\$9,007,243	\$9,099,225	13.6	1.0	3.5	6.2	2.2	2.0	1.7	Mar-15
<i>Total Alternatives Benchmark⁴</i>				0.8	4.8	5.0	2.7	3.0	2.4	
Weatherlow Offshore Fund I Ltd CI IIA	\$4,808,111	\$4,880,232	7.3	1.5	5.3	6.2	2.1	7.6	-0.9	Jul-21
<i>HFRI Fund of Funds Composite Index</i>				0.8	4.8	5.0	2.7	4.8	1.0	
Cliffwater Corporate Lending I	\$1,903,038	\$1,922,899	2.9	1.0	7.8	12.5	9.8	-	1.0	Jan-24
<i>Credit Suisse Leveraged Loan Index</i>				0.8	7.1	11.1	5.5	5.2	0.8	
H.I.G. Whitehorse Principal Lending Offshore Feeder Fd, L.P.	\$2,296,094	\$2,296,094	3.5	0.0	2.8	9.1	-	-	8.3	Jul-22
<i>Credit Suisse Leveraged Loan Index</i>				0.8	7.1	11.1	5.5	5.2	11.0	
Total Fixed Income	\$32,648,770	\$32,780,219	49.1	0.4	4.2	4.4	-0.2	2.0	2.0	Jul-10
<i>Total Fixed Income Benchmark⁵</i>				0.3	3.9	4.0	-0.4	1.5	1.6	
JPMorgan Core Bond	\$5,248,419	\$5,254,229	7.9	0.1	3.2	2.4	-2.6	1.3	1.1	Sep-17
<i>Blmbg. U.S. Aggregate Index</i>				-0.3	3.1	2.1	-3.2	0.8	0.8	
YSU Intermediate Term Bond	\$4,461,235	\$4,477,136	6.7	0.4	4.1	3.9	-1.2	1.9	3.1	Apr-04
<i>Blmbg. Intermed. U.S. Government/Credit</i>				0.2	3.9	3.5	-1.5	1.5	2.8	
Fidelity Interm Treasury Bond Index	\$3,262,274	\$3,269,491	4.9	0.2	2.7	1.4	-3.9	0.5	0.2	Jan-24
<i>Blmbg. U.S. Treasury: 5-10 Year</i>				0.0	2.6	1.3	-3.8	0.6	0.0	
YSU Short Term Bond	\$13,098,573	\$13,159,735	19.8	0.5	4.0	4.5	0.5	1.8	2.3	Apr-04
<i>ICE BofA 1-3 Yr. Gov/Corp</i>				0.4	3.9	4.3	0.2	1.5	2.1	
Lord Abbett Short Duration Income I	\$6,572,540	\$6,619,618	9.9	0.7	4.3	4.6	0.7	2.0	2.2	Apr-18
<i>ICE BofA 1-3 Yr. Gov/Corp</i>				0.4	3.9	4.3	0.2	1.5	1.7	
Total Cash & Cash Equivalents	\$232,046	\$890,001	1.3	0.4	3.0	4.8	2.2	1.7	1.6	Apr-18
<i>90 Day U.S. Treasury Bill</i>				0.4	3.1	5.1	2.3	1.9	1.9	
Federated Hermes Government Obligations Fund	\$232,046	\$890,001	1.3	0.4	3.0	4.8	2.2	1.7	1.6	Dec-19
<i>90 Day U.S. Treasury Bill</i>				0.4	3.1	5.1	2.3	1.9	1.8	

¹90 Day U.S. Treasury Bill: 45.00%, Russell 3000 Index: 15.00%, Blmbg. Intermed. U.S. Government/Credit: 11.00%, MSCI EAFE (Net): 4.00%, ICE BofA 1-3 Yr. Gov/Corp: 17.00%, Total Alternatives Benchmark: 8.00%

²90 Day U.S. Treasury Bill: 95.00%, Blmbg. 1-3 Govt: 5.00%

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

⁴HFRI Fund of Funds Composite Index: 100.00%

⁵Blmbg. Intermed. U.S. Government/Credit: 36.00%, ICE BofA 1-3 Yr. Gov/Corp: 64.00%

INVESTMENT POOL UPDATE: LATE FEBRUARY

YOUNGSTOWN STATE UNIVERSITY

AS OF FEBRUARY 22, 2024

	TICKER	INVESTMENT STRATEGY	MARKET VALUE (CURRENT)	% OF PORTFOLIO	POLICY TARGET	POLICY RANGE	TACTICAL +/-		
Total Operating & Short Term					\$23,321,539	100.0%			
Federated Hermes Govt Obligations	FOGXX	Money Market	\$23,321,539	100.0%					
Star Plus*	-	Cash Equivalent	\$0	0.0%					
Star Ohio*	-	Cash Equivalent	\$0	0.0%					
Total Long Term Reserves Pool					\$67,069,687	100.0%			
Domestic Equity					\$19,473,208	29.0%	27.0%	20-35%	2.0%
Vanguard Instl Index	VINIX	Large Cap Core	\$13,884,812	20.7%					
Vanguard Mid Cap Index Adm	VIMAX	Mid-Cap Core	\$2,440,717	3.6%					
Loomis Sayles Small Growth N2	LSSNX	Small Cap Growth	\$1,590,285	2.4%					
Victory Integrity Small Cap Value Y	VSVIX	Small Cap Value	\$1,557,393	2.3%					
International Equity					\$5,530,936	8.2%	8.0%	0-15%	0.2%
William Blair International Growth I	BIGIX	Foreign Growth	\$2,572,256	3.8%					
Dodge & Cox International Stock	DODFX	Foreign Value	\$2,958,680	4.4%					
Total Equity					\$25,004,144	37.3%	35.0%	25-45%	2.3%
Alternatives					\$9,042,811	13.5%	15.0%	0-20%	-1.5%
H.I.G. Principal Lending Fund ¹	-	Private Credit	\$2,296,094	3.4%					
Cliffwater Corporate Lending Fund	CCLFX	Private Credit	\$1,935,538	2.9%					
Apollo Infrastructure Opps Fund III	-	Real Assets	\$0	0.0%					
Weatherlow Fund ²	-	Diversifying Strategy	\$4,811,179	7.2%					
Fixed Income					\$32,358,137	48.2%	50.0%	35-75%	-1.8%
Short Term Fixed Income					\$19,616,256	29.2%	30.0%	25-45%	-0.8%
YSU Short Term Bond	-	Short-Term Fixed	\$13,030,937	19.4%					
Lord Abbett Short Duration	LLDYX	Short-Term Fixed	\$6,585,320	9.8%					
Intermediate Fixed Income					\$12,741,881	19.0%	20.0%	10-30%	-1.0%
JPMorgan Core Bond Fund R6 ³	JCBUX	Core Plus Fixed	\$5,162,221	7.7%					
YSU Intermediate Term Fixed	-	Interm-Term Fixed	\$4,394,001	6.6%					
Fidelity Intermediate Treasury Index	FUAMX	Interm-Term Treasury	\$3,185,659	4.7%					
Cash & Cash Equivalents					\$664,596	1.0%	0.0%	0-5%	1.0%
Federated Hermes Govt Obligations	-	Money Market	\$664,596	1.0%					
Total University Assets					\$90,391,226				

1) As of 09/30/2023.
 2) As of 12/31/2023.
 3) Held at JPMorgan.



APPENDIX



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

ENDOWMENT ASSETS: PERFORMANCE & ASSET ALLOCATION (AS OF 12/31/2023)

ENDOWMENT ASSETS	MARKET VALUE (\$MM)	TRAILING PERIODS								CALENDAR YEARS				SINCE INCEPTION ³
		QTD	FYTD	CYTD	1 YR	3 YR	5 YR	7 YR	10 YR	2022	2021	2020	2019	
YSU Endowment Fund	\$16.032	7.9%	5.8%	12.8%	12.8%	4.8%	10.6%	8.8%	8.0%	-15.7%	20.9%	16.3%	23.8%	8.4%
<i>Benchmark¹</i>		10.5%	6.9%	20.9%	20.9%	6.7%	12.1%	10.5%	9.6%	-16.6%	20.6%	16.2%	25.6%	9.5%
<i>Benchmark²</i>		9.7%	6.2%	17.7%	17.7%	4.7%	10.0%	8.7%	8.1%	-15.8%	15.9%	14.7%	22.2%	8.7%

COMPLIANCE

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

HOLDINGS

- Equity Mutual Funds – 16% (Mutual Funds & ETFs)
- Stocks – 52% (30-60 Concentrated U.S. Large/Mid-Cap Stock Portfolio)
- Alternatives – 2% (Real Estate Mutual Fund)
- Fixed Income Mutual Funds – 2% (Federated High Yield)
- Individual Bonds – 22% (Individual Bond Portfolio: U.S. Corporate / Gov't / Asset Backed Debt)
- Cash – 6%

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

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

3) Inception date: 06/2013.



DETAILED PERFORMANCE

EXECUTIVE SUMMARY

	Market Value 10/01/2023	Market Value 12/31/2023	% of Portfolio	4th Quarter 2023 (%)	YTD (%)
Total University Assets	\$84,550,946	\$71,759,116	100.0	5.8	11.0
<i>Total Policy Benchmark¹</i>				4.1	8.7
Total Operating & Short Term	\$22,103,843	\$5,297,918	7.4	1.4	5.0
<i>Total Operating & Short Term Benchmark²</i>				1.4	5.0
Total Long Term/ Reserves Pool	\$62,447,104	\$66,461,197	92.6	6.6	11.8
<i>Total Long Term/ Reserves Fund Benchmark³</i>				6.4	11.8
Total Domestic Equity	\$19,142,506	\$19,159,694	26.7	11.6	22.7
<i>Russell 3000 Index</i>				12.1	26.0
Total International Equity	\$4,967,584	\$5,457,629	7.6	9.9	16.2
<i>MSCI EAFE (Net)</i>				10.4	18.2
Total Alternatives	\$6,973,420	\$8,963,058	12.5	2.8	7.1
<i>Total Alternatives Benchmark</i>				3.6	6.6
Total Fixed Income	\$31,200,858	\$32,648,770	45.5	3.9	5.9
<i>Total Fixed Income Benchmark⁴</i>				3.3	4.9
Total Cash & Cash Equivalents	\$162,736	\$232,046	0.3	1.3	5.2
<i>90 Day U.S. Treasury Bill</i>				1.4	5.0

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

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

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

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

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

ASSET ALLOCATION GUIDELINES COMPLIANCE

Total Plan Asset Allocation Policy	Range	Current
Operating & Short-Term Pool	0% - 50%	7%
Long Term/ Reserves Pool	50% - 100%	93%

Operating & Short-Term Pool		Range	Current
Operating Assets		60% - 100%	100%
Short-Term Assets		0% - 40%	0%

Long Term/ Reserves Pool	Target	Range	Current
Domestic Equity	27%	20% - 35%	29%
International Equity	8%	0% - 15%	8%
Total Equity	35%	25% - 45%	37%
Alternatives	15%	0%-20%	11%
Short-Term Fixed Income	30%	25% - 45%	30%
Intermediate Fixed Income	20%	10% - 30%	22%
Cash & Cash Equivalents	0%	0% - 5%	0%

In Line Within Tolerance Review

SCHEDULE OF ASSETS

	Ticker	Account Type	Begin Market Value \$	Market Value 12/31/2023	% of Portfolio
Total University Assets			\$84,550,946	\$71,759,116	100.0
Total Operating & Short Term			\$22,103,843	\$5,297,918	7.4
Federated Hermes Government Obligations Fund	GOSXX	Cash	\$22,103,843	\$5,297,918	7.4
Total Long Term/ Reserves Pool			\$62,447,104	\$66,461,197	92.6
Total Domestic Equity			\$19,142,506	\$19,159,694	26.7
Vanguard Institutional Index	VINIX	US Stock Large Cap Core	\$13,015,865	\$12,992,618	18.1
Vanguard Mid Cap Index Adm	VIMAX	US Stock Mid Cap Core	\$2,950,232	\$3,056,749	4.3
Loomis Sayles Sm Growth N	LSSNX	US Stock Small Cap Growth	\$1,587,629	\$1,539,866	2.1
Victory Integrity Small Value Y	VSVIX	US Stock Small Cap Value	\$1,588,780	\$1,570,461	2.2
Total International Equity			\$4,967,584	\$5,457,629	7.6
William Blair International Growth I	BIGIX	International	\$2,172,574	\$2,472,228	3.4
Dodge & Cox Internat'l Stock	DODFX	International	\$2,795,010	\$2,985,401	4.2
Total Alternatives			\$6,973,420	\$8,963,058	12.5
Weatherlow Offshore Fund I Ltd CI IIA		Hedge Fund	\$4,617,654	\$4,811,179	6.7
Cliffwater Corporate Lending I		Private Debt	-	\$1,855,785	2.6
H.I.G. Whitehorse Principal Lending Offshore Feeder Fd, L.P.		Direct Lending	\$2,355,766	\$2,296,094	3.2
Total Fixed Income			\$31,200,858	\$32,648,770	45.5
JPMorgan Core Bond	WOBDX	US Fixed Income Core	\$4,934,285	\$5,248,419	7.3
YSU Intermediate Term Bond		US Fixed Income Core	\$4,263,239	\$4,461,235	6.2
Fidelity Interm Treasury Bond Index	FUAMX	US Fixed Income Core	-	\$3,262,274	4.5
PGIM High Yield R6	PHYQX	US Fixed Income High Yield	\$3,095,765	\$5,729	0.0
YSU Short Term Bond		US Fixed Income Short Term	\$12,743,122	\$13,098,573	18.3
Lord Abbett Short Duration Income I	LLDYX	US Fixed Income Short Term	\$6,164,447	\$6,572,540	9.2
Total Cash & Cash Equivalents			\$162,736	\$232,046	0.3
Federated Hermes Government Obligations Fund	GOSXX	Cash	\$162,736	\$232,046	0.3

ATTRIBUTION OF MARKET VALUE

TOTAL UNIVERSITY ASSETS

	Q1-2023	Q2-2023	Q3-2023	Q4-2023	One Year
Total University Assets					
Beginning Market Value	\$73,068,111	\$88,538,544	\$77,367,011	\$84,550,946	\$73,068,111
Contributions	\$20,000,000	-	\$15,000,000	-	\$35,000,000
Distributions	-\$7,041,880	-\$13,121,696	-\$7,026,806	-\$17,000,000	-\$44,190,382
Net Cash Flows	\$12,958,120	-\$13,121,696	\$7,973,194	-\$17,000,000	-\$9,190,382
Net Investment Change	\$2,512,313	\$1,950,164	-\$789,259	\$4,208,169	\$7,881,387
Ending Market Value	\$88,538,544	\$77,367,011	\$84,550,946	\$71,759,116	\$71,759,116
Change \$	\$15,470,433	-\$11,171,532	\$7,183,935	-\$12,791,831	-\$1,308,995

LONG-TERM POOL

	Q1-2023	Q2-2023	Q3-2023	Q4-2023	One Year
Total Long Term/ Reserves Pool					
Beginning Market Value	\$59,507,519	\$61,709,542	\$63,401,993	\$62,447,104	\$59,507,519
Contributions	-	-	-	-	-
Distributions	-\$41,880	-\$27,473	-\$26,806	-	-\$96,159
Net Cash Flows	-\$41,880	-\$27,473	-\$26,806	-	-\$96,159
Net Investment Change	\$2,243,903	\$1,719,924	-\$928,083	\$4,014,094	\$7,049,838
Ending Market Value	\$61,709,542	\$63,401,993	\$62,447,104	\$66,461,197	\$66,461,197
Change \$	\$2,202,023	\$1,692,451	-\$954,889	\$4,014,094	\$6,953,679

PERFORMANCE SUMMARY

	% of Portfolio	QTD (%)	FYTD (%)	1 Yr (%)	2 Yr (%)	3 Yr (%)	5 Yr (%)	7 Yr (%)	10 Yr (%)	2022 (%)	2021 (%)	2020 (%)	Inception (%)	Inception Date
Total University Assets	100.0	5.8	4.7	11.0	1.1	3.3	6.1	5.2	4.3	-7.8	7.8	9.5	4.2	Apr-04
<i>Total Policy Benchmark</i>		4.1	4.1	8.7	1.8	2.6	4.4	3.8	3.2	-4.7	4.3	5.5	3.2	
Total Operating & Short Term	7.4	1.4	2.7	5.0	3.2	2.1	2.0	1.7	1.3	1.4	0.0	1.1	1.0	Jul-10
<i>Total Operating & Short Term Benchmark</i>		1.4	2.7	5.0	3.1	2.0	1.8	1.7	1.2	1.2	0.0	0.8	0.9	
Federated Hermes Government Obligations Fund	7.4	1.3	2.5	4.8	3.0	2.0	1.6	1.5	1.0	1.4	0.0	0.3	2.8	Nov-21
<i>90 Day U.S. Treasury Bill</i>		1.4	2.7	5.0	3.2	2.2	1.9	1.7	1.2	1.5	0.0	0.7	3.0	
Total Long Term/ Reserves Pool	92.6	6.6	4.9	11.8	-0.4	2.8	6.4	5.5	4.7	-11.2	9.5	8.8	5.1	Jul-10
<i>Total Long Term/ Reserves Fund Benchmark</i>		6.4	5.3	11.8	0.5	2.9	6.3	5.5	4.7	-9.7	8.0	9.2	4.8	
Total Domestic Equity	26.7	11.6	7.6	22.7	0.5	8.6	14.6	12.4	11.1	-17.7	26.9	18.5	13.6	Jul-10
<i>Russell 3000 Index</i>		12.1	8.4	26.0	0.9	8.5	15.2	12.8	11.5	-19.2	25.7	20.9	13.9	
Vanguard Institutional Index	18.1	11.7	8.0	26.2	1.7	10.0	15.7	13.4	12.0	-18.1	28.7	18.4	14.2	Jul-10
<i>S&P 500 Index</i>		11.7	8.0	26.3	1.7	10.0	15.7	13.4	12.0	-18.1	28.7	18.4	14.2	
Vanguard Mid Cap Index Adm	4.3	12.3	6.6	16.0	-2.9	5.5	12.7	10.2	9.4	-18.7	24.5	18.2	11.6	Oct-10
<i>Vanguard Mid Cap Index Benchmark</i>		12.3	6.6	16.0	-2.9	5.5	12.7	10.2	9.4	-18.7	24.5	18.2	11.7	
Loomis Sayles Sm Growth N	2.1	8.2	2.6	12.1	-7.0	-1.6	10.1	11.0	8.4	-22.8	10.2	34.3	7.2	Sep-19
<i>Russell 2000 Growth Index</i>		12.7	4.5	18.7	-6.5	-3.5	9.2	8.1	7.2	-26.4	2.8	34.6	6.9	
Victory Integrity Small Value Y	2.2	11.9	10.4	17.6	4.2	13.2	12.6	7.5	7.5	-7.7	33.6	1.2	10.6	Oct-10
<i>Russell 2000 Value Index</i>		15.3	11.8	14.6	-1.0	7.9	10.0	6.1	6.8	-14.5	28.3	4.6	9.5	
Total International Equity	7.6	9.9	4.6	16.2	-2.2	1.7	9.3	7.1	4.4	-17.6	10.0	16.7	5.3	Oct-10
<i>MSCI EAFE (Net)</i>		10.4	5.9	18.2	0.6	4.0	8.2	6.9	4.3	-14.5	11.3	7.8	5.6	
<i>MSCI AC World ex USA (Net)</i>		9.8	5.6	15.6	-1.5	1.5	7.1	6.3	3.8	-16.0	7.8	10.7	4.6	
William Blair International Growth I	3.4	13.8	3.7	15.4	-9.1	-3.4	9.2	7.5	4.6	-28.3	9.0	32.0	6.9	Jul-12
<i>MSCI AC World ex USA (Net)</i>		9.8	5.6	15.6	-1.5	1.5	7.1	6.3	3.8	-16.0	7.8	10.7	5.8	
Dodge & Cox Internat'l Stock	4.2	6.8	5.4	16.7	4.3	6.5	8.6	6.4	4.0	-6.8	11.0	2.1	5.6	Oct-10
<i>MSCI EAFE (Net)</i>		10.4	5.9	18.2	0.6	4.0	8.2	6.9	4.3	-14.5	11.3	7.8	5.6	

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

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

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

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

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

PERFORMANCE SUMMARY

	% of Portfolio	QTD (%)	FYTD (%)	1 Yr (%)	2 Yr (%)	3 Yr (%)	5 Yr (%)	7 Yr (%)	10 Yr (%)	2022 (%)	2021 (%)	2020 (%)	Inception (%)	Inception Date
Total Alternatives	12.5	2.8	2.5	7.1	-0.1	1.6	2.9	2.3	-	-6.9	5.3	-3.7	1.6	Mar-15
<i>Total Alternatives Benchmark</i>		3.6	4.2	6.6	0.5	2.3	3.8	3.2	-	-5.3	6.2	0.6	2.4	
Weatherlow Offshore Fund I Ltd Cl IIA	6.7	4.2	3.8	7.6	-1.0	1.2	8.0	6.0	4.9	-8.9	5.6	24.7	-1.5	Jul-21
<i>HFRI Fund of Funds Composite Index</i>		3.6	4.2	6.6	0.5	2.3	5.2	4.2	3.3	-5.3	6.2	10.9	0.8	
Cliffwater Corporate Lending I	2.6	3.2	6.7	12.7	9.6	9.8	-	-	-	6.6	10.3	8.7	1.1	Dec-23
<i>Credit Suisse Leveraged Loan Index</i>		2.9	6.3	13.0	5.8	5.6	5.6	4.7	4.4	-1.1	5.4	2.8	0.0	
H.I.G. Whitehorse Principal Lending Offshore Feeder Fd, L.P.	3.2	0.0	2.8	9.1	-	-	-	-	-	-	-	-	8.8	Jul-22
<i>Credit Suisse Leveraged Loan Index</i>		2.9	6.3	13.0	5.8	5.6	5.6	4.7	4.4	-1.1	5.4	2.8	11.1	
Total Fixed Income	45.5	3.9	3.7	5.9	-0.6	-0.4	2.1	2.0	1.8	-6.7	0.1	5.2	2.0	Jul-10
<i>Total Fixed Income Benchmark</i>		3.3	3.5	4.9	-0.4	-0.5	1.5	1.5	1.5	-5.4	-0.8	4.5	1.6	
JPMorgan Core Bond	7.3	6.3	3.1	5.8	-3.7	-2.9	1.4	1.6	1.9	-12.3	-1.1	8.1	1.1	Sep-17
<i>Bmbg. U.S. Aggregate Index</i>		6.8	3.4	5.5	-4.2	-3.3	1.1	1.3	1.8	-13.0	-1.5	7.5	0.9	
YSU Intermediate Term Bond	6.2	4.6	3.7	5.7	-1.4	-1.4	2.0	1.9	1.9	-8.0	-1.3	7.5	3.1	Apr-04
<i>Bmbg. Intermed. U.S. Government/Credit</i>		4.6	3.7	5.2	-1.7	-1.6	1.6	1.6	1.7	-8.2	-1.4	6.4	2.8	
Fidelity Interm Treasury Bond Index	4.5	5.7	2.5	4.1	-4.7	-4.1	0.6	0.9	1.5	-12.7	-3.0	9.1	3.3	Dec-23
<i>Bmbg. U.S. Treasury: 5-10 Year</i>		6.0	2.7	4.1	-4.6	-4.1	0.7	1.0	1.6	-12.6	-3.0	9.1	0.0	
PGIM High Yield R6	0.0	6.9	7.3	12.3	-0.3	1.9	5.4	4.7	4.8	-11.5	6.5	5.7	4.7	Jan-17
<i>Bmbg. U.S. Corp: High Yield Index</i>		7.2	7.7	13.4	0.4	2.0	5.4	4.6	4.6	-11.2	5.3	7.1	4.6	
YSU Short Term Bond	18.3	2.8	3.5	5.0	0.8	0.4	1.8	1.7	1.4	-3.3	-0.4	3.7	2.3	Apr-04
<i>ICE BofA 1-3 Yr. Gov/Corp</i>		2.6	3.4	4.6	0.3	0.1	1.5	1.4	1.3	-3.8	-0.4	3.3	2.1	
Lord Abbett Short Duration Income I	9.2	2.6	3.6	5.4	0.3	0.6	2.1	2.1	2.1	-4.6	1.1	3.2	2.1	Apr-18
<i>ICE BofA 1-3 Yr. Gov/Corp</i>		2.6	3.4	4.6	0.3	0.1	1.5	1.4	1.3	-3.8	-0.4	3.3	1.6	
Total Cash & Cash Equivalents	0.3	1.3	3.0	5.2	3.3	2.2	1.7	-	-	1.5	0.0	0.4	1.6	Apr-18
<i>90 Day U.S. Treasury Bill</i>		1.4	2.7	5.0	3.2	2.2	1.9	1.7	1.2	1.5	0.0	0.7	1.9	
Federated Hermes Government Obligations Fund	0.3	1.3	2.5	4.8	3.0	2.0	1.6	1.5	1.0	1.4	0.0	0.3	1.6	Dec-19
<i>90 Day U.S. Treasury Bill</i>		1.4	2.7	5.0	3.2	2.2	1.9	1.7	1.2	1.5	0.0	0.7	1.8	

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



SUPPORTING INFORMATION

HEADWINDS AND TAILWINDS



TAILWINDS

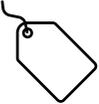
- Presidential cycle generally supportive of gains
- Corporate America working through higher rates - earnings and margins improving
- Services economy still moderately expanding
- Diversification away from “Magnificent 7” should not hinder returns
- Strong consumer – at full employment, unemployment claims near historic lows, and job growth still positive



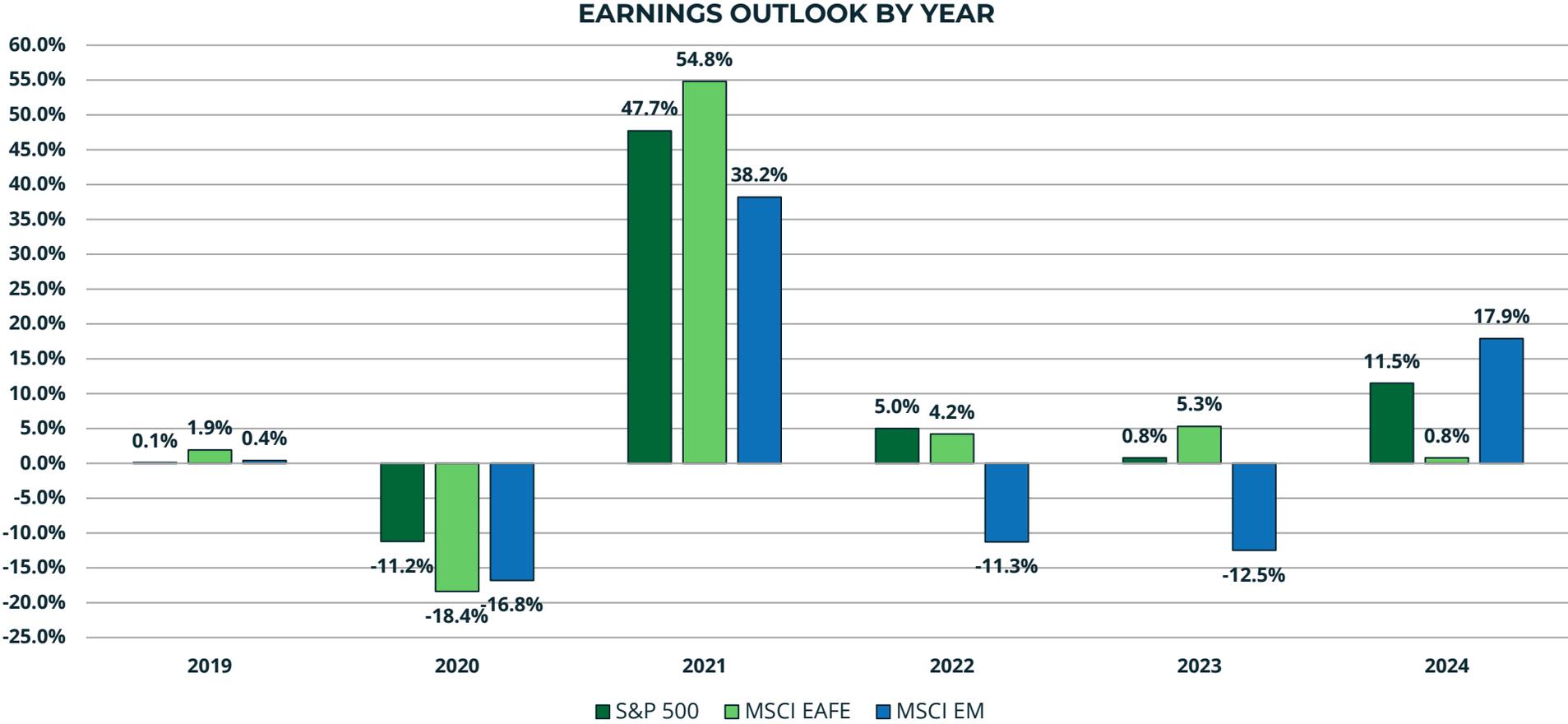
HEADWINDS

- Treasury supply surging; rates may move higher
- Potential drag from student loan payments resuming
- Debt building, defaults rising in riskier cohorts (corporate and consumer)
- Manufacturing still in contraction; global growth environment weak
- Fiscal policy likely to exert a modest drag on growth in 2024
- Disconnect between Fed & Market (on rate cuts) corrects in-favor of Fed

Source: Clearstead. As of 12/31/2023.

AREA	EXPECTATIONS
 Labor Markets	<ul style="list-style-type: none">• U.S. may track to 75k-175k jobs per month• Unemployment rate may rise but remain <4.0%• Average hourly wages rangebound between 3.5% and 4%
 Manufacturing	<ul style="list-style-type: none">• Slowdown in manufacturing activity improves• Input prices falling with select sectors outperforming (Utilities, Housing, etc.)
 Services	<ul style="list-style-type: none">• Services industry remains positive• Spending remains resilient at full employment, but tighter credit conditions pose some risks
 Inflation	<ul style="list-style-type: none">• Core CPI remains elevated but falls below 4%• Headline CPI likely to hover around 3%• Service sector prices remain high due to elevated wage costs
 Equity Markets	<ul style="list-style-type: none">• Volatility may increase; Bullish S&P range ≈ 4,600 to 4,800• Some technical support at the lower-end• Market's assumption for no landing/soft-landing has become consensus
 Fixed Income Markets	<ul style="list-style-type: none">• 10-Yr UST likely range bound between 3.5% and 4.5%• Uncertainty around Fed policy with potential interest rate cuts in 2nd half of year

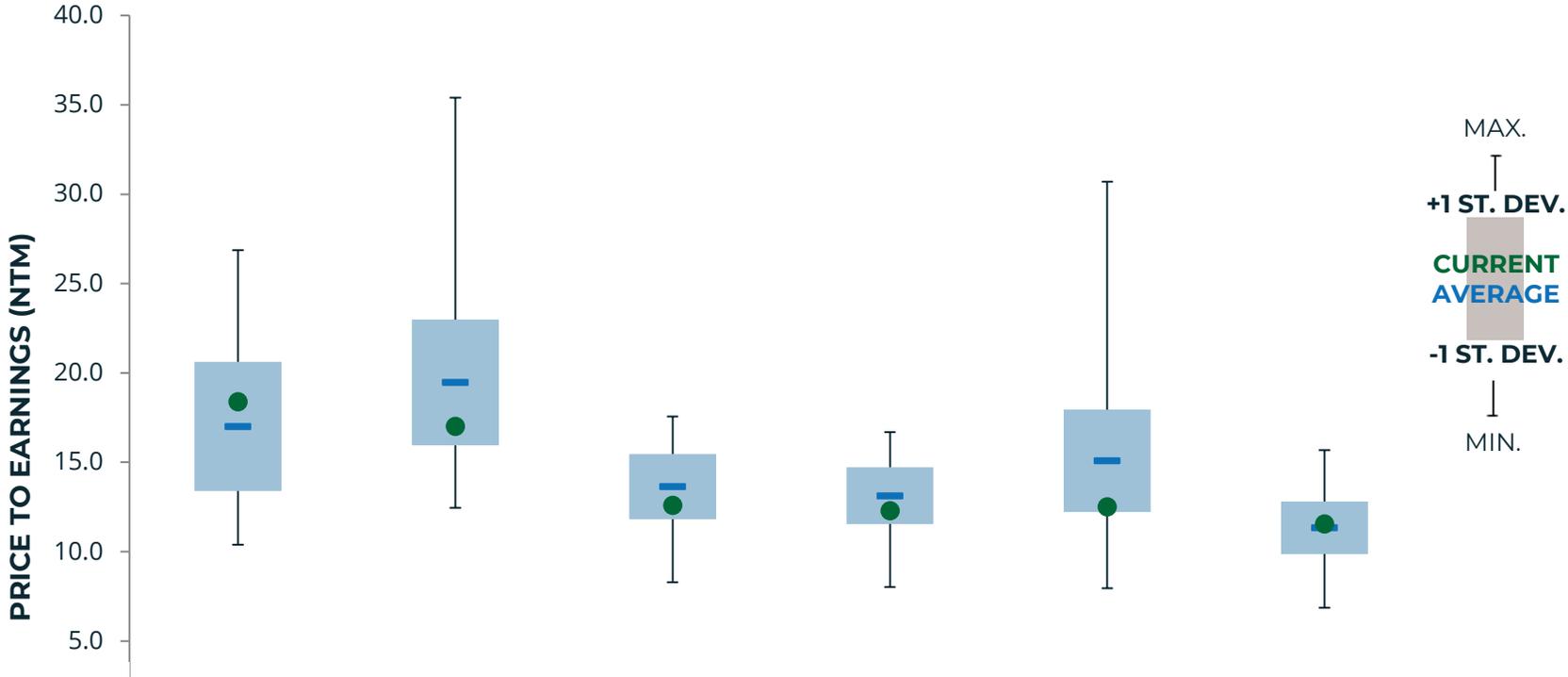
Source: Clearstead, as of 12/31/2023.
Expectations for 1st quarter of calendar year 2024.



- Earnings expectations have been revised lower again as analysts downgrade their expectations
- Expectations for EM markets have eroded the most in the face of heightened energy costs, global monetary tightening, and the slowdown in the Chinese economy (CY2022 EM earnings ex Russia would be approximately -3%)

Source: Bloomberg, FactSet, Goldman Sachs.
Data as of 12/31/2023.

GLOBAL EQUITY VALUATIONS



	MSCI USA	MSCI USA SMALL	MSCI EAFE	MSCI ACWI EX USA	MSCI ACWI EX USA SMALL	MSCI EM
Current P/E (NTM)	18.4	19.0	13.3	12.8	12.9	11.7
Average P/E (NTM)	17.0	19.5	13.6	13.1	15.1	11.3

Source: Bloomberg as of 12/31/2023. Average taken over full index history. MSCI USA- 1994 - Current; MSCI USA Small- 1994 - Current; MSCI EAFE- 2003 - Current; MSCI ACWI ex USA- 2003 - Current; MSCI ACWI ex USA Small- 1994 - Current; MSCI EM- 2003.

GLOBAL HEADLINE INFLATION

	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23
Dev. Markets																								
US	7.0	7.5	7.9	8.5	8.3	8.6	9.1	8.5	8.3	8.2	7.7	7.1	6.5	6.4	6.0	5.0	4.9	4.0	3.0	3.2	3.7	3.7	3.2	3.1
EU	5.0	5.1	5.9	7.5	7.5	8.1	8.6	8.9	9.1	10.0	10.7	10.0	9.2	8.5	8.5	6.9	7.0	6.1	5.5	5.3	5.3	4.3	2.9	2.4
Japan	0.8	0.5	0.9	1.2	2.5	2.5	2.4	2.6	3.0	3.0	3.7	3.8	4.0	4.3	3.3	3.2	3.5	3.2	3.3	3.3	3.2	3.0	3.3	2.8
UK	5.4	5.5	6.2	7.0	9.0	9.1	9.4	10.1	9.9	10.1	11.1	10.7	10.5	10.1	10.4	10.1	8.7	8.7	7.9	6.8	6.7	6.7	4.6	3.9
Canada	4.8	5.1	5.7	6.7	6.8	7.7	8.1	7.6	7.0	6.9	6.9	6.8	6.3	5.9	5.2	4.3	4.4	3.4	2.8	3.3	4.0	3.8	3.1	3.1
Australia	3.5	3.5	3.5	5.1	5.1	5.1	6.1	6.1	6.1	7.3	7.3	7.3	7.8	7.8	7.8	7.0	7.0	7.0	6.0	6.0	6.0	5.4	5.4	5.4
Switzerland	1.5	1.6	2.2	2.4	2.5	2.9	3.4	3.4	7.3	7.2	7.2	7.2	7.2	7.2	3.4	2.9	2.6	2.2	1.7	1.6	1.6	1.7	1.7	1.4
Norway	5.3	3.2	3.7	4.5	5.4	5.7	6.3	6.8	6.5	6.9	7.5	6.5	5.9	7.0	6.3	6.5	6.4	6.7	6.4	5.4	4.8	3.3	4.0	4.8
Sweden	3.9	3.7	4.3	6.0	6.4	7.3	8.7	8.5	8.9	10.8	10.9	11.5	12.3	11.7	12.0	10.6	10.5	9.7	9.3	9.3	7.5	6.5	6.5	5.8
Asia																								
China	1.5	0.9	0.9	1.5	2.1	2.1	2.5	2.7	2.5	2.8	2.1	1.6	1.8	2.1	1.0	0.7	0.1	0.2	0.0	-0.3	0.1	0.0	-0.2	-0.5
India	5.6	5.8	5.0	5.4	6.3	7.0	6.2	5.8	5.9	6.5	6.1	5.4	5.8	6.2	6.2	5.8	5.1	4.4	5.6	7.5	6.9	4.7	4.5	4.5
Indonesia	1.9	2.2	2.1	2.6	3.5	3.6	4.4	4.9	4.7	6.0	5.7	5.4	5.5	5.3	5.5	5.0	4.3	4.0	3.5	3.1	3.3	2.3	2.6	2.9
Malaysia	3.2	2.3	2.2	2.2	2.3	2.8	3.4	4.4	4.7	4.5	4.0	4.0	3.8	3.7	3.7	3.4	3.3	2.8	2.4	2.0	2.0	1.9	1.8	1.5
S Koreas	3.7	3.6	3.7	4.1	4.8	5.4	6.0	6.3	5.7	5.6	5.7	5.0	5.0	5.2	4.8	4.2	3.7	3.3	2.7	2.3	3.4	3.7	3.8	3.3
Taiwan	2.6	2.8	2.3	3.3	3.4	3.4	3.6	3.4	2.7	2.8	2.7	2.4	2.7	3.1	2.4	2.4	2.4	2.0	1.8	1.9	2.5	2.9	3.1	2.9
Latin America																								
Brazil	10.1	10.4	10.5	11.3	12.1	11.7	11.9	10.1	8.7	7.2	6.5	5.9	5.8	5.8	5.6	4.7	4.2	3.9	3.2	4.0	4.6	5.2	4.8	4.7
Chile	7.2	7.7	7.8	9.4	10.5	11.5	12.5	13.1	14.1	13.7	12.8	13.3	12.8	12.3	11.9	11.1	9.9	8.7	7.6	6.5	5.3	5.1	5.0	4.8
Colombia	5.6	6.9	8.0	8.5	9.2	9.1	9.7	10.2	10.8	11.4	12.2	12.5	13.1	13.3	13.3	13.3	12.8	12.4	12.1	11.8	11.4	11.0	10.5	10.2
Mexico	7.4	7.1	7.3	7.5	7.7	7.7	8.0	8.2	8.7	8.7	8.4	7.8	7.8	7.9	7.6	6.9	6.3	5.8	5.1	4.8	4.6	4.5	4.3	4.3

Inflation has eased in most countries but is still above many Central Banks' inflation targets.

- Only China and Taiwan saw negligible rises in inflation; China is seeing minor deflation at present.
- The US, Canada, Mexico, and most of Europe have seen sustained declines in inflation.

Bloomberg Inflation Monitor as of 12/31/2023.

GLOBAL GROWTH EXPECTATIONS

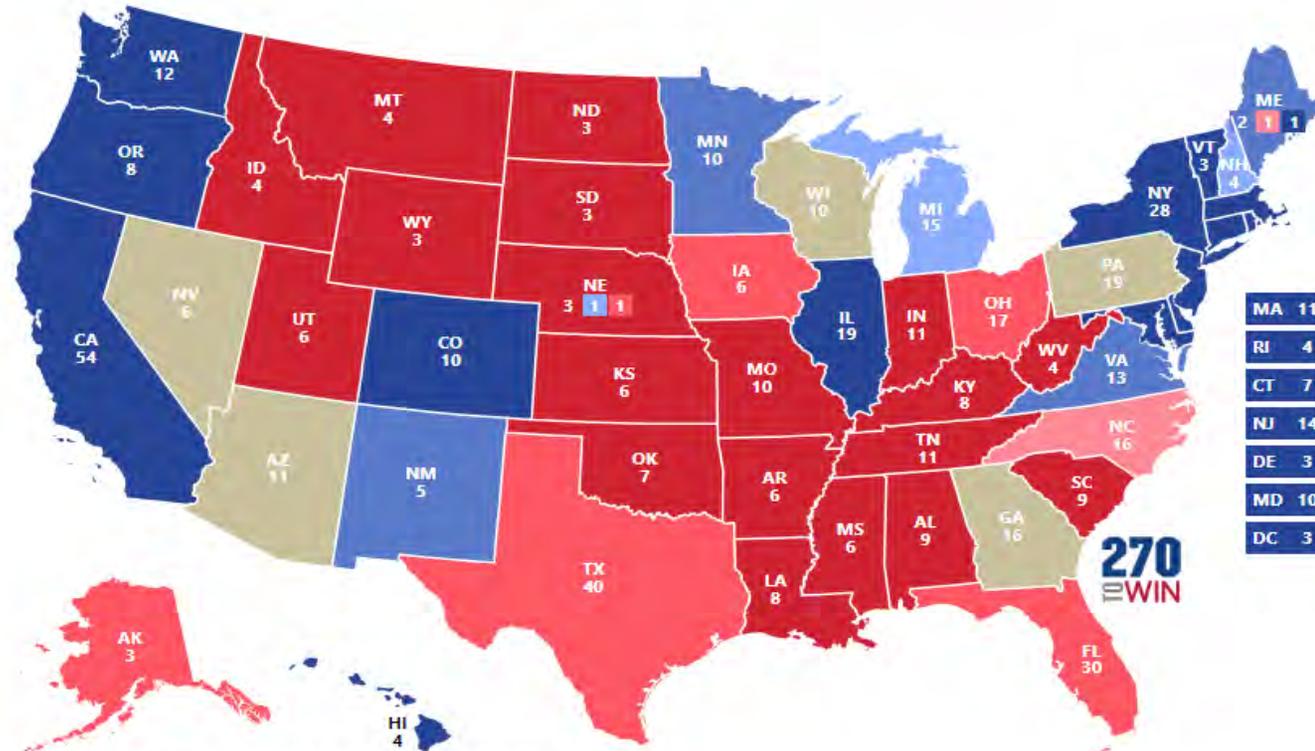
Real GDP Growth Forecasts

	CY2023	CY2024				CY2025			
	Estimate s	IMF	OECD	Bloomberg Consensus	Goldman Sachs	IMF	OECD	Bloomberg Consensus	Goldman Sachs
US	2.4%	1.5%	1.5%	1.3%	2.3%	1.7%	1.7%	1.7%	1.9%
EU*	0.5%	1.2%	0.9%	0.5%	0.7%	1.3%	1.5%	1.4%	1.4%
China	5.2%	4.2%	4.7%	4.5%	4.8%	4.0%	4.2%	4.3%	4.2%
Japan	1.9%	1.0%	1.0%	0.8%	1.3%	0.9%	1.2%	1.0%	1.1%
UK	0.5%	0.6%	0.7%	0.3%	0.6%	0.8%	1.2%	1.2%	1.0%
India	6.9%	6.3%	6.1%	6.0%	6.2%	6.3%	6.5%	6.2%	6.5%

Source: Clearstead, Forecasts as of 12/30/2023 Bloomberg & GS; Oct-2023 IMF, Nov-2023 OECD; *Eurozone

- Global growth is generally forecasted to be weaker in CY2024 than it was in CY2023
 - Growth projections for CY2024 are on-par or below CY2023, and still represent below-trend real growth most of the world—world real GDP growth of around ≈2.7% for CY2024.
 - Expectations for CY2025 are slightly better but still represent below-trend (pre-Pandemic) growth for most of the world.

PRESIDENTIAL ELECTION – EARLY LOOK



Toss-Up States

- Pennsylvania - 19 votes
- Georgia - 16 votes
- Arizona - 11 votes
- Wisconsin - 10 votes
- Nevada - 6 votes

Map Updated: Dec. 20, 2023 at 00:04 UTC (Dec. 19, 7:04 PM EST)

- Only about five states too close to call at this point; but the race may tighten in select states after Primary season concludes.
 - Barring any health issues—a Trump-Biden matchup will be set by mid-March.

Source: Clearstead, 538.Com
Data as of 12/31/2023.

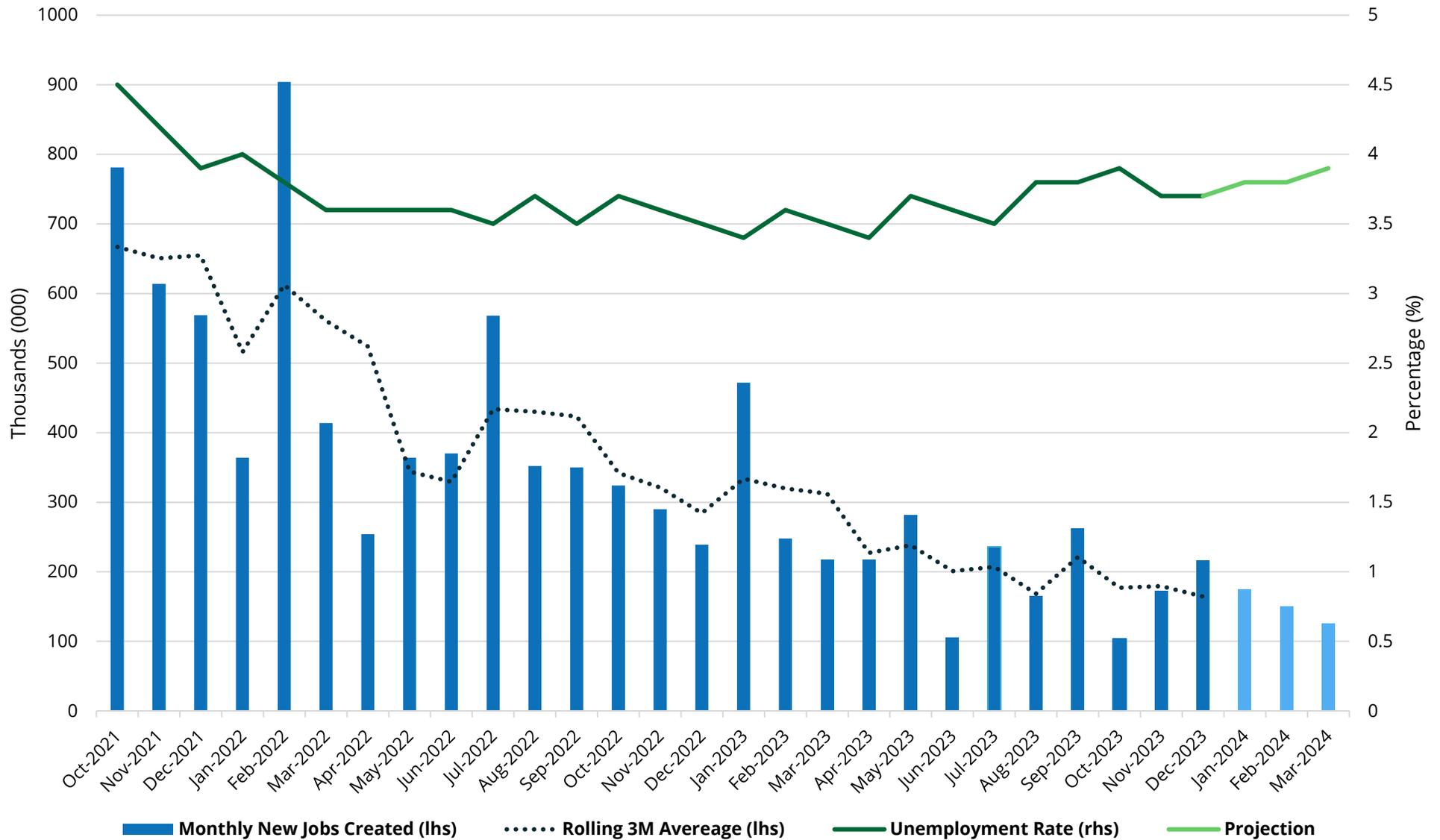
GLOBAL ECONOMY

		Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	12M Trend
Global	Mfg	49.1	49.9	49.6	49.6	49.5	48.7	48.6	49.0	49.2	48.8	49.3	49.0	
	Serv	50.1	52.6	54.4	55.4	55.5	53.9	52.6	51.0	50.7	50.4	50.6	51.6	
US	Mfg	46.9	47.3	49.2	50.2	48.4	46.3	49.0	47.9	49.8	50.0	49.4	48.2	
	Serv	46.8	50.6	52.6	53.6	54.9	54.4	52.3	50.5	50.1	50.6	50.8	51.3	
Eurozone	Mfg	48.8	48.5	47.3	45.8	44.8	43.4	42.7	43.5	43.4	43.1	44.2	44.2	
	Serv	50.8	52.7	55.0	56.2	55.1	52.0	50.9	47.9	48.7	47.8	48.7	48.1	
UK	Mfg	47.0	49.3	47.9	47.8	47.1	46.5	45.3	43.0	44.3	44.8	47.2	46.4	
	Serv	48.7	53.5	52.9	55.9	55.2	53.7	51.5	49.5	49.3	49.5	50.9	52.7	
Japan	Mfg	48.9	47.7	49.2	49.5	50.6	49.8	49.6	49.6	48.5	48.7	48.3	47.7	
	Serv	52.3	54.0	55.0	55.4	55.9	54.0	53.8	54.3	53.8	51.6	50.8	52.0	
China	Mfg	49.2	51.6	50.0	49.5	50.9	50.5	49.2	51.0	50.6	49.5	50.7	50.8	
	Serv	52.9	55.0	57.8	56.4	57.1	53.9	54.1	51.8	50.2	50.4	51.5	52.9	
India	Mfg	55.4	55.3	56.4	57.2	58.7	57.8	57.7	58.6	57.5	55.5	56.0	54.9	
	Serv	57.2	59.4	57.8	62.0	61.2	58.5	62.3	60.1	61.0	58.4	56.9	59.0	
S. Korea	Mfg	48.5	48.5	47.6	48.1	48.4	47.8	49.4	48.9	49.9	49.8	50.0	49.9	

- Global manufacturing and service PMIs have converged many major economies in Q4 close to neutral.
 - Manufacturing and services PMIs are still signaling stagnation economic activity
 - Global services PMIs are mildly positive in select economies (US, Japan, and China);
- Whereas global manufacturing PMIs are consistent with a mild contraction in the manufacturing sector and slowing global trade.
- India in the one country whose PMIs show universal strength.

Source: Bloomberg, Markit/HIS.
Data as of 12/31/2023.

LABOR MARKET

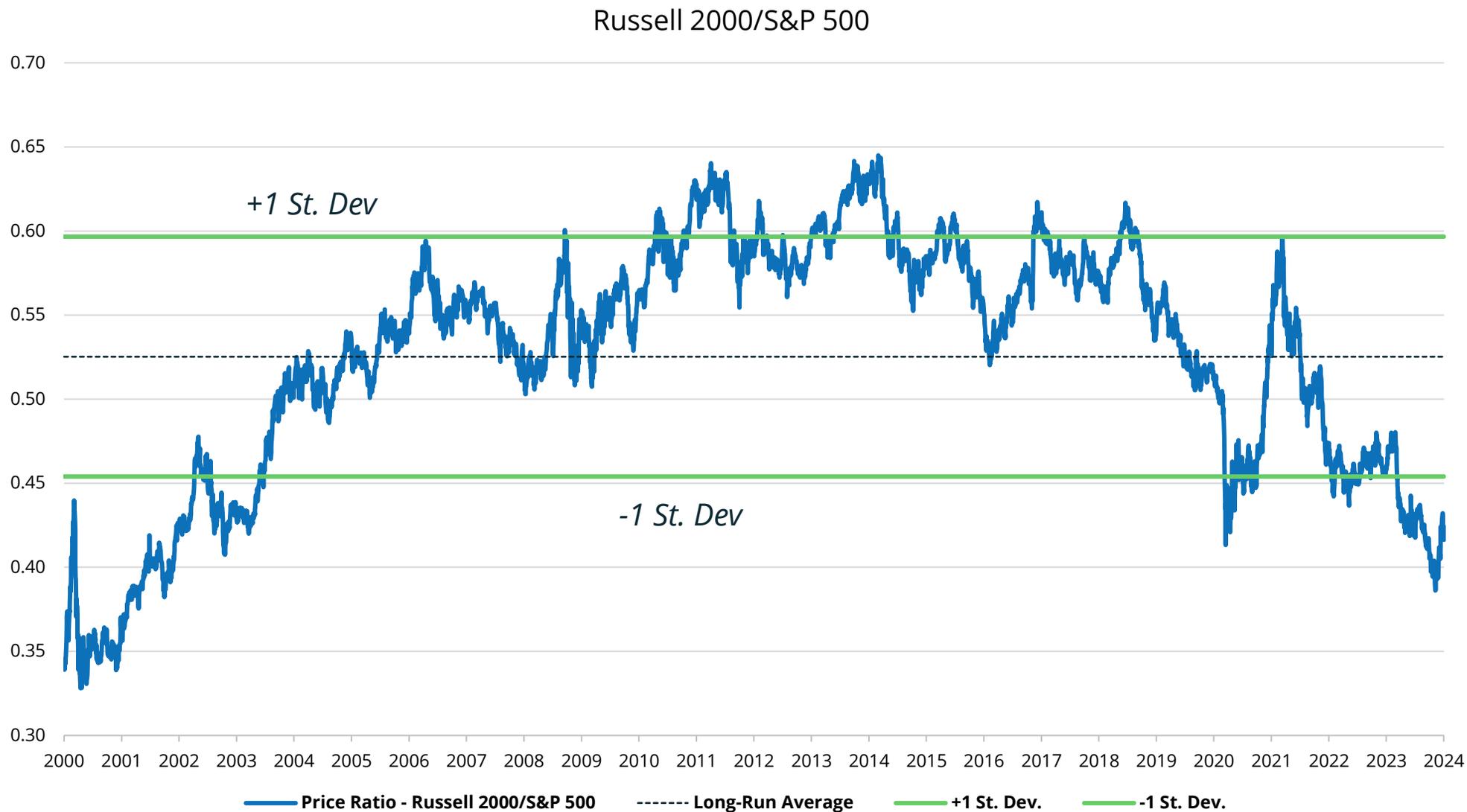


Source: Clearstead; Bloomberg LP - 1/5/2024. Projection assumes approximate decline of 25,000 jobs/month.

GEOPOLITICAL RISKS

Geo-Politics	Global Significance	Asset Class Impact
Russia-Ukraine War	The conflict is likely to grind-on all of 2024 as neither side looks ready for serious peace-talks unless battlefield gains/losses surge.	Commodity price volatility—oil, gas, grains, and select metals.
Israel-Gaza Conflict	While the conflict in Gaza may wind down over the course of H1-2024, the aftermath has left the world & Middle East on edge.	Energy price volatility; increased shipping costs to Europe; delayed/disrupted supply chains.
China-Taiwan Tensions	The future political status of Taiwan is a constant source of tension in East Asia. China views nearly all foreign policy matters through the lens of Taiwan.	Negative sentiment towards Chinese risk assets (equities, debt, and real estate) and FDI into China.
Near-Shoring/Friend-Shoring	More and more companies are shifting from a philosophy of “just in time” to “just in case” in terms their supply chains	Inflationary development overall; favors select economies— Industrials in Mexico, India, Vietnam & Thailand.
US Debt Levels	US spending more on monthly interest payments than on its monthly defense budget; net public debt at 100% of GDP and rising.	Volatility in US Fixed Income; higher rates on the margin
Global Elections	Over 2 billion votes cast in half-dozen major economies	Varies – see global election detail

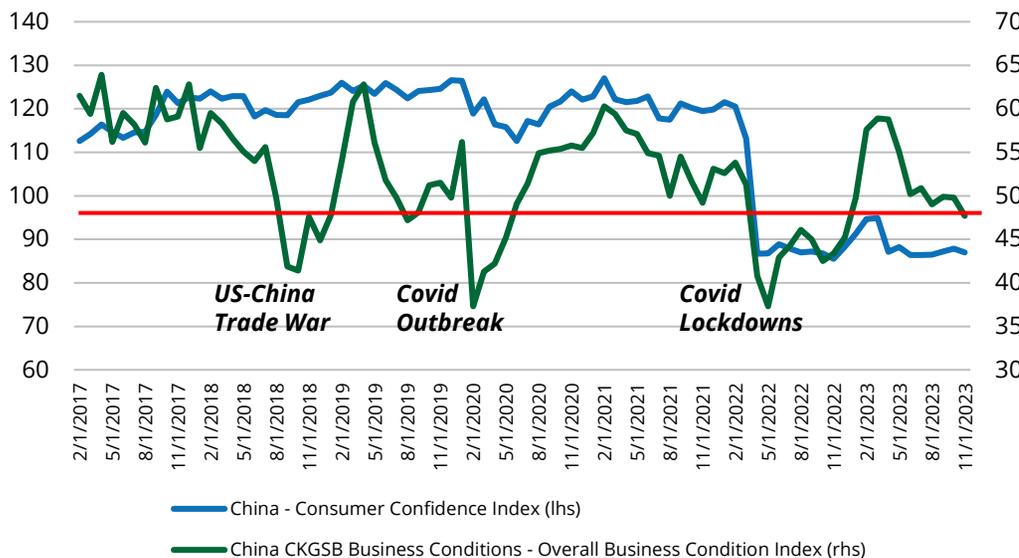
SMALL CAPS ATTRACTIVE



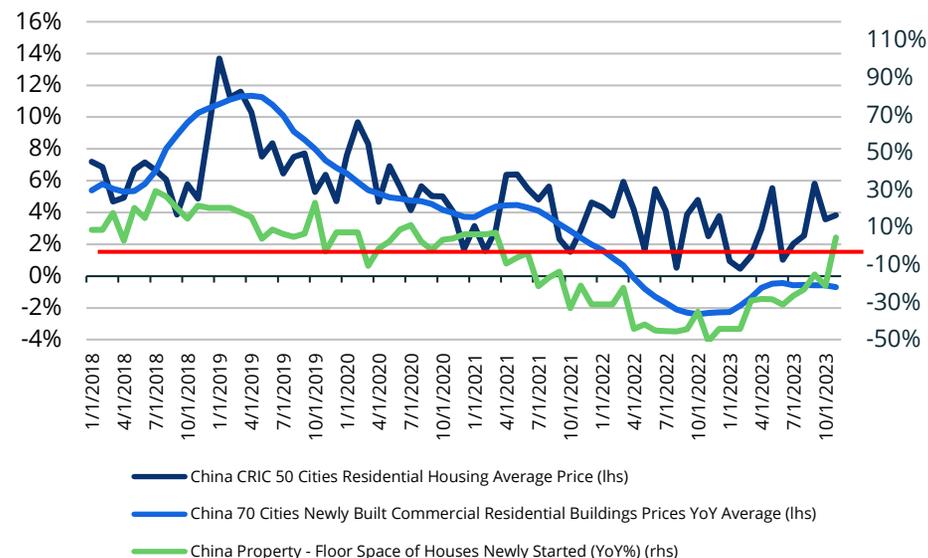
Source: Source: Clearstead Bloomberg 1/5/2024. Past performance is not an indicator of future results.

CHINA: EQUITIES, HOUSING, SENTIMENT REMAIN DEPRESSED

Chinese Consumer Sentiment & Business Outlook



Housing Market Doldrums



CSI 300 Index



- China is **gripped with a crisis of confidence**—stemming from structural weaknesses in its property sector—which is **holding back domestic investors and consumers**.
 - Few signs of a turnaround in sentiment.
 - FDI was negative in 2023 for the first time in 25 years.
- China is in the midst of a **multi-year deleveraging cycle**—for both households and businesses.

Source: Clearstead, Bloomberg 12/30/2023
Past performance is not an indicator of future results



DEFINITIONS & DISCLOSURES

DEFINITIONS & DISCLOSURES

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

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

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

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

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

The commodities industry can be significantly affected by commodity prices, world events, import controls, worldwide competition, government regulations, and economic conditions.

Changes in real estate values or economic conditions can have a positive or negative effect on issuers in the real estate industry, which may affect your investment.

Index Definitions:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

HFRF ED: Distressed Restructuring strategies which employ an investment process focused on corporate fixed income instruments, primarily on corporate credit instruments of companies trading at significant discounts to their value at issuance or obliged (par value) at maturity as a result of either formal bankruptcy proceeding or financial market perception of near term proceedings.

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

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

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

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

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

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

DEFINITIONS & DISCLOSURES

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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Evaluation of investment managers covers both quantitative and qualitative aspects. In addition to the investment performance evaluation, we monitor ownership structure, track key-employee information, and hold regular meetings with each investment management organization employed by our clients. The data presented in this report has been calculated on a time-weighted rate of return basis. All returns are net of investment advisory fees, but gross of Clearstead advisory fees and custodian fees, unless otherwise labeled. The deduction of Clearstead advisory fees and custodian fees would have the effect of decreasing the indicated investment performance. The performance data shown represent past performance. Past performance is not indicative of future results. Current performance data may be lower or higher than the performance data presented.

Returns for periods longer than one year are annualized. Each number is independently rounded. A current copy of Hartland & Co.'s ADV-Part 2 is available to all clients upon request.

YSU Anonymous Reporting Hotline
Aggregated Statistics
 Fiscal Year 2024 Quarter 2

Hotline Activity	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Fiscal Year To Date Total
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Reports received	3	4	-	-	7
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Closed					
Unsubstantiated/insufficient information	0	1	-	-	1
Process enhancements noted	0	0	-	-	0
Investigation	1	1	-	-	2
Referred	2	2	-	-	4
Total Closed	3	4			7

Under review at quarter end	-	-	-	-	-
-----------------------------	---	---	---	---	---

Reporting Method	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Fiscal Year To Date Total
Ethicspoint Phone	0	0	-	-	0
Ethicspoint Website	3	4	-	-	7
Total:	3	4	-	-	7

Reporter Anonymity	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Fiscal Year To Date Total
Anonymous	3	4	-	-	7
Not anonymous	0	0	-	-	0
Total:	3	4	-	-	7

Youngstown State University
Quarterly Internal Audit Plan Update
FY24 Q2 October 1 - December 31, 2023

Projects							
Project Area	Risk Category	Risk Level*	Status**	Actual Q1 Hours	Actual Q2 Hours	Actual YTD Hours	Audit Plan Budgeted Hours
Current Year Audits:							
Student Billing, Collections, and Accounts Receivable	Financial & Operational	High	Completed	25	-	25	0
Banner User Access (KSU IT Audit)	IT & Compliance	High	Completed	5	-	5	0
Division of Workforce Education & Innovation	Operational, Financial, & Compliance	High	In Process	112	113	225	410
Division of Workforce Education & Innovation Student Information System (KSU IT Audit)	IT & General Controls	High	In Process	-	4	4	0
Facilities and Building Access	Facilities, Operational, & Compliance	High	Planned	-	-	-	225
Conflict of Interest	Compliance & Operational	High	Planned	-	-	-	225
Consulting & Advisory							
Consulting & Advisory/ERM	Various	Moderate	Ongoing	67	24	91	50
Continuous Auditing Analytics							
Payroll	Financial, Operational, Compliance	Moderate	Ongoing	30	36	66	150
Accounts Payable	Financial, Operational, Compliance	Moderate	Ongoing	32	54	86	150
EthicsPoint Hotline Monitoring	Various	High	Ongoing	15	11	26	100
Follow-up on Open Audit Recommendations	Various	Various	Ongoing	2	5	7	120
Total Project Hours				288	247	535	1,430

***Risk Level**

Assessment of potential impact of risks and likelihood of risk events occurring; rating drives Internal Audit plan priorities:

High - significant risk area, high priority for Internal Audit coverage

Medium - moderate risk area, moderate priority for Internal Audit coverage

Non-Project Hours				
Category	Actual Q1 Hours	Actual Q2 Hours	Actual YTD Hours	Audit Plan Budgeted Hours
Professional Development	10	18	28	100
Administrative:	222	255	477	550
Total Administrative Hours		232	273	505

Total Administrative Hours **232** **273** **505** **650**

****Status Definitions**

Planned - as per audit plan, schedule to start in current FY

In Process - in progress at quarter end

Complete - audit procedures concluded and results communicated

Deferred - moved from current FY plan per updated risk assessment

Ongoing - performed on ongoing, periodic basis

Total Hours **520** **520** **1,040** **2,080**

Audit Recommendations Status- FY2024 Q2

Audit	Info	Recommendation Name	Summary of Recommendation	Summary of Original Response	Prior Status Comment	Current Status Comment
Audit #	2020-01-01	Policies and Procedures Student Organizations Audit	Update policies to address financial management requirements including tax status, accounting concepts, record keeping, contract requirements, funding mechanisms and procedures, disbursement controls, agency account and off-campus cash accounts.	Policies will be developed in this area.	The CampusGroups implementation has been taking longer than expected. Work is being done to set up all the components of the new system. We are on track to complete this recommendation by mid-semester.	A Student Organization Finance guide is being developed and be completed by March 2024. Also treasurer training will be offered through a video hosted on the Student Organization Management Software which must be completed when accepting an officer position and should be completed by April 2024.
Dated Issued	2/17/2020					
Risk Category	Financial					
Risk Level	Low					
Division	Student Experience					
Deadline	8/31/2020					
New Deadline	4/30/2023					
Current Status	Deadline Revised					

Audit	Info	Recommendation Name	Summary of Recommendation	Summary of Original Response	Prior Status Comment	Current Status Comment
Audit #	2023-01	Student Bill Presentation Student Billing, Collections, & Accounts Receivable Audit	Evaluate developing script to combine charges for more simplified, condensed presentation on student bills.	Discussions have occurred and meetings are scheduled with Kent State to explore opportunities for YSU to utilize and modify existing script used by Kent State. An IT work order has been established to move forward to simplify and condense the presentation of the student bills. The implementation depends on IT resources and the complexity of the script needed.	Work order has been created for IT to review and discussions have been initiated between Bursar and IT office. Further discussions will take place as progress on work order continues.	Meeting with Kent State to discuss student bill presentation and script development.
Dated Issued	8/10/2023					
Risk Category	Operational					
Risk Level	Medium					
Division	Finance/Business Operations					
Deadline	6/30/2024					
New Deadline						
Current Status	On Schedule					

Audit	Info	Recommendation Name	Summary of Recommendation	Summary of Original Response	Prior Status Comment	Current Status Comment
Audit #	2023-01	Reducing Cash Collections Student Billing, Collections, & Accounts Receivable Audit	Consider implementing policies and procedure to further reduce the amount of cash payments collected and processed.	Realizing the inherent risk of collecting and handling cash the Bursar office collaborated with PNC and the Penguin Service Center earlier this year and implemented potential opportunities to reduce cash payments received from students. Continued efforts will be made to further reduce the amount of cash payments collected and processed.	Bursar and Student Experience offices have met with PNC to discuss a more efficient way for students to open accounts with the bank. If alternatives can be established with PNC so students can easily deposit the cash with the bank students can then process payments online by ACH transactions which will reduce the cash processed by YSU cashiers. The first meeting was on 10/13 with a follow-up meeting scheduled for 11/9.	Effective 2/1/2024 the Cashier's Office is no longer accepting cash payments for tuition and room and board. They will still take small cash payments for charges such as transcripts, etc.
Dated Issued	8/10/2023					
Risk Category	Financial					
Risk Level	Medium					
Division	Finance/Business Operations					
Deadline	2/1/2024					
New Deadline						
Current Status	Pending Validation					

Audit Recommendations Status- FY2024 Q2

Audit	Info	Recommendation Name	Summary of Recommendation	Summary of Original Response	Prior Status Comment	Current Status Comment
Audit #	2023-01	Student Write-Off Review	Enhance internal controls to ensure write-off transactions are accurate and proper. Complete the process to automate the write off process to ensure accuracy and efficiency reducing the volume of manual transactions for posting and manual review.	A review of write-offs in total is completed by the Bursar and Controller’s office on an annual basis. Discussions and documentation for a work order to automate the write-off process was already in place prior to this audit.	A work order was created to automate the write-off process prior to the audit. IT created the job and Bursar office is in the process of testing it.	A work order was created to automate the write-off process prior to the audit. IT created the job and Bursar office is in the process of testing it.
Dated Issued	8/10/2023	Student Billing, Collections, & Accounts Receivable Audit				
Risk Category	Financial, Operational					
Risk Level	Medium					
Division	Finance/Business Operations					
Deadline	12/31/2023					
New Deadline	6/30/2024					
Current Status	Deadline Revised					

Audit	Info	Recommendation Name	Summary of Recommendation	Summary of Original Response	Prior Status Comment	Current Status Comment
Audit #	KSU 2023-1057	Job Change Report & Annual Review for Banner Access	An annual, centrally facilitated review should be completed by all Data Custodians to confirm access is appropriate.	A new process will be implemented to update Banner access and include a new change job report when a person changes jobs. This process will provide Data Custodians with visibility to identify any inappropriate Banner access. Work will begin in April 2024 and will work towards a defined approach by 6/30/24.		A new process will be implemented to update Banner access and include a new change job report when a person changes jobs. This process will provide Data Custodians with visibility to identify any inappropriate Banner access. Work will begin in April 2024 and will work towards a defined approach by 6/30/24.
Dated Issued	11/17/2023	Banner Access Audit				
Risk Category	IT					
Risk Level	High					
Division	Division of IT, Application Services					
Deadline	6/30/2024					
New Deadline						
Current Status	on Schedule					

Audit	Info	Recommendation Name	Summary of Recommendation	Summary of Original Response	Prior Status Comment	Current Status Comment
Audit #	KSU 2023-1057	PII Data in Banner	Access to view sensitive PII data should be masked or restricted to only those users who require for business purposes.	Solutions to be reviewed that would accomplish this but need to be cognizant of a potential move to Banner SaaS, where customizations are not allowed. Approach to be identified by 6/30/24 by Director of Application Services.		Solutions to be reviewed that would accomplish this but need to be cognizant of a potential move to Banner SaaS, where customizations are not allowed. Approach to be identified by 6/30/24 by Director of Application Services.
Dated Issued	11/17/2023	Banner Access Audit				
Risk Category	IT					
Risk Level	High					
Division	Division of IT, Application Services					
Deadline	6/30/2024					
New Deadline						
Current Status	On Schedule					

Audit Recommendations Status- FY2024 Q2

Audit	Info	Recommendation Name	Summary of Recommendation	Summary of Original Response	Prior Status Comment	Current Status Comment
Audit #	KSU 2023-1057	SOP for Annual Review of YSU Banner Access Banner Access Audit	A standard operating procedure for Banner user access review should be created and used by Data Custodians.	An access review process will be identified and formalized over time, as YSU is in the process of forming a new Data Governance/Data Integrity team. Data owners will be identified, standards enforced, and policies will be reviewed by 12/31/24.		An access review process will be identified and formalized over time, as YSU is in the process of forming a new Data Governance/Data Integrity team. Data owners will be identified, standards enforced, and policies will be reviewed by 12/31/24.
Dated Issued	11/17/2023					
Risk Category	IT					
Risk Level	High					
Division	Division of IT, Application Services					
Deadline	12/31/2024					
New Deadline						
Current Status	On Schedule					

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



Office of Internal Audit

Lindsey Ekstrand, Director, Workforce Acceleration Programs
Workforce Education and Innovation

February 26, 2024
Audit #2024-1057

Dear Ms. Ekstrand:

Internal Audit completed an Information Technology General Controls (ITGC) audit of the Student Information System IT application administered by Workforce Education and Innovation at Youngstown State University.

General Controls are applicable to all applications in the IT environment and can be automated, manual or both. IT applications support many of the university's business processes and require effective general controls to achieve operating objectives.

Internal Audit promotes continuous improvement of preventive, detective, and corrective controls in IT environment. However, management is responsible for establishing and maintaining effective IT General Controls to ensure reliability of IT applications and system data.

Objectives

The primary objective of this ITGC audit is to provide reasonable assurance that General Controls within Workforce Education and Innovation and IT environment are present and operating. Information technology processes are critical to enable Workforce Education and Innovation and IT to process, maintain and report operations. Thus, this review of General Controls in Workforce Education and Innovation and the Student Information System IT application assessed the effectiveness and efficiency of automated and manual IT controls in the following areas:

- (1) System access is authorized and appropriate,
- (2) Software and hardware are appropriately safeguarded from malicious attack,
- (3) Business Continuity plans are in place to continue business operations should application failure occur, and
- (4) Change management processes are in place to ensure reliable data, availability, and system functionality.

Scope

The audit scope included Information Technology General Controls in the Student Information Systems application environment as of December 2023.

The above objectives were accomplished using audit procedures including, but not limited to, the following:

- inquiries of management and staff at Workforce Education and Innovation and IT,
- identification and evaluation of operational and financial risks, and
- testing of IT General Controls at Workforce Education and Innovation and IT processes.

An audit of General Controls for applications in an IT environment is performed to provide management with reasonable but not absolute assurance that procedures and transactions are executed in an efficient manner. This internal audit was performed using a risk-based approach that did not include evaluation and testing of every transaction. Thus, assurance cannot be provided that all errors, irregularities, and instances of non-compliance occurring during the audit period were identified.

Control Standards

For each ITGC objective, a control standard was used to assess status levels based on the suitability of the design and effectiveness of controls in place in Workforce Education and Innovation and IT. The following status levels are based on ISO 15504 standard and consist of:

- *Fully Addressed* – The design and effectiveness of controls appear to fully address the ITGC objectives.
- *Partially Addressed* – Gaps were identified in the design or effectiveness of controls when compared to the ITGC objectives.
- *Not Addressed* – Controls are not currently designed to cover the ITGC objectives.
- *Not Applicable* – Objective does not apply and therefore no testing was performed.

Status levels assessed by Internal Audit based on testing results have been validated by Workforce Education and Innovation and IT personnel. If a control is partially addressed or not addressed, weaknesses in general controls were identified in IT processes that need to be strengthened.

Opinion

Based on the results of audit procedures performed, General Controls within Workforce Education and Innovation and IT environment are not all present and operating and **Require Improvement**.

A **Require Improvement Opinion** necessitates that Internal Audit perform follow-up on corrective actions noted in management responses based on timeframes provided.

February 26, 2024
Audit #2024-1057
Page 3

Internal Audit thanks you and your staff for their time and full cooperation during the audit process. Please call x28617 with any questions regarding this Report.



Sarah Gampo, CPA, CIA
Director, Internal Audit



Annette M. Alboreo, CISA, CRISC, CDPSE
IT Audit Manager

cc: J. Bettura
M. DiLullo
B. Johnson
N. McNally
J. Pintar
M. Polatajko
J. Ruller
W. Steelant
J. Yukech
YSU Audit Subcommittee

Office of Internal Audit
226 Schwartz Center • Kent, Ohio 44242-0001
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Acknowledgement of Responsibility

The Audit Comments include Management’s Responses to audit observations and recommendations contained in this Report. These respective responses have been prepared and approved by the following individual(s) who acknowledge responsibilities for directing the implementation of corrective action plans.

Lindsey Ekstrand

Digitally signed by Lindsey Ekstrand
Date: 2024.02.26 09:52:18 -05'00'



Lindsey Ekstrand
Director, Workforce Acceleration Programs

Date

Justin L Bettura

Digitally signed by Justin L Bettura
Date: 2024.02.23 13:28:18 -05'00'



Justin Bettura
Chief Information Security Officer

Date

**ITGC Audit – Student Information System
Workforce Education and Innovation
Audit Findings**

This below table summarizes the results of the Information Technology General Controls (ITGC) audit findings including the corrective actions to which management has committed.

Summary of Audit Findings – Student Information System			
(Risk Level) IT General Controls #	ITGC Objective	ITGC Recommendation (if applicable)	Management Response
#1 (High) System access is authorized and appropriate	General Controls should include procedures to remove users who no longer require access.	System access testing revealed that some users had access beyond what is necessary for their job function. Recommend removal of access or reduced access for users with inappropriate access. Recommend annual review of users to confirm system access.	Agree. The application administrator will review current roles and access and will modify individual account access levels by 3/31/24. Going forward, access will be reviewed annually.
#2 (High) Software & hardware is appropriately safeguarded	General Controls should include procedures to deploy and update anti-virus software regularly, safeguard data on devices, and appropriately configure firewall.	Testing of a sample of users showed inappropriate computer safeguards on devices using the application. All devices of users with elevated access should be YSU managed devices and have appropriate computer safeguards. YSU firewall is configured to protect university resources.	Agree. Information Security Engineer will implement appropriate computer safeguards for all YSU managed devices by 12/31/24.
#3 (Medium) Business continuity plan (BCP)	General Controls should include BCPs to continue business operations should an application failure occur, available and tested data backups, and a secure location for application servers and backups.	Data backups and data center controls are provided by the vendor. Business Continuity Plan was not completed. Recommend completing a Business Continuity Plan to document steps required to continue business processes in the event of a system failure.	Agree. The application administrator will complete a Business Continuity Plan to ensure proper procedures are in place should a system failure occur by 12/31/24.
#4 (Medium) Change management controls	General Controls should maintain strong change management controls to ensure ongoing application operations and safe and secure application upgrades.	Upgrades to the application are performed by the vendor. Communication of changes to application users should be implemented. Standard Operation Procedures (SOP) should be developed.	Agree. The application administrator will complete Standard Operating Procedures for the application and will ensure there is proper communication regarding application updates/changes by 12/31/24.

**Audit Findings per ITGC Business Objective
Workforce Education and Innovation – Student Information System**

Business Objectives	Status Level
Objective 1: System access is authorized and appropriate	
Access to business sensitive data is restricted to only those who need it to perform business functions	Partially Addressed
Access to FERPA data is restricted to only those who need it to perform business functions	Fully Addressed
Elevated access is restricted	Partially Addressed
Access is appropriate and authorized per application functions/roles/modules	Partially Addressed
Access is appropriately segregated to restrict access to actions that would provide excessive access that may allow fraudulent transactions or conflict of interest situations	Fully Addressed
Objective 2: Software and hardware are appropriately safeguarded from malicious attack	
Anti-virus software and encryption on application servers and client machines	Partially Addressed
Anti-virus software is updated regularly	Partially Addressed
Firewall is appropriately configured to protect the environment	Fully Addressed
Objective 3: Business Continuity plans continue business operations should application failure occur	
Business continuity plans are in place to provide support / instructions during an extended system failure	Partially Addressed
Data backups are available	Fully Addressed
Data backups have been tested to ensure the data can be properly restored following a system failure	Fully Addressed
Servers are in a protected environment, with appropriate environmental conditions and safety features	Fully Addressed
Objective 4: Change Management processes ensure reliable data, availability & system functionality	
Application changes are approved prior to implementation	Fully Addressed
Application changes are tested in a test system prior to implementation	Fully Addressed
Application promotion to production environment is restricted	Not Applicable
Developers cannot promote code changes to production environment	Not Applicable
Test plans exist to test application changes prior to upgrades, incl regression testing to confirm application functionality	Not Applicable
Users are informed of changes prior to implementation and training is available	Not Addressed
The system is available and response time is adequate	Fully Addressed
Current/supported software release is installed	Fully Addressed
SOC report obtained (HECVAT)	Fully Addressed
SOC report reviewed (JECVAT)	Fully Addressed
Business and technical procedures are documented and maintained	Not Addressed
System interfaces are timely and accurate	Fully Addressed
Total ITGC audit tests:	24
Partially Addressed or Not Addressed:	8
Fully Addressed:	13
Not Applicable:	3

StaRS

Star Rating System

Monitoring transparency in government

Reach for a star... by meeting every Sunshine Law requirement. Then add best practices from the list below to achieve a multiple-star rating

-  Compliant: Meets all Sunshine Law requirements
-  Compliant, plus 1-2 best practices
-  Compliant, plus 3-4 best practices
-  Compliant, plus 5 or more best practices

Name of Entity	County	Audit Period	Compliant	Best Practices (stars are clickable)	Non-Compliant (x's are clickable)
Youngstown State University	Mahoning	07/01/2019 to 06/30/2020	★	★★★★	
Youngstown State University	Mahoning	07/01/2020 to 06/30/2021	★	★★★★	
Youngstown State University	Mahoning	07/01/2021 to 06/30/2022	★	★★★★	
Youngstown State University	Mahoning	07/01/2022 to 06/30/2023	★	★★★★	

Best Practices for: Youngstown State University (Mahoning County)

1. Method to Track Public Records Requests
2. Standard Request Forms
3. Public Records Request Acknowledgement
4. Public Records Custodian Identified and Trained
5. Prompt Certified Public Records Training
6. Online Presence – Upcoming Events and Office Operations
7. Online Presence – Official Documents

This entity received the Highest Achievement in Open and Transparent Government Award

**NOTE: Best practices 4 and 5 apply to elected officials and are not applicable to state universities.*

Source: https://ohioauditor.gov/open/StaRS_results.html

Youngstown State University

Mahoning County

Agreed-upon Procedures Report

June 30, 2023

Independent Accountant's Report on Applying Agreed-upon Procedures	1-14
Intercollegiate Athletics Program Statement of Revenues and Expenses	15
Notes to Intercollegiate Athletics Program Statement of Revenues and Expenses	16-17

Independent Accountant’s Report on Applying Agreed-upon Procedures

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

We have performed the procedures enumerated below on Youngstown State University’s (the “Institution”) Intercollegiate Athletics Program Statement of Revenues and Expenses (the “Statement”) under National Collegiate Athletic Association (NCAA) Bylaw 20.2.4.17 for the year ended June 30, 2023. The Institution’s management is responsible for the Institution’s Intercollegiate Athletics Program Statement of Revenues and Expenses under NCAA Bylaw 20.2.4.17 for Division I.

The Institution has agreed to the procedures performed and acknowledged that they are appropriate to meet the intended purpose of performing testing on certain intercollegiate athletics activity. Additionally, the required agreed-upon procedures are prescribed by the NCAA annually through published instructions, which is deemed as acknowledgment that the procedures performed are appropriate for its purposes. The procedures below are specified in the NCAA’s 2023 Agreed-Upon Procedures instructions. No other parties have agreed to and acknowledged the appropriateness of the procedures. This report may not be suitable for any other purpose. The procedures performed may not address all items of interest to a user of this report and may not meet the needs of all users of this report; as such, users are responsible for determining whether the procedures performed are appropriate for their purposes. We make no representation regarding the sufficiency of these procedures, either for the purpose intended or for any other purpose.

An agreed-upon procedures engagement involves performing specific procedures that the engaging party has agreed to and acknowledged to be appropriate for the intended purpose of the engagement and reporting on findings based on the procedures performed. As agreed to by the Institution, for the purpose of performing these procedures, exceptions are reported in accordance with the NCAA’s 2023 Agreed-Upon Procedures instructions.

Agreed-upon Procedures Related to the Intercollegiate Athletics Program Statement of Revenues and Expenses

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

Internal Control Structure

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

- 1) We met with the Institution’s VP of finance to identify areas of significant interest and specific agreed-upon procedures related to both internal controls and other specified areas. The discussion did not identify any areas of significant interest or any other agreed-upon procedures.

To Dr. Helen K. Lafferty, Interim President
 Youngstown State University

- 2) We met with the director of intercollegiate athletics and inquired about the general control environment over intercollegiate athletic finances, the level of control consciousness in the Institution, the competence of personnel, and the protection of records and equipment. The discussion did not identify any weaknesses in controls, and the general control environment is thought to be strong, with competent and consistent personnel year over year.
- 3) We obtained the audited financial statements for the year ended June 30, 2023 and any additional reports regarding internal controls, if the Institution was audited independent of these agreed-upon procedures, and any corrective action taken in response to comments concerning the internal control structure.
- 4) We obtained any documentation of the accounting systems and procedures unique to the intercollegiate athletics department.
- 5) Cash disbursements and athletic employee payroll are addressed in connection with the audit of the Institution's financial statements. The following control environment and accounting systems are (a) unique to intercollegiate athletics and (b) have not been addressed in connection with the audit of the Institution's financial statements. We performed the following procedures:
 - i. We selected one game and tested the ticket collection receipting process by comparing the total receipts for the game to the reconciliation and documentation of the related cash deposit amount with the bank.

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

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

<u>Event Date</u>	<u>Sporting Event</u>	<u>Ticket</u>		
		<u>Sales Amount</u>	<u>Deposit Amount</u>	<u>Deposit Date</u>
9/10/2022	Football vs. University of Dayton	\$ 4,301	\$ 4,301	9/10/2022

<u>Date of Revenue</u>	<u>Amount</u>	<u>Deposit Amount</u>	<u>Deposit Date</u>
9/6/2022	\$ 54	\$ 54	9/7/2022
9/7/2022	770	770	9/8/2022
9/8/2022	531	531	9/9/2022
9/9/2022	336	336	9/9/2022

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

NCAA Reporting

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

Result: We noted no discrepancies.

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

Grants-in-Aid	2021-2022	2022-2023	%	Explanation of Variance per Management
	Total	Total	Change	
Baseball	11.56	10.75	-7.01%	Changes in scholarship amounts offered
Men's Basketball	16.07	14.51	-9.71%	Decrease in roster size due to COVID-19 eligibility
Men's Swimming and Diving	8.99	9.55	6.23%	Newer program, growing rapidly
Men's Tennis	4.27	3.83	-10.30%	Changes in scholarship amounts offered
Men's Track, Outdoor	15.50	14.51	-6.39%	Changes in scholarship amounts offered
Women's Basketball	15.04	13.87	-7.78%	Changes in scholarship amounts offered
Women's Golf	6.08	5.57	-8.39%	Decrease in roster size
Women's Bowling	6.14	5.09	-17.10%	Decrease in roster size
Women's Softball	12.02	9.87	-17.89%	Decrease in roster size
Women's Soccer	12.30	12.95	5.28%	Changes in scholarship amounts offered
Women's Swimming and Diving	10.61	14.23	34.12%	Increase in roster size
Women's Tennis	6.72	7.70	14.58%	Increase in roster size
Women's Track, Indoor	-	0.67	100.00%	Aid for these athletes has traditionally been included with outdoor track.
Women's Track, Outdoor	22.23	17.54	-21.10%	Changes in scholarship amounts offered

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

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

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

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

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

Result: We noted the Membership Financial Reporting System information provided by management was in draft form, and management represented there would be no changes to the final submission. The total number of Pell Grants in 2022 and 2023 was 123 and 122, respectively. We agreed the total number of student-athletes who received a Pell Grant award during the academic year and the total dollar amount of the Pell Grants to be reported in the NCAA Membership Financial Reporting System to the reports generated from the Institution's financial aid records and noted no discrepancies.

Notes, Disclosures, and Other Procedures

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

Result: We selected the 2023 40-lb. washer addition for \$25,215.70 and agreed it to the purchase order and the invoice dated February 16, 2023. We agreed total institutional property, plant, and equipment to the Institution's audited financial statements. We noted no exceptions.

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

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

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

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

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

Intercollegiate Athletics Program Statement of Revenues and Expenses

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

Result: We noted no exceptions.

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

Result: There were no variances that met the thresholds for required disclosure.

- M. **Procedure:** We performed additional procedures on the following revenue and expense categories unless the specific reporting category is less than 4% of total revenues or expenses.

Result: See procedures below.

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

Revenues

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

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

- 1) **Ticket Sales Procedure:** Ticket sales were less than 4% of total revenues, so additional procedures were not performed.
- 2) **Student Fees Procedure:** No amounts were reported for this revenue category; therefore, additional procedures were not performed.
- 3) **Direct State or Other Governmental Support Procedure:** No amounts were reported for this revenue category; therefore, additional procedures were not performed.
- 4) **Direct Institutional Support Procedure:** We agreed a sample of one direct institutional support recorded by the Institution during the reporting period with the institutional supporting budget transfers documentation and other corroborative supporting documentation and recalculated totals.

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

- 5) **Less - Transfers to Institution Procedure:** Transfers to the Institution were less than 4% of total revenues, so additional procedures were not performed.
- 6) **Indirect Institutional Support Procedure:** Indirect institutional support was less than 4% of total revenues, so additional procedures were not performed.
- 7) **Guarantees Procedure:** Guarantees were less than 4% of total revenues, so additional procedures were not performed.
- 8) **Contributions Procedure:** We obtained supporting documentation for each contribution of moneys, goods, or services received directly by an intercollegiate athletics program from any affiliated or outside organization, agency or group of individuals that constitutes 10 percent or more of all contributions received for intercollegiate athletics during the reporting periods. We disclosed the source and dollar value of these contributions in the report.

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

- 9) **In-Kind Procedure:** In-kind revenues were less than 4% of total revenues, so additional procedures were not performed.
- 10) **Compensation and Benefits Provided by a Third Party Procedure:** No amounts were reported for this revenue category; therefore, additional procedures were not performed.

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

- 11) **Media Rights Procedure:** No amounts were reported for this revenue category; therefore, additional procedures were not performed.
- 12) **NCAA Distributions Procedure:** We agreed the amounts recorded in the revenue and expense reporting to general ledger detail for NCAA distributions and other corroborative supporting documents and recalculated totals.

Result: A listing of NCAA distributions was obtained and tied to the recorded amount. Supporting communications from the Horizon League or NCAA were reviewed, supporting each NCAA distribution. We noted no exceptions.
- 13) **Conference Distributions and Conference Distributions of Football Bowl Generated Revenue Procedure:** Conference distributions and conference distributions of football bowl generated revenue were less than 4% of total revenues, so additional procedures were not performed.
- 14) **Program Sales, Concessions, Novelty Sales and Parking Procedure:** Program sales, concessions, novelty sales and parking were less than 4% of total revenues, so additional procedures were not performed.
- 15) **Royalties, Licensing, Advertisements and Sponsorships Procedure:** Royalties, licensing, advertisements and sponsorships were less than 4% of total revenues, so additional procedures were not performed.
- 16) **Sports Camp Revenues Procedure:** No amounts were reported for this revenue category; therefore, additional procedures were not performed.
- 17) **Athletics Restricted Endowment and Investment Income Procedure:** Athletics restricted endowment and investment income were less than 4% of total revenues, so additional procedures were not performed.
- 18) **Football Bowl Revenues Procedure:** No amounts were reported for this revenue category; therefore, additional procedures were not performed.
- 19) **Other Revenues Procedure:** Other revenues were less than 4% of total revenues, so additional procedures were not performed.

Expenses

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

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

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

We performed the following procedures for the indicated expense category:

- 1) **Athletic Student Aid Procedures:** We selected a sample of 40 students from the listing of institutional student aid recipients during the reporting period (no less than 10% of the total student-athletes for institutions who have used the NCAA's CA software to prepare athletic aid detail, with a maximum sample size of 40, and no less than 20% of total student-athletes for institutions who have not, with a maximum sample size of 60).
 - a. We obtained individual student account detail for each selection and agreed total aid in the Institution's student system to student detail in CA or the institution report that ties directly to the NCAA Membership Financial Reporting System.
 - b. We performed a check of each student selected to ensure that their information was reported accurately in either the CA software or entered directly into the NCAA Membership Financial Reporting System using the following criteria:
 - i. The equivalency value for each student-athlete in all sports, including head-count sports, needs to be converted to a full-time equivalency value. The full-time equivalency value is calculated using the athletic grant amount reported on the Calculation of Revenue Distribution Equivalencies Report from CA as the numerator and the full grant amount which is the total cost for tuition, fees, books, room and board for an academic year as the denominator. If using the NCAA CA software, this equivalency value should already be calculated on the CRDE report labeled "Revenue Distribution Equivalent Award."
 - ii. Grants-in-aid is calculated by using the revenue distribution equivalencies by sport and in aggregate. (Athletic grant amount divided by the full grant amount.)
 - iii. Other expenses related to attendance (also known as cost of attendance) should not be included in grants-in-aid revenue distribution equivalencies. Only tuition, fees, room, board, and course-related books are countable for grants-in-aid revenue distribution per Bylaw 20.02.10.
 - iv. Full grant amount should be entered as a full year of tuition, not a semester or quarter.
 - v. Student-athletes are to be counted once, regardless of multiple sport participation, and should not receive a revenue distribution equivalency greater than 1.00.
 - vi. Athletics grants are valid for revenue distribution purposes only in sports in which the NCAA conducts championships competition, emerging sports for women and football bowl subdivision football.
 - vii. Grants-in-aid are valid for revenue distribution purposes in NCAA sports that do not meet the minimum contests and participants' requirements of Bylaw 20.10.6.3.
 - viii. Institutions providing grants to student-athletes listed on the CRDE as "Exhausted Eligibility (fifth-year)" or "Medical" receive credit in the grants-in-aid component.

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

- ix. The athletics aid equivalency cannot exceed maximum equivalency limits. However, the total revenue distribution equivalency can exceed maximum equivalency limits due to exhausted eligibility and medical equivalencies (reference Bylaw 15.5.3.1).
 - x. If a sport is discontinued and the athletic grant(s) are still being honored by the Institution, the grant(s) are included in student-athlete aid for revenue distribution purposes.
 - xi. All equivalency calculations should be rounded to two decimal places.
 - xii. If a selected student received a Pell Grant, ensure that the value of the grant is not included in the calculation of equivalencies or the total dollar amount of student athletic aid expense for the Institution.
 - xiii. If a selected student received a Pell Grant, ensure that the student's grant was included in the total number and total value of Pell Grants reported for revenue distribution purposes in the NCAA Membership Financial Reporting System.
- c. We recalculated totals for each sport and overall.

Result: The total amount of the countable aid from the squad list tied to the amount shown on the Statement within an insignificant amount. As the Institution utilizes the CA software, we selected 10%, or 40 students. We noted differences during the recalculation of revenue distribution per student for 1 student and a difference in recalculation of contributable aid for 4 students.

For 1 student tested who received a Pell Grant, the total value of Pell Grant received did not agree to the total value of Pell Grant reported for revenue distribution purposes in the NCAA Membership Financial Reporting System.

To Dr. Helen K. Lafferty, Interim President
 Youngstown State University

The student accounts tested are summarized below:

Student Tested	Total Contributable Aid Recalculated	Total Contributable Aid Reported	Revenue Distribution Recalculation	Revenue Distribution Reported	Difference
1	\$ 5,300	5,300	0.25	0.25	-
2	9,500	9,500	0.34	0.34	-
3	15,489	15,489	0.79	0.79	-
4	25,500	25,500	1.00	1.00	-
5	24,716	24,716	1.00	1.00	-
6	22,024	22,024	1.00	1.00	-
7	9,126	9,126	0.45	0.45	-
8	3,000	3,000	0.15	0.15	-
9	20,670	20,670	1.00	1.00	-
10	23,657	23,657	1.00	1.00	-
11	17,200	17,200	0.87	0.85	0.02
12	7,425	7,425	0.37	0.37	-
13	17,964	17,964	0.86	0.86	-
14	6,952	6,952	0.34	0.34	-
15	11,000	11,000	0.53	0.53	-
16	10,597	10,597	0.53	0.53	-
17	6,000	6,000	0.19	0.19	-
18	22,101	21,790	1.00	1.00	-
19	2,000	2,000	0.10	0.10	-
20	9,000	9,000	0.45	0.45	-
21	23,716	23,716	1.00	1.00	-
22	22,716	22,716	1.00	1.00	-
23	18,000	18,000	0.83	0.83	-
24	1,000	1,000	0.05	0.05	-
25	10,313	10,313	0.49	0.49	-
26	13,000	13,000	0.60	0.60	-
27	12,191	12,191	0.59	0.59	-
28	9,588	9,588	0.48	0.48	-
29	10,000	10,000	0.47	0.47	-
30	14,250	14,250	0.70	0.70	-
31	9,200	9,200	0.37	0.37	-
32	16,000	16,000	0.74	0.74	-
33	12,474	12,474	0.61	0.61	-
34	21,000	21,000	0.88	0.88	-
35	21,931	21,917	1.00	1.00	-
36	17,101	17,101	0.87	0.87	-
37	13,211	12,850	0.67	0.67	-
38	22,461	22,540	1.00	1.00	-
39	2,000	2,000	0.10	0.10	-
40	22,141	22,141	1.00	1.00	-

2) **Guarantees Procedure:** Guarantees were less than 4% of total expenses, so additional procedures were not performed.

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

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

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

- 4) **Coaching Salaries, Benefits, and Bonuses Paid by a Third Party Procedure:** No amounts were reported for this expense category; therefore, additional procedures were not performed.
- 5) **Support Staff/Administrative Compensation, Benefits and Bonuses Paid by the Institution and Related Entities Procedure:** We selected a sample of one support staff/administrative personnel employed by the Institution and related entities during the reporting period. We obtained and inspected payroll summary registers for the selection. We agreed related payroll summary registers to the related support staff/administrative salaries, benefits and bonuses paid by the Institution and related entities expense recorded by the Institution in the Statement during the reporting period. We also recalculated totals.

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

- 6) **Support Staff/Administrative Compensation, Benefits, and Bonuses Paid by a Third Party Procedure:** No amounts were reported for this expense category; therefore, additional procedures were not performed.
- 7) **Severance Payments Procedure:** No amounts were reported for this expense category; therefore, additional procedures were not performed.
- 8) **Recruiting Procedure:** Recruiting was less than 4% of total expenses, so additional procedures were not performed.
- 9) **Team Travel Procedure:** We obtained documentation of the Institution's team travel policies. We agreed to existing institutional- and NCAA-related policies. We obtained general ledger detail and agreed to the total expenses reported. We recalculated totals.

Result: We noted no exceptions.

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

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

Result: We selected a transaction paid on September 9, 2022 for football equipment totaling \$65,394.71 and agreed it to the purchase order, the invoice, and the check. We noted no exceptions.
- 11) **Game Expenses Procedure:** Game expenses were less than 4% of total expenses, so additional procedures were not performed.
- 12) **Fund Raising, Marketing and Promotion Procedure:** Fund raising, marketing and promotion were less than 4% of total expenses, so additional procedures were not performed.
- 13) **Sports Camp Expenses Procedure:** No amounts were reported for this expense category; therefore, additional procedures were not performed.
- 14) **Spirit Groups Procedure:** Spirit groups expenses were less than 4% of total expenses, so additional procedures were not performed.
- 15) **Athletic Facilities Debt Service, Leases and Rental Fees Procedure:** Athletic facilities debt service, leases and rental fees were less than 4% of total expenses, so additional procedures were not performed.
- 16) **Direct Overhead and Administrative Expenses Procedure:** Direct overhead and administrative expenses were less than 4% of total expenses, so additional procedures were not performed.
- 17) **Indirect Institutional Support Procedure:** We tested this with the revenue section – Indirect Institutional Support.
- 18) **Medical Expenses and Insurance Procedure:** Medical expenses and insurance were less than 4% of total expenses, so additional procedures were not performed.
- 19) **Memberships and Dues Procedure:** Memberships and dues were less than 4% of total expenses, so additional procedures were not performed.
- 20) **Student-Athlete Meals (non-travel) Procedure:** Student-athlete meals (non-travel) were less than 4% of total expenses, so additional procedures were not performed.
- 21) **Football Bowl Expenses Procedure:** No amounts were reported for this expense category; therefore, additional procedures were not performed.
- 22) **Other Operating Expenses Procedure:** We obtained general ledger detail and compared to the total expenses reported. We selected a sample of one transaction to validate existence of the transaction and accuracy of recording and recalculated totals.

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

Result: We selected a transaction paid on May 4, 2023 for team catering totaling \$2,610 and agreed it to the invoice, purchase card detail, and payment of purchase card statement. We noted no exceptions.

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

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

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

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

To Dr. Helen K. Lafferty, Interim President
Youngstown State University

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

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

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

Plante & Moran, PLLC

Columbus, Ohio
December 21, 2023

Intercollegiate Athletics Program Statement of Revenues and Expenses

Year Ended June 30, 2023

Operating Revenues	Football	Men's Basketball	Women's Basketball	Other Sports	Non-Program Specific	Total
Ticket Sales	\$ 300,051	\$ 279,050	\$ 19,664	\$ -	\$ -	\$ 598,765
Guarantees	550,000	100,000	-	-	-	650,000
Contributions	527,993	14,472	7,488	179,825	899,495	1,629,273
In-Kind Contributions	-	-	-	8,470	-	8,470
Direct State or Other Governmental Support	-	-	-	-	-	-
Direct Institutional Support	-	-	-	-	15,829,765	15,829,765
Less - Transfers Back to Institution	-	-	-	-	(36,713)	(36,713)
Indirect Institutional Support	-	-	-	-	46,942	46,942
NCAA Distributions	-	-	-	-	1,544,775	1,544,775
Conference Distributions	-	-	-	23,140	104,194	127,334
Broadcast Television, Radio and Internet Rights	-	-	-	-	-	-
Program Sales, Concessions, Novelty Sales and Parking	258,709	1,091	444	-	-	260,244
Royalties, Licensing, Advertisements and Sponsorships	383,790	168,000	-	-	172,054	723,844
Sports Camp Revenues	-	-	-	-	-	-
Endowment and Investment Income	-	-	-	-	3,148	3,148
Other	-	20,711	-	9,925	163,380	194,016
Total Operating Revenues	2,020,543	583,324	27,596	221,360	18,727,040	21,579,863
Operating Expenses						
Athletic Student Aid	1,584,280	354,014	367,507	2,847,403	328,688	5,481,892
Guarantees	225,000	107,000	16,500	-	-	348,500
Coaching Salaries, Benefits and Bonuses Paid by the Institution	1,495,085	783,826	551,425	1,679,857	-	4,510,193
Support Staff/Administrative Compensation, Benefits and Bonuses Paid by the Institution	-	-	-	-	3,449,054	3,449,054
Recruiting	100,055	88,468	46,175	64,511	-	299,209
Team Travel	583,724	302,060	134,203	1,332,357	-	2,352,344
Sports Equipment, Uniforms and Supplies	309,165	58,253	46,691	389,292	124,592	927,993
Game Expenses	109,304	185,536	80,360	146,430	14,405	536,035
Fund Raising, Marketing and Promotion	-	-	440	280	222,963	223,683
Sports Camp Expenses	-	-	-	-	-	-
Athletic Facilities Debt Service, Leases and Rental Fees	-	-	-	59,719	90,378	150,097
Direct Overhead and Administrative Expenses	-	-	-	-	542,244	542,244
Spirit Groups	-	-	-	-	83,614	83,614
Medical Expenses and Insurance	-	-	-	-	307,122	307,122
Memberships and Dues	-	-	-	8,303	27,197	35,500
Student-Athlete Meals (non-travel)	97,119	-	-	31,158	-	128,277
Other Operating Expenses	104,366	73,741	39,502	106,312	1,417,881	1,741,802
Total Operating Expenses	4,608,098	1,952,898	1,282,803	6,665,622	6,608,138	21,117,559
Excess of Revenues (Under) Over Expenses	\$ (2,587,555)	\$ (1,369,574)	\$ (1,255,207)	\$ (6,444,262)	\$ 12,118,902	\$ 462,304

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

Year Ended June 30, 2023

Note 1 - Contributions

The University received no individual contributions of moneys, goods, or services directly by the Institution's intercollegiate athletics program from any affiliated or outside organization, agency, or individuals (e.g., contributions by corporate sponsors) that constitute 10 percent or more of all contributions received for intercollegiate athletics during the year ended June 30, 2023.

Note 2 - Intercollegiate Athletics-Related Assets

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

The current year capitalized additions and deletions to facilities during the year ended June 30, 2023 are as follows:

	Current Year Additions	Current Year Deletions
Construction in Progress	\$ 129,729	\$ -
Equipment	112,454	18,075
Buildings	10,830	-
Building Improvements	1,472,356	-
Improvements - Other	-	-
Total Athletics Facilities	<u>\$ 1,725,369</u>	<u>\$ 18,075</u>
Other Institutional Facilities	\$ 14,674,431	\$ 1,892,275

The total estimated book values of property, plant, and equipment, net of depreciation, of the Institution as of June 30, 2023 are as follows:

	Estimated Book Value
Athletically Related Property, Plant, and Equipment Balance	\$ 21,586,932
Institution's Total Property, Plant, and Equipment Balance	\$ 232,127,268

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

Year Ended June 30, 2023

Note 3 - Intercollegiate Athletics-Related Debt

The annual debt service and debt outstanding for the Institution as of June 30, 2023 are as follows:

	Annual Debt Service	Debt Outstanding
Athletically Related Facilities	\$ 90,378	\$ 2,328,834
Institution's Total	\$ 3,554,174	\$ 64,148,837

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

	Total Intercollegiate Athletics Debt
2024	\$ 8,713
2025	161,396
2026	204,546
2027	212,429
2028	220,727
2029-2034	1,521,023
	\$ 2,328,834

Note 4 - Restricted and Endowment and Plant Funds

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

In addition, at June 30, 2023, the Institution had \$70,630 of endowments and \$0 in pledges receivable dedicated to the sole support of athletics not reported in the Statement. The athletics department's fund balance is \$1,409,400 at June 30, 2023.



**YOUNGSTOWN
STATE
UNIVERSITY**



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

For the Years Ended
June 30, 2023 and 2022

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

CONTENTS

Financial Report

<i>Independent Auditor's Report</i>	1
<i>Management's Discussion and Analysis</i>	4
<i>Statements of Net Position</i>	15
<i>Statements of Revenues, Expenses, and Changes in Net Position</i>	16
<i>Statements of Cash Flows</i>	17
<i>Notes to Financial Statements</i>	18

Required Supplementary Information

<i>Schedule of the Station's Proportionate Share of the Net Pension Liability</i>	41
<i>Schedule of the Station's Pension Contributions</i>	42
<i>Schedule of the Station's Proportionate Share of the Net OPEB Liability</i>	43
<i>Schedule of the Station's OPEB Contributions</i>	44

Independent Auditor's Report on Internal Control Over Financial Reporting

And on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with Government Auditing Standards	45
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Independent Auditor's Report

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

Report on the Audits of the Financial Statements

Opinion

We have audited the financial statements of the business-type activities of WYSU-FM Youngstown State University Radio (the "Station"), a department of Youngstown State University, as of and for the years ended June 30, 2023 and 2022 and the related notes to the financial statements, which collectively comprise WYSU-FM Youngstown State University Radio's basic financial statements, as listed in the table of contents.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the financial position of the business-type activities of WYSU-FM Youngstown State University Radio as of June 30, 2023 and 2022 and the changes in its financial position and its cash flows thereof for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

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

Emphasis of Matter

As described in Note 1 to the financial statements, the financial statements of the Station are intended to present the net position, changes in net position, and cash flows of only that portion of Youngstown State University's business-type activities that is attributable to the transactions of the Station. They do not purport to, and do not, present fairly the net position of Youngstown State University as of June 30, 2023 and 2022 or the changes in net position or the changes in cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

Responsibilities of Management for the Financial Statements

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

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

Auditor's Responsibilities for the Audits of the Financial Statements

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

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

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

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

Required Supplementary Information

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

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

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated December 21, 2023 on our consideration of WYSU-FM Youngstown State University Radio's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements, and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of WYSU-FM Youngstown State University Radio's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering WYSU-FM Youngstown State University Radio's internal control over financial reporting and compliance.

Plante & Moran, PLLC

December 21, 2023

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

The Management's Discussion and Analysis section of the WYSU-FM Youngstown State University Radio (WYSU-FM or the Station) Financial Report presents an unaudited discussion and analysis of the financial performance of the Station, a non-commercial public radio station operated by Youngstown State University (the University or YSU), during the fiscal year ended June 30, 2023 with comparative information for the fiscal years ended June 30, 2022 and June 30, 2021. This discussion has been prepared by management and should be read in conjunction with the financial statements and the accompanying notes that follow.

Introduction

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

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

Using the Financial Statements

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

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

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

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

exchange with notice as to the law. The pension system is responsible for the administration of the plan.

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

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

Overall key presentation elements of the financial statements include:

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

The Statement of Net Position

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

A summarized comparison of the Station's assets, deferred outflows of resources, liabilities, deferred inflows of resources, and net position at June 30, 2023, 2022, and 2021 follows:

	June 30, 2023	June 30, 2022	June 30, 2021
Assets			
Current assets	\$ 1,817,531	\$ 1,932,895	\$ 1,923,766
Noncurrent assets			
Capital assets, net	85,518	103,465	121,412
Other assets	254,478	309,052	326,672
Total Noncurrent assets	<u>339,996</u>	<u>412,517</u>	<u>448,084</u>
Total Assets	<u>2,157,527</u>	<u>2,345,412</u>	<u>2,371,850</u>
Deferred Outflows of Resources	<u>297,600</u>	<u>67,296</u>	<u>49,715</u>
Liabilities			
Current liabilities	46,517	39,925	40,761
Noncurrent liabilities	715,483	223,708	388,089
Total Liabilities	<u>762,000</u>	<u>263,633</u>	<u>428,850</u>
Deferred Inflows of Resources	<u>5,674</u>	<u>325,410</u>	<u>349,636</u>
Net Position			
Net investment in capital assets	85,518	103,465	121,412
Restricted	286,451	274,847	317,286
Unrestricted	1,315,484	1,445,353	1,204,381
Total Net Position	<u>\$ 1,687,453</u>	<u>\$ 1,823,665</u>	<u>\$ 1,643,079</u>

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

Total assets, consisting primarily of cash and cash equivalents, accounts receivable, pledges receivable, investments, and capital assets, decreased \$26,438 or 1% from fiscal year 2021 to fiscal year 2022. Current assets increased \$9,129 or 0.47% between fiscal year 2021 and fiscal year 2022 primarily due to an increase in cash and cash equivalents. Noncurrent assets decreased \$35,567 or 8% from fiscal year 2021 to fiscal year 2022. The decrease was attributed to a combination of a decrease in endowment investments of \$43,678 due to unfavorable market environment in fiscal year 2022 and a decrease in net capital assets of \$17,947 which represents the recording of fiscal year 2022 depreciation offset by an increase in the net OPEB asset of \$26,058.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

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

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

Deferred Outflows of Resources	June 30, 2023	June 30, 2022	June 30, 2021
Related to pension	\$ 255,639	\$ 65,605	\$ 28,697
Related to OPEB	41,961	1,691	21,018
Total Deferred Outflows of Resources	<u>\$ 297,600</u>	<u>\$ 67,296</u>	<u>\$ 49,715</u>

Deferred Inflows of Resources	June 30, 2023	June 30, 2022	June 30, 2021
Related to pension	\$ 1,067	\$ 248,059	\$ 195,976
Related to OPEB	4,607	77,351	153,660
Total Deferred Inflows of Resources	<u>\$ 5,674</u>	<u>\$ 325,410</u>	<u>\$ 349,636</u>

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

Deferred outflows of resources increased \$230,304 or 342% from fiscal year 2022 to fiscal year 2023. Deferred outflows of resources related to pension increased \$190,034 or 290% primarily due a \$192,483 increase in the net difference between projected and actual earnings on pension plan investments related to the Ohio Public Employees Retirement System (OPERS) plan. Deferred outflows of resources related to OPEB increased \$40,270 or 2,381% primarily due to a \$13,639 increase in the changes in assumptions and a \$27,735 increase in the net difference between projected and actual earnings on OPEB investments related to the OPERS plan.

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

Deferred outflows of resources increased \$17,581 or 35% from fiscal year 2021 to fiscal year 2022. Deferred outflows of resources related to pension increased \$36,908 or 129% primarily due a \$24,236 increase in the changes in assumptions related to the OPERS plan as well as a \$10,009 increase in the differences between expected and actual experience related to the OPERS plan. Deferred outflows of resources related to OPEB decreased \$19,327 or 92% primarily due to a \$21,016 decrease in the changes in assumptions related to the OPERS plan.

Deferred inflows of resources decreased \$24,226 or 7% from fiscal year 2021 to fiscal year 2022. Deferred inflows of resources related to pension increased \$52,083 or 27% due to a \$91,885 increase in the net difference between projected and actual earnings on pension plan investments offset by a \$28,442 decrease in change in proportionate share of contributions to the OPERS plan and a \$11,360 decrease in the differences between expected and actual experience. Deferred inflows of resources related to OPEB decreased \$76,309 or 50% due to a \$41,413 decrease in changes in assumptions, a \$28,143 decrease in the differences between expected and actual experience and a \$16,788 decrease in the change in proportionate share of contributions related to the OPERS plan offset by a \$10,035 increase in the net difference between projected and actual earnings on OPEB investments related to the OPERS plan.

See Note 6 for additional information on employee benefit plans.

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

Total liabilities consisting of accounts payable, payroll liabilities, unearned revenue, compensated absences, net pension liability, and net OPEB liability decreased \$165,217 or 39% from fiscal year 2021 to fiscal year 2022 and was primarily due to a decrease in the net pension liability of \$166,183 or 48%.

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

	June 30, 2023	June 30, 2022	June 30, 2021
Net investment in capital assets	\$ 85,518	\$ 103,465	\$ 121,412
Restricted - nonexpendable	108,153	108,153	108,153
Restricted - expendable	178,298	166,694	209,133
Unrestricted	1,699,499	1,818,316	1,811,392
Total net position without GASBs 68 and 75	2,071,468	2,196,628	2,250,090
GASB 68	(407,405)	(366,112)	(517,120)
GASB 75	23,390	(6,851)	(89,891)
Total Net Position	\$ 1,687,453	\$ 1,823,665	\$ 1,643,079

Overall, the Station's total net position decreased \$136,212 or 8% from \$1,823,665 at June 30, 2022 to \$1,687,453 at June 30, 2023. This was primarily due to a decrease of \$129,869 in unrestricted net position. Excluding net position attributed to GASBs 68 and 75, net position decreased \$125,160 or 6% from \$2,196,628 at June 30, 2022 to \$2,071,468 at June 30, 2023. The net investment in capital assets consists of equipment net of accumulated depreciation. The \$17,947 or 17% decrease from fiscal year 2022 to fiscal year 2023 was due to current year depreciation expense. Restricted nonexpendable net position consists primarily of endowment funds held by the University in the name of the Station. Changes in this category are driven by additions or deductions to the endowment corpus. During fiscal year 2023, there were no changes. Restricted expendable net position is subject to externally imposed restrictions governing their use. Changes in this category are due to the timing of revenues and expenses in funds provided by donors and grantors. Restricted expendable net position increased \$11,604 or 7% primarily due to the allocation of unrealized investment gains in the Station's endowment fund. Unrestricted net position is not subject to externally imposed restrictions and is designated for future operations. Unrestricted net position decreased \$118,817 or 7% from fiscal year 2022 to fiscal year 2023 primarily due to decreases in revenue from membership receipts, general appropriations from the University and in-kind support from the Broadcast Educational Media Commission (BEMC) coupled with increases in management, broadcasting and fundraising expenses.

Overall, the Station's total net position increased \$180,586 or 11% from \$1,643,079 at June 30, 2021 to \$1,823,665 at June 30, 2022. This was primarily due to an increase of \$240,972 in unrestricted net position. Excluding net position attributed to GASBs 68 and 75, net position decreased \$53,462 or 2% from \$2,250,090 at June 30, 2021 to \$2,196,628 at June 30, 2022. The net investment in capital assets consists of equipment net of accumulated depreciation. The \$17,947 or 15% decrease from fiscal year 2021 to fiscal year 2022 was due to current year depreciation expense. Restricted nonexpendable net position consists primarily of endowment funds held by the University in the name of the Station. Changes in this category are driven by additions or deductions to the endowment corpus. During fiscal year 2022, there were no changes. Restricted expendable net position is subject to externally imposed restrictions governing their use. Changes in this category are due to the timing of revenues and expenses in funds provided by donors and grantors. Restricted expendable net position decreased \$42,439 or 20% primarily due to the allocation of unrealized investment losses in the Station's endowment fund. Unrestricted net

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

position is not subject to externally imposed restrictions and is designated for future operations. Unrestricted net position increased \$6,924 or 0.38% from fiscal year 2021 to fiscal year 2022.

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

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

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

	June 30, 2023	June 30, 2022	June 30, 2021
Total Operating Revenues	\$ 378,196	\$ 411,184	\$ 371,228
Total Operating Expenses	1,404,713	1,069,547	583,260
Operating Loss	(1,026,517)	(658,363)	(212,032)
Net Non-operating Revenues	890,305	838,949	1,006,407
Change in Net Position	(136,212)	180,586	794,375
Net Position at Beginning of the Year	1,823,665	1,643,079	848,704
Net Position at End of the Year	\$ 1,687,453	\$ 1,823,665	\$ 1,643,079

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

The Station's total operating revenues increased \$39,956 or 11% from fiscal year 2021 to fiscal year 2022. The increase was primarily the result of an increase of \$36,282 in revenue from in-kind contributions.

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

	June 30, 2023	June 30, 2022	June 30, 2021
Program Services	\$ 801,922	\$ 776,940	\$ 678,597
Support Services	591,739	526,655	389,933
Operating Expenses without GASBs 68 and 75 accruals	1,393,661	1,303,595	1,068,530
GASB 68 pension expense accruals	41,293	(151,008)	(157,330)
GASB 75 OPEB expense accrual	(30,241)	(83,040)	(327,940)
Total Operating Expenses	<u>\$ 1,404,713</u>	<u>\$ 1,069,547</u>	<u>\$ 583,260</u>

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

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

Excluding the impact of GASBs 68 and 75, total operating expenses increased \$235,065 or 22% from fiscal year 2021 to fiscal year 2022. Program services increased \$98,343 or 14% primarily due to increases in programming and production expense and broadcasting expense related to the increase in in-kind support from BEMC. In addition, the increase is attributed to an increase in program information expense due to hiring an employee at the end of fiscal year 2021 to fill the program information position which was left vacant in March 2021. Support services increased \$136,722 or 35% primarily attributed to an increase in management and general expenses related to the increase in institutional support from the University.

Pension expense attributed to GASB 68 increased \$6,322 from (\$157,330) in fiscal year 2021 to (\$151,008) in fiscal year 2022; whereas OPEB expense attributed to GASB 75 increased \$244,900 from (\$327,940) in fiscal year 2021 to (\$83,040) in fiscal year 2022. These expenses are the result of changes in the deferred outflows/inflows and liabilities/assets related to pension/OPEB. The Station has no control over the factors affecting these changes.

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

Total net non-operating revenues increased \$51,356 or 6% from fiscal year 2022 to fiscal year 2023. The general appropriation from the University decreased \$22,917 or 6% between fiscal year 2022 and fiscal year 2023, primarily due to current year payroll expenses being redistributed to the WYSU-FM Cares Act fund. Donated facilities and administrative support from the University

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

increased \$46,159 or 23% due to an increase in institutional support from the University, the result of an increase in pension and OPEB expenses attributed to GASBs 68 and 75 in fiscal year 2023. Membership income decreased \$30,746 or 11% due to a decline in the number of donors and a decline in the average donation per donor in fiscal year 2023 compared to fiscal year 2022. Investment income, net of investment expense increased \$58,735 or 179% which is attributed to the recognition of realized and unrealized gains in the Station's endowment fund due to favorable market conditions.

Total net non-operating revenues decreased \$167,458 or 17% from fiscal year 2021 to fiscal year 2022. The Station did not receive federal appropriations in fiscal year 2022 resulting in a decrease of \$166,757 or 100%. The general appropriation from the University increased \$77,027 or 24% between fiscal year 2021 and fiscal year 2022, primarily due to payroll increases resulting from all positions being fully-staffed in fiscal year 2022 compared to fiscal year 2021 as well as a vacation and sick leave payout to an employee due to retirement. Donated facilities and administrative support from the University increased \$114,079 or 136% due to an increase in institutional support from the University, the result of an increase in total operating expenses in fiscal year 2022. Membership income increased \$24,661 or 10%, the result of two, month-long fundraising initiatives. The Station did not receive any bequests or large gifts in fiscal year 2022 as compared to fiscal year 2021 resulting in a decrease in private gifts of \$110,928 or 99%. Investment income, net of investment expense decreased \$105,540 or 145% which is attributed to the recognition of unrealized losses in the Station's endowment fund due to unfavorable market conditions.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

MANAGEMENT'S DISCUSSION AND ANALYSIS (CONT.)

Economic Factors for the Future

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

Continued downturned trends in both the national and regional economies have led to challenges in increasing external funding to pre-pandemic levels. A nation-wide downturn in the number of households contributing to charities as well as a downturned regional economy with a declining population have resulted in a decrease in listeners and listeners' support. To address these issues, the Station implemented two month-long, "soft" fundraising initiatives which offered an alternative to the traditional donor drive model. The Station also enhanced the marketing of its vehicle donation program by implementing a billboard campaign throughout the service area. In the coming year, the Station plans to work more closely with the YSU Foundation to pursue major and planned gifts as well as the YSU social media, marketing, and events staff to increase the Station's capabilities in all areas.

The Station recognizes the need to continuously enhance, upgrade and develop new technologies in order to provide continuous and reliable service to its audience. In the current year, the broadcast automation system was upgraded to the latest software and the website was renewed and refreshed on a new cloud server. Major projects in the planning phase include making significant repairs to the primary antenna and upgrading the digital production and broadcast audio system. Completion of these endeavors will allow the Station to continue to help listeners in their life-long learning pursuits, satisfy their intellectual curiosity, make more informed decisions, lead more fulfilling lives, become better and more involved citizens, and help make northeast Ohio and western Pennsylvania a better place to live.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

STATEMENTS OF NET POSITION AT JUNE 30, 2023 AND 2022

	June 30, 2023	June 30, 2022
ASSETS		
Current Assets		
Cash and cash equivalents	\$ 1,803,030	\$ 1,918,160
Interest receivable	628	292
Accounts receivable (net of allowance of \$200 in 2023 and \$0 in 2022)	5,553	4,116
Pledges receivable (net of allowance of \$1,591 in 2023 and \$1,174 in 2022)	8,320	10,327
Total Current Assets	1,817,531	1,932,895
Noncurrent Assets		
Endowment investments	254,478	240,243
Net OPEB asset	-	68,809
Capital assets, net	85,518	103,465
Total Noncurrent Assets	339,996	412,517
Total Assets	2,157,527	2,345,412
DEFERRED OUTFLOWS OF RESOURCES		
Deferred outflows related to pension	255,639	65,605
Deferred outflows related to OPEB	41,961	1,691
Total Deferred Outflows of Resources	297,600	67,296
LIABILITIES		
Current Liabilities		
Accounts payable	13,950	3,726
Payroll liabilities	15,143	18,911
Unearned revenue	9,171	7,642
Compensated absences	8,253	9,646
Total Current Liabilities	46,517	39,925
Noncurrent Liabilities		
Compensated absences	39,542	40,050
Net pension liability	661,977	183,658
Net OPEB liability	13,964	-
Total Noncurrent Liabilities	715,483	223,708
Total Liabilities	762,000	263,633
DEFERRED INFLOWS OF RESOURCES		
Deferred inflows related to pension	1,067	248,059
Deferred inflows related to OPEB	4,607	77,351
Total Deferred Inflows of Resources	5,674	325,410
NET POSITION		
Net investment in capital assets	85,518	103,465
Restricted, nonexpendable	108,153	108,153
Restricted, expendable - grant and endowment	178,298	166,694
Unrestricted	1,315,484	1,445,353
Total Net Position	\$ 1,687,453	\$ 1,823,665

See accompanying notes to financial statements.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

STATEMENTS OF REVENUES, EXPENSES AND CHANGES IN NET POSITION FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

	June 30, 2023	June 30, 2022
REVENUES		
Operating Revenues		
Corporation for Public Broadcasting grant	\$ 117,105	\$ 126,402
In-kind contributions	142,642	174,064
Broadcast Education Media Commission grant	33,570	33,570
Underwriting revenue	84,879	77,148
Total Operating Revenues	378,196	411,184
EXPENSES		
Operating Expenses		
Program Services		
Programming and production	484,842	430,677
Broadcasting	223,247	187,335
Program information	78,855	42,509
Traffic and continuity	20,140	10,254
Support Services		
Management and general	346,932	252,069
Fund raising and membership development	79,506	43,289
Underwriting	33,322	24,155
Clerical	119,922	61,312
Depreciation	17,947	17,947
Total Operating Expenses	1,404,713	1,069,547
Operating Loss	(1,026,517)	(658,363)
NONOPERATING REVENUES (EXPENSES)		
General appropriation from the University	378,222	401,139
Donated facilities and administrative support from the University	244,292	198,133
Membership revenue	240,977	271,723
Private gifts	875	750
Investment income, net of investment expense	25,939	(32,796)
Net Nonoperating Revenues	890,305	838,949
Change in Net Position	(136,212)	180,586
NET POSITION		
Net Position at Beginning of the Year	1,823,665	1,643,079
Net Position at End of the Year	\$ 1,687,453	\$ 1,823,665

See accompanying notes to financial statements.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

STATEMENTS OF CASH FLOWS FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

	June 30, 2023	June 30, 2022
Cash Flows from Operating Activities		
Corporation for Public Broadcasting grant	\$ 117,105	\$ 126,402
Broadcast Educational Media Commission grant	33,570	33,570
Underwriting support	85,421	73,161
Payments to suppliers	(462,594)	(412,154)
Payments to employees	(379,680)	(365,885)
Payments for benefits	(141,951)	(129,676)
Total Cash Flows Used in Operating Activities	(748,129)	(674,582)
Cash Flows from Noncapital Financing Activities		
General appropriation from the University	378,222	401,139
Membership receipts	242,534	276,057
Private gifts	875	750
Total Cash Flows Provided by Noncapital Financing Activities	621,631	677,946
Cash Flows from Investing Activities		
Interest on investments	14,809	43,262
(Purchase) sale of investments	(3,441)	(32,499)
Total Cash Flows Provided by Investing Activities	11,368	10,763
Change in Cash and Cash Equivalents	(115,130)	14,127
Cash and Cash Equivalents, Beginning of Year	1,918,160	1,904,033
Cash and Cash Equivalents, End of Year	\$ 1,803,030	\$ 1,918,160
Reconciliation of Operating Loss to Net Cash Used in Operating Activities		
Operating loss	\$ (1,026,517)	\$ (658,363)
Adjustments to reconcile operating loss to net cash used in operating activities:		
Depreciation	17,947	17,947
Donated facilities and administrative support from the University	244,292	198,133
Changes in assets and liabilities:		
Accounts receivable, net	(987)	782
Net OPEB asset	68,809	(26,058)
Accounts payable, payroll liabilities, compensated absences, and unearned revenue	6,084	967
Net pension/OPEB liability	492,283	(166,183)
Deferred outflows-pension and OPEB	(230,304)	(17,581)
Deferred inflows-pension and OPEB	(319,736)	(24,226)
Net Cash Flows Used in Operating Activities	\$ (748,129)	\$ (674,582)

See accompanying notes to financial statements.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 1 – Organization and Summary of Significant Accounting Policies

Organization and Basis of Presentation

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

The financial statements of the Station are intended to present the financial position, the changes in financial position and cash flows, of only that portion of the activities of Youngstown State University that is attributable to the transactions of the Station. They do not purport to, and do not present fairly the financial position of Youngstown State University as of June 30, 2023 and 2022, and the changes in its financial position and its cash flows, for the years then ended in accordance with accounting principles generally accepted in the United States of America.

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

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Summary of Significant Accounting Policies

The accompanying financial statements have been prepared using the economic resource measurement focus and the accrual basis of accounting. The Station reports as a business-type activity, as defined by the GASB. Business-type activities are those that are financed in whole or in part by fees charged to external parties for goods or services.

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

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

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

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

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

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

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

Unearned Revenue - Unearned revenue includes certain underwriting amounts received prior to the end of the fiscal year that relate to the subsequent accounting period. Unearned revenue at June 30, 2023 and June 30, 2022 were \$9,171 and \$7,642, respectively.

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

Deferred Outflows and Inflows of Resources – Deferred outflows of resources represent the consumption of resources that are applicable to a future reporting period, but do not require further exchange of goods or services. Deferred inflows of resources represent the acquisition of resources that are applicable to a future resource period. Deferred outflows and inflows of resources in the Station's financial statements relate to the Ohio Public Employees Retirement System (OPERS) pension/OPEB plan.

Pensions/OPEB – For purposes of measuring the net pension/OPEB asset/liability, deferred outflows of resources and deferred inflows of resources related to pensions/OPEB, pension/OPEB expense, information about the fiduciary net position of the pension/OPEB plans, and additions to/deductions from their fiduciary net position have been determined on the same basis as they are reported by the pension/OPEB plan, which use the economic resources measurement focus and the full accrual basis of accounting. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

Corporation for Public Broadcasting Community Service Grants - The Corporation for Public Broadcasting is a private, nonprofit grantmaking organization responsible for funding more than

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

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

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

Donated Facilities and Administrative Support - Donated facilities and administrative support represent the Station's allocated amounts of institutional support and donated facilities and is recorded as non-operating revenue and expenses in the Statement of Revenue, Expenses and Changes in Net Position. Administrative support is based on the Station's pro-rata share of the University's total salaries, wages and administrative expenses. Donated facilities are the Station's pro-rata share of the University's total plant expenses along with calculated occupancy costs.

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

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

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

Management's Estimates - The preparation of the financial statements in conformity with accounting principles generally accepted in the United States of America requires management to

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

make estimates and assumptions that affect the amounts reported in the financial statements and disclosures in the notes to financial statements. Actual results could differ from these estimates.

Adoption of New Accounting Pronouncements – In fiscal year 2023, the provisions of the following GASB Statements became effective:

- GASB Statement No. 91, *Conduit Debt Obligations*, issued May 2019. As a result of the adoption of GASB Statement No. 95, the requirements of this Statement are effective for reporting periods beginning after December 15, 2021. The primary objectives of this Statement are to provide a single method of reporting conduit debt obligations by issuers and eliminate diversity in practice associated with commitments extended by issuers, arrangements associated with conduit debt obligations, and related note disclosures.
- GASB Statement No. 94, *Public-Private and Public-Public Partnerships and Availability Payment Arrangements*, issued March 2020. The requirements of this Statement are effective for fiscal years beginning after June 15, 2022. The primary objective of this Statement is to improve financial reporting by addressing issues related to public-private and public-public partnership arrangements.
- GASB Statement No. 96, *Subscription-Based Information Technology Arrangements*, issued May 2020. The requirements of this Statement are effective for fiscal years beginning after June 15, 2022. This Statement provides guidance on the accounting and financial reporting for subscription-based information technology arrangements for government end users.
- GASB Statement No. 99, *Omnibus 2022*, issued April 2022. The requirements of this statement are effective immediately, with the exception of requirements related to leases, PPPs and SBITAs effective June 30, 2023; and the requirements related to financial guarantees and the classification and reporting of derivative instruments effective June 30, 2024. The Statements enhances comparability in accounting and financial reporting and improves the consistency of authoritative literature.

Adoption of above standards had no impact on the statements as a whole as there were no subscription-based information technology arrangements for the Station.

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

- GASB Statement No. 101, *Compensated Absences*, issued June 2022. The requirements of this Statement are effective for fiscal years beginning after December 15, 2023. The objective of this statement is to better meet the information needs of financial statement users by updating the recognition and measurement guidance for compensated absences.

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

Note 2 – Cash and Cash Equivalents

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

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

The University's cash and cash equivalents at June 30, 2023 and June 30, 2022 consisted of the following:

	2023	2022
Carrying Amount (Cash and cash equivalents)	<u>\$ 20,392,242</u>	<u>\$ 29,097,272</u>
FDIC Insured	\$ 571,114	\$ 750,000
Uninsured but collateralized by pools of securities pledged by the depository banks	1,668,881	1,263,509
Uninsured but assets held in name of YSU not pledged as collateral elsewhere	<u>18,274,158</u>	<u>27,757,496</u>
Bank Balance	<u>\$ 20,514,153</u>	<u>\$ 29,771,005</u>

The difference in carrying amount and bank balance is caused by items in transit and outstanding checks. The University's deposits held in safekeeping by a bank, as trustee or escrow agent, included in cash totaled \$8,808 at June 30, 2023 and \$47,230 at June 30, 2022, which approximates market. These deposits, including interest on the investments, are retained in the trust for projects funded by bond proceeds and payment of principal and interest on outstanding indebtedness.

The Station's cash and cash equivalents are included in these totals and were \$1,803,030 and \$1,918,160 at June 30, 2023 and June 30, 2022, respectively.

Credit risk for deposits is the risk that, in the event of a bank failure, the University's deposits may not be returned to the University. At June 30, 2023 and June 30, 2022, all uncollateralized or

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

uninsured deposits of the University are exposed to credit risk. The University's investment policy and asset allocation guidelines facilitate the management and monitoring of credit risk.

Note 3 - Investments

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

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

The University utilizes an investment advisor and investment managers for endowment funds. University endowment investments were \$13,620,238 as of June 30, 2023 and \$12,287,093 as of June 30, 2022. The Station's restricted investments represent WYSU-FM's endowment fund, which includes endowment corpus and undistributed investment earnings. Investment income is allocated to the Station's endowment fund on a monthly basis based on the value of WYSU-FM's endowment fund in relation to the total value of the University's endowments. The fair value of the Station's endowment investments was \$254,478 as of June 30, 2023 and \$240,243 as of June 30, 2022.

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

Level 1 – Investments reflect prices quoted in active markets.

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

Level 3 – Investments reflect prices based upon unobservable sources.

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

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

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

As of June 30, 2022, the Station had the following investments measured at fair value:

	Fair Value Measurement			Total
	Level 1	Level 2	Level 3	
U.S. Government Obligations	\$ -	\$ 14,415	\$ -	\$ 14,415
Corporate Bonds	-	26,428	-	26,428
U.S. Government Bonds	-	3,604	-	3,604
Bond Mutual Funds	11,772	-	-	11,772
Common Stock	145,586	-	-	145,586
Equity Mutual Funds	38,438	-	-	38,438
Totals	\$ 195,796	\$ 44,447	\$ -	\$ 240,243

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

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

As of June 30, 2022, the Station had the following investments and maturities using the segmented time distribution method:

Investment Type	Fair Value	Investment Maturities (in Years)			
		Less than 1	1-5	6-10	More than 10
U.S. Government Obligations	\$ 14,415	\$ 4,805	\$ 9,610	\$ -	\$ -
Corporate Bonds	26,428	2,883	23,545	-	-
Foreign Bonds	3,604	-	3,604	-	-
Bond Mutual Funds	11,772	11,772	-	-	-
Common Stock	145,586	145,586	-	-	-
Equity Mutual Funds	38,438	38,438	-	-	-
Totals	\$ 240,243	\$ 203,484	\$ 36,759	\$ -	\$ -

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

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

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

As of June 30, 2022, investments had the following quality credit ratings:

Investment Type	Fair Value	Aaa	Aa	A	Baa	Unrated
Corporate Bonds	\$ 26,428	\$ 4,934	\$ -	\$ 14,113	\$ 7,381	\$ -
Foreign Bonds	3,604	-	-	3,604	-	-
Bond Mutual Funds	11,772	6,746	-	-	4,968	58
Totals	\$ 41,804	\$ 11,680	\$ -	\$ 17,717	\$ 12,349	\$ 58

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Custodial Credit Risk - Custodial credit risk is the risk that in the event of the failure of the counterparty to a transaction, the University will not be able to recover the value of investments or collateral securities that are in the possession of an outside party. Investments that are both unregistered and uninsured are exposed to custodial credit risk if investments are held by the counterparty or are held by the counterparty's trust department or agent but not in the name of the University. At June 30, 2023 and 2022, the University had no exposure to custodial credit risk. The University does not address custodial credit risk in its investment policy and asset allocation guidelines.

Concentration of Credit Risk – Concentration of credit risk is the risk of loss attributed to the magnitude of investment in a single issuer. As of June 30, 2023, \$5,091,372 or 7% of the University's portfolio was held in an intermediate bond fund and \$6,082,117, or 8% was held in a short-term bond fund. As of June 30, 2022, \$5,113,700 or 7% was held in an intermediate bond fund and \$5,343,570 or 8% was held in a short-term bond fund.

Foreign Currency Risk - Foreign currency risk is the risk that changes in exchange rates will adversely affect the fair value of an investment or deposit. At June 30, 2023 and 2022, the University had no material exposure to foreign currency risk. The University does not address foreign currency risk in its investment policy and asset allocation guidelines.

Note 4 – Capital Assets

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

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

Capital assets activity for the year ended June 30, 2022 was as follows:

	Beginning Balance	Additions	Reductions	Ending Balance
Depreciable assets:				
Antenna and tower	\$ 552,979	\$ -	\$ -	\$ 552,979
Studio and broadcast equipment	133,032	-	-	133,032
Total cost	686,011	-	-	686,011
Less: Accumulated depreciation	564,599	17,947	-	582,546
Capital assets, net	<u>\$ 121,412</u>	<u>\$ (17,947)</u>	<u>\$ -</u>	<u>\$ 103,465</u>

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 5 – Compensated Absences

Compensated Absences at June 30, 2023 and June 30, 2022 were as follows:

	2023	2022
Beginning Balance	\$ 49,696	\$ 44,520
Additions	-	5,177
Reductions	1,901	-
Ending Balance	47,795	49,696
Less: current portion	8,253	9,646
Compensated Absences, noncurrent portion	<u>\$ 39,542</u>	<u>\$ 40,050</u>

Note 6 – Employee Benefit Plans

Plan Descriptions

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

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

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

Contributions

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Member contributions are set at the maximums authorized by the ORC. The plan's 2023 and 2022 employer and member contribution rates on covered payroll to each system are:

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

The required and actual contributions to the plans are:

	For the years ended 6/30			
	2023		2022	
	Pension	OPEB	Pension	OPEB
OPERS	\$ 51,671	-	\$ 50,659	-

Benefits Provided

OPERS

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

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

A death benefit of \$500 - \$2,500 is determined by the number of years of service credit of the retiree. Benefits may transfer to a beneficiary upon death with 1.5 years of service credits with the plan obtained within the last 2.5 years, except for law enforcement and public safety personnel who are eligible immediately upon employment.

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

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NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Net Pension Liability, Deferrals, and Pension Expense

At June 30, 2023 and 2022, the Station reported a liability for its proportionate share of the net pension liability of OPERS. For June 30, 2023, the net pension liability was measured as of December 31, 2022. For June 30, 2022, the net pension liability was measured as of December 31, 2021. The total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of those dates. The University's proportion of the net pension liability was based on a projection of its long-term share of contributions to the pension plan relative to the projected contributions of all participating reporting units, actuarially determined. At June 30, 2023 and 2022, the University's proportionate share of the net pension liability was 0.2371% and 0.2347%, respectively. The amount the University allocated to the Station is based on total retirement contributions for the Station's employees as a percentage of the total retirement contributions for the University. At June 30, 2023 and 2022, the Station's allocation of the University's proportion was 0.9529% and 0.9440%, respectively.

Plan	Measurement Date	Net Pension Liability		Proportionate Share		Percent Change	Percent Change
		2023	2022	2023	2022	2022-23	2021-22
OPERS	December 31	\$ 661,977	\$ 183,658	0.002260%	0.002216%	0.000044%	-0.000197%

For the years ended June 30, 2023 and 2022, the Station recognized pension expense of \$92,964 and (\$100,349), respectively. At June 30, 2023 and 2022, the Station reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	2023		2022	
	Deferred Outflows of Resources	Deferred Inflows of Resources	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ 22,764	\$ 821	\$ 10,154	\$ 5,426
Changes of assumptions	7,441	-	24,823	-
Net difference between projected and actual earnings on pension plan investments	192,483	-	-	233,350
Changes in proportion and differences between University contributions and proportionate share of contributions	5,737	246	4,458	9,283
University contributions subsequent to the measurement date	27,214	-	26,170	-
Totals	\$ 255,639	\$ 1,067	\$ 65,605	\$ 248,059

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

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

Year Ended June 30	Amount
2024	\$ 30,605
2025	45,224
2026	56,690
2027	94,282
2028	126
Thereafter	431
Totals	<u>\$ 227,358</u>

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

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

At June 30, 2023, the Station reported a liability for its proportionate share of the net OPEB liability of OPERS. For June 30, 2023, the net OPEB liability was measured as of December 31, 2022. For June 30, 2022, the net OPEB (asset) was measured as of December 31, 2021. The total OPEB liability/(asset) used to calculate the net OPEB liability/(asset) was determined by an actuarial valuation dated December 31, 2021 and 2020, respectively, rolled forward to the measurement date by incorporating the expected value of health care cost accruals, the actual health care payments, and interest accruals during the year for the defined benefit health care plans.

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

For plan years ending December 31, 2022 and 2021, OPERS did not allocate employer contributions to the OPEB plan. Therefore, OPERS' calculation of the employers' proportionate share is based on total contributions to the plan for both pension and OPEB.

At June 30, 2023 and 2022, the University's proportionate share of the net OPEB liability (asset) was 0.2324% and 0.2327%, respectively. The amount the University allocated to the Station is based on total retirement contributions for the Station's employees as a percentage of the total retirement contributions for the University. At June 30, 2023 and 2022, the Station's allocation of the University's proportion was 0.9529% and 0.944%, respectively.

Plan	Measurement Date	Net OPEB Liability (Asset)		Proportionate Share		Change 2022-23	Change 2021-22
		2023	2022	2023	2022		
OPERS	December 31	\$ 13,964	\$ (68,809)	0.002215%	0.002197%	0.000018%	-0.000203%

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

For the years ended June 30, 2023 and 2022, the Station recognized OPEB expense of (\$30,241) and (\$83,040), respectively. At June 30, 2023 and 2022, the Station reported deferred outflows of resources and deferred inflows of resources related to OPEB from the following sources.

	2023		2022	
	Deferred Outflows of Resources	Deferred Inflows of Resources	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ -	\$ 3,483	\$ -	\$ 10,437
Changes of assumptions	13,639	1,122	-	27,854
Net difference between projected and actual earnings on OPEB investments	27,735	-	-	32,804
Changes in proportion and differences between University contributions and proportionate share of contributions	587	2	1,691	6,256
University contributions subsequent to the measurement date	-	-	-	-
Totals	\$ 41,961	\$ 4,607	\$ 1,691	\$ 77,351

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

Year Ended June 30	Amount
2024	\$ 4,579
2025	10,729
2026	8,648
2027	13,398
2028	-
Thereafter	-
Totals	\$ 37,354

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Actuarial Assumptions

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

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

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

OPERS	
Valuation date - Pension	December 31, 2021
Valuation date - OPEB	December 31, 2020
Actuarial cost method	Individual entry age
Cost of living	2.05% - 3.00%
Salary increases, including inflation	2.75% - 10.75%
Inflation	2.75%
Investment rate of return - Pension	6.90%, net of investment expense, including inflation
Investment rate of return - OPEB	6.00%, net of investment expense, including inflation
Health care cost trend rates	5.50% initial, 3.50% ultimate in 2034
Experience study date	Period of 5 years ended December 31, 2020
Mortality basis	Pre-retirement mortality rates are based on 130% of the Pub-2010 General Employee Mortality tables (males and females) for State and Local Government divisions and 170% of the Pub-2010 Safety Employee Mortality tables (males and females) for the Public Safety and Law Enforcement divisions. Post-retirement mortality rates are based on 115% of the PubG-2010 Retiree Mortality Tables (males and females) for all divisions. Post-retirement mortality rates for disabled retirees are based on the PubNS-2010 Disabled Retiree Mortality Tables (males and females) for all divisions. For all of the previously described tables, the base year is 2010 and mortality rates for a particular calendar year are determined by applying the MP-2020 mortality improvement scales (males and females) to all of these tables.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Pension Discount Rate

The projection of cash flows used to determine the discount rate assumed that employee contributions will be made at the current contribution rate and that employer contributions will be made at contractually required rates for all plans. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments for current active and inactive employees. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability. The discount rates used to measure the total pension liability for OPERS were 6.90 percent for both the plan years ended December 31, 2022 and 2021, respectively.

OPEB Discount Rate

The projection of cash flows used to determine the discount rate assumed that employee contributions will be made at the current contribution rate and that employer contributions will be made at contractually required rates for all plans. Plans that project fiduciary net position to be insufficient to make all projected future benefit payments for current active and inactive employees used a blended discount rate between the long-term expected rate of return on plan investments and a 20-year municipal bond rate applied to all periods of projected benefit payments to determine the total OPEB liability/(asset).

OPERS OPEB Discount Rate - The discount rates used to measure the total OPEB liabilities/(assets) were 5.22 percent and 6.00 percent for the plan years ended December 31, 2022 and 2021, respectively. At December 31, 2022 the plan's fiduciary net position was projected to become insufficient to make all projected future benefit payments for current active and inactive employees. Therefore, a blended rate was used, which consisted of the long-term expected rate of return on OPEB plan investments (6.00 percent) for the funded benefit payments and Fidelity Index's 20-Year Municipal GO AA Index of 4.05 percent as of December 31, 2022. At December 31, 2021, the plan's fiduciary net position was projected to be available to make all projected future benefit payments for current active and inactive employees. Therefore, the long term expected rate of return on OPEB plan investments was applied to all periods of projected benefit payments to determine the total OPEB liability.

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

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

OPERS as of 12/31/21				
Investment Category	Pension Portfolio		Health Care Portfolio	
	Target Allocation	Long-Term	Target Allocation	Long-Term
		expected Real Rate of Return		expected Real Rate of Return
Fixed income	24.0%	1.32%	34.0%	1.07%
Domestic Equities	21.0%	5.64%	25.0%	5.64%
Real Estate	11.0%	5.39%	0.0%	0.00%
Private Equity	12.0%	10.42%	0.0%	0.00%
International Equity	23.0%	7.36%	25.0%	7.36%
Risk Parity	5.0%	2.92%	2.0%	2.92%
REITs	0.0%	0.00%	7.0%	3.71%
Other Invesments	4.0%	2.85%	7.0%	1.93%
	<u>100.0%</u>		<u>100.0%</u>	

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

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

2023 (\$ in thousands)						
Plan	1% Decrease		Current Discount Rate		1% Increase	
OPERS	5.90%	\$ 997	6.90%	\$ 662	7.90%	\$ 383

2022 (\$ in thousands)						
Plan	1% Decrease		Current Discount Rate		1% Increase	
OPERS	5.90%	\$ 504	6.90%	\$ 184	7.90%	\$(83)

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

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

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

Plan	1% Decrease		2023 (\$ in thousands)		1% Increase	
	Rate	Amount	Current Discount Rate	Amount	Current Discount Rate	Amount
OPERS	4.22%	\$ 48	5.22%	\$ 14	6.22%	\$ (14)

Plan	1% Decrease		2022 (\$ in thousands)		1% Increase	
	Rate	Amount	Current Discount Rate	Amount	Current Discount Rate	Amount
OPERS	5.00%	\$ (40)	6.00%	\$ (69)	7.00%	\$ (92)

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

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

Plan	1% Decrease		2023 (\$ in thousands)		1% Increase	
	Trend Rate	Amount	Current Trend Rate	Amount	Current Trend Rate	Amount
OPERS		\$13		\$14		\$15

Plan	1% Decrease		2022 (\$ in thousands)		1% Increase	
	Trend Rate	Amount	Current Trend Rate	Amount	Current Trend Rate	Amount
OPERS		(\$70)		(\$69)		(\$68)

Pension plan and OPEB plan fiduciary net position

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

Benefit changes

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

Assumption changes

During the measurement period ended December 31, 2022, certain assumption changes were made by the plan. The OPERS OPEB discount rate decreased from 6.00 percent to 5.22 percent, which impacted the annual actuarial valuation for OPEB prepared as of December 31, 2022. During the measurement period ended December 31, 2021, certain assumption changes were made by the plan. The OPERS pension discount rate was reduced from 7.20 percent to 6.90 percent, which impacted the annual actuarial valuation for the pension liability as of December 31, 2021.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Payable to the Pension Plan and OPEB Plan

The Station reported a payable of \$9,617 and \$8,583 for the outstanding amount of contributions to the OPERS pension plan required for the years ended June 30, 2023 and June 30, 2022, respectively.

Defined Contribution Pension Plan

The Alternative Retirement Plan (ARP) is a defined contribution pension plan, under IRS Section 401(a), and established by Ohio Amended Substitute House Bill 586 (ORC 3305.02) on March 31, 1997, for public institutions of higher education. The University's Board of Trustees adopted the University's plan on December 11, 1998. Full-time employees are eligible to choose a provider, in lieu of OPERS, from the list of nine providers currently approved by the Ohio Department of Insurance and who hold agreements with the University. Employee and employer contributions equal to those required by OPERS are required for the ARP, less any amounts required to be remitted to the state retirement system in which the employee would otherwise have been enrolled.

Eligible employees have 120 days from their date of hire to make an irrevocable election to participate in the ARP. Under this plan, employees who would have otherwise been required to be in OPERS, and who elect to participate in the ARP, must contribute the employee's share of retirement contributions to one of nine private providers approved by the Ohio Department of Insurance. The legislation mandates that the employer must contribute an amount to the state retirement system to which the employee would have otherwise belonged, based on an independent actuarial study commissioned by the Ohio Retirement Study Council and submitted to the Ohio Department of Higher Education. That amount is 2.24 percent and 2.44 percent for OPERS for the years ended June 30, 2023 and 2022. If the employee was hired on or after August 2005, the employer contributes 6.00 percent. The employer also contributes what would have been the employer's contribution under OPERS, less the aforementioned percentages, to the private provider selected by the employee. The University plan provides these employees with immediate plan vesting. The ARP does not provide disability benefits, survivor benefits, or postretirement health care. Benefits are entirely dependent on the sum of contributions and investment returns earned by each participant's choice of investment options. OPERS also offers a defined contribution plan and a combined plan with features of both a defined contribution plan and a defined benefit plan. There were no contributions made to the ARP for the fiscal years ended June 30, 2023 and 2022. Contributions were equal to the required contributions for each year.

Note 7 - Related Party

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

The operations of WYSU-FM are supported by general appropriations from the University. The University's support allocation totaled \$378,222 and \$401,139 in direct support for fiscal years 2023 and 2022, respectively, and \$244,292 and \$198,133 in indirect administrative support and donated facilities.

Note 8 – Risk Management

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

Note 9 – Nonfederal Financial Support

The Corporation for Public Broadcasting (CPB) allocates a portion of its funds annually to public broadcasting entities, primarily based on Nonfederal Financial Support (NFFS). NFFS is defined as the total value of cash and the fair market value of property and services received as either a contribution or a payment and meeting all of the respective criteria for each.

A contribution is cash, property or services given to a public broadcasting entity for general operational purposes. Support received as a contribution by a public broadcasting entity must meet the following criteria to be includable as NFFS: (1) the source may be an entity except the federal government or any other public broadcasting entity; (2) the contribution may take the form of a gift, grant, bequest, donation or appropriation; (3) the purpose must be for the construction or operation of a noncommercial, educational public broadcast station or for the production, acquisition, distribution or dissemination of educational television or radio program and related activities; and (4) the recipient must be a public broadcasting entity on behalf of a public broadcast station. However, to eliminate distortions in the TV CSG grant program precipitated by extraordinary infusions of new capital investments in DTV, all capital contributions received for purposes of acquiring new equipment or upgrading existing or building new facilities regardless of source or form of the contribution are not included in calculating the fiscal year 2023 or fiscal year 2022 NFFS. This change excludes all revenues received for any capital purchases.

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

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

NOTES TO FINANCIAL STATEMENTS (CONT.) FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

public broadcast station; and (4) the recipient must be a public broadcasting entity on behalf of a public broadcast station.

Reported NFFS for the Station was \$1,132,504 and \$1,161,471 for the radio fund for 2023 and 2022, respectively.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

REQUIRED SUPPLEMENTARY INFORMATION

Schedule of the Station's Proportionate Share of the Net Pension Liability Plan Years Ended 2014 to 2022

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

The plan year ends on December 31 for OPERS.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

REQUIRED SUPPLEMENTARY INFORMATION

Schedules of the Station's Pension Contributions

Fiscal Year	Statutorily required contribution	Contributions in relation to the statutorily required contributions	Annual contribution deficiency	Station's covered payroll	Contributions recognized by the pension plan in relation to the statutorily or contractually required employer contribution as a percent of the employer's covered payroll
Ohio Public Employees Retirement System (OPERS)					
2023	\$ 51,671	\$ 51,671	\$ -	\$ 369,079	14.00%
2022	\$ 50,659	\$ 50,659	\$ -	\$ 361,850	14.00%
2021	\$ 46,172	\$ 46,172	\$ -	\$ 329,801	14.00%
2020	\$ 57,331	\$ 57,331	\$ -	\$ 409,509	14.00%
2019	\$ 65,665	\$ 65,665	\$ -	\$ 472,860	13.89%
2018	\$ 63,928	\$ 63,928	\$ -	\$ 474,256	13.48%
2017	\$ 57,269	\$ 57,269	\$ -	\$ 459,488	12.47%
2016	\$ 55,912	\$ 55,912	\$ -	\$ 465,061	12.02%
2015	\$ 55,579	\$ 55,579	\$ -	\$ 461,406	12.05%

Changes of benefit terms

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

Changes of assumptions

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

During the plan year ended December 31, 2021, there were changes to several assumptions for OPERS. The discount rate was reduced from 7.20% to 6.90%. The wage inflation dropped from 3.25% to 2.75%. The projected salary increase range changed from 3.25%-10.75% to 2.75%-10.75%. The experience study changed from the 5-year period ended December 31, 2015 to the 5-year period ended December 31, 2020. The mortality tables used changed from RP2014 to PUB-2010.

During the plan year ended December 31, 2018, the discount rate was reduced from 7.50% to 7.20%. During the plan year ended December 31, 2016, there were changes to several assumptions for OPERS. The wage inflation dropped from 3.75% to 3.25%. The projected salary increase range changed from 4.25%-10.05% to 3.25%-10.75%. The mortality tables used changed from RP-2000 to RP-2014.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

REQUIRED SUPPLEMENTARY INFORMATION

Schedules of the Station's Proportionate Share of the Net OPEB Liability (Asset) Plan Years Ended 2017 to 2022

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

The plan year ends on December 31 for OPERS.

WYSU-FM YOUNGSTOWN STATE UNIVERSITY RADIO

REQUIRED SUPPLEMENTARY INFORMATION

Schedules of the Station's OPEB Contributions

Fiscal Year	Statutorily required contribution	Contributions in relation to the statutorily required contributions	Annual contribution deficiency	Station's covered payroll	Contributions recognized by the OPEB plan in relation to the statutorily or contractually required employer contribution as a percent of the employer's covered payroll
Ohio Public Employees Retirement System (OPERS)					
2023	\$ -	\$ -	\$ -	\$ 369,079	0.00%
2022	\$ -	\$ -	\$ -	\$ 361,850	0.00%
2021	\$ -	\$ -	\$ -	\$ 329,801	0.00%
2020	\$ -	\$ -	\$ -	\$ 409,509	0.00%
2019	\$ -	\$ -	\$ -	\$ 472,860	0.00%
2018	\$ 2,468	\$ 2,468	\$ -	\$ 474,256	0.52%

Changes of benefit terms

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

Changes of assumptions

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

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

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

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

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

Independent Auditor's Report

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

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the business-type activities of WYSU-FM Youngstown State University Radio (the "Station"), a department of Youngstown State University, which comprise the basic statement of net position as of June 30, 2023 and the basic statements of revenues, expenses, and changes in net position and cash flows for the year then ended, and the related notes to the financial statements and have issued our report thereon dated December 21, 2023.

Report on Internal Control Over Financial Reporting

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

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

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

Report on Compliance and Other Matters

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

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

Purpose of This Report

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

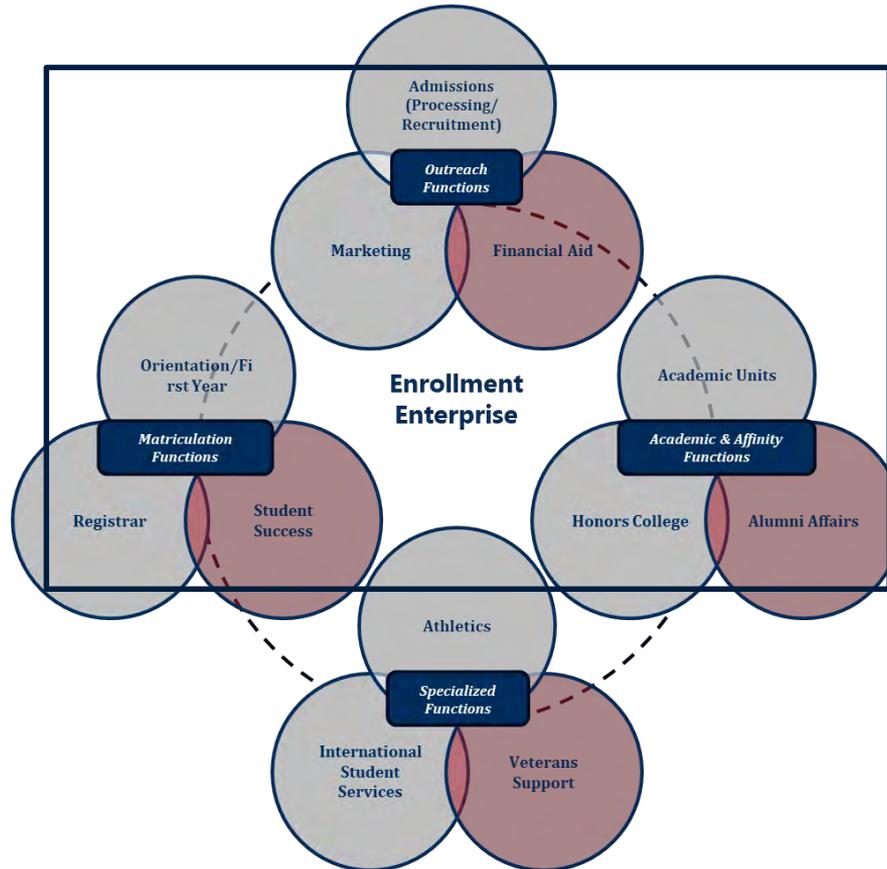
Plante & Moran, PLLC

December 21, 2023



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

ENROLLMENT ENTERPRISE



Building a Best-in-Class Enrollment and Recruitment Enterprise



Youngstown State
University/RNL Partnership

Charles Ramos - Vice President/Account Mgt



Leveraging RNL's Research and Recognized Expertise

Building New YSU Capabilities to Establish a Long-Term Competitive Advantage

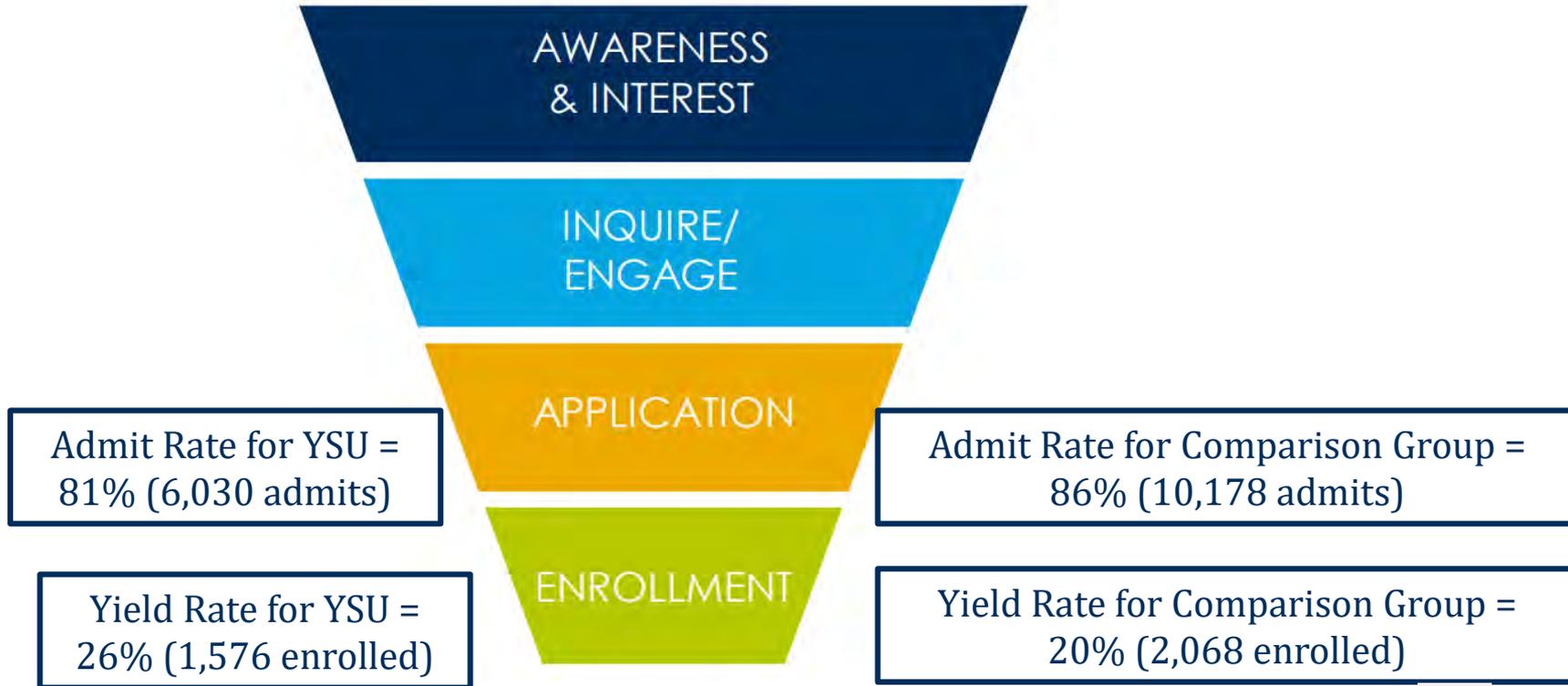
- Train and Consult enrollment leadership and recruitment staff 'up' to First Class level(s) – allowing YSU to build internal capabilities that are continually optimized
- Develop, Consult and Execute on strategic plans – ensuring successful launch, adherence to, and on-going evolution of the plan to produce increased sustainable enrollment and revenue growth
- Position YSU at a distinct competitive advantage in the state and region
- YSU and RNL will work together in partnership to achieve/exceed goals

Transforming YSU for Long-Term Sustainable Growth

Optimizing the Enrollment Enterprise

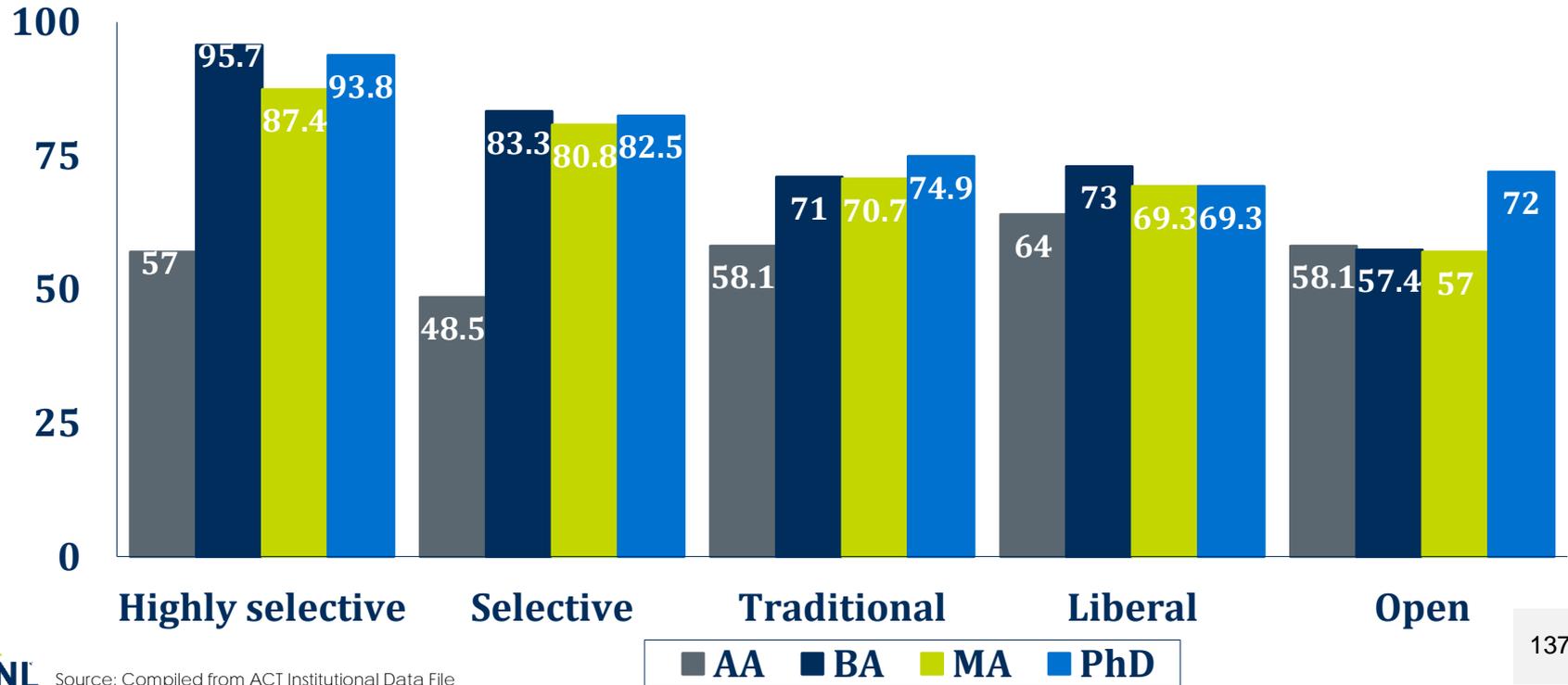
- Leverage RNL research to inform and affect strategy and execution of best-in-class services and recruitment practices
- Benefit from nimble, market-sensitive approach that values engagement, nurturing and conversion
 - Meet the market where it is, rather than force the market to meet YSU
- Promote a value proposition-based approach conveyed through multiple channels to ensure widespread consumption from a market that now sees a higher ed degree as a commodity
- Enhancement of not just YSU's current state, but implementation of a transformative approach for the institution, and the overall enrollment enterprise,
 - Fully optimized – moving toward a more self-sustaining entity driving long-term, annual enrollment and revenue growth
- Establish a meaningful competitive advantage in the state and region via a YSU/RNL partnership

Perspective on YSU's Funnel Conversion



Youngstown State University retention rate = 78%

First- to Second-Year retention rates for Public Institutions



BROADER LANDSCAPE

Ohio

The competition factor



	In-state Counts	Percentage	Rank
2023-24 High School Seniors*	132,520		7
Institutions of Higher Education**	199		6
College Continuation***	87,478	66.0%	29
Leave the State to Go to College***	14,203	10.7%	36

Largest Institutions***	In-state Freshman***	Estimated Market Share ^
Ohio State University-Main Campus	6140	8.96%
University of Cincinnati-Main Campus	4119	5.71%
Columbus State Community College	3653	5.06%
Sinclair Community College	3109	4.31%
Kent State University at Kent	3087	4.28%

Remaining Students	Remaining Institutions	Students Per Institution
53,167	194	274

Sources:

*Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, www.knocking.wiche.edu

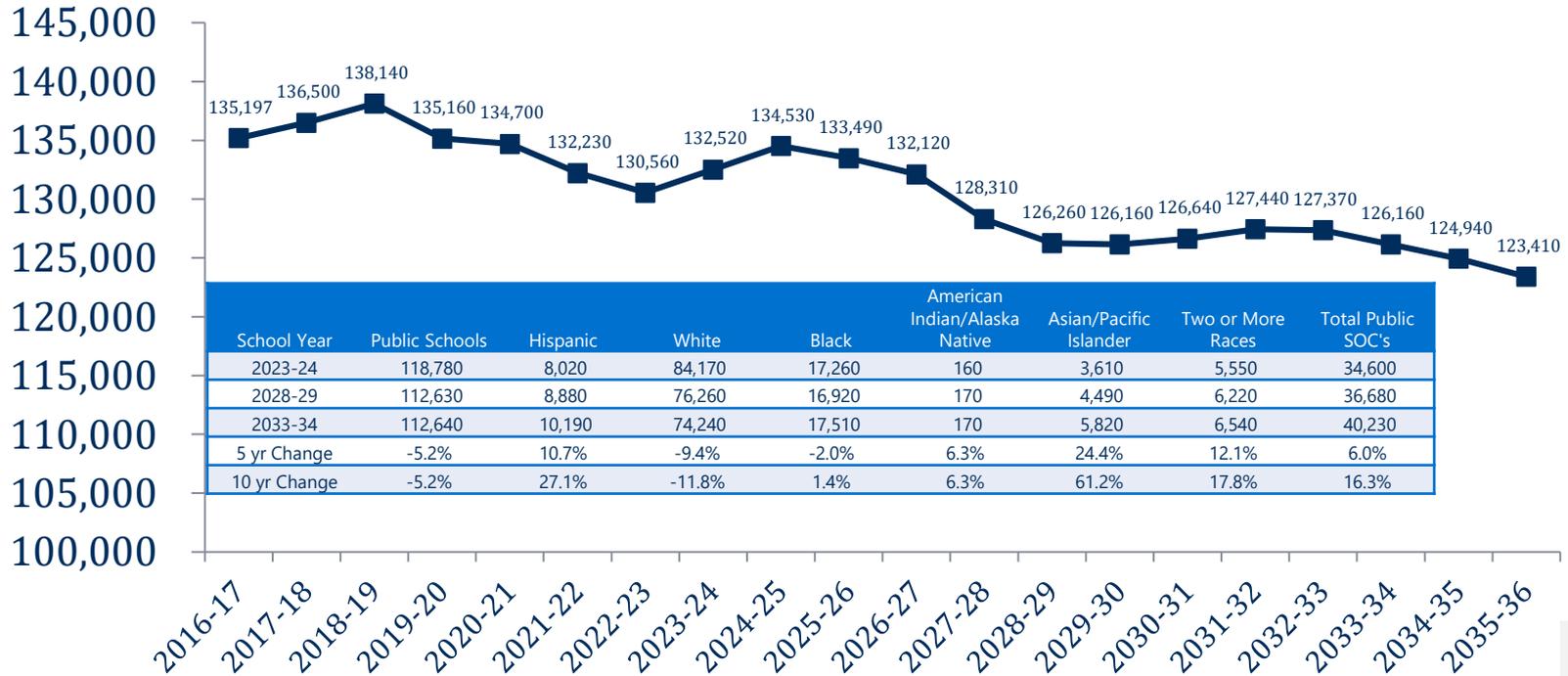
**National Center for Education Statistics, IPEDS, 2022

***National Center for Education Statistics, Freshman Migration Data for 2020-21

BROADER LANDSCAPE

Projected change in high school graduates

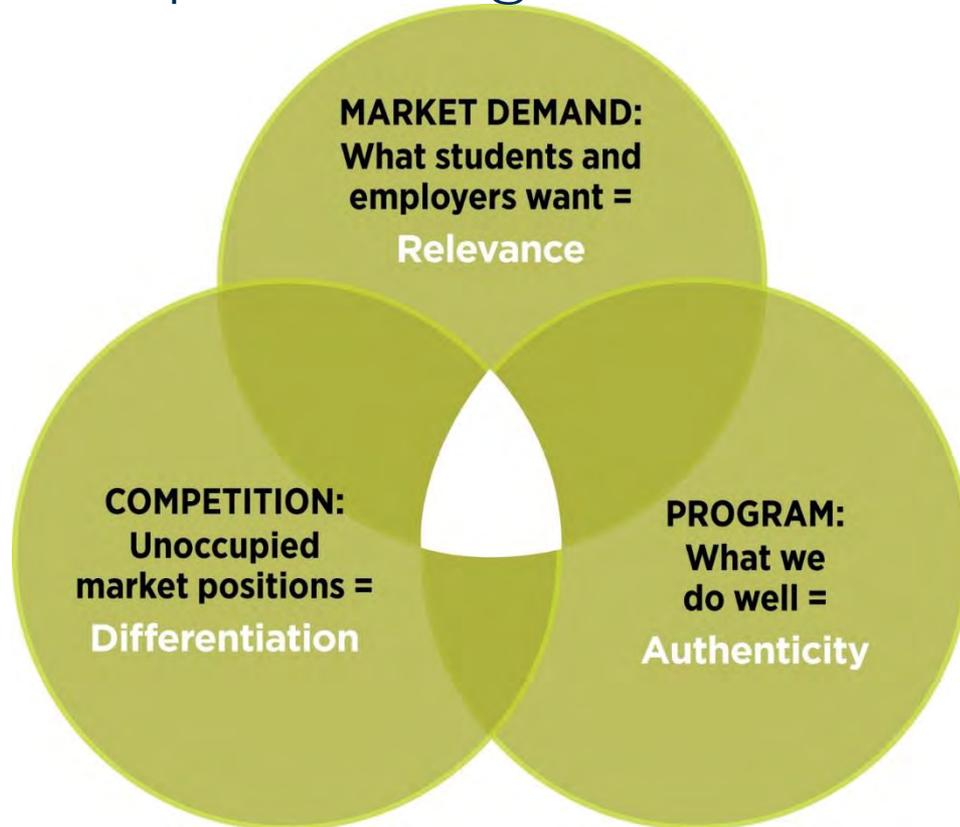
Ohio 2017-36



Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2020*, www.knocking.wiche.edu

MARKET RESEARCH & ENROLLMENT PROJECTION MODELING

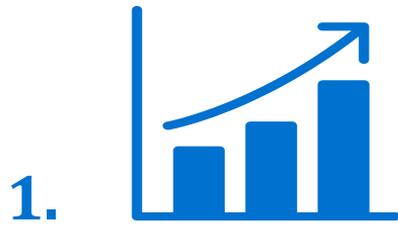
A rubric for prioritizing academic programs



MARKET RESEARCH & ENROLLMENT PROJECTION MODELING

Enrollment Projection Model Methodology

Know your enrollment pipeline backwards and into the future!



Predict overall market (recruitment) size

Data:

- Freshmen/Transfer: NCES kindergarten
- Adults: Pull most recent census projections

Equation:

- Weighted retention formula to predict market size

Predict market size through 2033



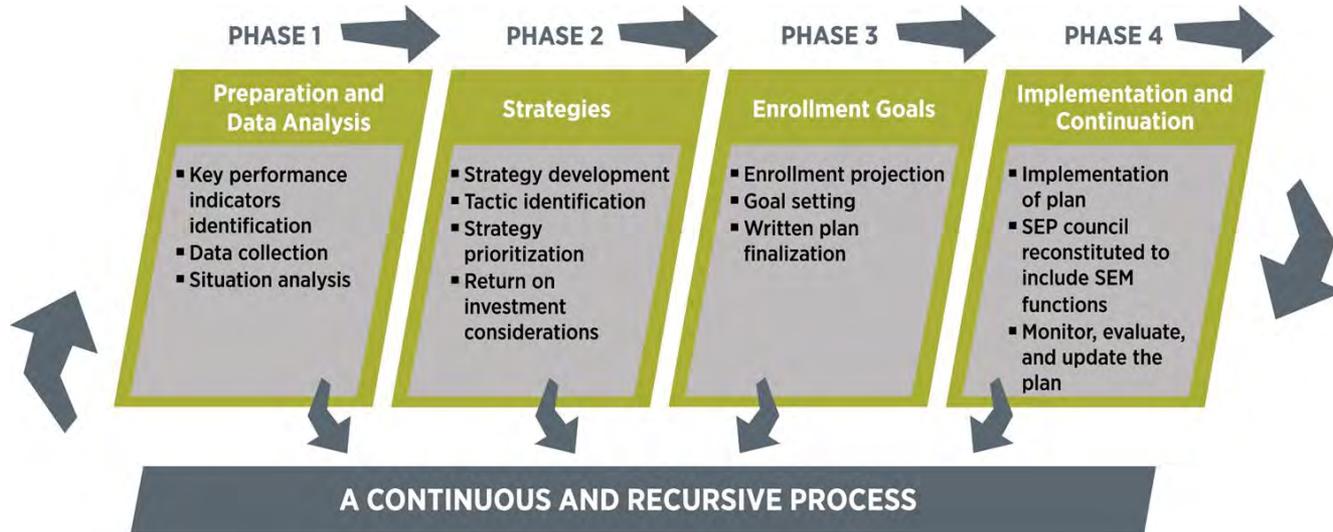
Examine your market share for past three years



Combine market share and demographic trends to establish predicted enrollment

- Best case
- Worst case
- Maintain

Strategic Enrollment - Planning Phases



RNL Student Search to Enrollment

Solution Objective and Funnel Impact

Student Search to Enrollment Objective

RNL Student Search to Enrollment helps institutions maximize ROI and reach enrollment goals by creating a continuous engagement process with students and parents at every stage of the enrollment journey.

Backed by RNL's team of experts, this comprehensive solution combines compelling creative, analytical insights, and strategy to drive student conversion at every stage of the enrollment funnel.

Funnel Impact

Build Awareness and Generate Leads



Build and Qualify Inquiry Pool



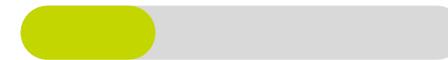
Convert to Applicant



Admit

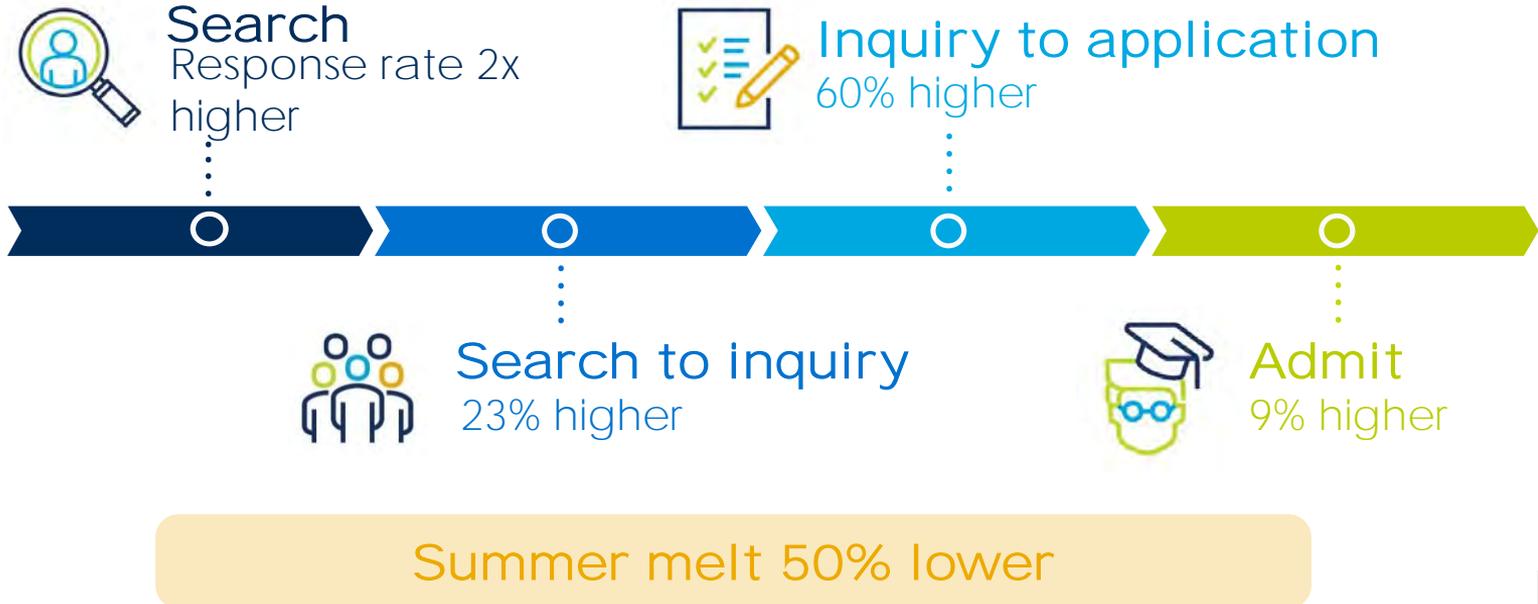


Enroll



RNL Student Search to Enrollment

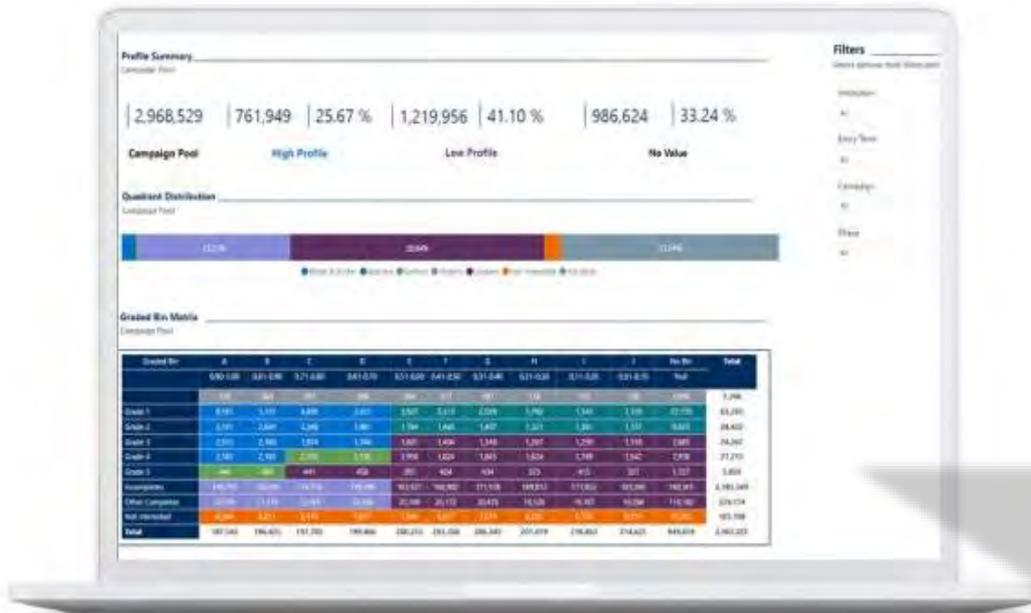
Student and Parent Connections Lift Conversion



RNL Student Search to Enrollment

RNL's SmartView Dashboards

See your data better than ever before!

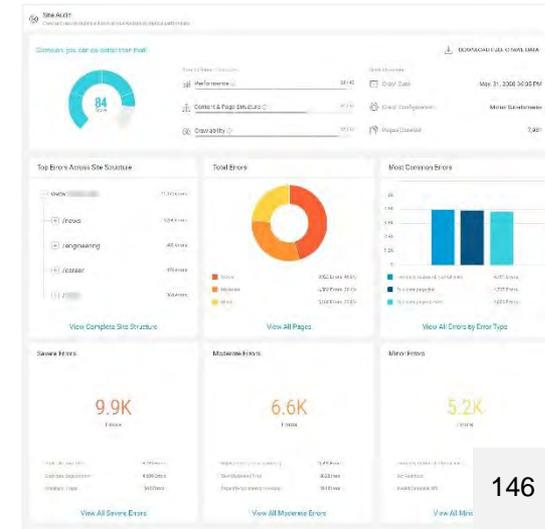


Search Engine Optimization

Combine BrightEdge Technology with Higher Ed Expertise

We measure our success by your results!!

- Use of the BrightEdge SEO management platform to conduct keyword research and develop SEO strategy;
- Ongoing benchmarking against natural and aspirant competitors;
- Site auditing to assess technical performance and identify site errors that impact SEO performance, with prioritized recommendations for improvement; and
- Development of performance dashboards and assessment of performance results at the keyword and website, including integration with your Google Analytics account.



RNL Communication Flow Audit

Audience Message Development

How it Works



Onboarding

RNL schedules a phone conference to review project goals and set dates for the assessment.



Pre-Visit Review

YSU submits all existing communication flows to RNL before the on-campus visit.



Campus Visit

RNL visits campus to review and assess YSU's current communications plans.



Our Comm Flow Audit will include a specific review of YSU's transfer student outreach efforts with recommendations to refine your strategies for admitting and attracting transfer students.



Predictive Analytics that Impact Enrollment

ATTRITION CURVES

C—What some have called the “Murky Middle”

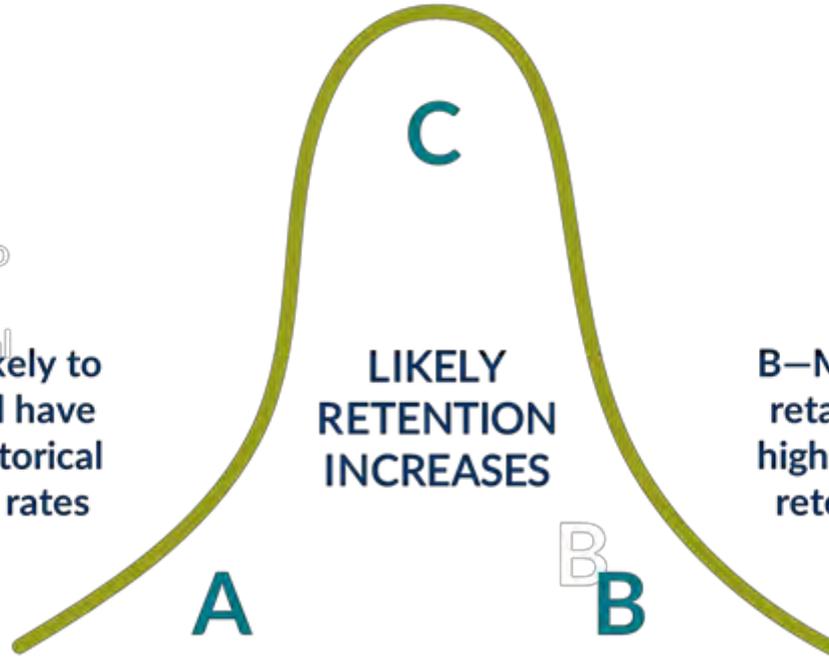
*Allows for
focused
strategies on
focused targets*

A—Less likely to
retain and have
lowest historical
retention rates

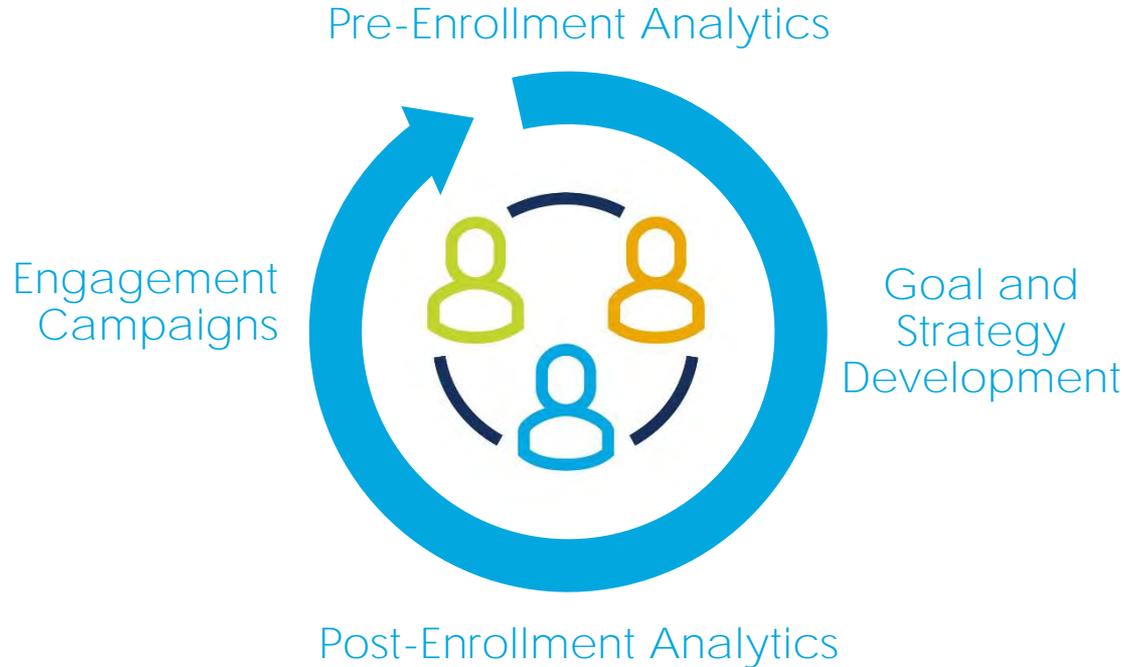
A—Less likely to
retain and have
lowest historical
retention rates

LIKELY
RETENTION
INCREASES

B—Most likely to
retain and have
highest historical
retention rates



RNL Student Success



Achieve retention and completion goals through:

- Actionable analytics
- Motivational and satisfaction surveys
- Student engagement campaigns

Youngstown State University

- ★ Senior Search Launch
- ★ Applicant Cultivator Launch
- ★ So/Jr Search Launch
- ★ Campaign Launch

Service	MAR	APR	MAY	JUNE	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB
RNL Student Search to Enrollment	<div style="background-color: #800040; color: white; padding: 5px;"> Creative & Campaign Buildout/Boost Launch ★ (Jul) ★ (Aug) ★ (Sep) </div>											
Comm Flow Audit	<div style="background-color: #003366; height: 20px; width: 100%;"></div>											
Search Engine Optimization (SEO)	<div style="background-color: #666699; color: white; padding: 5px;"> Contract Signing & Kickoff Call Creative Discovery ★ BE Dashboard Setup Monitoring Campaign for Technical Success </div>											
RNL Market Research	<div style="background-color: #0066b3; color: white; padding: 5px;"> Enrollment Projection Models </div> <div style="background-color: #92d050; color: black; padding: 5px; margin-top: 5px;"> Phase 1: Academic Program Environmental Scan </div> <div style="background-color: #92d050; color: black; padding: 5px; margin-top: 5px;"> Phase 2: Custom Academic Program Demand Survey </div>											
RNL Student Success	<div style="background-color: #ffcc00; color: black; padding: 5px;"> Retention Consulting: Building Retention Plan & SRP SSI CSI On-going Consulting & Training </div>											
Strategic Enrollment Planning (SEP)	<div style="background-color: #333333; color: white; padding: 5px;"> Data Analysis Strategy Development Goal Development Implementation & Continuation </div>											

Launch of Inquiry and Application Generation Campaigns



Youngstown State University
High Level Summary
2023 IPEDS DATA FEEDBACK REPORT

Data is typically for Fall 2022, FY-22, or from the 2021-2022 academic year

March 2024

Board of Trustees

- YSU is slightly more selective (81% vs. 88% admitted) and has an equivalent yield (26% vs. 25% of those admitted matriculated fall term).
- YSU average net price is lower (by \$1,125) while published tuition and fees is higher (by \$1,493) compared to peers.
- A slightly lower percentage of YSU students receive aid (93% vs. 95%) while the amount of any grant aid received is lower for YSU students compared to peers (\$7,631 vs. \$9,612).
- The retention rate for first-time bachelor's degree-seeking full-time students was higher for YSU for the Fall 2021 cohort (78% vs. 69%).
- The 6-y graduation rate for the 2016 cohort is higher for YSU (49% vs. 46%) while the graduation rate for black/African American is lower for YSU (31% vs. 37%) (30% vs. 36% in previous report), while YSU graduation rate for non-resident aliens is lower compared to peers (33% vs. 57%) (higher for YSU in previous report (61% vs. 56%).
- 6-y graduation rate for the 2016 cohort is higher for YSU (49% vs. 46%) than compared to peers. The transfer out rate for YSU is 19%, while the peer transfer-out rate is 26%.
- For YSU, the 6-y graduation rate for the 2015 cohort is 8% higher than that of the 2013 cohort, whereas there was no change in the graduation rate for the same comparison for peers.
- YSU non-first-time, full-time, degree/certificate seeking undergraduate PELL recipients (2014-15 cohort) have a lower 8-y graduation rate (47% vs. 59%), and YSU non-PELL recipients have a lower graduation rate (59% vs. 65%) compared to peers.
- State funding constitutes a smaller percentage of revenue for YSU compared to peers (22% vs. 28%), while 7% vs. 1% of revenue is derived from private gifts, grants, and contracts for YSU and peers, respectively.
- YSU invests 62% while peers invest 58% of core expenses in the areas of instruction, academic support, and research per student FTE compared to total core expenses.
- YSU spends \$17,278 for the seven standard expense categories while peers spend \$20,887 per student FTE (peers spend \$3,609 or 21% more than YSU per student FTE).
- Average salaries (9-month) for all academic ranks is \$75,963 for YSU vs. \$80,317 for Peers (5.4% lower than Peers).
- YSU has slightly more (49%) compared to peers (47%) of individuals in instruction and instructional support occupational categories considering all 10 categories of employment.
- YSU has 1,123 while peers have 1,277 FTE staff for 10 occupational categories (YSU employs 154 or 12% fewer FTE staff).

IPEDS DATA FEEDBACK REPORT 2023

What Is IPEDS?

The Integrated Postsecondary Education Data System (IPEDS) is a system of survey components that collects data from all institutions that provide postsecondary education and are eligible to receive Title IV funding across the United States and other U.S. jurisdictions.

These data are used at the federal and state level for policy analysis and development; at the institutional level for benchmarking and peer analysis; and by students and parents, through the College Navigator (<https://nces.ed.gov/collegenavigator/>), an online tool to aid in the college search process. Additional information about IPEDS can be found on the website at <https://nces.ed.gov/ipeds>.

What Is the Purpose of This Report?

The Data Feedback Report is intended to provide institutions a context for examining the data they submitted to IPEDS. The purpose of this report is to provide institutional executives a useful resource and to help improve the quality and comparability of IPEDS data.

What Is in This Report?

The figures in this report provide a selection of indicators for your institution to compare with a group of similar institutions. The figures draw from the data collected during the 2022-23 IPEDS collection cycle and are the most recent data available. The inside cover of this report lists your selected comparison group of institutions and the criteria used for their selection. The Methodological Notes at the end of the report describe additional information about these indicators and the pre-selected comparison group.

Where Can I Do More with IPEDS Data?

Each institution can access previously released Data Feedback Reports from 2005 and customize this 2023 report by using a different comparison group and IPEDS variables of its choosing. To learn how to customize the 2023 report, visit this resource page <https://nces.ed.gov/ipeds/Help/View/2>. To download archived reports or customize the current Data Feedback Report, visit the 'Use the Data' portal on the IPEDS website <https://nces.ed.gov/ipeds> and click on Data Feedback Report.

Youngstown State University
Youngstown, OH

COMPARISON GROUP

Comparison group data are included to provide a context for interpreting your institution’s indicators. If your institution did not define a custom comparison group for this report by July 15, 2023 NCES selected a comparison group for you. (In this case, the characteristics used to define the comparison group appears below.) The customized Data Feedback Report function available at <https://nces.ed.gov/ipeds/use-the-data/> can be used to reproduce the figures in this report using different peer groups.

The custom comparison group chosen by Youngstown State University includes the following 29 institutions:

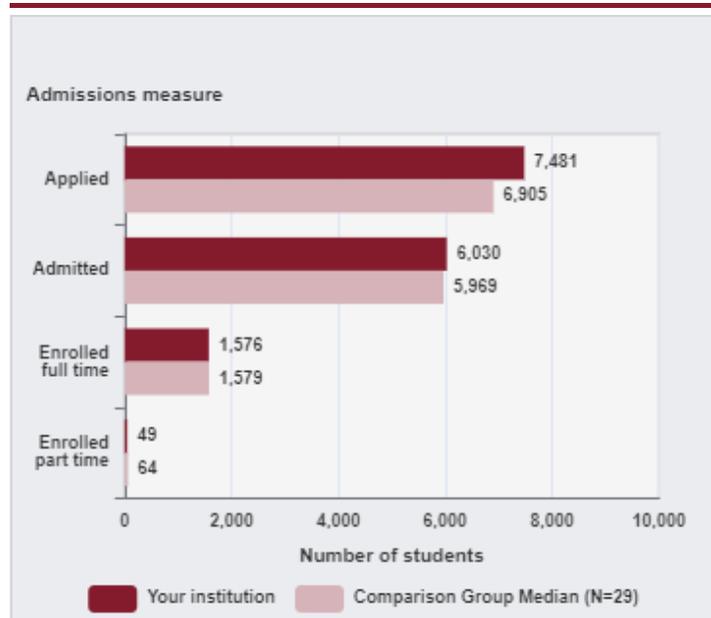
- ▶ [Austin Peay State University](#) (Clarksville, TN)
- ▶ [California State University-Chico](#) (Chico, CA)
- ▶ [California State University-Fresno](#) (Fresno, CA)
- ▶ [California State University-Sacramento](#) (Sacramento, CA)
- ▶ [Cleveland State University](#) (Cleveland, OH)
- ▶ [Columbus State University](#) (Columbus, GA)
- ▶ [Eastern Michigan University](#) (Ypsilanti, MI)
- ▶ [Eastern Washington University](#) (Cheney, WA)
- ▶ [Jacksonville State University](#) (Jacksonville, AL)
- ▶ [Kean University](#) (Union, NJ)
- ▶ [Lamar University](#) (Beaumont, TX)
- ▶ [McNeese State University](#) (Lake Charles, LA)
- ▶ [Middle Tennessee State University](#) (Murfreesboro, TN)
- ▶ [Northeastern State University](#) (Tahlequah, OK)
- ▶ [Northern Kentucky University](#) (Highland Heights, KY)
- ▶ [Northwestern State University of Louisiana](#) (Natchitoches, LA)
- ▶ [Purdue University Fort Wayne](#) (Fort Wayne, IN)
- ▶ [Sam Houston State University](#) (Huntsville, TX)
- ▶ [San Francisco State University](#) (San Francisco, CA)
- ▶ [Southeastern Louisiana University](#) (Hammond, LA)
- ▶ [Southern Oregon University](#) (Ashland, OR)
- ▶ [Texas A & M University-Commerce](#) (Commerce, TX)
- ▶ [Texas A & M University-Corpus Christi](#) (Corpus Christi, TX)
- ▶ [The University of Texas at Tyler](#) (Tyler, TX)
- ▶ [The University of Texas Rio Grande Valley](#) (Edinburg, TX)
- ▶ [University of Akron Main Campus](#) (Akron, OH)
- ▶ [University of Central Oklahoma](#) (Edmond, OK)
- ▶ [University of Memphis](#) (Memphis, TN)
- ▶ [University of Michigan-Flint](#) (Flint, MI)

The figures in this report have been organized and ordered into the following topic areas:

Topic Area	Figures	Pages
1) Admissions (only for non-open-admissions schools)	1 and 2	3
2) Student Enrollment	3, 4, 5 and 6	3 and 4
3) Awards	7	4
4) Charges and Net Price	8 and 9	5
5) Student Financial Aid	10, 11, 12, 13, 14 and 15	5 and 6
6) Military Benefits*	[Not applicable]	
7) Retention and Graduation Rates	16, 17, 18, 19, 20, 21, 22, 23 and 24	7, 8, 9 and 10
8) Finance	25 and 26	11
9) Staff	27 and 28	11 and 12
10) Libraries*	29 and 30	12

*These figures only appear in customized Data Feedback Reports (DFRs), which are available through Use the Data portal on the IPEDS website.

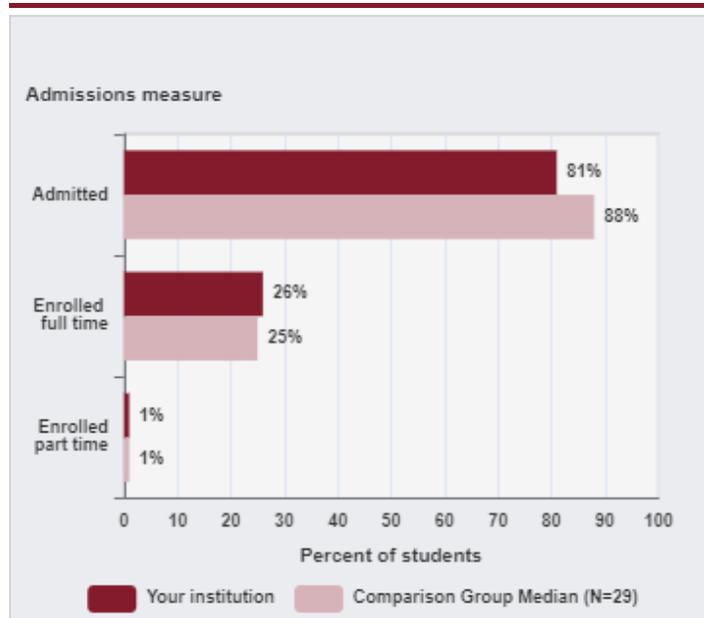
Figure 1. Number of first-time undergraduate students who applied, were admitted, and enrolled full-time and part-time: Fall 2022



NOTE: Admissions data are presented only for institutions that do not have an open admission policy, and apply to first-time, degree/certificate-seeking undergraduate students only. For details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Admissions survey component.

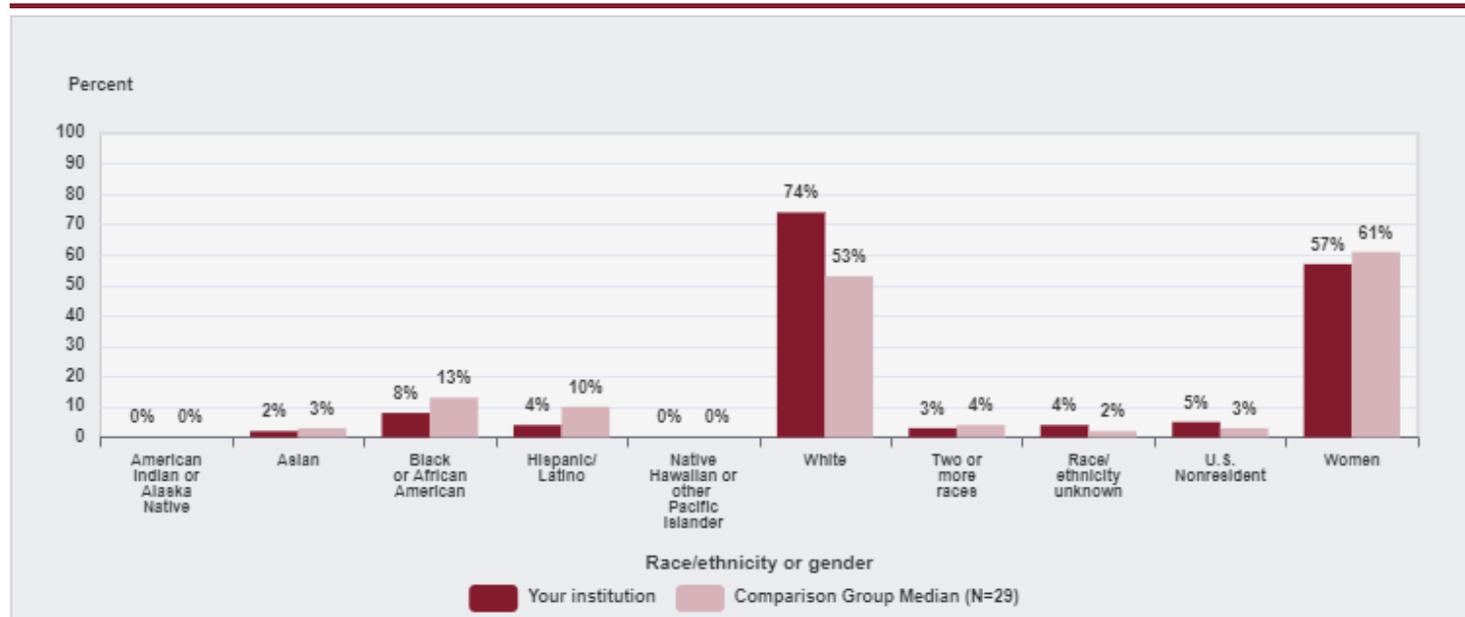
Figure 2. Percent of first-time undergraduate applicants admitted, and percent of admitted students enrolled full-time and part-time: Fall 2022



NOTE: Admissions data are presented only for institutions that do not have an open admission policy, and apply to first-time, degree/certificate-seeking undergraduate students only. For details, see the Methodological Notes. See 'Use of Median Values for Comparison Group' for how median values are determined. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Admissions survey component.

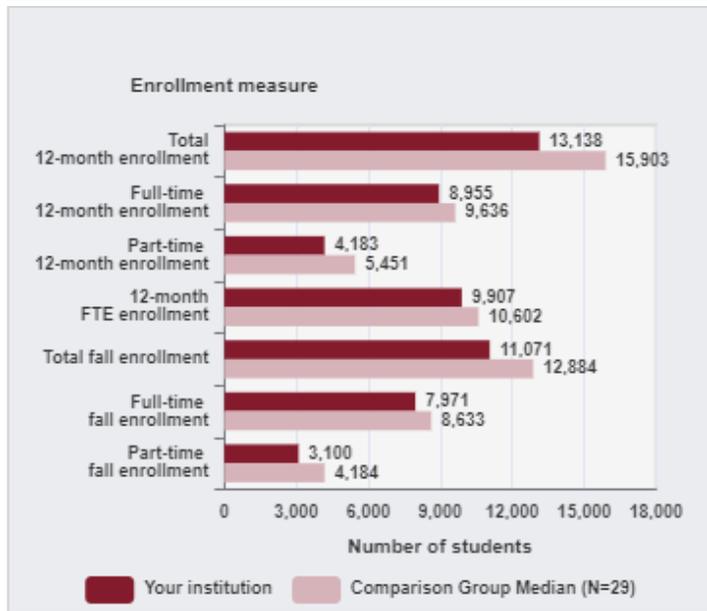
Figure 3. Percent of all students enrolled, by race/ethnicity, and percent of students who are women: Fall 2022



NOTE: For more information about disaggregation of data by race and ethnicity, see the Methodological Notes. Median values for the comparison group will not add to 100%. See 'Use of Median Values for Comparison Group' for how median values are determined. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Fall Enrollment survey component.

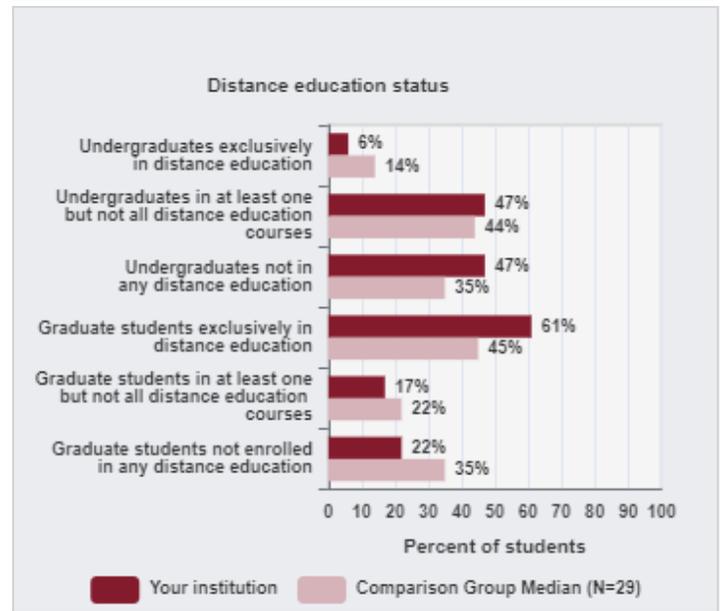
Figure 4. Total 12-month enrollment, full-time and part-time 12-month enrollment, 12-month FTE enrollment (2021-22), and total fall enrollment, full-time and part-time fall enrollment (Fall 2022)



NOTE: For details on calculating full-time equivalent (FTE) enrollment, see Calculating FTE in the Methodological Notes. Total headcount, FTE, and full- and part-time fall enrollment include both undergraduate and postbaccalaureate students, when applicable. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2022, 12-month Enrollment survey component and Spring 2023, Fall Enrollment survey component.

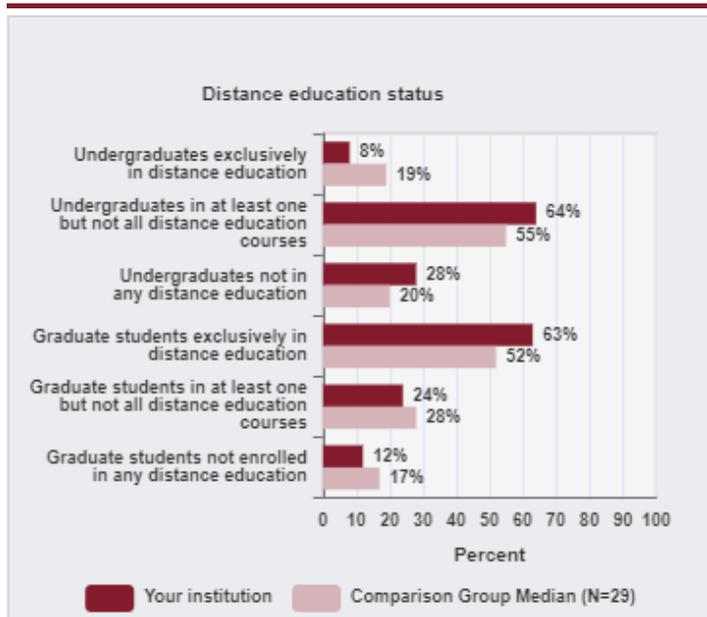
Figure 5. Percent of students enrolled in distance education courses, by distance education status and student level: Fall 2022



NOTE: N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Fall Enrollment survey component.

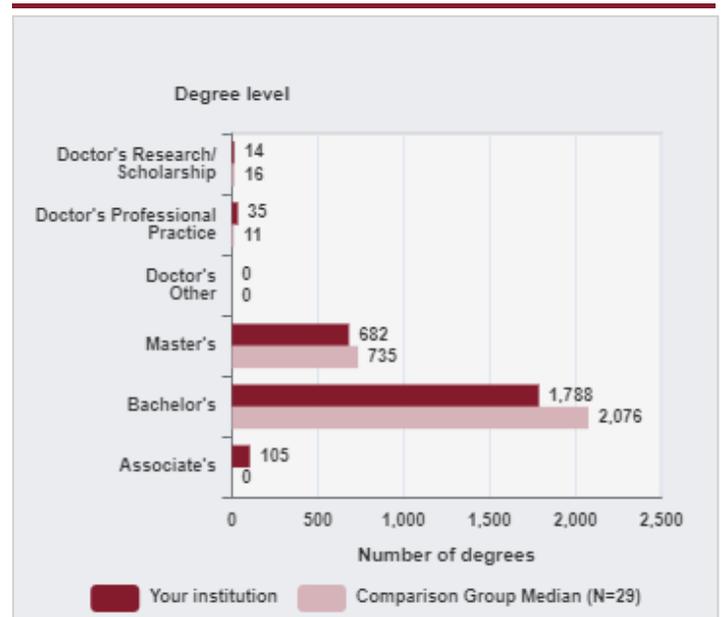
Figure 6. Percent of students enrolled in distance education courses, by distance education status and student level: 2021-22



NOTE: N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2022, 12-month Enrollment survey component.

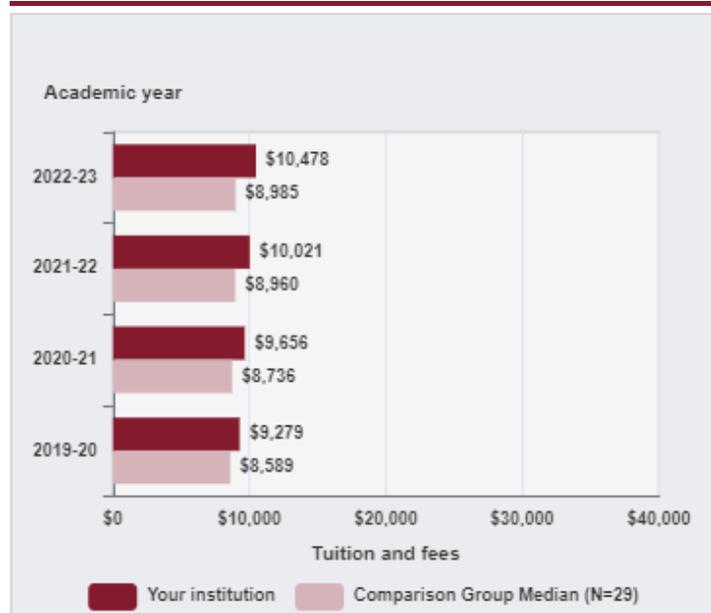
Figure 7. Number of degrees awarded, by level: 2021-22



NOTE: N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2022, Completions survey component.

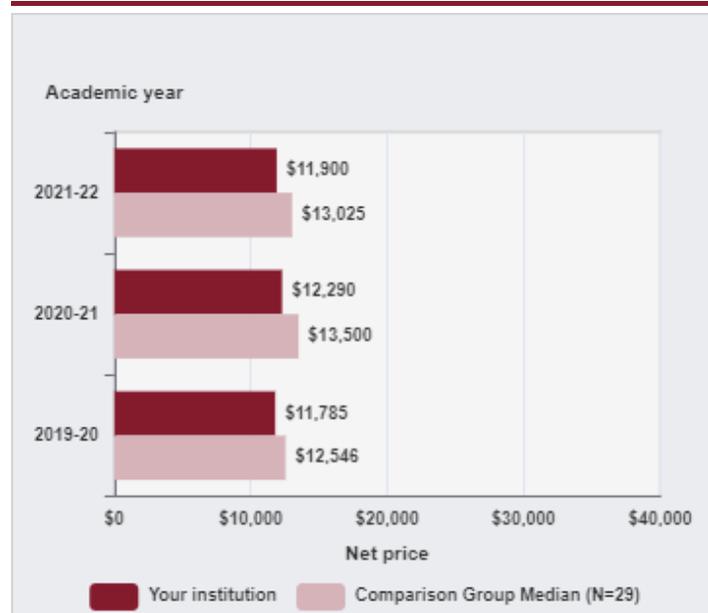
Figure 8. Tuition and required fees for full-time, first-time degree/certificate-seeking undergraduate students: Academic years 2019-20 to 2022-23



NOTE: The tuition and required fees shown here are the lowest reported from the categories of in-district, in-state, and out-of-state. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2022, Institutional Characteristics survey component.

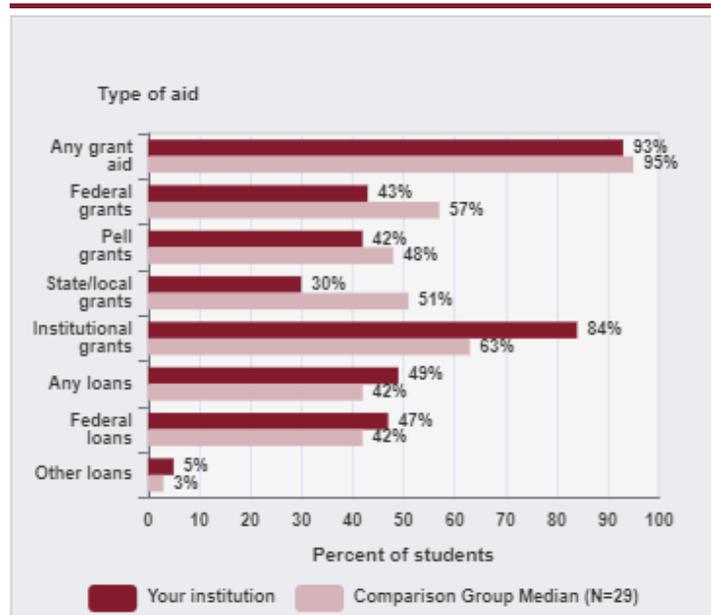
Figure 9. Average net price of attendance for full-time, first-time degree/certificate-seeking undergraduate students, who were awarded grant or scholarship aid: Academic years 2019-20 to 2021-22



NOTE: Average net price is for full-time, first-time degree/certificate-seeking undergraduate students and is generated by subtracting the average amount of federal, state/local government, and institutional grant and scholarship awarded aid from the total cost of attendance. Total cost of attendance is the sum of published tuition and required fees (lower of in-district or in-state for public institutions), books and supplies, and the weighted average of room and board and other expenses. For details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2022, Institutional Characteristics survey component and Winter 2022-23, Student Financial Aid survey component.

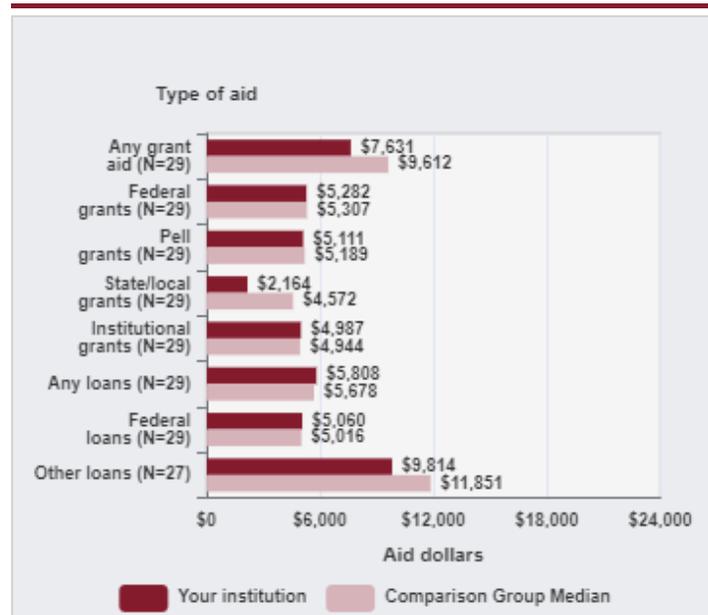
Figure 10. Percent of full-time, first-time degree/certificate-seeking undergraduate students who were awarded grant or scholarship aid, or loans, by type of aid: Academic year 2021-22



NOTE: Any grant aid above includes grant or scholarship aid awarded from the federal government, state/local government, or the institution. Federal grants include Federal Pell grants and other federal grants. Any loans include federal loans and other loans awarded to students. For details on how students are counted for financial aid reporting, see Cohort Determination in the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Student Financial Aid survey component.

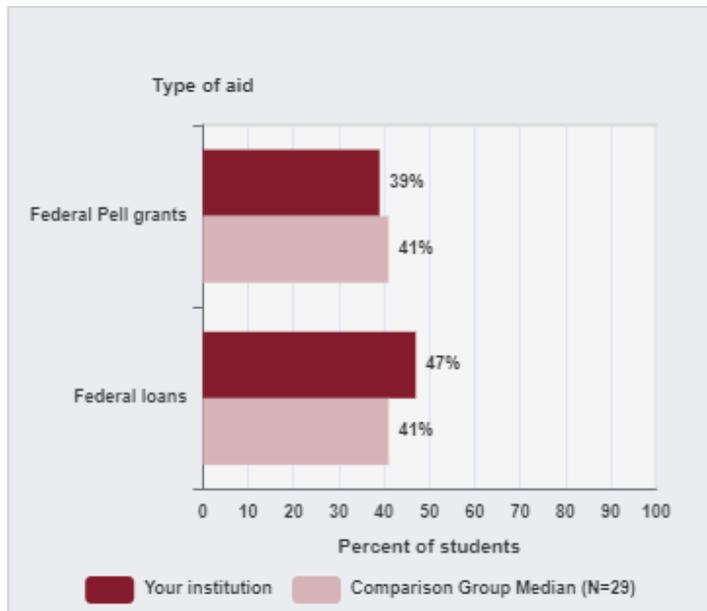
Figure 11. Average amounts of awarded grant or scholarship aid, or loans awarded to full-time, first-time degree/certificate-seeking undergraduate students, by type of aid: Academic year 2021-22



NOTE: Any grant aid above includes grant or scholarship aid awarded from the federal government, state/local government, or the institution. Federal grants include Federal Pell grants and other federal grants. Any loans include federal loans and other loans awarded to students. Average amounts of aid were calculated by dividing the total aid awarded by the unduplicated count of recipients at each institution. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Student Financial Aid survey component.

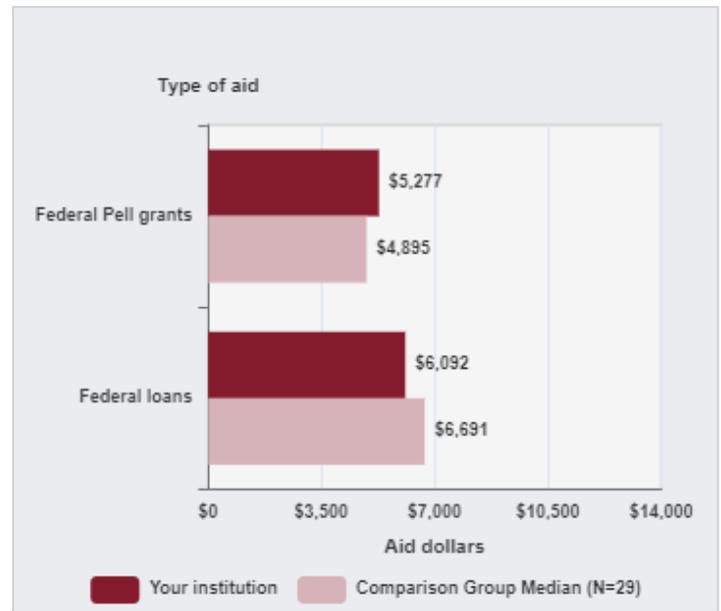
Figure 12. Percent of degree/certificate-seeking undergraduate students awarded Federal Pell grants and Federal Student loans : Academic year 2021-22



NOTE: Federal loans include federal loans awarded to students. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Student Financial Aid survey component.

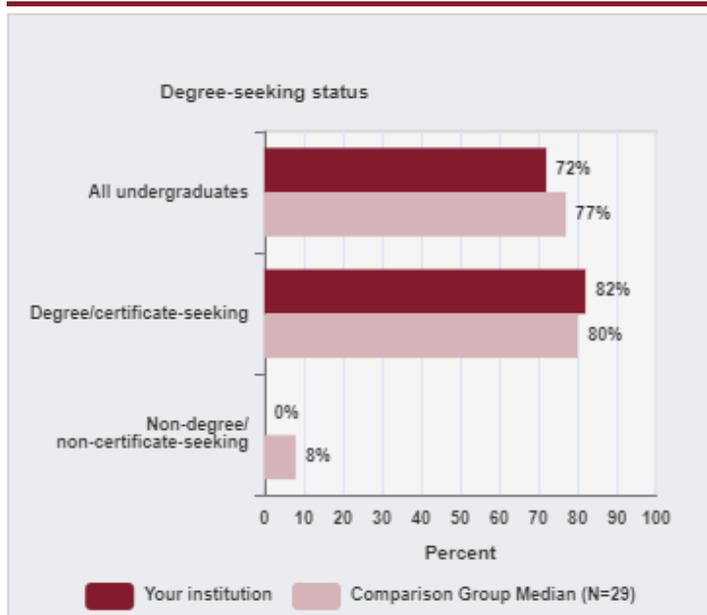
Figure 13. Average amount of Federal Pell grants and Federal Student loans awarded to degree/certificate-seeking undergraduate students: Academic year 2021-22



NOTE: Federal loans include federal loans to students. Average amounts of aid were calculated by dividing the total aid awarded by the unduplicated count of recipients at each institution. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Student Financial Aid survey component.

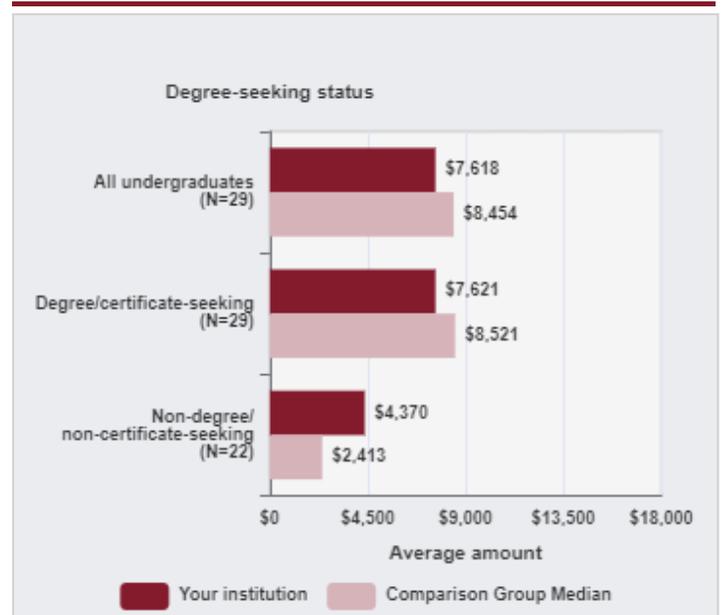
Figure 14. Percent of undergraduate students awarded grant or scholarship aid, by degree/certificate-seeking status: Academic year 2021-22



NOTE: Grant or scholarship aid includes grant or scholarship aid from the federal government, state/local government, the institution, or other sources. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Student Financial Aid survey component.

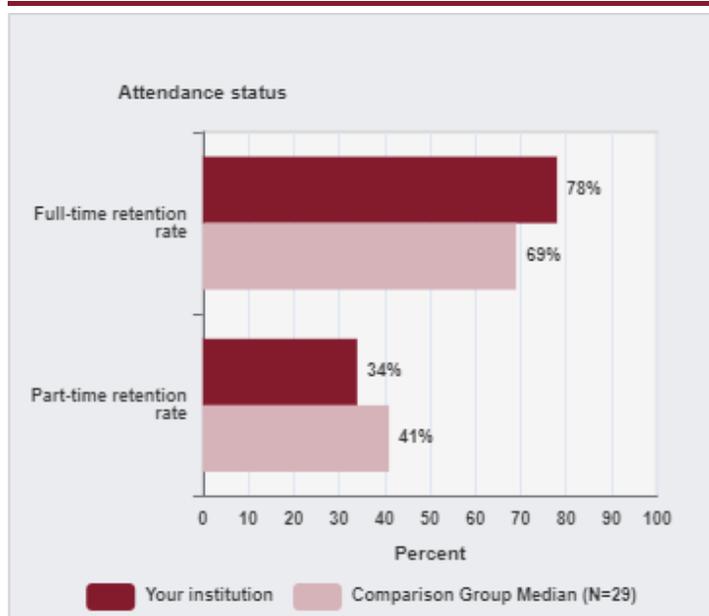
Figure 15. Average amount of grant or scholarship aid awarded to undergraduate students, by degree/certificate-seeking status: Academic year 2021-22



NOTE: Grant or scholarship aid includes grant or scholarship aid from the federal government, state/local government, the institution, or other sources. Average amounts of aid were calculated by dividing the total aid awarded by the unduplicated count of recipients at each institution. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Student Financial Aid survey component.

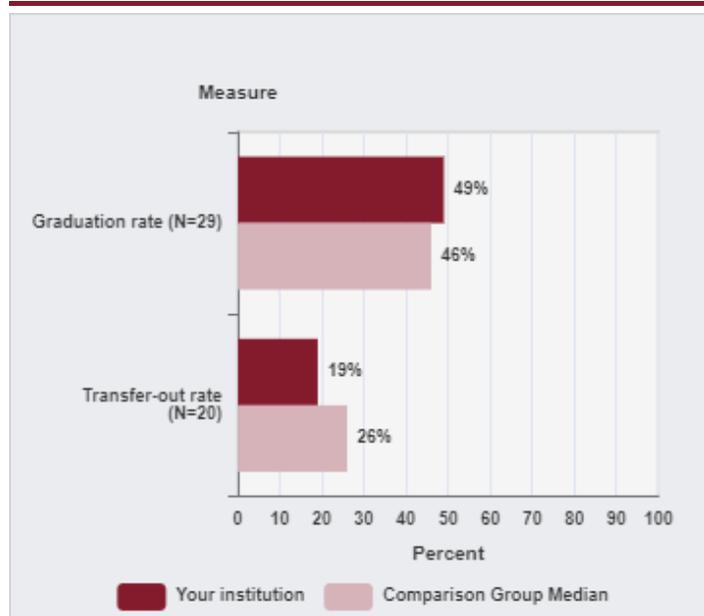
Figure 16. Retention rates of first-time bachelor's degree-seeking students, by attendance status: Fall 2021 cohort



NOTE: Retention rates are measured from the fall of first enrollment to the following fall. Academic reporting institutions report retention data for the Fall 2021 cohort of students who are still enrolled as of the institution's official fall reporting date or as of October 15, 2022. Program reporters determine the cohort with enrollment any time between August 1 - October 31, 2021 and retention based on August 1, 2022. Four-year institutions report retention rates for students seeking a bachelor's degree. For more details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Fall Enrollment survey component.

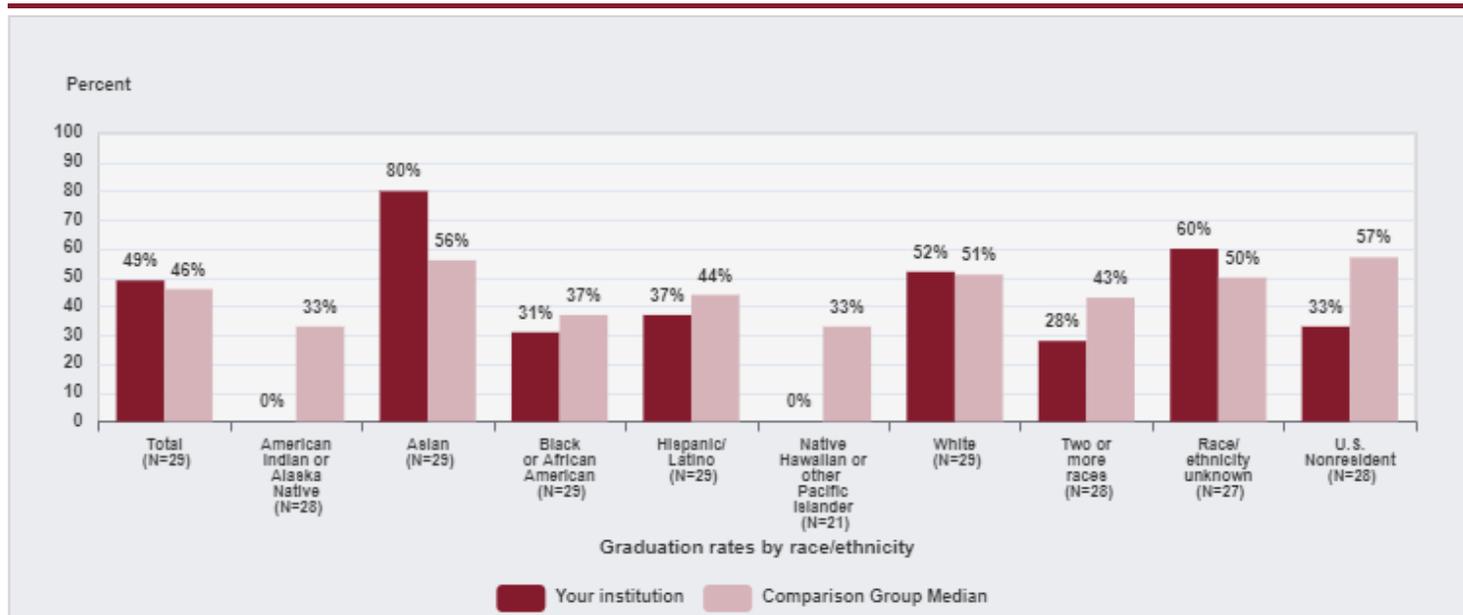
Figure 17. Graduation and transfer-out rates of all full-time, first-time degree/certificate-seeking undergraduate students within 150% of normal time to program completion: 2016 cohort



NOTE: Graduation rate cohort includes all full-time, first-time degree/certificate-seeking undergraduate students. Graduation and transfer-out rates are the Student Right-to-Know rates. Only institutions with mission to prepare students to transfer are required to report transfer out. For more details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Graduation Rates survey component.

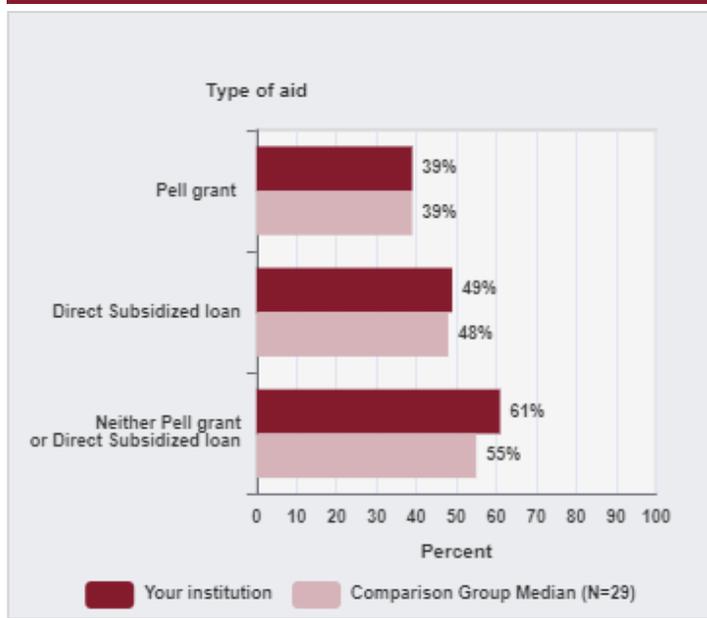
Figure 18. Graduation rates of all full-time, first-time degree/certificate-seeking undergraduate students within 150% of normal time to program completion, by race/ethnicity: 2016 cohort



NOTE: For more information about disaggregation of data by race and ethnicity, see the Methodological Notes. The graduation rates are the Student Right-to-Know (SRK) rates. Median values for the comparison group will not add to 100%. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Graduation Rates survey component.

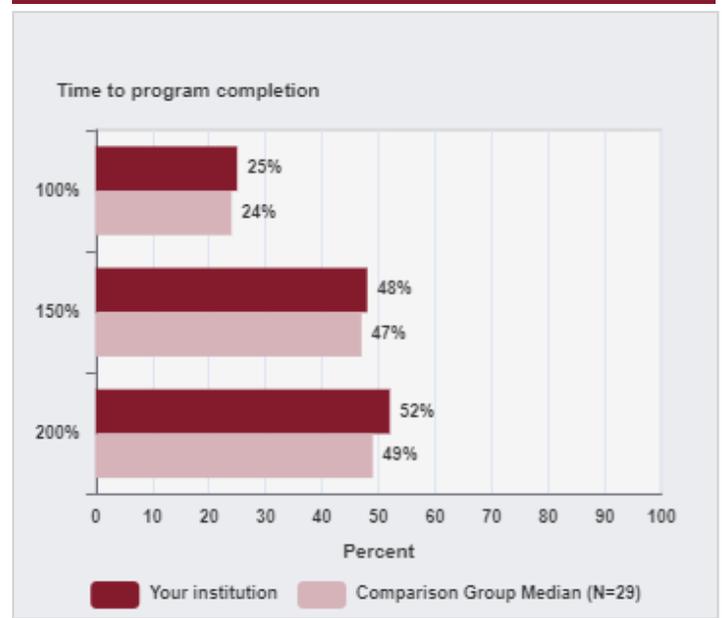
Figure 19. Graduation rates of all full-time, first-time degree/certificate-seeking undergraduate students within 150% of normal time to program completion, by type of aid: 2016 cohort



NOTE: Graduation rate cohort includes all full-time, first-time degree/certificate-seeking undergraduate students. Data were collected on those students, who at entry of the cohort, were awarded a Pell Grant and students who were awarded a Subsidized Stafford loan, but did not receive a Pell Grant. Graduation rates are the Student Right-to-Know rates. For more details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Graduation Rates survey component.

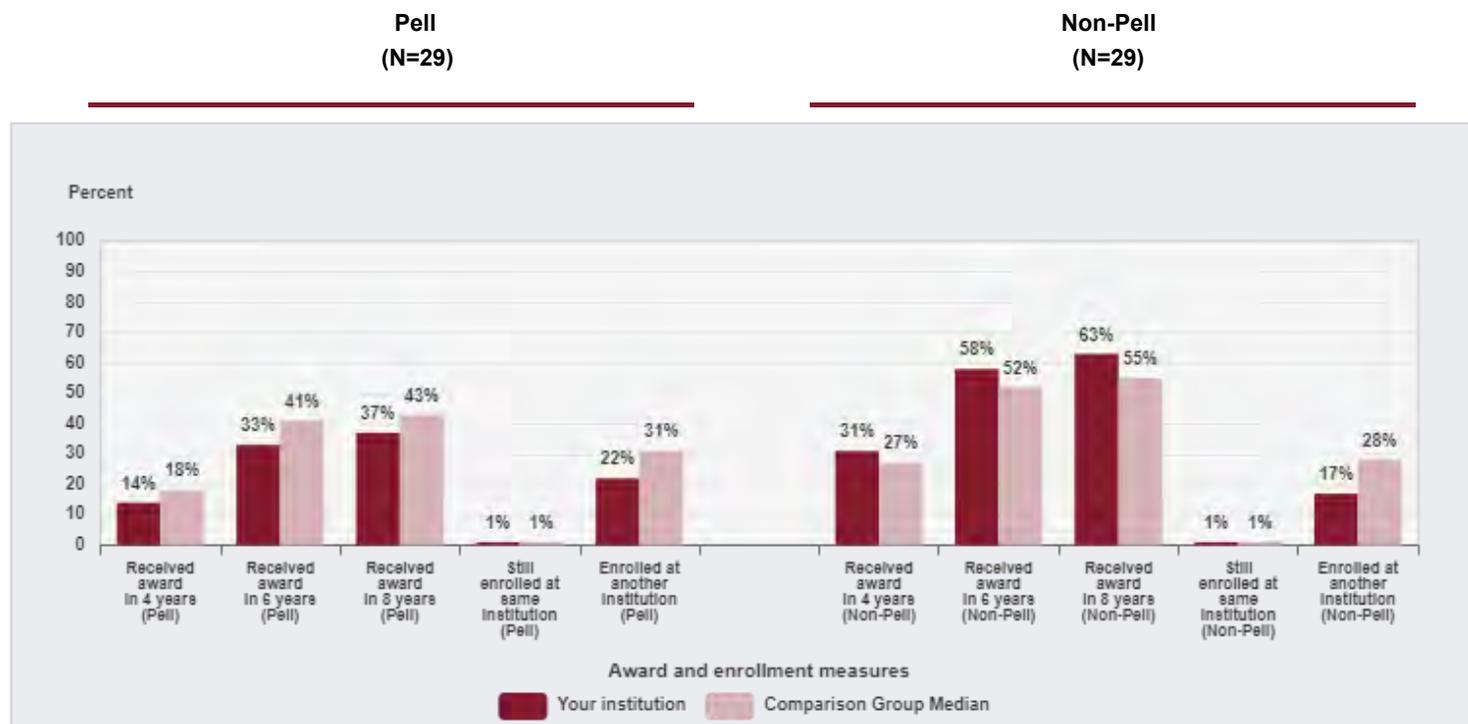
Figure 20. Bachelor's degree graduation rates of full-time, first-time bachelor's degree-seeking undergraduate students within 100%, 150% and 200% of normal time to completion: 2014 cohort



NOTE: The 100%, 150% and 200% graduation rates are calculated using the number of students who completed a bachelor's or equivalent degree from a cohort of students who entered the institution seeking a bachelor's or equivalent degree. For details, see the Methodological Notes. N is the number of institutions in the comparison group. Medians are not reported for comparison groups with less than three values.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, 200% Graduation Rates survey component.

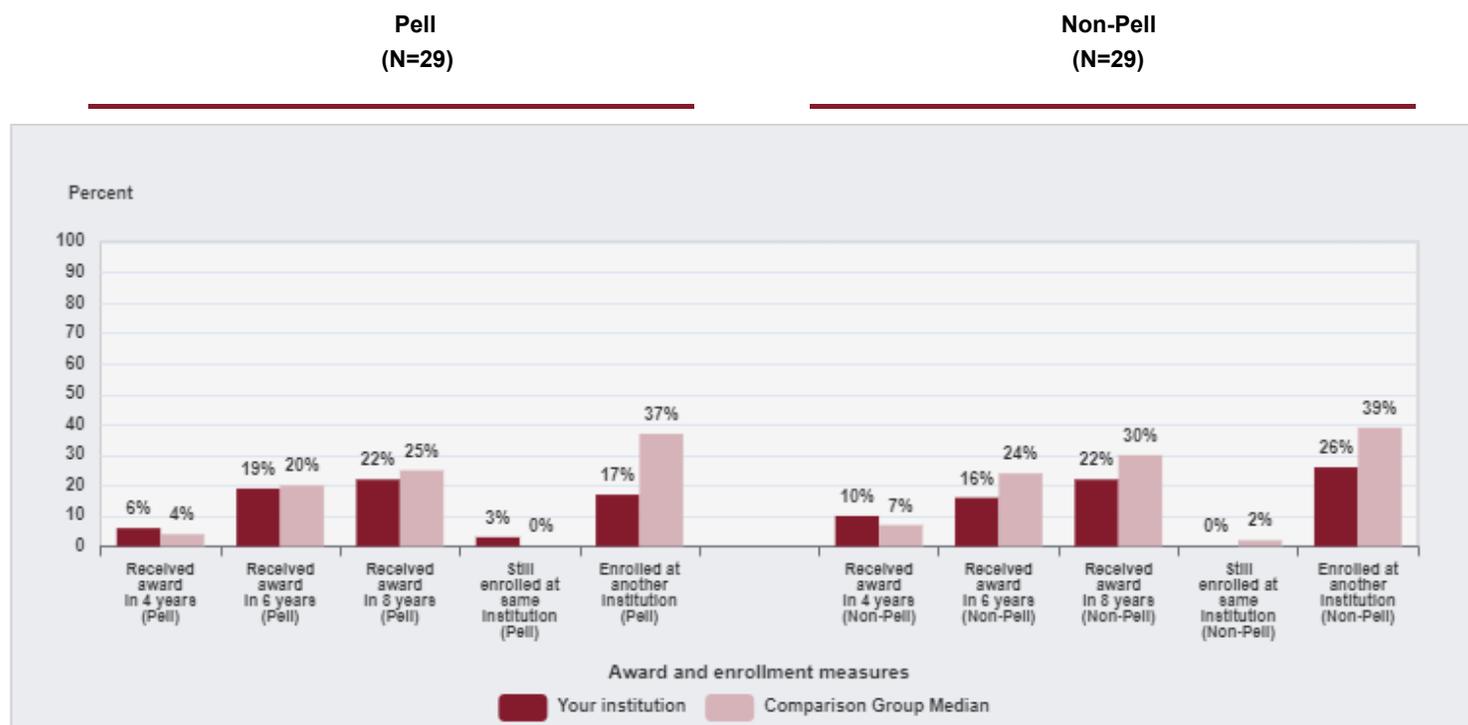
Figure 21. Award and enrollment rates of first-time, full-time, degree/certificate-seeking undergraduate students after 8 years of entry, by Pell status: 2014-15 cohort



NOTE: Award measures are based on the highest award received after 8 years of entry and enrollment measures are based on students who did not receive an award after 8 years of entry. Student cohorts (i.e., first-time, full-time; first-time, part-time; non-first-time, full-time; and non-first-time, part-time) are degree/certificate-seeking undergraduate students who entered the institution between July 1, 2014-June 30, 2015. Pell recipients are students with demonstrated financial need. For more details, see the Methodological Notes. N is the number of institutions in the comparison group. Medians are not reported for comparison groups with less than three values.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Outcome Measures survey component.

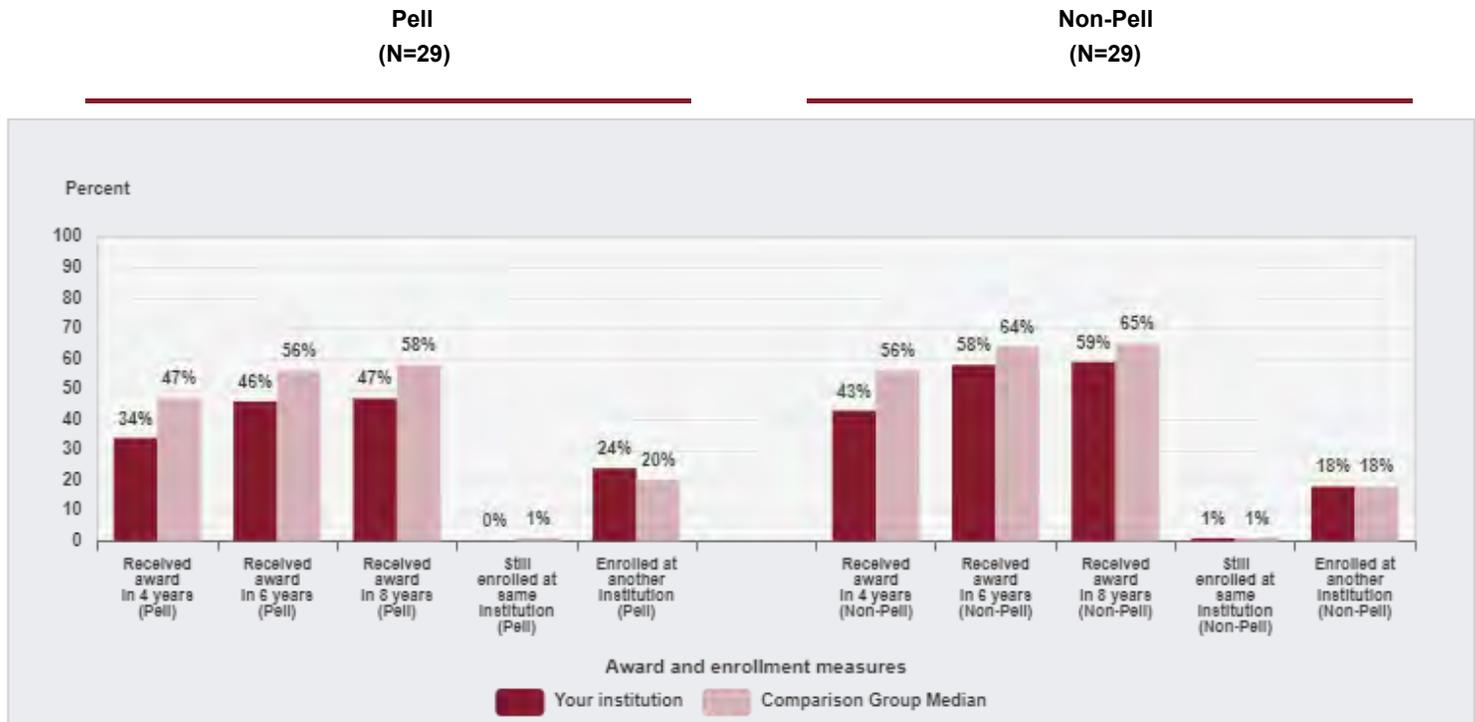
Figure 22. Award and enrollment rates of first-time, part-time, degree/certificate-seeking undergraduate students after 8 years of entry, by Pell status: 2014-15 cohort



NOTE: Award measures are based on the highest award received after 8 years of entry and enrollment measures are based on students who did not receive an award after 8 years of entry. Student cohorts (i.e., first-time, full-time; first-time, part-time; non-first-time, full-time; and non-first-time, part-time) are degree/certificate-seeking undergraduate students who entered the institution between July 1, 2014-June 30, 2015. Pell recipients are students with demonstrated financial need. For more details, see the Methodological Notes. N is the number of institutions in the comparison group. Medians are not reported for comparison groups with less than three values.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Outcome Measures survey component.

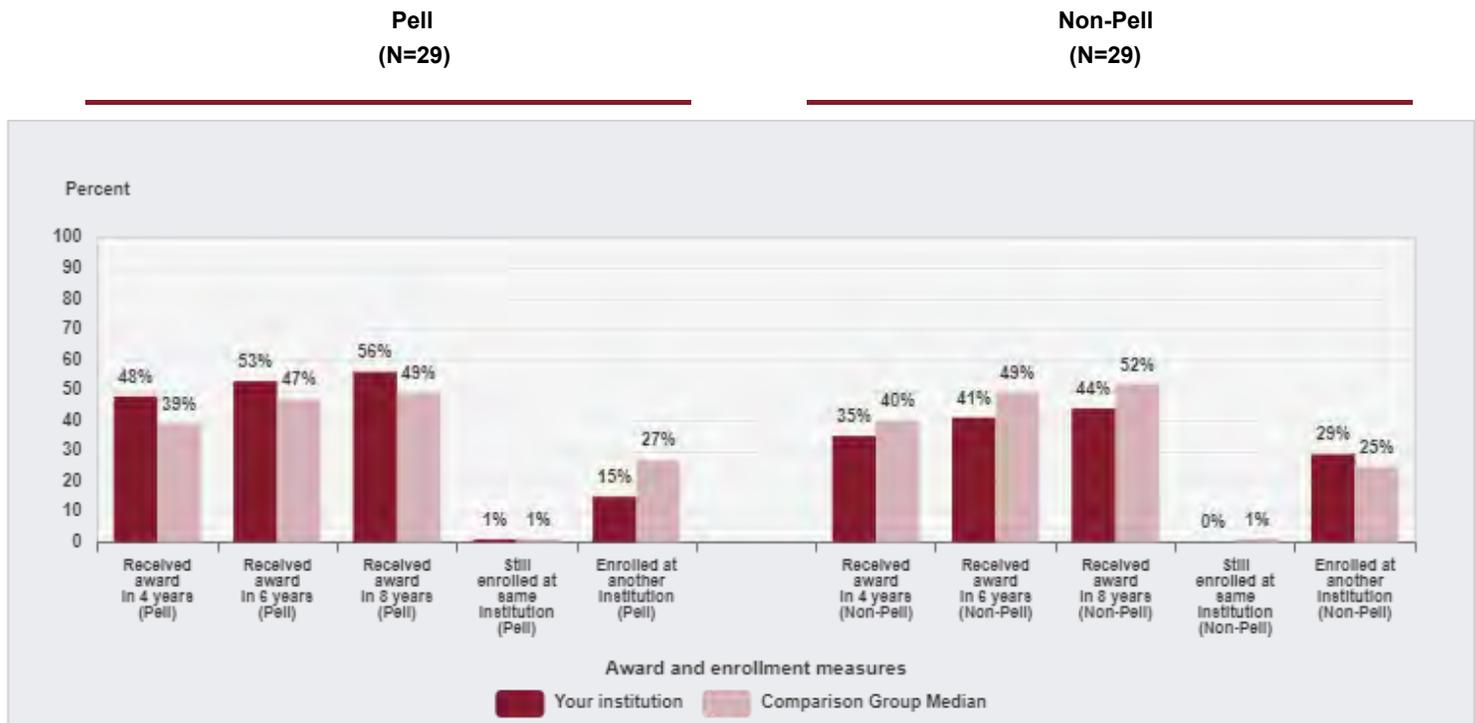
Figure 23. Award and enrollment rates of non-first-time, full-time, degree/certificate-seeking undergraduate students after 8 years of entry, by Pell status: 2014-15 cohort



NOTE: Award measures are based on the highest award received after 8 years of entry and enrollment measures are based on students who did not receive an award after 8 years of entry. Student cohorts (i.e., first-time, full-time; first-time, part-time; non-first-time, full-time; and non-first-time, part-time) are degree/certificate-seeking undergraduate students who entered the institution between July 1, 2014-June 30, 2015. Pell recipients are students with demonstrated financial need. For more details, see the Methodological Notes. N is the number of institutions in the comparison group. Medians are not reported for comparison groups with less than three values.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Outcome Measures survey component.

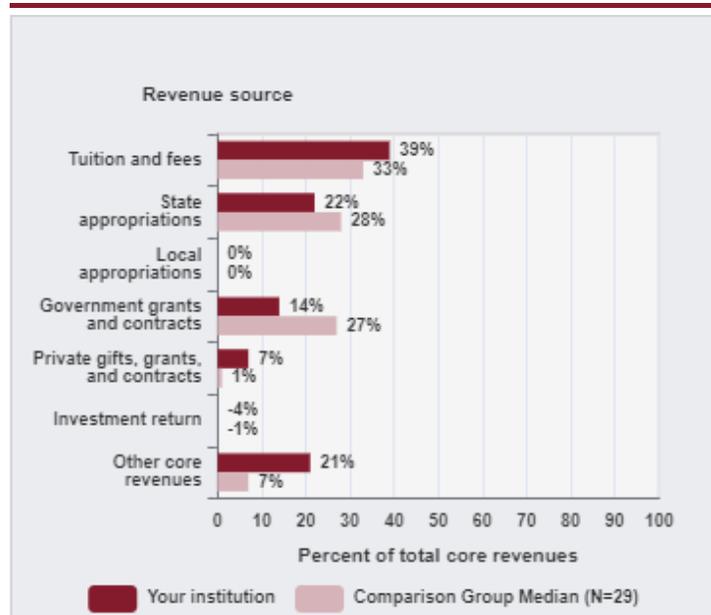
Figure 24. Award and enrollment rates of non-first-time, part-time, degree/certificate-seeking undergraduate students after 8 years of entry, by Pell status: 2014-15 cohort



NOTE: Award measures are based on the highest award received after 8 years of entry and enrollment measures are based on students who did not receive an award after 8 years of entry. Student cohorts (i.e., first-time, full-time; first-time, part-time; non-first-time, full-time; and non-first-time, part-time) are degree/certificate-seeking undergraduate students who entered the institution between July 1, 2014-June 30, 2015. Pell recipients are students with demonstrated financial need. For more details, see the Methodological Notes. N is the number of institutions in the comparison group. Medians are not reported for comparison groups with less than three values.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2022-23, Outcome Measures survey component.

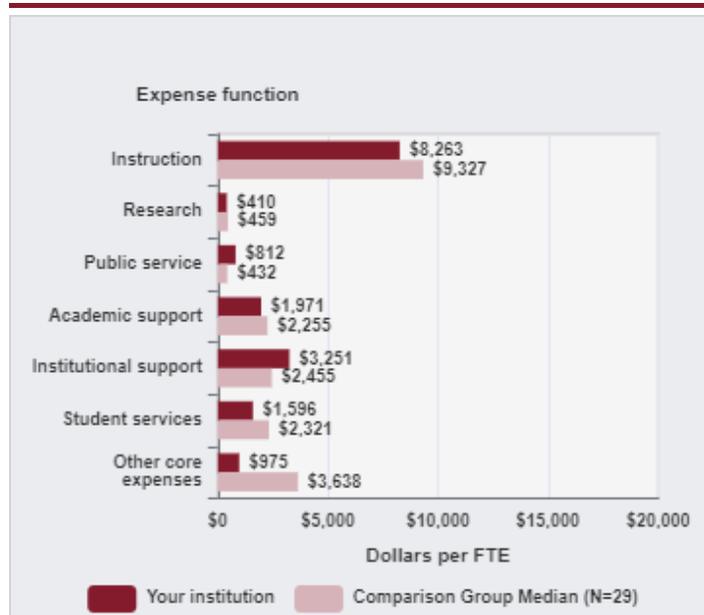
Figure 25. Percent distribution of core revenues, by source: Fiscal year 2022



NOTE: The comparison group median is based on those members of the comparison group that report finance data using the same accounting standards as the comparison institution. For more information, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Finance survey component.

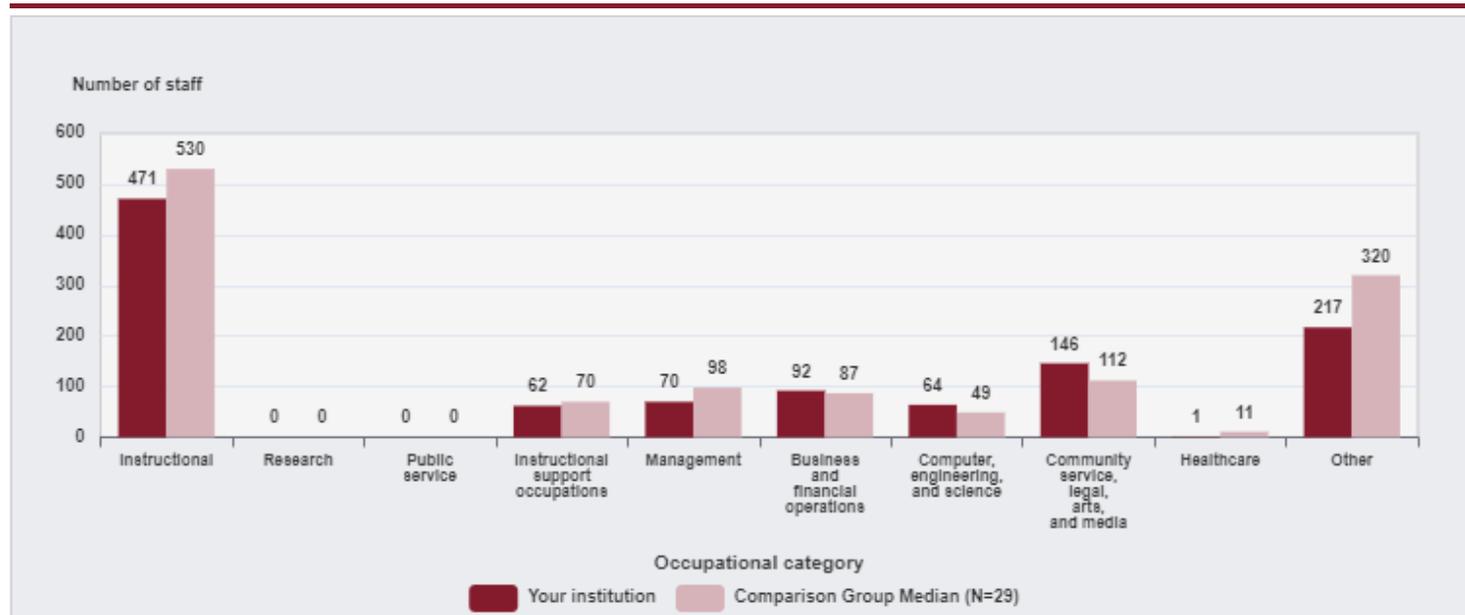
Figure 26. Core expenses per FTE enrollment, by function: Fiscal year 2022



NOTE: Expenses per full-time equivalent (FTE) enrollment, particularly instruction, may be inflated because finance data includes all core expenses while FTE reflects credit activity only. For details on calculating FTE enrollment and a detailed definition of core expenses, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2022, 12-month Enrollment survey component and Spring 2023, Finance survey component.

Figure 27. Full-time equivalent staff, by occupational category: Fall 2022



NOTE: Graduate assistants are not included. For calculation details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Human Resources survey component.

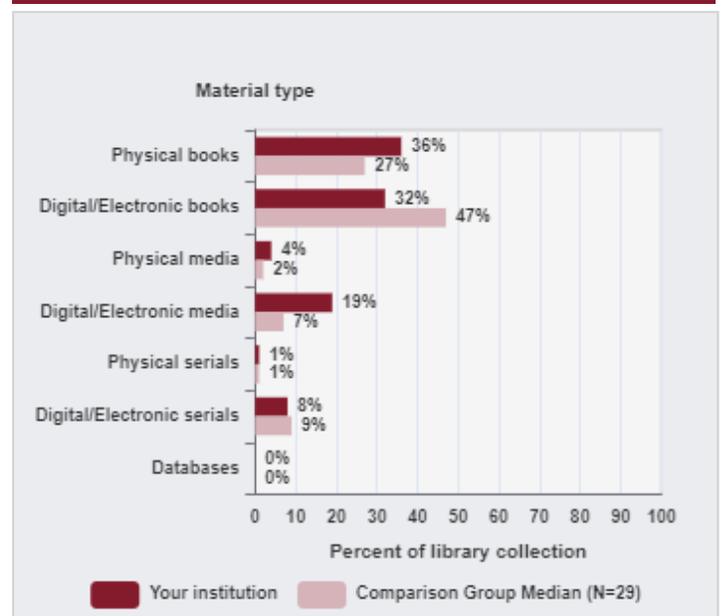
Figure 28. Average salary outlays of full-time non-medical instructional staff equated to 9-months worked, by academic rank: Academic year 2022-23



NOTE: See Methodology Notes for more details on average salary. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Human Resources survey component.

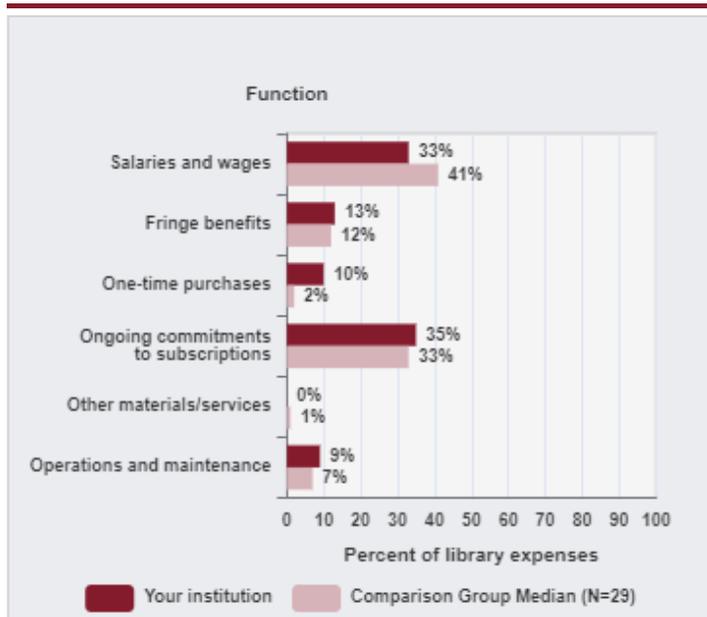
Figure 29. Percent distribution of library collection, by material type: Fiscal year 2022



NOTE: N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Academic Libraries survey component.

Figure 30. Percent distribution of library expenses, by function: Fiscal year 2022



NOTE: N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Academic Libraries survey component.

METHODOLOGICAL NOTES

Overview

This report is based on data supplied by institutions to IPEDS during 2022-23 data collection year. Response rates exceeded 99% for most survey components. IPEDS data release memos at <https://nces.ed.gov/ipeds/use-the-data/survey-components> provide an overview of the number of institutions responding to the survey components. Furthermore, data used in this report are provisional level and may be revised for a limited time through the IPEDS Prior Year Revision system.

Use of Median Values for Comparison Group

This report compares your institution's data to the median value for the comparison group for each indicator shown in the figure. If more than one indicator is present in a figure, the median values are determined separately for each indicator. Medians are not displayed for comparison groups with fewer than three values. Where percentage distributions are presented, median values may not add to 100%. To access all the data used to create the figures included in this report, go to 'Use the Data' portal on the IPEDS website at this provided link (<https://nces.ed.gov/ipeds>).

Missing Indicators

If an indicator is not reported for your institution, the omission implies that the indicator is not relevant to your institution and the data were not collected. Not all notes may be applicable to your report.

Use of Imputed Data

All IPEDS data are subject to imputation for total (institutional) and partial (item) nonresponse. If necessary, imputed values were used to prepare your report.

Data Confidentiality

IPEDS data are not collected under a pledge of confidentiality.

Disaggregation of Data by Race/Ethnicity

When applicable, some indicators are disaggregated by race/ethnicity. Data disaggregated by race/ethnicity have been reported using the 1997 Office of Management and Budget categories. Detailed information about the race/ethnicity categories can be found at <https://nces.ed.gov/ipeds/Section/Resources>.

Cohort Determination for Reporting Student Financial Aid, Graduation Rates, and Outcome Measures

Student cohorts for reporting Student Financial Aid and Graduation Rates data are based on the reporting type of the institution. For institutions that report based on an academic year (those operating on standard academic terms), student counts and cohorts are based on fall term data. Student counts and cohorts for program reporters (those that do not operate on standard academic terms) are based on unduplicated counts of students enrolled during a full 12-month period.

Student cohorts for reporting Outcome Measures are based on a full-year cohort from July 1-June 30 for all degree-granting institutions.

DESCRIPTION OF INDICATORS USED IN THE FIGURES

Admissions (only for non-open-admissions schools)

Admissions and Test Score Data

Admissions and test score data are presented only for institutions that do not have an open admission policy, and apply to first-time, degree/certificate-seeking undergraduate students only. Applicants include only those students who fulfilled all requirements for consideration for admission and who were notified of one of the following actions: admission, non-admission, placement on a wait list, or application withdrawn (by applicant or institution). Admitted applicants (admissions) include wait-listed students who were subsequently offered admission. Early decision, early action, and students who began studies during the summer prior to the fall reporting period are included. For customized Data Feedback Reports, test scores are presented only if scores are required for admission.

Student Enrollment

Enrollment Counts

12-month Enrollment captures a cumulative unduplicated headcount of enrollment over the full 12-month period beginning July 1 and ending June 30. In contrast, Fall Enrollment captures number of students enrolled on a particular date in the fall. Fall enrollment is often referred to as a "snapshot" of an institution's enrollment at a specific time.

FTE Enrollment

The full-time equivalent (FTE) enrollment used in this report is the sum of the institution's FTE undergraduate enrollment and FTE graduate enrollment (as calculated from or reported on the 12-month Enrollment survey component). Undergraduate and graduate FTE are estimated using 12-month instructional activity (credit and/or clock hours). See "Calculation of FTE Students (using instructional activity)" in the IPEDS Glossary at <https://surveys.nces.ed.gov/ipeds/VisGlossaryAll.aspx>.

Completions

Completions and Completers

Completions collects data on undergraduate and graduate completions and completers in a 12-month period beginning July 1 and ending June 30. Completions are the counts of postsecondary awards granted where each award reported once but multiple awards may be reported for one recipient. Completers are the counts of students granted postsecondary awards. The count of completers is collected in two ways. The first way counts all completers, while the second way counts completers by award level (e.g., number of associate's completers, number of bachelor's completers).

Student Financial Aid

Financial Aid Recipients and Amounts

Student Financial Aid collects the counts of undergraduate students awarded different types of financial aid and the total amounts of aid awarded. The average dollar amount of aid awarded is then calculated. In addition, Student Financial Aid collects counts of full-time, first-time undergraduate students awarded aid and amounts of aid, and counts and disbursed amounts for undergraduate and graduate students receiving military education benefits.

Charges and Average Net Price

Tuition and Required Fees (Published)

Tuition is defined as the amount of money charged to students for instructional services, and required fees are those fixed sum charges to students for items not covered by tuition and that are required of such a large proportion of all students that the student who does not pay the charge is an exception. The amounts used in this report are for full-time, first-time degree/certificate-seeking undergraduate students and are those used by the financial aid office to determine the financial need. For institutions that have differential tuition rates for in-district or in-state students, the lowest tuition rate is used in the figure. Only institutions that operate on standard academic terms will have tuition figures included in their report.

Average Institutional Net Price

IPEDS collects data to calculate average net price at each institution for two groups of undergraduate students: those awarded grant and scholarship aid and those awarded Title IV federal aid.

Average net price is calculated for full-time, first-time degree/certificate-seeking undergraduate students who were awarded grant or scholarship aid from the federal government, state/local government, or the institution anytime during the academic year. For public institutions, this includes only students who paid the in-state or in-district tuition rate. Other sources of grant aid are excluded. Average net price is generated by subtracting the average amount of federal, state/local government, and institutional grant and scholarship aid from the total cost of attendance. Total cost of attendance is the sum of published tuition and required fees (lower of in-district or in-state for public institutions), books and supplies, and the weighted average of room and board, and other expenses.

For the purpose of the IPEDS reporting, aid awarded refers to financial aid that was awarded to, and accepted by, a student. This amount may differ from the aid amount that is disbursed to a student.

Retention, Graduation Rates, and Outcome Measures

Retention Rates

Retention rates are measures of the rate at which students persist in their educational program at an institution, expressed as a percentage. For four-year institutions, this is the percentage of first-time bachelors (or equivalent) degree-seeking undergraduate students from the previous fall who are still enrolled in the current fall. For all other institutions this is the percentage of first-time degree/certificate-seeking undergraduate students from the previous fall who either re-enrolled or successfully completed their program by the current fall. The full-time retention rate is calculated using the percentage of full-time, first-time degree/certificate-seeking undergraduate students, while the part-time rate is calculated using the percentage of part-time, first-time degree/certificate-seeking undergraduate students.

Graduation Rates and Transfer-out Rate

Graduation rates are those developed to satisfy the requirements of the Student Right-to-Know Act and Higher Education Act, as amended, and are defined as the total number of individuals from a given cohort of full-time, first-time degree/certificate-seeking undergraduate students who completed a degree or certificate within a given percent of normal time to complete all requirements of the degree or certificate program; divided by the total number of students in the cohort of full-time, first-time degree/certificate-seeking undergraduate students minus any allowable exclusions. Institutions are permitted to exclude from the cohort students who died or were totally and permanently disabled; those who left school to serve in the armed forces or were called up to active duty; those who left to serve with a foreign aid service of the federal government, such as the Peace Corps; and those who left to serve on an official church mission.

A further extension of the traditional Graduation Rates (GR) survey component which carries forward 100% and 150% graduation rates data previously reported in the GR survey component is the Graduation Rates 200% (GR200) survey component, which requests information on any additional completers and exclusions from the cohort between 151% and 200% normal time for students to complete all requirements of their program of study.

Transfer-out rate is the total number of students from the cohort who are known to have transferred out of the reporting institution (without earning a degree/award) and subsequently re-enrolled at another institution within the same time period; divided by the same adjusted cohort (initial cohort minus allowable exclusions) as described above. Only institutions with a mission that includes providing substantial preparation for students to enroll in another eligible institution are required to report transfers out.

Outcome Measures Data

Alternative measures of student success are reported by degree-granting institutions to describe the outcomes of four degree/certificate-seeking undergraduate student groups: first-time, full-time entering (FTFT); first-time, part-time entering (FTPT); non-first-time, full-time entering (NFTFT); and non-first-time, part-time entering (NFTPT). Additionally, each of the four cohorts collects data on two subcohorts: Pell grant recipients and non-Pell grant recipients. These measures provide the 4-year, 6-year, and 8-year award rates (or completions rates) after entering an institution. NCES calculates award rates by dividing a cohort's or subcohort's adjusted cohort into the number of total awards at 4-year, 6-year, and 8-year status points.

The initial cohort can be revised for allowable exclusions resulting in an adjusted cohort. Institutions are permitted to exclude from the initial cohort students who died or were totally and permanently disabled; those who left school to serve in the armed forces or were called up to active duty; those who left to serve with a foreign aid service of the federal government, such as the Peace Corps; and those who left to serve on an official church mission.

The highest award and the type of award (i.e., certificate, Associate's, or Bachelor's) are reported at each status point. For students who did not earn an undergraduate award after 8-years of entry, the enrollment statuses are reported as either still enrolled at the institution, or subsequently transferred out of the institution. Unlike the Graduation Rates data, all institutions must report on a full-year cohort (students entering July 1 of one year to June 30 of the next year) and on their transfer out students, regardless if the institution has a mission that provides substantial transfer preparation.

Finance

Core Revenues

Core revenues for public institutions reporting under GASB reporting standards include tuition and fees; government (federal, state, and local) appropriations and operating and nonoperating grants/contracts; private gifts, grants, and contracts (private operating grants/contracts plus gifts and contributions from affiliated entities); sales and services of educational activities; investment income; other operating and nonoperating sources; and other revenues and additions (capital appropriations and grants and additions to permanent endowments). "Other core revenues" include federal appropriations, sales and services of educational activities, other operating and nonoperating sources, and other revenues and additions.

Core revenues for private, not-for-profit institutions (and a small number of public institutions) reporting under FASB reporting standards include tuition and fees; government (federal, state, and local) appropriations and grants/contracts; private gifts, grants and contracts (including contributions from affiliated entities); investment return; sales and services of educational activities; and other sources (a generated category of total revenues minus the sum of core and noncore categories on the Finance survey component). "Other core revenues" include government (federal, state, and local) appropriations, sales and services of educational activities, and other sources.

Core revenues for private, for-profit institutions reporting under FASB reporting standards include tuition and fees; government (federal, state, and local) appropriations and grants/contracts; private grants/ contracts; investment income; sales and services of educational activities; and other sources (a generated category of total revenues minus the sum of core and noncore categories on the Finance survey component). "Other core revenues" include government (federal, state, and local) appropriations and other sources.

At degree-granting institutions, core revenues exclude revenues from auxiliary enterprises (e.g., bookstores and dormitories), hospitals, and independent operations. Non-degree-granting institutions do not report revenue from auxiliary enterprises in a separate category, and thus may include these amounts in the core revenues from other sources.

Core Expenses

Core expenses include expenses for instruction, research, public service, academic support, student services, institutional support, scholarships and fellowships (GASB) or net grant aid to students (FASB) and other expenses. Core expenses exclude expenses for auxiliary enterprises, hospitals, and independent operations. "Other core expenses" is the sum of grant aid/scholarships and fellowships and other expenses.

Endowment Assets

Endowment assets, for public institutions under GASB reporting standards, and private, not-for-profit institutions under FASB reporting standards, include gross investments of endowment funds, term endowment funds, and funds functioning as endowment for the institution and any of its foundations and other affiliated organizations. Private, for-profit institutions under FASB do not hold or report endowment assets.

Salaries and Wages

Salaries and wages for public institutions under GASB reporting standards and private (not-for-profit and for-profit) institutions under FASB reporting standards, include amounts paid as compensation for services to all employees regardless of the duration of service, including all regular or periodic payments to a person for the regular or periodic performance of work or a service and payment to a person for more sporadic performance of work or a services (e.g., overtime, extra compensation, summer compensation, bonuses, sick or annual leave, etc.)

Staff

FTE Staff

The full-time-equivalent (FTE) by occupational category is calculated by summing the total number of full-time staff and adding one-third of the total number of part-time staff. Occupational categories include instructional staff, research staff, public service staff, instructional support staff, management staff, and other occupations. Instructional staff are primarily engaged in teaching and do a combination of teaching, research, and/or public service. Research staff are staff whose primary function is research while public service staff are staff whose primary function is public service. Instructional support occupations include archivists, curators, and museum technicians; librarians and media collections specialists; librarian technicians; student and academic affairs and other education services occupations. Other staff include staff in service occupations; sales and related occupations; office and administrative support occupations; natural resources, construction, and maintenance occupations; production, transportation and material moving occupations; and military specific occupations. Graduate assistants are not included.

Equated Non-Medical Instructional Staff Salaries

Institutions report the number of full-time non-medical instructional staff and their salary outlays by academic rank, gender, and the number of months worked (9-, 10-, 11-, and 12-months). Salary outlays for staff who worked 10-, 11-, and 12-months were equated to 9-months of work by multiplying the outlays reported for 10-months by 0.90, the outlays reported for 11 months by 0.818, and the outlays reported for 12-months by 0.75. The equated 10-, 11-, and 12-outlays were then added to the outlays for instructional staff that worked 9-months to generate a total 9-month equated salary outlay. The total 9-month equated outlay was then divided by total number of non-medical instructional staff to determine an equated 9-month average salary. This calculation was done for each academic rank. Salary outlays were not reported for staff that work less than 9-months and were excluded.

Student-to-Faculty Ratio

Institutions can provide their institution's student-to-faculty ratio (i.e., student-to-instructional staff) for undergraduate programs or follow the NCES guidance in calculating their student-to-faculty ratio, which is as follows: the number of FTE students (using Fall Enrollment survey component data) divided by total FTE instructional staff (using the total primarily instruction + instruction/research/public service staff reported in Human Resources survey component and adding any not primarily instructional staff that are teaching a credit course). For this calculation, FTE for students is equal to the number of the full-time students plus one-third the number of part-time students; FTE for instructional staff is similarly calculated. Students in "stand-alone" graduate or professional programs (such as, medicine, law, veterinary, dentistry, social work, or public health) and instructional staff teaching in these programs are excluded from the FTE calculations.

Libraries

Library Collections

Library collections comprise of documents held locally and remote resources for which permanent or temporary access rights have been acquired. Access rights may be acquired by the library itself, by a consortium and/or through external funding. Interlibrary lending and document delivery are excluded from the collection.

Degree-granting institutions with total library expenses greater than zero and/or had access to a library collection report their physical books, media, and serials collections and their digital/electronic books, media, serials, and database collections.

Counts in each category (i.e., physical books, media, and serials as well as digital/electronic books, media, serials, and databases) are the number of held at the end of the most recent fiscal year. The percent distribution of each resource is derived by dividing the counts in each category by the total of all categories.

Digital/electronic books and media are reported by titles owned or leased by the library if individual titles are cataloged and/or searchable through the library catalog or discovery system. E-serials are reported by titles that are accessible through the library's catalog or discovery system. Digital and Electronic databases are reported by the total number of licensed digital/electronic databases in the institutions collection if there is bibliographic or discovery access at the database level.

Library Expenses

Library expenses are funds expended by the library (regardless of when received) from its regular budget and from all other sources (e.g., research grants, special projects, gifts and endowments, and fees for services) for the most recent 12-month period that corresponds to your institution's fiscal year that ends before October 1.

Degree-granting institutions with total library expenses less than \$100,000 are not required to report their expenses to IPEDS. Salaries and wages are reported from the library budget or all other institutional sources that are identifiable. Fringe benefits are reported only if paid from the library budget. The percent distribution of each category of expense is derived by dividing each expense category by the sum of total library expenses.

Additional Resources

Additional information on the IPEDS survey components, including survey methodology, survey forms, and frequently asked questions, can be found at <https://nces.ed.gov/ipeds/use-the-data/survey-components>.

Additional information on the timing of IPEDS data collection, data coverage, and data release cycle, can be found at <https://nces.ed.gov/ipeds/use-the-data/timing-of-ipeds-data-collection>.

Additional definitions of variables used in this report can be found in the IPEDS glossary available at <https://surveys.nces.ed.gov/ipeds/VisGlossaryAll.aspx>.

Additional resources on the IPEDS Data Feedback Report, including the instructions on creating a custom comparison report, FAQs, and video tutorials, can be found at <https://nces.ed.gov/Iped/Help/View/2>.

YOUNGSTOWN STATE UNIVERSITY

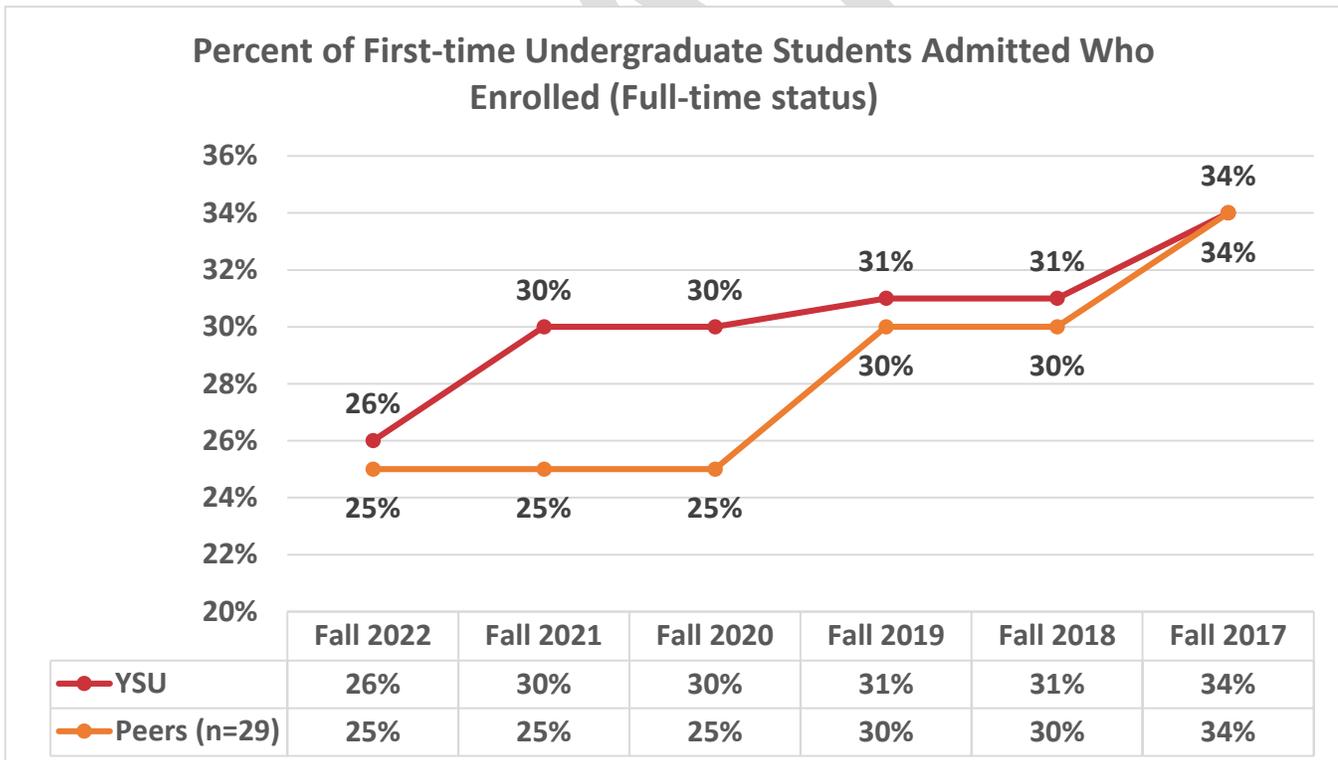
BOARD OF TRUSTEES

MARCH 6, 2024

BOARD-LEVEL KEY PERFORMANCE INDICATORS

The following variables reflecting 2023 are those chosen by the Board of Trustees upon adoption of the *Plan for Strategic Actions to Take Charge of Our Future*. These “lag” indicators attest to overall institutional performance across 15 variables. Available in On Board Resources are the variables identified as “lead” indicators that the institution more directly influences on a day-to-day and operational basis. It is intended that implementing Strategies within the Goals of the Plan will positively influence the “lead” indicator variables and that there will be consequential improvement in the “lag” indicator variables. This is not withstanding the typical other measures that also indicate some other aspects of institutional well-being such as Audited Financial Statement, HLC annual data feed, Senate Bill 6 ratios, etc.

YIELD OF ADMITTED STUDENTS



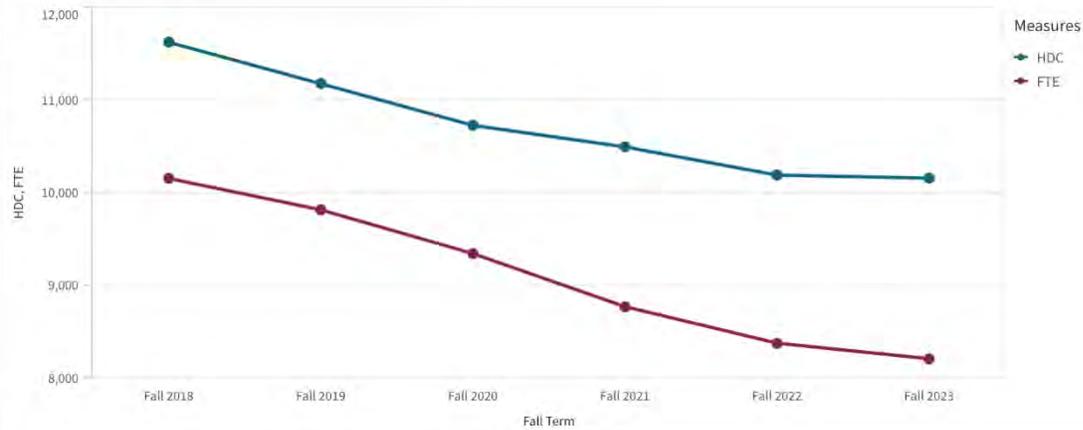
While yield of admitted students has declined for both YSU and peer institutions. For fall 2022, institutions receiving Title IV funds had a yield rate of 21%.

(<https://nces.ed.gov/ipeds/TrendGenerator/app/answer/10/103>).

Headcount and Full-Time Equivalent Enrollment

YSU's Headcount (HDC) and Full-Time Equivalent (FTE)

14th Day Fall Term



Source: YSU IR Datasets. HDC is Undergraduate and Graduate. FTE is Course Credit Hours divided by 15.

Headcount and Full-Time Equivalent

Q	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
HDC	11,627	11,179	10,728	10,495	10,190	10,157	-33	-0%	-1,470	-13%
FTE	10,154.00	9,814.20	9,341.07	8,766.60	8,371.73	8,203.00	-168.73	-2%	-1,951.00	-19%

Both headcount and full-time equivalent enrollment have declined over both a one-year (-0%; -2%) and five-year timeframe (-13%; -19%). The Enterprise Enrollment strategy focusing on market share is intended to stabilize and/or reverse this trend.

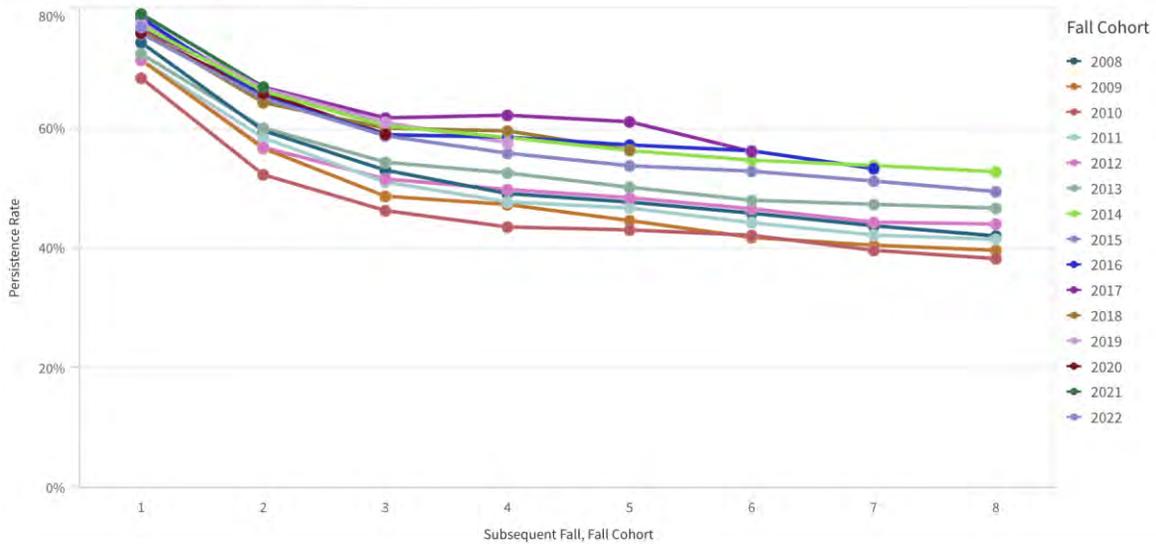


COHORT PERSISTENCE

Persistence through Eight Years after Entrance

YSU's Persistence Rate

First-Time Full-Time Bachelor's Degree-Seeking



Source: YSU IR Datasets and ODS_ST_ACADEMIC_OUTCOMES. Persistence means graduated or retained by the University to the next subsequent fall term. It does NOT indicate a continuation in the entering college or major.

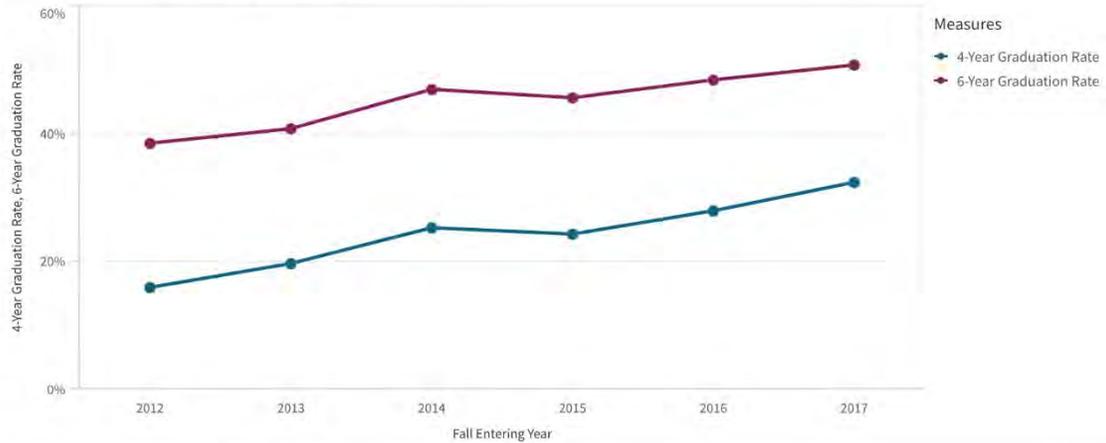
Persistence Rate: First-Time Full-Time Bachelor's Degree-Seeking

Fall Cohort	Subsequent Fall							
	1	2	3	4	5	6	7	8
2008	74.3%	59.6%	53.0%	49.1%	47.7%	45.8%	43.7%	42.0%
2009	71.4%	56.7%	48.7%	47.3%	44.6%	41.8%	40.5%	39.6%
2010	68.4%	52.3%	46.3%	43.5%	43.0%	42.1%	39.6%	38.2%
2011	71.4%	58.4%	51.0%	47.7%	46.7%	44.2%	42.2%	41.5%
2012	71.4%	56.8%	51.5%	49.8%	48.4%	46.6%	44.3%	44.0%
2013	72.4%	60.1%	54.3%	52.5%	50.2%	48.0%	47.3%	46.7%
2014	77.2%	66.2%	60.4%	58.5%	56.3%	54.7%	53.8%	52.7%
2015	75.8%	65.0%	58.7%	55.8%	53.7%	52.8%	51.2%	49.4%
2016	78.4%	65.2%	58.9%	58.5%	57.2%	56.2%	53.3%	-
2017	76.6%	66.9%	61.7%	62.2%	61.1%	56.1%	-	-
2018	76.3%	64.3%	60.0%	59.5%	56.4%	-	-	-
2019	77.5%	66.6%	61.0%	57.6%	-	-	-	-
2020	75.9%	65.8%	59.0%	-	-	-	-	-
2021	79.1%	66.9%	-	-	-	-	-	-
2022	76.9%	-	-	-	-	-	-	-

While persistence in years 1 and 2 is relatively flat (77%), persistence in the following years remains problematic. Implementing a student anticipatory and preventative advising and support strategy is intended to improve persistence across all years.

4- and 6-Year Graduation Rates, Cohorts 2012-2017

YSU's 4- and 6-Year Graduation Rates, Cohorts 2012-2017
First-Time Full-Time Bachelor's Degree-Seeking



Source: YSU IPEDS Graduation Rates survey responses.

4- and 6-Year Graduation Rates, Cohorts 2012-2017
First-Time Full-Time Bachelor's Degree-Seeking

	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
4-Year	15.9%	19.7%	25.3%	24.3%	27.9%	32.4%	0.05	16%	0.16	103%
6-Year	38.5%	40.8%	46.9%	45.6%	48.4%	50.8%	0.05	5%	0.12	32%

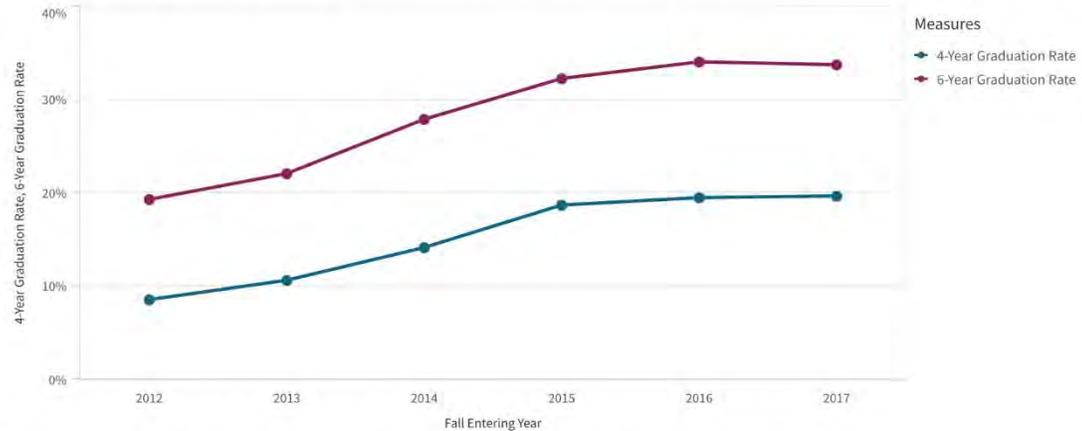
Both 4- and 6-year graduation rates have increased year over year (over one year (16%; 103%) and over 5-years (+5%; +32%). The 4- and 6-y graduation rates are now 32% and 51%, respectively, for the Fall 2017 cohort while they were 16% and 39%, respectively, for the Fall 2012 cohort.



REDUCING THE ACHIEVEMENT GAP

4- and 6-Year Graduation Rates, Cohorts 2012-2017: Minority

YSU's 4- and 6-Year Graduation Rates, Cohorts 2012-2017: Minority
First-Time Full-Time Bachelor's Degree-Seeking



Source: YSU IPEDS Graduation Rates survey responses. Minority includes Asian, Black, Hawaiian, Hispanic, and Native American.

4- and 6-Year Graduation Rates, Cohorts 2012-2017: Minority
First-Time Full-Time Bachelor's Degree-Seeking

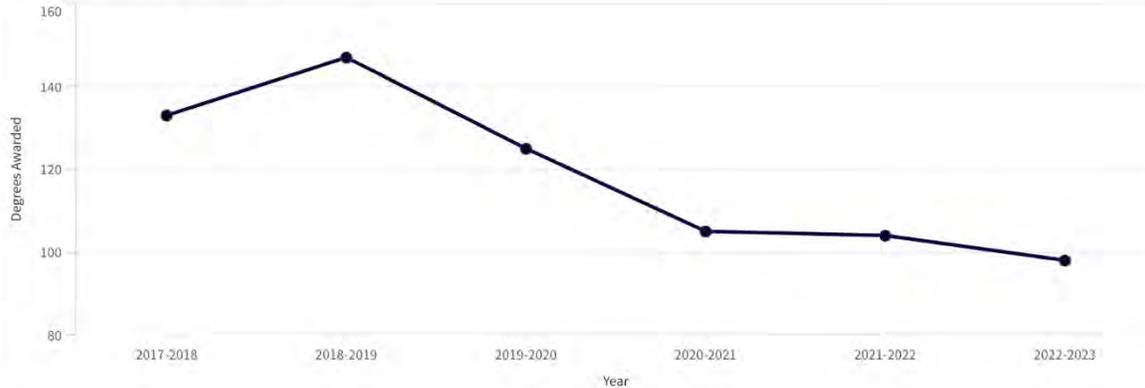
	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
4-Year	8.6%	10.7%	14.2%	18.7%	19.5%	19.7%	0.00	1%	0.11	129%
6-Year	19.3%	22.1%	27.9%	32.3%	34.0%	33.7%	-0.00	-1%	0.14	75%

The 4- and 6-year graduation rate for minority students has increased 129% and 75%, respectively. This remains 12% and 29% lower, respectively, compared to all students. Further analysis is required to understand the underlying reason(s) for such an outcome so support can be enhanced in strategic ways.

DEGREES AWARDED BY LEVEL

Degrees Awarded: Associate

YSU Degrees Awarded: Associate



Source: YSU Banner System, July 1 through June 30.

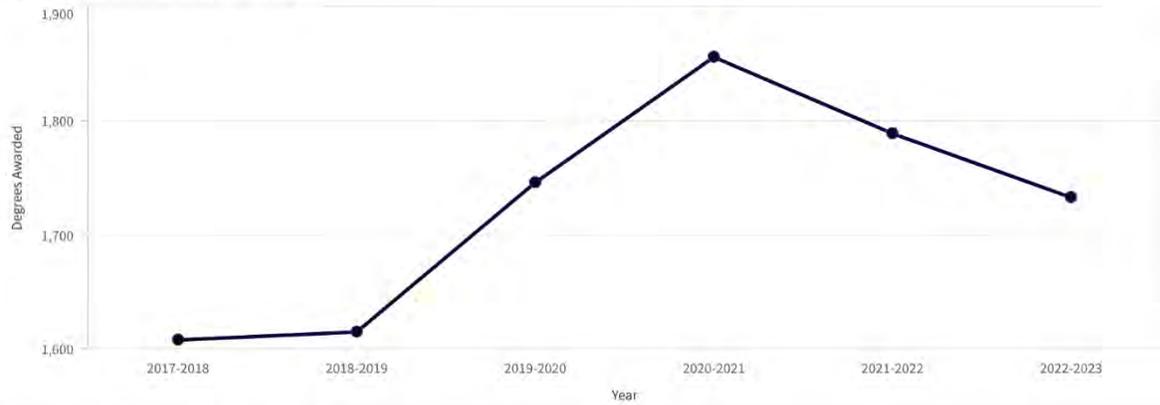
Degrees Awarded: Associate

2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
133	147	125	105	104	98	-6	-6%	-35	-26%

The number of Associate degree completions has decreased by 26% over five years (133 to 98). Strategies aligned with Workforce Education and Innovation are intended to reverse this trend.

Degrees Awarded: Bachelor's

YSU Degrees Awarded: Bachelor's



Source: YSU Banner System, July 1 through June 30.

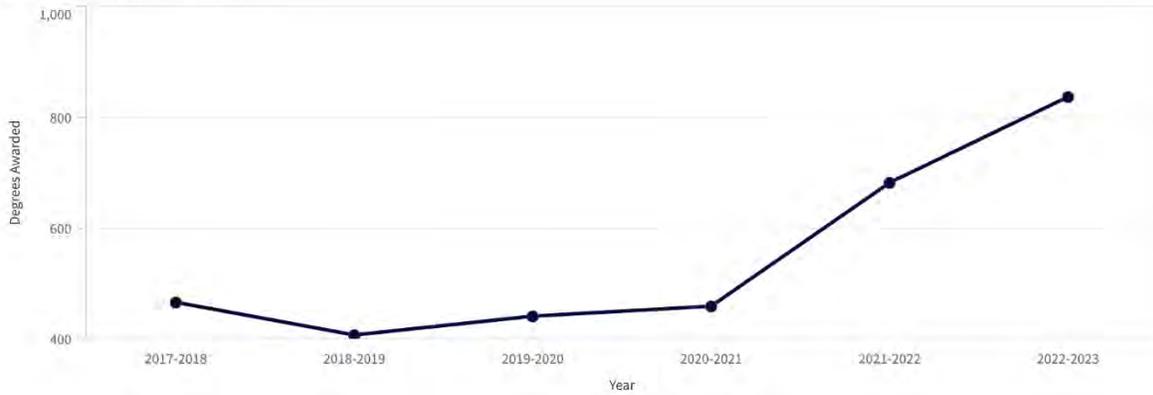
Degrees Awarded: Bachelor's

2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
1,608	1,615	1,746	1,856	1,789	1,733	-56	-3%	125	8%

Bachelor's degrees awarded has increased 8% over 5-years and decreased 3% over one-year. The number of degrees awarded in 2022-23 is 8% higher than the average of 2017 - 2019. While increasing the number of graduates is a measure of academic program success, this does create a dynamic tension with constructing the incoming classes. Implementing for fall 2025, 15 online undergraduate degrees, 5 per year over three years, will increase the number of Bachelor's degrees awarded.

Degrees Awarded: Master's

YSU Degrees Awarded: Master's



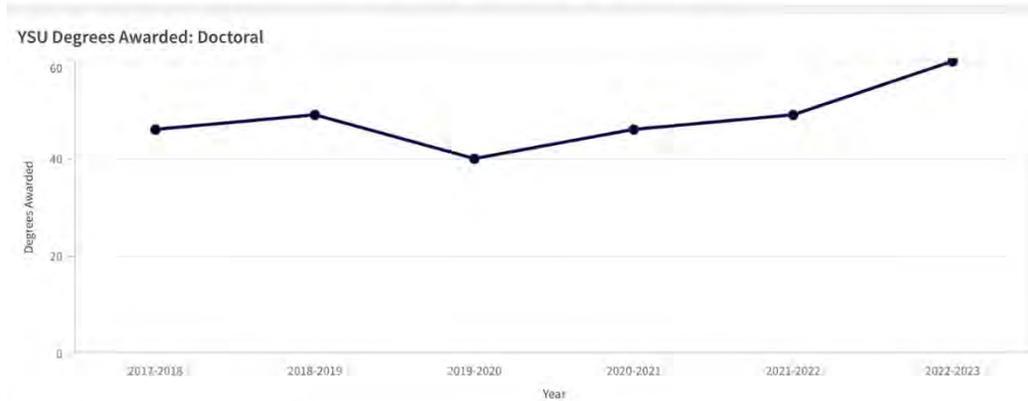
Source: YSU Banner System July 1 through June 30.

Degrees Awarded: Master's

2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
466	407	441	459	682	837	155	23%	371	80%

The number of Master's degrees awarded has increased 80% over 5-years and 23% over 1-year. This is the result of a very purposeful implementation of offering Master's degree programs online. It is also related to strategic marketing of Master's degree in the College of Science, Technology, Engineering, and Mathematics. Strategies are emerging to aligning Master degree offerings to businesses/industries and governmental agencies requiring Master's degree for career advancement (Air Force, etc.).

Degrees Awarded: Doctoral



Source: YSU Banner System, July 1 through June 30.

Degrees Awarded: Doctoral						One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
2017-18	2018-19	2019-20	2020-21	2021-22	2022-23				
46	49	40	46	49	60	11	22%	14	30%

The number of Doctoral degrees awarded has increased 30% and 22% over 5- and 1-year(s), respectively. This is the result of a very purposeful enhancement of (physical therapy) or implementation of such degrees in recent years (nurse practitioner and anesthetist).

GRADUATE OUTCOME REPORT FOR ACADEMIC YEAR 2022-2023

EXECUTIVE SUMMARY

The Graduate Outcome Report is a summary of employment and continuing education decisions made by Youngstown State University graduates who completed degrees during the 2022-2023 academic year.

Who had the opportunity to take the survey: The survey was distributed through Handshake (the university's career management system) to 2,864 individuals who received degrees in August 2022, December 2022, and May 2023.

How the data was collected: Students who did not respond to the survey were sent multiple emails over a period of six months after graduation. In addition, staff gathered student knowledge rate data (defined by the national Association of Colleges and Employers) via current social media profiles, information reported by the Alumni Office and faculty, and pre-graduation exit interviews.

Knowledge Rate: The YSU total knowledge rate is 41.82%. Out of 2,864 graduates, there were 1,198 reported student outcomes.

Career Outcomes Definition: Respondents that are either working as an employee, freelancer, and contract worker, accepted in a program of additional education, in the military, or in a service position (AmeriCorps, Peace Corps, etc.).

Career Outcomes Rate: The YSU total career outcome rate is 77.37%. Out of the 1,198 respondents, 927 had outcomes related to a career.

Ohio Retention Rate: 77.6% of respondents remained in Ohio.

Reported Salaries by Degree Type:

<u>Associate</u>	<u>Bachelor</u>	<u>Master</u>	<u>Doctorate</u>
Responses = 4	Responses = 243	Responses = 72	Responses = 7
Mean: \$49,160	Mean: \$58,958	Mean: \$71,311	Mean: \$89,260
Median: \$38,428	Median: \$57,500	Median: \$66,560	Median: \$100,000

Prepared January 2024

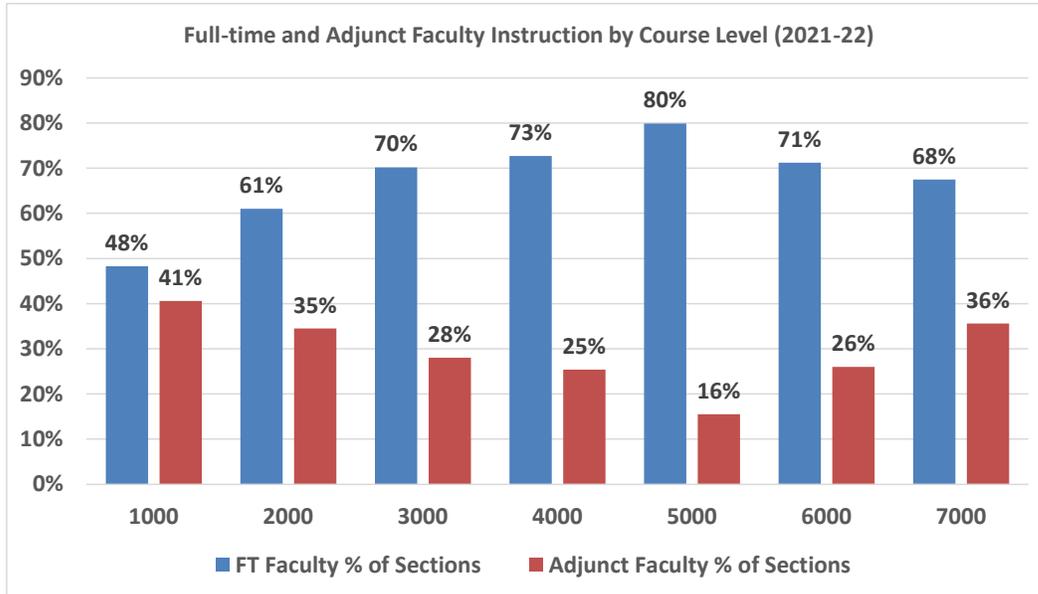
GRADUATE OUTCOME REPORT 2022-2023



Individuals in Mahoning County with a high school diploma earn on average \$25,341. Average earning for Mahoning County with a Bachelor's degree is on average \$43,259. Given these facts, a Bachelor's degree from YSU adds value given the average mean income for a YSU Bachelor's degree recipient is \$58,958.

https://www.opendatanetwork.com/entity/0500000US42049-0500000US39099/Erie_County_PA-Mahoning_County_OH/jobs.earnings.median_earnings?year=2018

PERCENT OF FULL-TIME FACULTY TEACHING

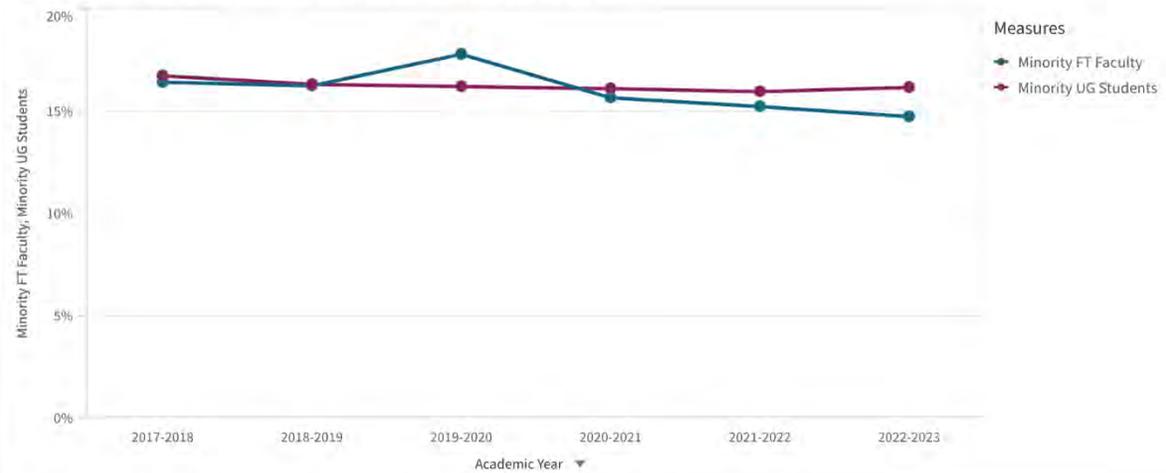


It is known that the more exposure students have to full-time faculty the better the student experience. Thus it is important to assess how this varies across course offering levels. Academic Affairs will consider this information and determine how this factors into the offering of course sections across the colleges.

DIVERSITY OF INSTRUCTION

Percentage Minority: Full-Time Faculty and Undergraduate Students

YSU's Percentage Minority Full-Time Faculty and Undergraduate Students



Source: YSU Banner data reported via IPEDS Human Resources Survey.

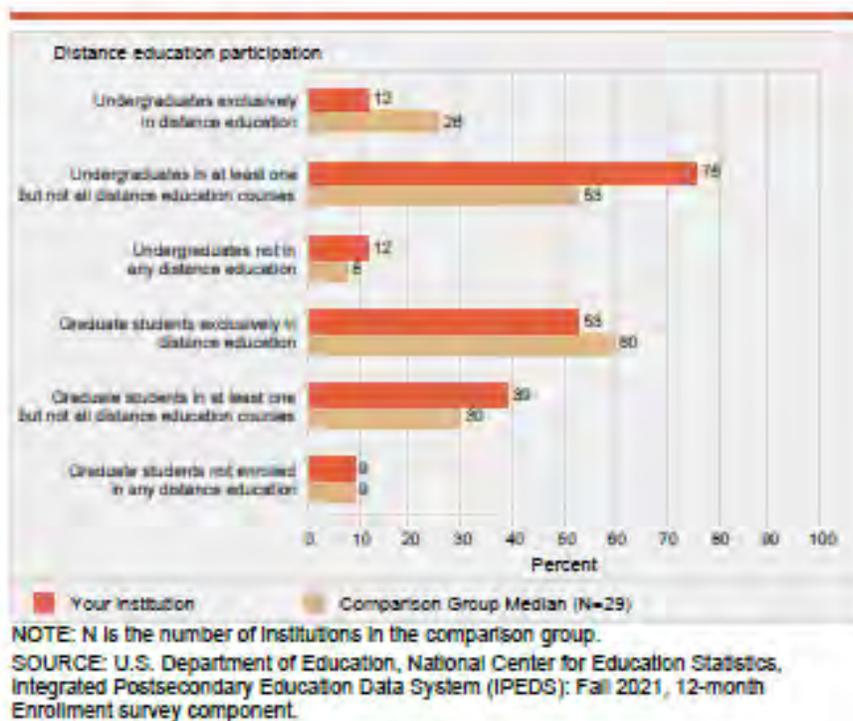
Percentage Minority Full-Time Faculty and Undergraduate Students

Minority	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	One-Year Change	One-Year Change %	Five-Year Change	Five-Year Change %
FT Faculty	16.4%	16.2%	17.8%	15.7%	15.2%	14.7%	-0.00	-3%	-0.02	-10.28%
Undergraduates	16.7%	16.3%	16.2%	16.1%	16.0%	16.2%	0.00	1%	-0.01	-3.37%

The diversity of the students and that of the full-time faculty are roughly equivalent over the past five years. There are no established criteria for this this measure other than to be aware of this relationship. Should this remain a Board Key Performance Indicator?

DISTANCE EDUCATION ENROLLMENT

Figure 6. Percent of students enrolled in distance education courses, by amount of distance education and student level: 2020-21

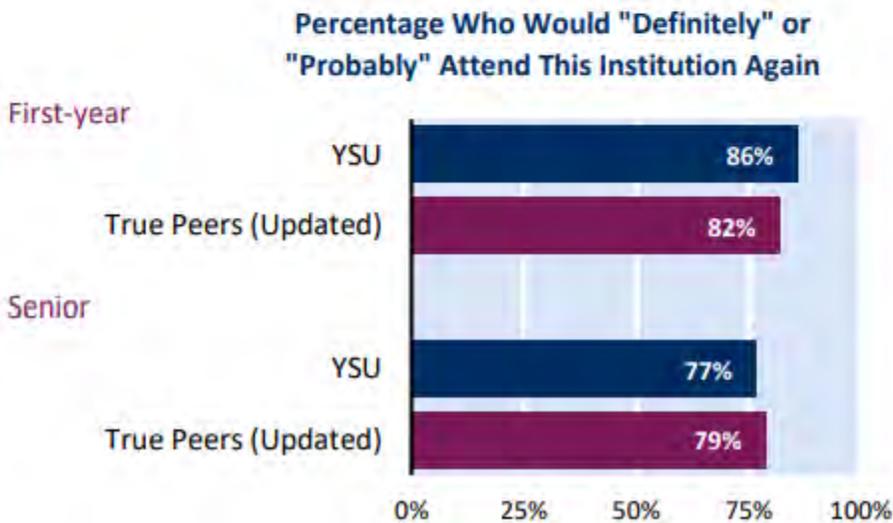
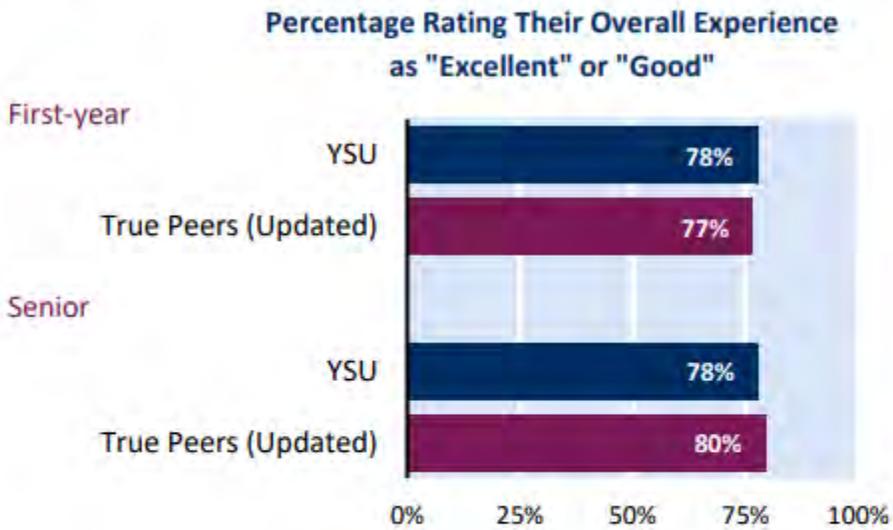


The percent of students enrolled in distance education is illustrated above. The information is reflected in an IPEDS Customized Feedback Report. A significant proportion of undergraduate students enroll in at least one such course. As expected, given the implementation of online Master's programs, a large proportion of graduate students are enrolled totally in online degree programs.

NATIONAL SURVEY OF STUDENT ENGAGEMENT - 2021

Satisfaction with YSU

Students rated their overall experience at the institution, and whether or not they would choose it again.

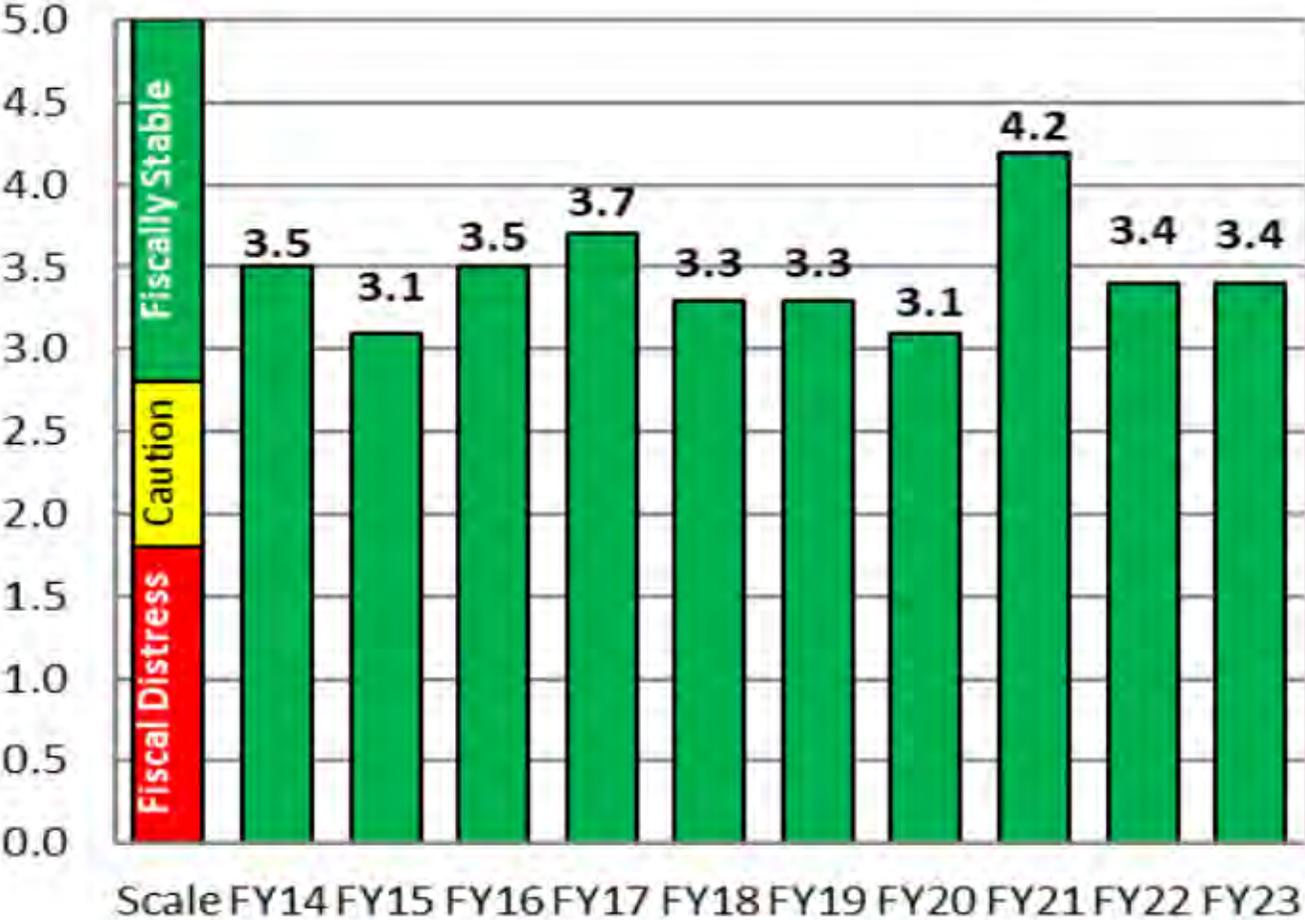


The most recent administration of this survey instrument indicates that YSU students are satisfied with their experiences overall. In addition, most students would choose to attend YSU again. These results not dissimilar to those of 2018.

SENATE BILL SIX SCORE

Historical Data

YSU’s S.B. 6 composite scores have fluctuated over the last 10 years but have remained stable since inception.



Senate Bill 6 composite score is a measure of institutional fiscal stability. YSU’s score has consistently been above 3.0 and has been as high as 4.2 for FY21 (linked to federal funds related to COVID). It is the institutions objective to have a SB 6 score no lower than 2.7.



SUMMARY OF PERSONNEL ACTIONS
Athletic Employees
10/16/2023 through 1/15/2024

Separations – 1

- Professional Administrative Excluded – 1

Reclassification/Position Adjustments – 2

- Professional Administrative Excluded – 2

Salary Adjustments – 3

- Professional Administrative Excluded – 3

Multi-Year Appointments – 1

- Professional Administrative Excluded – 1

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SEPARATIONS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	DATE OF SEPARATION	FTE	SALARY	TYPE OF SEPARATION
Lindley, Tory	Excluded	Deputy Athletic Director Sports Medicine	Training Room	10/30/2023	1.00	\$ 95,716.80	Resigned

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
RECLASSIFICATIONS AND POSITION ADJUSTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Klekner-Alt, Kiersten	Excluded	Associate Athletic Director & Director of Compliance/Assistant Athletic Director	Athletic Administration	11/16/2023	1.00	\$ 65,545.20	\$ 62,424.00
Tymkew, Jennifer	Excluded	Senior Associate Athletic Director for Integrated Healthcare & Performance/ Associate Athletic Director	Training Room	11/16/2023	1.00	\$ 80,414.08	\$ 73,103.71

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SALARY ADJUSTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Fink, Rebecca	Excluded	Senior Associate Athletic Director for Internal Operations Senior Women's Administrator	Athletic Administration	11/16/2023	1.00	\$ 77,197.68	\$ 72,828.00
Pinciario, Steven	Excluded	Assistant Athletic Director	Ticket Office	11/16/2023	1.00	\$ 65,954.86	\$ 62,814.15
Stuart, Timothy	Excluded	Senior Associate Athletic Director for External Operations	Athletic Facilities Rental	11/16/2023	1.00	\$ 77,197.68	\$ 72,828.00

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
MULTI-YEAR APPOINTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	NEW FTE	SALARY
Duncan, Kody	Excluded	Head Coach Men's Tennis	Tennis - Men's	10/16/2023 - 06/302026	1.00	\$ 50,000.00

**YOUNGSTOWN STATE UNIVERSITY
INTERCOLLEGIATE ATHLETICS
TEN YEAR HISTORY**

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

ENTERING FRESHMEN CLASS	<u>2023</u> 16-17	<u>2022</u> 15-16	<u>2021</u> 14-15	<u>2020</u> 13-14	<u>2019</u> 12-13	<u>2018</u> 11-12	<u>2017</u> 10-11	<u>2016</u> 09-10	<u>2015</u> 08-09	<u>2014</u> 07-08
YSU STUDENT-ATHLETES	64	62	59	62	61	60	63	61	64	65
YSU GENERAL STUDENTS	46	43	40	36	33	33	32	32	34	34
DIFFERENCE	18	19	19	26	28	27	31	29	30	31

STUDENT ATHLETES VS. GENERAL STUDENT BODY GRADUATION RATE (NON-COHORT)

YSU STUDENT-ATHLETES	61	67	63	64	52	54	72	59	49	65
YSU GENERAL STUDENTS	49	47	48	41	37	35	31	31	33	33
DIFFERENCE	12	20	15	23	15	19	41	28	16	32
NCAA REQUIREMENT OF > 13%	13	13	13	13	13	13	13	13	13	13
DIFFERENCE	-1	7	2	10	2	6	28	15	3	19

NCAA GRADUATION SUCCESS RATE

YSU - GSR	79	79	78	80	81	80	79	79	78	76
NCAA REQUIREMENT OF > 90%	90	90	90	90	90	90	90	90	90	90
DIFFERENCE	-11	-11	-12	-10	-9	-10	-11	-11	-12	-14

YOUNGSTOWN STATE UNIVERSITY
 INTERCOLLEGIATE ATHLETICS
 FOUR-YEAR COHORT STUDENT-ATHLETES GRADUATION RATES
 TEN YEAR HISTORY

ENTERING FRESHMEN CLASS	<u>2023</u> 16-17	<u>2022</u> 15-16	<u>2021</u> 14-15	<u>2020</u> 13-14	<u>2019</u> 12-13	<u>2018</u> 11-12	<u>2017</u> 10-11	<u>2016</u> 09-10	<u>2015</u> 08-09	<u>2014</u> 07-08
HORIZON LEAGUE:										
YOUNGSTOWN STATE	64	62	59	62	61	60	63	61	64	65
HORIZON LEAGUE AVERAGE	69	69	68	69	67	66	65	64	64	65
<i>NCAA DIVISION I</i>	69	69	69	69	68	67	67	66	66	65
<hr/>										
YSU GENERAL STUDENTS	46	43	40	36	33	33	32	32	34	34
HL GENERAL STUDENTS (AVERAGE)	51	51	51	48	47	46	45	46	47	47
<hr/>										
YSU S/A'S ABOVE GENERAL STUDENTS	18	19	19	26	28	27	31	29	30	31
HL S/A'S ABOVE GENERAL STUDENTS	18	18	17	21	20	20	20	18	17	18
<hr/>										
MISSOURI VALLEY FOOTBALL:										
YOUNGSTOWN STATE	64	62	59	62	61	60	63	61	64	65
MISSOURI VALLEY AVERAGE	66	68	67	68	66	66	65	64	65	65
<i>NCAA DIVISION I</i>	69	69	69	69	68	67	67	66	66	65
<i>FCS</i>	68	68	69	68	67	66	65	65	64	65
<hr/>										
YSU GENERAL STUDENTS	46	43	40	36	33	33	32	32	34	34
MVFC GENERAL STUDENTS (AVERAGE)	56	55	55	53	53	52	53	52	53	53
<hr/>										
YSU S/A'S ABOVE GENERAL STUDENTS	18	19	19	26	28	27	31	29	30	31
MVFC S/A'S ABOVE GENERAL STUDENTS	10	13	12	15	13	14	12	12	12	12

YOUNGSTOWN STATE UNIVERSITY
 INTERCOLLEGIATE ATHLETICS
 FOUR-YEAR COHORT GENERAL STUDENTS GRADUATION RATES
 TEN YEAR HISTORY

ENTERING FRESHMEN CLASS	<u>2023</u> 16-17	<u>2022</u> 15-16	<u>2021</u> 14-15	<u>2020</u> 13-14	<u>2019</u> 12-13	<u>2018</u> 11-12	<u>2017</u> 10-11	<u>2016</u> 09-10	<u>2015</u> 08-09	<u>2014</u> 07-08
HORIZON LEAGUE:										
YOUNGSTOWN STATE	46	43	40	36	33	33	32	32	34	34
HORIZON LEAGUE AVERAGE	51	51	51	48	47	46	45	44	45	44
MISSOURI VALLEY FOOTBALL:										
YOUNGSTOWN STATE	46	43	40	36	33	33	32	32	34	34
MISSOURI VALLEY AVERAGE	56	55	55	53	53	52	53	52	53	53

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

ENTERING FRESHMEN CLASS	<u>2023</u> 16-17	<u>2022</u> 15-16	<u>2021</u> 14-15	<u>2020</u> 13-14	<u>2019</u> 12-13	<u>2018</u> 11-12	<u>2017</u> 10-11	<u>2016</u> 09-10	<u>2015</u> 08-09	<u>2014</u> 07-08
HORIZON LEAGUE:										
YOUNGSTOWN STATE	80	79	78	80	81	80	79	79	78	76
HORIZON LEAGUE AVERAGE	89	88	87	88	87	85	84	82	81	81
NCAA DIVISION I	92	89	89	90	88	87	86	84	83	82
MISSOURI VALLEY FOOTBALL:										
YOUNGSTOWN STATE	80	79	78	80	81	80	79	79	78	76
MISSOURI VALLEY AVERAGE	88	87	86	87	86	85	83	81	79	78
NCAA DIVISION I	92	89	89	90	88	87	86	84	83	82
FCS	79	88	88	88	87	76	74	73	71	72

Source: NCAA Graduation Success Rates Report

How does it differ from the Federal Graduation Rate?:

The NCAA developed its Graduation Success Rate (GSR) in response to criticism that the Federal Graduation Rate (FGR) understates the academic success of athletes because the FGR method does not take into account two important factors in college athletics:

- When student-athletes transfer FROM an institution before graduating and is in good academic standing (perhaps to transfer to another institution for more playing time, different major, or to go pro); and
- Those student-athletes who transfer TO an institution (e.g. from a community college or another 4-year college) and earn a degree.

The Federal Graduation Rate (FGR) treats transfers as nongraduates for the original institution the student-athlete attended, even if that student-athlete later graduates from another institution. Also, the FGR does not include that student-athlete in the graduation rates at the new institution where he/she does graduate. Therefore, once a student-athlete transfers to another school he/she is no longer recognized in the calculated graduation rate. The GSR takes into accounts both factors and gives credit to institutions for successful transfers, whether they are leaving or entering an institution.

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

	2021-22	2022-23				2021-22				2020-21				2019-20			
	NCAA AVERAGE	POINTS EARNED	TOTAL POSSIBLE	ANNUAL APR	MULTI-YEAR APR												
BASEBALL	977	100	100	1000	988	95	97	979	983	102	103	990	981	106	109	972	973
MEN'S BASKETBALL	967	38	39	974	969	52	53	981	975	48	48	1000	948	46	51	902	938
MEN'S CROSS COUNTRY	983	61	61	1000	972	62	65	954	970	56	56	1000	977	31	34	912	949
FOOTBALL	962	284	293	969	951	270	278	971	944	292	305	957	946	307	337	911	949
MEN'S GOLF	988	36	36	1000	1000	38	38	1000	1000	36	36	1000	1007	32	32	1000	977
MEN'S SWIMMING	985	76	76	1000	982	70	72	972	972	54	56	964	972	16	16	1000	1000
MEN'S TENNIS	986	32	32	1000	984	36	36	1000	976	28	30	933	958	26	26	1000	957
MEN'S TRACK	974	152	153	993	974	148	155	955	964	145	151	960	971	151	153	987	961
WOMEN'S BASKETBALL	982	47	47	1000	986	55	55	1000	987	53	56	946	982	59	59	1000	991
BOWLING	982	35	35	1000	1000	36	36	1000	1000	32	32	1000	1000	39	39	1000	982
WOMEN'S CROSS COUNTRY	989	50	50	1000	996	65	65	1000	996	67	68	985	990	44	44	1000	994
WOMEN'S GOLF	993	36	36	1000	994	43	44	977	988	44	44	1000	979	40	40	1000	977
LACROSSE	994	113	117	966	984	112	113	991	995	74	74	1000	1000				
SOCCER	989	116	117	991	993	115	116	991	986	116	117	991	980	98	99	990	964
SOFTBALL	988	77	77	1000	988	81	81	1000	988	91	92	989	984	78	82	951	984
WOMEN'S SWIMMING	992	119	119	1000	992	97	98	990	989	93	93	1000	988	81	83	976	986
WOMEN'S TENNIS	991	31	31	1000	1000	25	25	1000	991	32	32	1000	991	26	26	1000	973
WOMEN'S TRACK	984	161	163	988	984	177	184	962	982	180	181	994	986	164	166	988	978
VOLLEYBALL	990	47	47	1000	1000	46	46	1000	1000	46	46	1000	984	40	40	1000	973
INSTITUTIONAL APR	984			994	986			985	983			985	980			977	972

- The APR, holds institutions accountable for the academic progress of their student-athletes through a team-based metric that accounts for the eligibility and retention of each student-athlete for each academic term.
- The APR is calculated as follows:
 - Each student receiving athletically related financial aid earns 1 point for staying in school (retention) & 1 point for being academically eligible (retention)
 - the 2 factors research identifies as best indicators of graduation.
 - A team's total points are divided by points possible and then multiplied by 1,000 to equal the team's Academic Progress Rate.
 - In addition to a team's current-year APR, its rolling four-year APR is also used to determine accountability.
- Teams must earn a four-year APR of 930 to compete in NCAA Championships.

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

SPORT	THREE YEAR AVERAGE	2023-24		2022-23		2021-22		2020-21		2019-20	
		SPRING 2024	FALL 2023	SPRING 2023	FALL 2022	SPRING 2022	FALL 2021	SPRING 2021	FALL 2020	SPRING 2020	FALL 2019
BASEBALL	3.32		3.44	3.37	3.34	3.20	3.26	3.32	3.27	3.29	3.18
MEN'S BASKETBALL	3.27		3.31	3.16	3.19	3.20	3.40	3.33	3.19	2.95	2.88
WOMEN'S BASKETBALL	3.76		3.73	3.71	3.77	3.74	3.84	3.76	3.76	3.73	3.73
MEN'S CROSS COUNTRY	3.26		3.37	3.27	3.29	3.28	3.13	3.24	3.13	2.96	2.78
WOMEN'S CROSS COUNTRY	3.48		3.42	3.53	3.51	3.46	3.46	3.52	3.41	3.47	3.40
FOOTBALL	3.16		3.21	3.20	3.17	3.17	3.10	3.12	3.06	2.94	2.88
MEN'S GOLF	3.44		3.38	3.34	3.31	3.48	3.59	3.55	3.55	3.53	3.47
WOMEN'S GOLF	3.69		3.94	3.75	3.74	3.54	3.60	3.56	3.54	3.47	3.34
LACROSSE	3.57		3.62	3.60	3.58	3.53	3.50	3.59	3.43		
SOCCER	3.64		3.66	3.61	3.59	3.61	3.65	3.71	3.71	3.64	3.56
SOFTBALL	3.43		3.61	3.51	3.45	3.38	3.37	3.23	3.18	3.05	3.03
MEN'S SWIMMING	3.56		3.63	3.58	3.53	3.47	3.51	3.62	3.59	3.41	3.44
WOMEN'S SWIMMING	3.54		3.57	3.57	3.57	3.52	3.51	3.52	3.51	3.43	3.34
MEN'S TENNIS	3.64		3.53	3.62	3.65	3.68	3.73	3.61	3.56	3.37	3.25
WOMEN'S TENNIS	3.68		3.76	3.72	3.69	3.66	3.63	3.64	3.70	3.66	3.65
MEN'S TRACK	3.17		3.23	3.20	3.19	3.13	3.16	3.09	2.86	3.15	3.09
WOMEN'S TRACK	3.44		3.45	3.49	3.49	3.41	3.43	3.35	3.34	3.42	3.33
VOLLEYBALL	3.61		3.64	3.60	3.63	3.61	3.62	3.56	3.54	3.65	3.66
BOWLING	3.81		3.75	3.80	3.81	3.84	3.87	3.80	3.78	3.48	3.43
ALL STUDENT-ATHLETE'S	3.44		3.49	3.44	3.42	3.38	3.52	3.38	3.33	3.26	3.20
NUMBER OF TEAMS ABOVE 3.0	19.00	0	19	19	19	19	19	19	18	15	15
NUMBER OF S/A'S WITH: SEMESTER GPA OF 4.00			144	117	134	92	102	111	114	104	64
SEMESTER GPA ABOVE 3.00			444	398	407	347	381	364	384	307	295
% SEMESTER GPA ABOVE 3.00			83%	80%	81%	74%	73%	76%	77%	76%	68%
CUMULATIVE GPA ABOVE 3.00			446	417	420	368	403	379	389	295	293
% CUMULATIVE GPA ABOVE 3.00			84%	83%	84%	79%	77%	80%	78%	73%	67%

YOUNGSTOWN STATE UNIVERSITY
INTERCOLLEGIATE ATHLETICS
FIVE YEAR HISTORY OF ACADEMIC MAJORS

MAJOR	COLLEGE	AS OF FALL SEMESTER				
		2023	2022	2021	2020	2019
Accounting	Business Administration	11	15	16	8	8
Advertising and PR	Business Administration			1		
Allied Health	Health and Human Services					
Anthropology	BCLASSE		1	1	1	1
Art Education	BCLASSE					
Art Studio	Creative Arts	4	3	3		2
Athletic Training	Health and Human Services					1
Biology	STEM	11	11	10	21	21
BS MD	STEM	5				
Business	Business Administration	84	87	82	35	50
Chemical Engineering	STEM	3	1	1	1	3
Chemistry	STEM	2	2	2	2	2
Civil and Construct Eng	STEM	5	5	2		1
Civil Engineering	STEM	4	2	5	3	3
Clinical Laboratory Sci	Health and Human Services					
Communication Studies	Business Administration	15	16	15	13	18
Computer Information Systems	STEM					
Computer Science	STEM	2	4	3	1	1
Coordinated Program Dietetics	Health and Human Services					
Counseling	BCLASSE	3	1			1
Criminal Justice	Health and Human Services	17	30	33	26	30
Dental Hygiene	Health and Human Services	2	2	2	5	5
Dietics	Health and Human Services	1	3	2	3	2
Early Childhood Education	BCLASSE			1		1
Economics	BCLASSE	1	5	5	4	3
Electric Utili Tech	STEM				1	1
Electrical Engineering	STEM	4	3	3	2	3
Engineering	STEM	10	11	14	21	18
English	BCLASSE	2	2	1	1	
Environmental Studies	STEM	2	2	4	5	4
Exercise Science	Health and Human Services	60	46	53	59	46
Family and Consumer Studies	Health and Human Services					
Finance	Business Administration	23	10	7	11	8
Food and Nutrition	Health and Human Services					
Forensic Science	Health and Human Services	3	4	6	5	2
General Administration	Business Administration				19	
General Studies	BCLASSE	56	53	45	31	30
Geography	BCLASSE	1	1	1	1	
Geology	BCLASSE					
Health and Human Services	Health and Human Services	6	5	2	1	1
Health Education	BCLASSE	1	1	2		
History	BCLASSE		1	1		1
Hospitality Management	Health and Human Services	2	3	5	4	2
Human Resource Management	Business Administration	1			1	
Individual Curriculum Prog	BCLASSE	3		3	2	1

YOUNGSTOWN STATE UNIVERSITY
INTERCOLLEGIATE ATHLETICS
FIVE YEAR HISTORY OF ACADEMIC MAJORS

MAJOR	COLLEGE	AS OF FALL SEMESTER				
		2023	2022	2021	2020	2019
Industrial and Systems Engr	STEM	2	2	3	2	
Info & Supply Chain Management	Business Administration					
Information Technology	STEM				1	
Information Technology B	STEM	2	1	2	3	1
Integrated Language Arts Educ	BCLASSE	2				2
Integrated Math Education	BCLASSE		2	1		1
Integrated Sciences Education	BCLASSE		1	2	2	2
Integrated Social Studies Educ	BCLASSE	4	3	2	1	1
Intervention Specialist	BCLASSE	9	8	8	8	5
Journalism	BCLASSE	6	5	3	1	
Law	BCLASSE		2	1	1	2
Life Sciences Education	BCLASSE					
Long Term Care Administration	BCLASSE					
Management	Business Administration	6	3	4	15	6
Marketing	Business Administration	27	20	5	3	5
Marketing Management	Business Administration	1	1	17	9	6
Mathematics	STEM	4	3	4	3	2
Mechanical Engineering	STEM	10	13	9	10	5
Medical Lab Science	Health and Human Services	2	1			
Merch Fashion and Interior	Health and Human Services	1			3	3
Middle Childhood Education	BCLASSE	3	4	4	4	5
Music Education	Creative Arts				1	
Music Perf Emphasis Music Record	Creative Arts	1	2	1		
Natural Science	STEM	4	8	5	6	6
Nursing	Health and Human Services	17	19	27	27	24
Philosophy	BCLASSE					
Physical Education	BCLASSE				2	2
Physical Sciences Education	BCLASSE					
Physical Therapy	Health and Human Services			1		1
Physics	STEM	7	5	2	2	1
Political Science	BCLASSE	6	6	4	4	2
Prof Writing and Editing	BCLASSE	2			3	
Psychology	BCLASSE	20	20	21	19	12
Public Health	Health and Human Services	5	2	4	3	1
Religious Studies	BCLASSE					
Respiratory Care	Health and Human Services			1		
Science Pre Education	BCLASSE					
Social Services	Health and Human Services					
Social Work	Health and Human Services	4	3	2	3	3
Sociology	BCLASSE	5	1		2	1
Spanish	BCLASSE					
Special Education	BCLASSE	2	4	1	2	2
Technology	STEM	3	3	2	2	1
Telecommunications	Creative Arts		1	1	6	5
Telecomm St. Spts Broadcast Tr	Business Administration	3	7	5		

YOUNGSTOWN STATE UNIVERSITY
 INTERCOLLEGIATE ATHLETICS
 FIVE YEAR HISTORY OF ACADEMIC MAJORS

<u>MAJOR</u>	<u>COLLEGE</u>	<u>AS OF FALL SEMESTER</u>				
		<u>2023</u>	<u>2022</u>	<u>2021</u>	<u>2020</u>	<u>2019</u>
Theatre Studies	Creative Arts			1		
Undetermined	Undetermined	23	52	47	75	58
Total		525	532	521	510	435

YOUNGSTOWN STATE UNIVERSITY
 INTERCOLLEGIATE ATHLETICS
 FIVE YEAR HISTORY OF ACADEMIC MAJORS

<u>MAJOR</u>	<u>COLLEGE</u>	<u>AS OF FALL SEMESTER</u>				
		<u>2023</u>	<u>2022</u>	<u>2021</u>	<u>2020</u>	<u>2019</u>
	Business Administration	171	159	152	114	101
	BCLASSE	126	121	107	89	75
	Creative Arts	5	6	6	7	7
	Health and Human Services	120	118	138	139	121
	STEM	80	76	71	86	73
	Undetermined	23	52	47	75	58
	Total	525	532	521	510	435

**RESOLUTION TO MODIFY
VACATION LEAVE, PROFESSIONAL/ADMINISTRATIVE STAFF AND
DEPARTMENT CHAIRPERSONS NOT COVERED BY A COLLECTIVE
BARGAINING AGREEMENT POLICY, 3356-7-09**

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

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

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

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

3356-7-09 Vacation leave, professional/administrative staff and department chairpersons not covered by a collective bargaining agreement.

Responsible Division/Office: Human Resources
Responsible Officer: VP for Legal Affairs and Human Resources
Revision History: May 1998; September 2009; October 2010;
March 2016; September 2018; June 2023;
[March 2024](#)
Board Committee: University Affairs
Effective Date: ~~June 22, 2023~~ [March 7, 2024](#)
Next Review: ~~2028~~ [2029](#)

- (A) Policy statement. The university is committed to employment practices that promote the health and welfare of its employees. Through its leave programs, it provides for and encourages preventive health care; physical, emotional, and mental well-being; professional growth and development; and civic responsibility.
- (B) Scope. This policy applies to professional/administrative staff and department chairpersons who are not part of a recognized bargaining unit. Employees in externally funded positions are provided with benefits in accordance with rule 3356-7-43 of the Administrative Code (see university policy 3356-7-43, “Externally funded university positions”). Other employees covered by collective bargaining may refer to their respective labor agreement.
- (C) Parameters.
- (1) Full-time professional/administrative staff and department chairpersons on twelve-month appointments earn 7.33 hours per pay period or one hundred seventy-six hours of paid vacation leave each fiscal year.
 - (2) Full-time staff with annual appointments less than twelve months and part-time staff with a .75 or greater full-time equivalent (FTE) earn vacation leave on a prorated basis, derived from the formula for twelve-month staff. Part-time staff employed less than .75 FTE do not earn vacation leave.

- (3) Individuals whose employment begins or ends during a given fiscal year shall earn a prorated amount of vacation leave during the fraction of the fiscal year employed.
- (4) Vacation leave for full-time twelve-month staff may be accrued up to a maximum of three hundred twenty hours.
- (5) Employees whose vacation balance reaches three hundred twenty hours will not accrue vacation until the balance is reduced below the three hundred twenty hour maximum. Employees are responsible for monitoring the vacation balance.
- (6) Vacation leave for part-time staff, .75 or greater FTE, may not exceed the maximum accrual for the prorated FTE and should be requested in hours (e.g., a .75 FTE staff member would have a maximum accrual of two hundred forty hours).
- (7) Vacation leave accrual begins on the effective date of the initial employment ~~and~~. [Vacation leave](#) may be requested once the staff member has successfully completed ninety days of service, [or as otherwise agreed to at the time of hiring](#).
- (8) Accrued vacation leave may be taken prior to the effective date of separation or a cash payment will be made for vacation accrued through the last day of work. Use of accrued vacation leave prior to effective date of separation is subject to supervisor approval based on university need including when and how much leave is requested. There will be no cash payment for accrued vacation hours made to employees separating from an externally funded position.
- (9) Department chairpersons and other administrators holding earned rank and tenure who revert to faculty status will receive a cash payment for accrued vacation earned through the last day of the administrative appointment (see rule 3356-9-05 of the Administrative Code, university policy 3356-9-05, "Faculty rank and tenure for designated administrators").
- (10) If an employee moves to a professional/administrative excluded status and their current available vacation balance exceeds the

maximum, a partial payout will be made to reduce the balance such that the employee will accrue the full accrual amount in the first pay period worked in the new position.

(D) Procedures.

- (1) Vacation leave may be taken at a time that is mutually agreed upon by the staff member and the immediate supervisor.
- (2) The staff member will request approval from the immediate supervisor in advance of the leave. The staff member will report the use of vacation leave, utilizing the electronic leave reporting system for the pay period in which the leave is utilized.
- (3) The supervisor approves the vacation leave as reported, utilizing the electronic leave reporting system.

**RESOLUTION TO MODIFY
UNIVERSITY HOLIDAYS POLICY, 3356-7-21**

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

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

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

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

**Board of Trustees Meeting
March 7, 2024
YR 2024-**

3356-7-21 University holidays.

Responsible Division/Office: Human Resources
Responsible Officer: VP for Legal Affairs and Human Resources
Revision History: March 1998; December 2009; March 2014;
March 2019; [March 2024](#)
Board Committee: University Affairs
Effective Date: ~~March 7, 2019~~ [March 7, 2024](#)
Next Review: ~~2024~~ [2029](#)

- (A) Policy statement. The board of trustees has been authorized by section 124.19 of the Revised Code to observe certain paid holidays on days other than their customary date of observance. Pursuant to state law, the board authorizes the president to move observance of these movable paid holidays to days that most favorably meet the needs of the university community.
- (B) Parameters. The below holidays may be observed as set forth in this paragraph or may be observed on another day, per section 124.19 of the Revised Code.
- (1) Martin Luther King, Jr. day (third Monday in January).
 - (2) Presidents' day (third Monday in February).
 - (3) Columbus day (second Monday in October).
- (C) Procedures.
- (1) The president, on the recommendation of the provost, will designate which of the paid holidays will be moved to better meet the needs of the academic calendar.
 - (2) The office of human resources is responsible for scheduling the annual holiday calendar after consulting with the president and the office of academic affairs. This schedule of holidays will then be provided to the registrar and the office academic affairs to set the academic calendar.

**RESOLUTION TO MODIFY
COLLECTIVE BARGAINING AND NEGOTIATIONS POLICY, 3356-7-23**

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

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

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

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

**Board of Trustees Meeting
March 7, 2024
YR 2024-**

3356-7-23 Collective bargaining and negotiations.

Responsible Division/Office: Human Resources
Responsible Officer: VP for Legal Affairs and Human Resources
Revision History: August 1998; December 2009; December 2014;
March 2019; [March 2024](#)
Board Committee: University Affairs
Effective Date: ~~March 7, 2019~~ [March 7, 2024](#)
Next Review: ~~2024~~ [2029](#)

- (A) Policy statement. Youngstown state university recognizes the right of eligible faculty and staff to be represented by an exclusive bargaining representative for purposes of collectively negotiating agreements defining the terms and conditions of employment. This recognition is extended solely to faculty and staff who are defined as “public employees” in section 4117.01 of the Revised Code.
- (B) Purpose. To establish a framework for the professional and collegial negotiation of successor agreements with each bargaining unit that achieve the goals of both the university and bargaining unit members.
- (C) Definitions.
- (1) Division (C) of section 4117.01 of the Revised Code defines “public employees” as “...any person holding a position by appointment or employment in the service of a public employer, including any person working pursuant to a contract between a public employer and a private employer and over whom the national labor relations board has declined jurisdiction on the basis that the involved employees are employees of a public employer...”
 - (2) Exceptions applicable to colleges and universities include: confidential employees, management level employees, supervisors, students whose primary purpose is educational training, including graduate assistants or associates, residents, interns, or other students working as part-time public employees less than fifty per cent of the normal year in the employee’s bargaining unit; and part-time faculty members of an institution of higher education.

- (D) Procedures. The board of trustees of Youngstown state university within its fiduciary responsibility provides oversight of collective bargaining between the university and the bargaining units that represent employee groups. The board and university administration shall fulfill the following responsibilities within the collective bargaining process:
- (1) The chairperson of the board of trustees or his/her designee will act as the sole spokesperson for the board of trustees on any matters related to negotiations.
 - (2) The university affairs committee shall be the committee through which collective bargaining issues are presented and discussed with the board of trustees. This committee will provide the necessary authorizations for administration negotiations teams and will establish parameters for board of trustees' participation and communications for each negotiation.
 - (3) The administration will present to the university affairs committee for its review and consideration the administration's recommendations for membership of the university negotiation team, the chief negotiator, the role of legal counsel and bargaining approach (e.g., traditional versus interest-based). The administration will also provide overviews of issues and outcomes of past negotiations, internal and external contexts, financial parameters, and university goals and priorities as well as anticipated bargaining unit goals and priorities.
 - (4) The university affairs committee will review overall financial parameters for each negotiation and any changes to those parameters during the course of each negotiation.
 - (5) During each negotiation, the administration will update the designated committee on overall progress, university and bargaining unit positions, proposed draft language, tentative agreements, and new issues.
 - (6) When a final tentative agreement is reached, and after legal review, the administration will provide to the university affairs committee a summary of major changes to the agreement and a complete redline version of the proposed agreement, including all appendices typically at least one week in advance of the scheduled meeting.

- (7) If a fact finder report is issued, the report shall be brought to the university affairs committee for discussion and vote.
- (8) The university affairs committee will recommend action on the proposed agreement or fact finder report to the full board of trustees.
- (9) The board of trustees must ratify all final collective bargaining agreements.
- (10) At the conclusion of each round of negotiations, the university affairs committee will prepare recommendations to guide the next round of negotiations.



Explanation of policy modification:

3356-7-46 Supplemental pay for faculty and professional/administrative staff.

This policy has been modified to include supplemental pay assignments for faculty and professional administrative staff and secondary appointments for full-time faculty members. Both payment types are used to enable the university to deal with short term staffing needs by assigning additional duties and/or services beyond the scope of an employee's primary position.

**Board of Trustees Meeting
March 7, 2024
YR 2024-**



**RESOLUTION TO MODIFY AND RETITLE
SUPPLEMENTAL PAY FOR FACULTY AND
PROFESSIONAL/ADMINISTRATIVE STAFF POLICY, 3356-7-46**

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

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

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

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

**Board of Trustees Meeting
March 7, 2024
YR 2024-**

3356-7-46 Supplemental pay assignments for full and part-time faculty and professional/administrative staff and secondary appointments for full-time faculty.

Responsible Division/Office: Human Resources
Responsible Officer: VP for Legal Affairs and Human Resources
Revision History: 1999; December 2003; June 2010; December 2015;
September 2018; September 2023; March 2024
Board Committee: University Affairs
Effective Date: ~~September 20, 2023~~ March 7, 2024
Next Review: ~~2028~~ 2029

- (A) Policy statement. On occasion, it is necessary and appropriate to have employees perform services not included in the employee’s assigned duties and responsibilities and to pay employees for these additional services. This policy does not apply to supplemental payment compensation for externally funded grants, sponsored programs and contracts (see rule 3356-7-48 of the Administrative Code, university policy 3356-7-48).
- (B) Scope. This policy applies only to faculty and professional/administrative staff. For supplemental payment compensation for externally funded grants, sponsored programs and contracts, consult rule 3356-7-48 of the Administrative Code and/or university policy 3356-7-48, “Supplemental pay from externally funded grants, sponsored programs and contracts for faculty and professional/administrative staff.”
- (C) Parameters.
- (1) Supplemental pay assignments are intended to enable the university to generally deal with short-term staffing needs ~~involving unusual circumstances or unanticipated situations, and assignments~~ that require the assignment of work or additional duties beyond the scope of ~~the assigned duties. Such assignments will generally not be approved as a routine matter or on a continuing or recurring basis and may not exceed six months for professional/ administrative staff or one academic year for faculty. In special circumstances, with the approval of the president, these time limitations may be extended~~ an employee’s primary position.
- (2) Secondary appointments enable the university to generally deal with staffing needs that require the assignment of work or additional duties beyond the scope of a faculty member’s primary position to act as a director, associate director, program manager, coordinator, or similar position for programs, partnerships, or other department activities on a limited basis.

- (2)(3) ~~Supplemental~~Total payments for supplemental pay to an employee during any fiscal year ~~may shall~~ not exceed ~~ten-five~~ thousand dollars unless approved by the president. Total payments for secondary appointments to an employee during any fiscal year shall not exceed five thousand dollars unless approved by the president. ~~In special circumstances, with the approval of the president, these fiscal limitations may be exceeded.~~
- (3)(4) To allow for accurate and transparent financial analysis and reporting and for audit purposes, supplemental and secondary appointment payments should be made from the appropriate account code in the university's financial system. Such payments shall be made to the employee on a semimonthly basis.
- (4)(5) Supplemental pay assignments and secondary appointments must be approved in advance by the employee or the faculty member's manager in any situation in which the assignment is for work for another university department.
- (6) Supplemental pay assignments and secondary appointments are contingent upon board approval; however, employees may begin these assignments prior to board approval.
- (7) The chief human resources officer will prepare and submit a summary of all personnel actions to include supplemental pay assignments and secondary appointments to the university affairs committee for recommendation for approval by the board of trustees. The personnel actions shall be contingent upon approval by the board.
- (D) Procedures. See human resources administrative policy ~~2023-1~~2024-1: "Supplemental pay assignments," and 2024-02: "Secondary appointments."

**RESOLUTION TO RATIFY
PERSONNEL ACTIONS**

WHEREAS, the *Policies of the Board of Trustees* authorize the President to manage the University, including appointing such employees as are necessary to effectively carry out the operation of the University and any other necessary personnel actions; and

WHEREAS, new appointments and other personnel actions have been made subsequent to the December 7, 2023, meeting of the Board of Trustees; and

WHEREAS, such personnel actions are in accordance with the 2023-2024 Budget and with University policies 3356-2-02, Equal Opportunity and Affirmative Action Recruitment and Employment; 3356-9-05, Faculty Rank and Tenure for Designated Administrators; 3356-9-02, Selection, Appointment, and Annual Evaluation of Administrative Officers; 3356-7-42, Selection, Appointment, and Evaluation of Professional/Administrative Staff; 3356-7-43, Externally Funded University Positions; and 3356-7-36, Hiring and Selection Process, Evaluation and Compensation for Intercollegiate Athletic Coaches;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees of Youngstown State University does hereby ratify and confirm the personnel actions, attached hereto.

**Board of Trustees Meeting
March 7, 2024
YR 2024-**



SUMMARY OF PERSONNEL ACTIONS

Faculty

10/16/2023 through 1/15/2023

Separations – 5

- Faculty Tenured – 1
- Faculty Term – 4

Appointments – 3

New Positions – 1

- Faculty Term – 1

Replacement Positions – 2

- Faculty Term – 2

YOUNGSTOWN STATE UNIVERSITY
FACULTY
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SEPARATIONS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT/ PROGRAM	DATE OF SEPARATION	FTE	SALARY	SEPARATION TYPE
Tenure Track/Probationary Appointments							
Arntsen, Christopher	Faculty	Associate Professor	Chemistry	12/31/2023	1.00	\$ 69,026.00	Resigned
Term Appointments							
Lipscomb, Nora	Faculty - Term	Senior Lecturer	Nursing	12/31/2023	1.00	\$ 59,309.64	Retired
Reed, Andrae	Faculty - Term	Lecturer	Computer Science & Info Systems	12/31/2023	1.00	\$ 60,180.00	Resigned
Rock, Rodney	Faculty - Term	Lecturer	Teacher Education	12/31/2023	1.00	\$ 49,939.20	Resigned
Small, Jason	Faculty - Term	Lecturer	Management	12/31/2023	1.00	\$ 44,443.00	Resigned

YOUNGSTOWN STATE UNIVERSITY
FACULTY
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
APPOINTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT/PROGRAM	CONTRACT/ APPOINTMENT DATES	FTE	SALARY
Tenure Track/Probationary Appointments						
Singer, Tyler	Faculty Tenure Track	Assistant Professor	Kinesiology and Sport Science	1/1/2024	1.00	\$ 60,000.00
Term Appointments						
Mikula, Vincent*	Faculty - Term	Lecturer	Nursing	1/1/2024	1.00	\$ 58,000.00
Nappi, Luke	Faculty - Term	Lecturer	Mathematics & Statistics	1/1/2024	1.00	\$ 48,000.00
<i>* New Position</i>						

SUMMARY OF PERSONNEL ACTIONS
Professional Administrative - (Excludes Athletics)
10/16/2023 through 1/15/2024

Separations – 16

- Professional Administrative Staff – 6
- Professional Administrative Excluded – 6
- Professional Administrative Externally Funded – 4

Appointments – 12

Replacement Positions – 11

- Professional Administrative Staff – 6
- Professional Administrative Excluded – 3
- Professional Administrative Externally Funded – 2

New Positions – 1

- Professional Administrative Externally Funded – 1

Reclassifications/Position Adjustments – 6

- Professional Administrative Staff – 4
- Professional Administrative Excluded – 2

Promotions – 6

- Professional Administrative Staff – 1
- Professional Administrative Excluded – 4
- Professional Administrative Externally Funded - 1

Salary Adjustments – 3

- Professional Administrative Staff – 2
- Professional Administrative Externally Funded - 1

Transfers – 2

- Professional Administrative Excluded – 2

**YOUNGSTOWN STATE UNIVERSITY
PROFESSIONAL ADMINISTRATIVE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SEPARATIONS**

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	DATE OF SEPARATION	FTE	SALARY	SEPARATION TYPE
Baker, Stephanie	APAS	Case Manager	Dean of Students	11/30/2023	1.00	\$ 45,900.00	Resigned
Castner, Mary Lou	APAS	Coordinator Financial Systems	Controller's Office	12/31/2023	1.00	\$ 76,951.49	Retired
Duchon, Colleen	APAS	Reference Librarian HHS	Maag Library	12/31/2023	1.00	\$ 47,164.09	Resigned
Maruca, Susan	APAS	Interim Success Coordinator	Dean - Bitonte College of Health & Human Services	10/31/2023	1.00	\$ 46,512.00	Terminated
Mattiussi, Carla	APAS	Coordinator Career Development	Career Exploration & Development	12/31/2023	1.00	\$ 52,357.09	Resigned
Richard, LaTieya	APAS	Senior Technology Trainer	IT Training Services	12/8/2023	1.00	\$ 53,856.00	Resigned
Drennen, Jennifer	Excluded	Director HR Operations	Human Resources	10/26/2023	1.00	\$ 92,584.86	Resigned
Hungerman, Erin	Excluded	Assistant Dean of Students	Dean of Students	10/20/2023	1.00	\$ 67,795.59	Resigned
Lafferty, Helen	Excluded	Interim President	President	12/31/2023	1.00	\$ 400,000.00	Temporary Appt. Ended
Luscher, David	Excluded	Associate Director	WYSU - FM	1/12/2024	1.00	\$ 58,228.63	Resigned
Moring, Greg	Excluded	Acting Chair	Dean Cliffe College of Creative Arts	12/31/2023	0.45	\$ 40,800.00	Resigned
Rojas, Rolando	Excluded	Manager	Undergraduate Admissions	1/12/2024	1.00	\$ 46,403.42	Resigned
Delisio, Richard	Externally Funded	Procurement Consultant	Dean - WCBA	12/31/2023	1.00	\$ 61,200.00	Resigned
Lander, Natalie	Externally Funded	Instructor Networking and Telecommunications	Center for Workforce Education & Innovation	12/31/2023	1.00	\$ 75,000.00	Resigned
Marino, Nicole	Externally Funded	Museum Assistant and Educator	Industry & Labor Steel Museum	12/31/2023	0.25	\$ 16,972.80	Resigned
Wilson, Marcelle	Externally Funded	Museum Site Manager	History	12/21/2023	0.50	\$ 25,056.37	Resigned

**YOUNGSTOWN STATE UNIVERSITY
PROFESSIONAL ADMINISTRATIVE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
APPOINTMENTS**

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	SALARY
Herzberger, Brent	APAS	Technology Trainer	IT Training Services	1/2/2024	1.00	\$ 48,000.00
Levonyak, Alexis	APAS	Success Coordinator	First Year Student Services	1/8/2024	1.00	\$ 43,000.00
McEldowney, Cara	APAS	Technology Trainer	IT Training Services	1/2/2024	1.00	\$ 48,000.00
Reidy, Emily	APAS	Senior Financial Analyst	Controller's Office	12/1/2023	1.00	\$ 51,000.00
Scott, Aaron	APAS	Coordinator	Undergraduate Admissions	12/16/2023	1.00	\$ 40,000.00
Trifonoff, Jaccob	APAS	Coordinator Theatrical Production and Facilities Support	Theatre and Dance	1/2/2024	1.00	\$ 47,791.00
Clowes, Josephine	Excluded	Temporary Executive Assistant to the Provost	Provost VP - Academic Affairs	11/1/2023	0.50	\$ 26,004.00
Memaj, Eron	Excluded	Director International Studies and Programs	International Programs Office	11/1/2023	1.00	\$ 107,000.00
Williams, Randall	Excluded	Deputy Chief of Police	YSU Police	1/1/2024	1.00	\$ 85,000.00
Davies-Anderson, Kali	Externally Funded	Program Coordinator Grants and Evaluation	Community Engagement	1/8/2024	1.00	\$ 46,500.00
Pickel, Dillan	Externally Funded	Government Procurement Specialist	Dean - WCBA	1/8/2024	1.00	\$ 60,000.00
Tullis, Jenny*	Externally Funded	Assistant Director WYSU	WYSU - FM	12/4/2023	1.00	\$ 40,000.00
<i>*New Position</i>						

**YOUNGSTOWN STATE UNIVERSITY
PROFESSIONAL ADMINISTRATIVE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
RECLASSIFICATIONS/POSITION ADJUSTMENTS**

EMPLOYEE NAME	NEW EMPLOYEE TYPE / PREVIOUS EMPLOYEE TYPE	NEW POSITION TITLE/ PREVIOUS POSITION TITLE	NEW DEPARTMENT/ PREVIOUS DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Alexander, Anne	APAS	Academic Advisor 2/Academic Advisor 1	Dean - WCBA	7/15/2023	1.00	\$ 38,093.33	\$36,279.36
Fabry, Dina	APAS	Assistant Director Fitness Wellness and Special Events/ Coordinator Fitness & Wellness	Andrews Student Recreation & Wellness Center	9/1/2023	1.00	\$ 43,813.69	\$41,727.32
Henline, Emily	APAS	Academic Advisor 2/Academic Advisor 1	Dean - WCBA	7/15/2023	1.00	\$ 41,233.50	\$39,270.00
McCurry, Rebecca	APAS	Senior Counselor Penguin Service Center/Counselor Penguin Service Center	Registration & Records	8/16/2023	1.00	\$ 48,000.00	\$44,108.88
Christiansen Erb, Joy	Excluded	Acting Chair and Professor/ Associate Dean	Art/Dean Cliffe College of Creative Arts	1/1/2024	1.00	\$ 103,458.00	\$ 111,322.80
Pintar, Jennifer	Excluded	Interim Provost & Vice President of Academic Affairs/Vice Provost	Provost VP - Academic Affairs	1/1/2024	1.00	\$ 220,000.00	\$ 163,200.00

**YOUNGSTOWN STATE UNIVERSITY
PROFESSIONAL ADMINISTRATIVE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
PROMOTIONS**

EMPLOYEE NAME	EMPLOYEE TYPE / PREVIOUS EMPLOYEE TYPE	NEW POSITION TITLE / PREVIOUS POSITION TITLE	NEW DEPARTMENT/ PREVIOUS DEPARTMENT	CONTRACT APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Shargo, Megan	APAS	Coordinator Continuous Improvement/Executive Assistant - Provost	Institute for Teaching & Learning/Provost - VP Academic Affairs	10/16/2023	1.00	\$ 50,386.00	\$ 46,464.26
D'Amato, Joseph	Excluded	Associate Director International Student and Scholar Services/Associate Director	International Programs Office/English Language Institute	10/16/2023	1.00	\$ 63,448.12	\$ 60,426.78
Gaston, Christopher	Excluded	Assistant Registrar Technology/Student Systems Administrator	Registration & Records	11/1/2023	1.00	\$ 65,000.00	\$ 58,080.33
Massaro, Megan	Excluded	Director HR Operations & Technical Systems/Business Systems Administrator	Human Resources/IT Data Analytics	11/1/2023	1.00	\$ 95,000.00	\$ 73,440.00
Natoli, Krystle	Excluded	Business Systems Administrator/ Human Resources Generalist	IT Data Analytics/Human Resources	10/22/2023	1.00	\$ 68,500.00	\$ 44,969.60
Binsley, Jenna	Externally Funded	Associate Director Marketing and Communications/Manager TILT	Center for Workforce Education & Innovation	10/16/2023	1.00	\$ 68,500.00	\$ 61,200.00

**YOUNGSTOWN STATE UNIVERSITY
PROFESSIONAL ADMINISTRATIVE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SALARY ADJUSTMENTS**

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT / APPOINTMENT DATES	NEW FTE	NEW SALARY	OLD FTE	PREVIOUS SALARY
Tervo, Kellie	APAS	Senior Academic Advisor 2	Dean Bitonte College Health & Human Services	6/16/2023	1.00	\$ 56,327.32	1.00	\$53,645.07
Reichert, Lisa	APAS	Special Assistant to AVP and Controller	Controller's Office	1/1/2024	0.75	\$ 64,746.90	0.50	\$43,176.60
Chapman, Gabrielle	Externally Funded	Instruction Specialist	Rich Center for Autism	1/1/2024	0.60	\$ 13,041.60	0.80	\$17,278.80

**YOUNGSTOWN STATE UNIVERSITY
PROFESSIONAL ADMINISTRATIVE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
TRANSFERS**

EMPLOYEE NAME	NEW EMPLOYEE TYPE/PREVIOUS EMPLOYEE TYPE	NEW POSITION TITLE/PREVIOUS POSITION TITLE	NEW DEPARTMENT/PREVIOUS DEPARTMENT	CONTRACT APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Bell, Cynthia	Excluded	Executive Assistant to the Provost/Executive Assistant to President	Provost- VP Academic Affairs/President	1/16/2024	1.00	\$ 69,985.54	\$ 69,985.54
Smith, Brien	Excluded	Special Assistant to the President/Provost - VP Academic Affairs	President/ Provost VP - Academic Affairs	1/5/2024	1.00	\$ 264,001.50	\$ 264,001.50



SUMMARY OF PERSONNEL ACTIONS
Athletic Employees
10/16/2023 through 1/15/2024

Separations – 1

- Professional Administrative Excluded – 1

Reclassification/Position Adjustments – 2

- Professional Administrative Excluded – 2

Salary Adjustments – 3

- Professional Administrative Excluded – 3

Multi-Year Appointments – 1

- Professional Administrative Excluded – 1

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SEPARATIONS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	DATE OF SEPARATION	FTE	SALARY	TYPE OF SEPARATION
Lindley, Tory	Excluded	Deputy Athletic Director Sports Medicine	Training Room	10/30/2023	1.00	\$ 95,716.80	Resigned

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
RECLASSIFICATIONS AND POSITION ADJUSTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Klekner-Alt, Kiersten	Excluded	Associate Athletic Director & Director of Compliance/Assistant Athletic Director	Athletic Administration	11/16/2023	1.00	\$ 65,545.20	\$ 62,424.00
Tymkew, Jennifer	Excluded	Senior Associate Athletic Director for Integrated Healthcare & Performance/ Associate Athletic Director	Training Room	11/16/2023	1.00	\$ 80,414.08	\$ 73,103.71

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SALARY ADJUSTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Fink, Rebecca	Excluded	Senior Associate Athletic Director for Internal Operations Senior Women's Administrator	Athletic Administration	11/16/2023	1.00	\$ 77,197.68	\$ 72,828.00
Pinciario, Steven	Excluded	Assistant Athletic Director	Ticket Office	11/16/2023	1.00	\$ 65,954.86	\$ 62,814.15
Stuart, Timothy	Excluded	Senior Associate Athletic Director for External Operations	Athletic Facilities Rental	11/16/2023	1.00	\$ 77,197.68	\$ 72,828.00

YOUNGSTOWN STATE UNIVERSITY
ATHLETICS EMPLOYEES
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
MULTI-YEAR APPOINTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	NEW FTE	SALARY
Duncan, Kody	Excluded	Head Coach Men's Tennis	Tennis - Men's	10/16/2023 - 06/302026	1.00	\$ 50,000.00

Human Resources Operations

Employment, Organizational Development, Compensation and Classification, HRIS

The 2024 Voluntary Separation or Retirement Program (VSRP) was offered to faculty members in specific majors identified by the Office of Academic Affairs. Eligible faculty members may submit Applications for review through February 15, 2024. Applicants will be notified if their VSRP application was approved or denied by February 19, 2024.

The Office of Human Resources Operations Team is currently working with the Office of Academic Affairs and IT Services to roll out and implement a new electronic process in Faculty Success by Watermark for faculty performance evaluations. In addition, all faculty have been assigned by Academic Major in the Banner System that pulls directly into the Faculty by Success Watermark System. Faculty Seniority Lists have also been updated to include academic majors.

Supervisors for Professional Administrative and Classified employees are currently completing electronic employee evaluations in the new Perform Module of the University's Workforce Management Platform NEOED for calendar year 2023. Supervisors will also be creating an evaluation plan and establishing employee goals for the 2024 calendar year.

Benefits, Training, Wellness

Human Resources is excited to announce its 2024 Wellness Challenges and Training Schedule. Each month, Human Resources will offer challenges as part of the university wellness program and training as part of our employee training program.

The Human Resources Department will offer monthly in-person training to all faculty and staff. In addition to the monthly offerings, we will begin a six-part management training series in June.

Benefits is preparing the 1095's for benefit eligible employees to be available for the 2023 tax season. Employees may elect to have their forms accessible electronically through self-service banner or a paper form mailed to them. The 1095c form provides employees with minimum essential coverage information required by the Affordable Care Act.

Labor and Employee Relations

Current as of 1/12/2024

ACE:

Clean copy of YSU/ACE labor agreement is being printed. Working on new seniority system for ACE; retention points vs. seniority based on service time.

APAS:

Prepping for APAS negotiations in March 2024. Pending discipline for Anne Lally.

FOP:

Step 3 Grievance #/Date Filed	Subject Matter/Issue	Date Heard	Disposition of Grievance
#80 6/5/23	Service Time for Vacation Accruals Rendin Fellows	1/9/24	Step 2 Grievance will be issued in the near future. It is anticipated that the grievance will be settled during upcoming negotiations.
#82 7/18/23	Hold Over/Force Out Chelsea Wolfe	7/24/23	Grievance denied at Step 1 on 7/26/23. Grievance was settled and grievance was withdrawn.
#83 9/19/23	Ohio State Football Game Overtime	N/A	Grievance was settled and grievance was withdrawn.

Prepping for FOP negotiations in March 2024.

YSU/OEA:

YSU/OEA CBA has been printed and distributed. Two faculty disciplines concerning failure to properly complete Outside Consulting/Employment Form resulted in resignations.

Equal Opportunity and Title IX

The Title IX Office sent out their annual Ohio Department of Higher Education survey in January 2024 to all students, staff, and faculty. The goal of the survey is to gather data regarding our overall campus culture. We will receive those results at the end of the academic year. The Title IX Office also has been busy with trainings. As of December 17, in-person trainings were completed fall semester across campus and we currently have more scheduled for spring semester.

April is Sexual Assault Awareness Month and the theme for this year is *Building Connected Communities*. The Title IX Office and Dean of Students partner to host different events throughout the month of April focused on Sexual Assault prevention. We will be partnering with the HR Wellness Program to offer information and trainings to our staff too. A list of events will be sent out to the campus community and all students, staff and faculty are welcomed to participate.

Current Postings 2/12/2024

<u>Full-time Faculty</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department</u>
Lecturer, Centofanti School of Nursing (Term)	Academic Affairs	Nursing
Lecturer, Family Nurse Practitioner - Nursing (Term)	Academic Affairs	Nursing
Assistant Professor, Physical Chemistry – Chemistry (Tenure-Track)	Academic Affairs	Chemistry
Lecturer, Exercise Science – Kinesiology and Sport Science (Term)	Academic Affairs	Kinesiology and Sport Science
Assistant Professor, Plant Molecular Ecology – Chemical and Biological Sciences (Tenure-Track)	Academic Affairs	Biology
Lecturer, Anatomy and Physiology – Chemical and Biological Sciences (Term)	Academic Affairs	Biology
Assistant Professor, Forensic Biology – Chemical and Biological Sciences (Tenure-Track)	Academic Affairs	Biology
Assistant Professor, Computer Science and Information Systems (Tenure-Track)	Academic Affairs	Computer Science & Info Systems
Assistant Professor, Mechanical Engineering (Tenure-Track)	Academic Affairs	Mechanical Engineering
Assistant Professor, Civil Engineering (Tenure-Track)	Academic Affairs	Civil Environmental & Chemical Engr
Assistant Professor, Inorganic Chemistry (Tenure-Track)	Academic Affairs	Chemistry
Assistant Professor, Industrial and Systems Engineering (Tenure-Track)	Academic Affairs	Mechanical Engineering
Assistant Professor, Electrical and Computer Engineering (Tenure-Track)	Academic Affairs	Electrical Engineering
Assistant Professor, Primary Education/Primary Intervention Specialist (Tenure – Track)	Academic Affairs	Teacher Education

Current Postings 2/12/2024

<u>Part-time Faculty</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department/Major</u>
Part-time Faculty, Teacher Education and Leadership Studies	Academic Affairs	Teacher Ed & Leadership Studies
Part-time Faculty, Management Undergraduate Courses	Academic Affairs	Management
Part-time Faculty, Management	Academic Affairs	Management
Part-time Faculty, First Year Student Services	Academic Affairs	Student Success
Part-time Faculty, Reading & Study Skills	Academic Affairs	Reading & Study Skills
Part-time Faculty, Teacher Education (Undergraduate Courses)	Academic Affairs	Teacher Education
Part-Time Faculty, Humanities and Social Sciences - Anthropology	Academic Affairs	Sociology & Anthropology
Part-Time Faculty, Geography	Academic Affairs	Geography
Part-Time Faculty, World Languages	Academic Affairs	English
Part-time Faculty, Photography	Academic Affairs	Art
Part-time Faculty, Master of Health and Human Services (MHHS)	Academic Affairs	Master of Health & Human Services
Part-time Faculty, Physical Therapy - Pediatrics	Academic Affairs	Physical Therapy
Part-Time Faculty, Health Professions - Kinesiology and Sport Science	Academic Affairs	Kinesiology and Sport Science
Part-time Faculty, Physics	Academic Affairs	Physics & Astronomy
Part-time Faculty, Medical Practices	Academic Affairs	Honors College
Part-time Faculty, Honors	Academic Affairs	Honors College
Part-time Faculty, PAGES - Geology	Academic Affairs	Geology & Environmental Studies
Part-time Faculty, Environmental Science	Academic Affairs	Geology & Environmental Studies
Part-time Faculty, Mechanical Engineering Technology	Academic Affairs	School of Technology
Part-time Faculty, Graphic Design	Academic Affairs	Art
Part-time Faculty, Visual Arts	Academic Affairs	Art
Part-time Faculty, Physical Therapy	Academic Affairs	Physical Therapy
Part-time Faculty, Pharmacology for Nurse Anesthetist Students	Academic Affairs	Nursing
Part-time Faculty, Dana School of Music	Academic Affairs	Dana School of Music
Part-time Faculty, Director of Dana Gospel Choir	Academic Affairs	Dana School of Music
Part-time Faculty, Teacher Education (Graduate Courses)	Academic Affairs	Teacher Education

Current Postings 2/12/2024

<u>Part-time Faculty Continued</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department/Major</u>
Part-time Faculty, Literacy Education	Academic Affairs	Teacher Ed & Leadership Studies
Part-time Faculty, Adolescent/Young Adult Education	Academic Affairs	Teacher Ed & Leadership Studies
Part-time Faculty, Civil and Construction Engineering Technology	Academic Affairs	School of Technology
Part-time Faculty, Electrical Engineering Technology	Academic Affairs	School of Technology
Part-time Faculty, Nursing Clinical	Academic Affairs	Nursing
Part-time Faculty, Mathematics	Academic Affairs	Mathematics & Statistics
Part-time Faculty, Marketing	Academic Affairs	Marketing
Part-time Faculty, Dietetics Program (Undergraduate)	Academic Affairs	Health Professions
Part-time Faculty, History	Academic Affairs	History
Part-time Faculty, Public Health	Academic Affairs	Health Professions
Part-time Faculty, Medical Laboratory Programs	Academic Affairs	Health Professions
Part-time Faculty, Health Professions - Dental Hygiene	Academic Affairs	Health Professions
Part-Time Faculty, Middle Childhood Education	Academic Affairs	Teacher Ed & Leadership Studies
Part-Time Faculty, Special Education	Academic Affairs	Teacher Ed & Leadership Studies
Part-Time Faculty, Nurse Practitioner (Online)	Academic Affairs	Nursing
Part-Time Faculty, Nursing - Graduate	Academic Affairs	Nursing
Part-Time Faculty, Politics and International Relations	Academic Affairs	Politics and International Relation
Part-Time Faculty, Counseling and School Psychology	Academic Affairs	Psychological Sciences & Counseling
Part-time Faculty, Mathematics and Statistics	Academic Affairs	Mathematics & Statistics
Part-Time Faculty, Psychology	Academic Affairs	Psychological Sciences & Counseling
Part-time Faculty, Respiratory Care	Academic Affairs	Health Professions
Part-Time Faculty, Humanities and Social Sciences - Political Science	Academic Affairs	Politics and International Relation
Part-time Faculty, Forensic Sciences	Academic Affairs	Forensic Science
Part-time Faculty, English Composition	Academic Affairs	English
Part-time Faculty, Philosophy	Academic Affairs	Philosophy & Religious Studies
Part-time Faculty, Hospitality Management	Academic Affairs	Hospitality Mgt & Merchandising

Current Postings 2/12/2024

<u>Part-time Faculty Continued</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department/Major</u>
Part-Time Faculty, Chemical Engineering	Academic Affairs	Civil Environmental & Chemical Engr
Part-time Faculty, Criminal Justice	Academic Affairs	Criminal Justice
Part-time Faculty, Merchandising - Fashion and Interiors	Academic Affairs	Hospitality Mgt & Merchandising
Part-Time Faculty, Visual Arts Foundations	Academic Affairs	Art
Part-Time Faculty, Communication - Journalism and Telecommunication Studies	Academic Affairs	Communication
Part-Time Faculty, Chemistry Lab	Academic Affairs	Chemistry
Part-Time Faculty, Civil, Environmental and Chemical Engineering	Academic Affairs	Civil Environmental & Chemical Engr
Part-time Faculty, Chemistry	Academic Affairs	Chemistry
Part-Time Faculty, Computer Science and Information Systems	Academic Affairs	Computer Science & Info Systems
Part-Time Faculty, Mechanical Engineering	Academic Affairs	Mechanical Engineering
Part-Time Faculty, Early Childhood Education/Early Childhood Intervention	Academic Affairs	Teacher Ed & Leadership Studies
Part-Time Faculty, Industrial Engineering	Academic Affairs	Mechanical Engineering
Part-Time Faculty, Social Work - Lakeland & Lorain CC Campuses	Academic Affairs	Social Work
Part-Time Faculty, Plant Biology	Academic Affairs	Biology
Part-time Faculty, Theatre and Dance Performance	Academic Affairs	Theater and Dance
Part-Time Faculty, Social Work	Academic Affairs	Social Work
Part-Time Faculty, Electrical and Computer Engineering	Academic Affairs	Electrical Engineering
Part-Time Faculty, Art History	Academic Affairs	Art
Part-time Faculty, Anatomy and Physiology	Academic Affairs	Biology
Part-time Faculty, Management Undergraduate Courses	Academic Affairs	Management
Part-time Faculty, Management	Academic Affairs	Management

Current Postings 2/12/2024

<u>Professional Administrative</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department</u>
Coordinator, Business Operations	Academic Affairs	Rich Center for Autism
Coordinator	Student Affairs & Inst Effectiveness	Undergraduate Admissions
Associate Director	Student Affairs & Inst Effectiveness	WYSU - FM
Assistant Coach, Football	President	Football
Coordinator	Academic Affairs	Career Exploration & Development
Interim Provost & Vice President, Academic Affairs	Academic Affairs	Provost VP - Academic Affairs
Museum Administrator (Part-time)	Academic Affairs	Industry & Labor Steel Museum
Coordinator, Center for Career Management	Academic Affairs	Dean - WCBA
Senior Financial Analyst	Student Affairs & Inst Effectiveness	Financial Aid and Scholarships
Coordinator, Nursing Clinical Scheduling and Placement	Academic Affairs	Nursing
International Student and Scholar Advisor	Student Affairs & Inst Effectiveness	International Programs Office
Clinical Counselor	Academic Affairs	Student Counseling Services
Case Manager	Academic Affairs	Dean of Students
Coordinator, English Language Institute	Student Affairs & Inst Effectiveness	English Language Institute
Associate Director, Sports Medicine	President	Training Room
Research Analyst	Student Affairs & Inst Effectiveness	Institutional Research & Analytics
Assistant Dean of Students	Academic Affairs	Dean of Students
Registered Behavior Technician	Academic Affairs	Rich Center for Autism
Program Support Specialist	Academic Affairs	College Access and Transition
Academic Advisor 2	Academic Affairs	Dean - STEM
Coordinator, Records	Student Affairs & Inst Effectiveness	Registration & Records
Coordinator, Social Media – Creative Content	Student Affairs & Inst Effectiveness	Marketing & Communications
Assistant Coach, Softball	President	Softball
Manager, Building Services	Finance & Business Operations	Janitorial Services
Financial Aid Counselor	Student Affairs & Inst Effectiveness	Financial Aid and Scholarships
Instruction Specialist	Academic Affairs	Rich Center for Autism
University Architect	Finance & Business Operations	Facilities Maintenance

Current Postings 2/12/2024

<u>Professional Administrative Continued</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department</u>
Academic Advisor 1	Academic Affairs	Dean - STEM
Technology Support Technician 1 - Desk Services	Finance & Business Operations	IT Customer Services
Business Operations Specialist 2	Finance & Business Operations	Procurement Services
Museum Specialist	Academic Affairs	Smith Museum Operation
Academic Operations Specialist 2	Academic Affairs	Dean-College of Graduate Studies
Print Specialist	Finance & Business Operations	Printing Services
Parking Facilities Attendant (.75)	Finance & Business Operations	Parking Services
Parking Facilities Attendant (Intermittent)	Finance & Business Operations	Parking Services
Electrician	Finance & Business Operations	Facilities Maintenance
Groundskeeper 2	Finance & Business Operations	Grounds
Academic Leader - Multiple Locations	Academic Affairs	Community Engagement
Business Operations Specialist 2	Academic Affairs	Dean - STEM
Police Officer 1	Finance & Business Operations	YSU Police
Academic Operations Specialist 2, Department of Art	Academic Affairs	Dean Cliffe College of Creative Arts

Current Postings 2/12/2024

<u>Classified</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department</u>
Business Operations Specialist 2	Student Affairs & Inst Effectiveness	Undergraduate Admissions
Technology Support Technician 1 - Field Services	Finance & Business Operations	IT Customer Services
Technology Support Technician 1 - Desk Services	Finance & Business Operations	IT Customer Services
Business Operations Specialist 2	Finance & Business Operations	Procurement Services
Museum Specialist	Academic Affairs	Smith Museum Operation
Academic Operations Specialist 2	Academic Affairs	Dean-College of Graduate Studies
Print Specialist	Finance & Business Operations	Printing Services
Parking Facilities Attendant (.75)	Finance & Business Operations	Parking Services
Parking Facilities Attendant (Intermittent)	Finance & Business Operations	Parking Services
Electrician	Finance & Business Operations	Facilities Maintenance
Groundskeeper 2	Finance & Business Operations	Grounds
Academic Leader - Multiple Locations	Academic Affairs	Community Engagement
Business Operations Specialist 2	Academic Affairs	Dean - STEM
Police Officer 1	Finance & Business Operations	YSU Police
<u>Unclassified</u>		
<u>Job Title</u>	<u>Division</u>	<u>Department</u>
Activity Leader - Multiple Locations	Academic Affairs	Community Engagement



SUMMARY OF PERSONNEL ACTIONS

Classified Employees

10/16/2023 through 1/15/2024

Separations – 8

- Classified Civil Service – 7
- FOP – 1

Appointments – 9

- Classified Civil Service – 7
- Classified Excluded – 2

Reclassifications/Position Adjustments – 4

- Classified Civil Service – 2
- FOP – 2

Promotions – 2

- Classified Excluded – 2

Salary Adjustments – 2

- Classified Civil Service – 1
- FOP – 1

YOUNGSTOWN STATE UNIVERSITY
CLASSIFIED EMPLOYEE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
APPOINTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	SALARY
Cucchiara, Samantha	ACE	Accountant/Examiner 3	University Bursar	12/18/2023	1.00	\$ 36,462.40
Gulu, Debbie	ACE	Clerk	Parking Services	10/23/2023	1.00	\$ 27,560.00
Johnston, Ashley	ACE	Academic Operations Specialist 2	Dean Cliffe College of Creative Arts	11/20/2023	1.00	\$ 35,360.00
Mercado, Dayaneira	ACE	Business Operations Specialist 1	Health Professions	10/23/2023	0.75	\$ 24,180.00
Moser-Flatley, Carla	ACE	Academic Operations Specialist 2	Dean Bitonte College of Health & Human Services	12/18/2023	1.00	\$ 35,360.00
O'Dell, Tatiana	ACE	Data Administration Specialist 1	Alumni Engagement	10/30/2023	1.00	\$ 37,419.20
Varley, Michael	ACE	Boiler Technician	Facilities Maintenance	11/20/2023	1.00	\$ 54,828.80
Curry, Afton	Excluded	Office Support Specialist HR	Human Resources	12/4/2023	1.00	\$ 45,219.20
Meaney, Kathleen	Excluded	Intermittent Academic Leader	Community Engagement	11/20/2023	0.40	\$ 20,800.00

YOUNGSTOWN STATE UNIVERSITY
CLASSIFIED EMPLOYEE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
APPOINTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	FTE	SALARY
Cucchiara, Samantha	ACE	Accountant/Examiner 3	University Bursar	12/18/2023	1.00	\$ 36,462.40
Gulu, Debbie	ACE	Clerk	Parking Services	10/23/2023	1.00	\$ 27,560.00
Johnston, Ashley	ACE	Academic Operations Specialist 2	Dean Cliffe College of Creative Arts	11/20/2023	1.00	\$ 35,360.00
Mercado, Dayaneira	ACE	Business Operations Specialist 1	Health Professions	10/23/2023	0.75	\$ 24,180.00
Moser-Flatley, Carla	ACE	Academic Operations Specialist 2	Dean Bitonte College of Health & Human Services	12/18/2023	1.00	\$ 35,360.00
O'Dell, Tatiana	ACE	Data Administration Specialist 1	Alumni Engagement	10/30/2023	1.00	\$ 37,419.20
Varley, Michael	ACE	Boiler Technician	Facilities Maintenance	11/20/2023	1.00	\$ 54,828.80
Curry, Afton	Excluded	Office Support Specialist HR	Human Resources	12/4/2023	1.00	\$ 45,219.20
Meaney, Kathleen	Excluded	Intermittent Academic Leader	Community Engagement	11/20/2023	0.40	\$ 20,800.00

YOUNGSTOWN STATE UNIVERSITY
CLASSIFIED EMPLOYEE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
RECLASSIFICATIONS/POSITION ADJUSTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	NEW POSITION TITLE/ OLD POSITION TITLE	NEW DEPARTMENT/ OLD DEPARTMENT	APPOINTMENT DATES	NEW FTE /OLD FTE	NEW SALARY	PREVIOUS SALARY
Boardman, Kenneth	ACE	Groundskeeper 3/ Groundskeeper 2	Grounds	12/3/2023	1.00	\$ 40,435.20	\$ 38,521.60
Goist, Carol	ACE	Business Operations Specialist 1/ Clerk	Parking Services	12/17/2023	1.00	\$ 32,240.00	\$ 27,560.00
Kane, Caitlin	FOP	University Police Officer 2/ University Police Officer 1	YSU Police	12/3/2023	1.00	\$ 47,028.80	\$ 43,097.60
Stoner, Hope	FOP	University Police Officer 2/ University Police Officer 1	YSU Police	12/3/2023	1.00	\$ 47,028.80	\$ 43,097.60

YOUNGSTOWN STATE UNIVERSITY
CLASSIFIED EMPLOYEE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
PROMOTIONS

EMPLOYEE NAME	EMPLOYEE TYPE	NEW POSITION TITLE/ OLD POSITION TITLE	NEW DEPARTMENT/ OLD DEPARTMENT	APPOINTMENT DATES	FTE	NEW SALARY	PREVIOUS SALARY
Barber, Debbie	Excluded	Senior Human Resources Generalist/ Human Resources Generalist	Human Resources	12/17/2023	1.00	\$ 47,028.80	\$ 44,324.80
Mazzocco, Linda	Excluded	Human Resources Generalist/ Benefits Management Analyst	Human Resources	12/31/2023	1.00	\$ 44,595.20	\$ 42,473.60

YOUNGSTOWN STATE UNIVERSITY
CLASSIFIED EMPLOYEE
PERSONNEL ACTIONS 10/16/2023 THROUGH 1/15/2024
SALARY ADJUSTMENTS

EMPLOYEE NAME	EMPLOYEE TYPE	POSITION TITLE	DEPARTMENT	CONTRACT/ APPOINTMENT DATES	NEW FTE	NEW SALARY	OLD FTE	PREVIOUS SALARY
Cerimele, Richard	ACE	Groundskeeper 2	Grounds	12/31/2023	0.60	\$ 20,841.60	1.00	\$ 34,736.00
Satterthwaite, Travis	FOP	University Police Officer 2/ University Police Officer 1	YSU Police	12/3/2023	1.00	\$ 53,580.80	1.00	\$ 51,833.60



SUMMARY OF PERSONNEL ACTIONS
Supplemental and Secondary Pay Assignments
10/16/2023 through 1/15/2024

Supplemental Pay Assignments – 72

General/Restricted Funded Assignments – 57

- Professional Administrative – 15
- Professional Administrative Externally Funded – 1
- Full-time Faculty – 28
- Part-time Faculty – 12
- Department Chair – 1

Grant Funded Assignments – 15

- Professional Administrative – 2
- Full-time Faculty – 7
- Part-time Faculty – 5
- Department Chair – 1

Faculty Secondary Appointments – 24

- Full-time Faculty – 21
- Department Chair – 3

YOUNGSTOWN STATE UNIVERSITY
SUPPLEMENTAL, ADDITIONAL AND SECONDARY PAY ASSIGNMENTS
10/16/2023 - 1/15/2024
GENERAL FUND SUPPLEMENTAL PAY ASSIGNMENTS

LAST NAME	FIRST NAME	EMPLOYMENT TYPE	ORIGINATING DEPARTMENT	RECEIVED IN HR	DATES DUTIES PERFORMED	PAYMENT AMOUNT
Baker	Stephanie	Professional Administrative	Office of Dean of Students	10/26/2023	11/1/23 - 04/30/24	\$ 4,200.00
Eisnaugle	Sarah	Professional Administrative	PAGES	10/26/2023	11/06/23 - 02/26/24	\$ 2,400.00
Tervo	Kellie	Professional Administrative	BCHHS Deans office	11/17/2023	12/11/23 - 05/10/24	\$ 2,750.00
Milliron	Kari	Professional Administrative	BCHHS Deans office	11/17/2023	10/30/23 - 01/31/24	\$ 4,830.00
Bruce	Cindi	Professional Administrative	BCHHS Deans office	11/17/2023	10/30/23 - 01/31/24	\$ 4,480.00
Leonelli	Ashley	Professional Administrative	College of Graduate Studies	11/22/2023	11/27/23- 02/29/24	\$ 3,357.20
Dobson	Rachael	Externally Funded	Rich Center for Autism	11/30/2023	08/2/23 - 06/30/23	\$ 2,300.00
Vigliotti	Cynthia	Faculty	English and World Languages	12/12/2023	01/3/2024	\$ 250.00
Pettite	Nicole	Faculty	English and World Languages	12/12/2023	01/3/2024	\$ 250.00
McCormick	Daniel	Professional Administrative	Communications	12/12/2023	11/08/23 - 02/28/24	\$ 4,350.00
Milliron	Kari Lynn	Professional Administrative	Dean - BCHHS	12/15/2023	02/01/24 - 07/31/24	\$ 5,865.00
Reichert	Lisa	Professional Administrative	Controllers Office	12/27/2023	01/01/24 - 06/30/24	\$ 3,750.00
Hoffmaster	Steven	Professional Administrative	Controllers Office	12/27/2023	01/01/24 - 03/31/24	\$ 2,500.00
Cody	Kathy	Professional Administrative	College of Graduate Studies	12/22/2023	01/02/24 - 02/29/24	\$ 2,107.80
Benton	Terry	Part-time Faculty	English and World Languages	1/8/2024	01/08/24 - 05/03/24	\$ 3,532.00
Janek	Mary	Part-time Faculty	Chemical and Biological Sciences	1/10/2024	01/08/24 - 05/24/24	\$ 1,500.00
Bowyer	Brittany	Professional Administrative	Finance & Business Operations	1/12/2024	01/16/24 - 07/15/24	\$ 3,000.00
Moore	Rebecca	Professional Administrative	Maag Library	1/18/2024	01/16/24 - 07/15/24	\$ 6,000.00
Holdridge	Shannon	Professional Administrative	Dean Cliffe College	1/23/2024	01/01/24 - 05/31/24	\$ 3,500.00
Seanger	Christina	Professional Administrative	WCBA Dean	1/25/2024	01/25/24 - 05/31/24	\$ 2,000.00
Carucci	Christine	Part-time Faculty	Dana School of Music	11/3/2023	11/5/2023	\$ 75.00
Umble	James	Part-time Faculty	Dana School of Music	11/3/2023	11/04/23 - 11/05/23	\$ 630.00
Granville	Bradley	Part-time Faculty	Dana School of Music	11/3/2023	11/04/23 - 11/05/23	\$ 350.00
Onitsuka	Yukitada	Part-time Faculty	Dana School of Music	11/15/2023	11/17/23 - 11/18/23	\$ 200.00

YOUNGSTOWN STATE UNIVERSITY
SUPPLEMENTAL, ADDITIONAL AND SECONDARY PAY ASSIGNMENTS
10/16/2023 - 1/15/2024
GENERAL FUND SUPPLEMENTAL PAY ASSIGNMENTS

Cruz	Courtney	Faculty	Teacher Education & Leadership	11/17/2023	07/01/23 - 08/01/23	\$ 2,000.00
LAST NAME	FIRST NAME	EMPLOYMENT TYPE	ORIGINATING DEPARTMENT	RECEIVED IN HR	DATES DUTIES PERFORMED	PAYMENT AMOUNT
Jeffords	Charles	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 1,000.00
Mlakar	Melissa	Part-time Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 1,250.00
Jeffords	Charles	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 750.00
Beese	Jane	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 250.00
Schafer	Holly	Part-time Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 500.00
Myers	Nate	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 250.00
Larwin	Karen	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 250.00
Larwin	Karen	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 250.00
Calcagni	Laura	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 250.00
Shortreed	Mary	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 750.00
McClusky	Paula	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 750.00
Shields	Cynthia	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 500.00
Weaver	Amy	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 750.00
Shields	Cynthia	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 750.00
Varga	Barbara	Part-time Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 375.00
Thomas	Wendy	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 375.00
Shields	Cynthia	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 750.00
Thomas	Wendy	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 1,250.00
Han-Haas	Helen	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 12,500.00
Hoon	Jeong	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 10,000.00
Eunni	Rangamohan	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 3,200.00
Cummins	Lauren	Faculty	Distance Education	11/20/2023	10/25/23 - 12/10/23	\$ 750.00
Walker	Jennifer	Faculty	Distance Education	11/20/2023	10/6/23 - 12/16/23	\$ 3,125.00

YOUNGSTOWN STATE UNIVERSITY
SUPPLEMENTAL, ADDITIONAL AND SECONDARY PAY ASSIGNMENTS
10/16/2023 - 1/15/2024
GENERAL FUND SUPPLEMENTAL PAY ASSIGNMENTS

Carucci	Joe	Faculty/Chair	Distance Education	11/20/2023	08/28/23 - 10/05/23	\$ 1,875.00
Johnson	Janis	Part-time Faculty	Teacher Education & Leadership	12/21/2023	01/08/24 - 05/04/24	\$ 3,075.00
LAST NAME	FIRST NAME	EMPLOYMENT TYPE	ORIGINATING DEPARTMENT	RECEIVED IN HR	DATES DUTIES PERFORMED	PAYMENT AMOUNT
Green	Karen	Part-time Faculty	Teacher Education & Leadership	12/22/2023	10/01/23 - 11/30/23	\$ 600.00
Yang	Xiaolou	Faculty	Distance Education	1/9/2024	08/21/23 -12/18/23	\$ 1,000.00
Myers	Nate	Faculty	Distance Education	1/9/2024	08/21/23 -12/18/23	\$ 2,000.00
Myers	Nate	Faculty	Distance Education	1/9/2024	08/21/23 -12/18/23	\$ 2,000.00
Myers	Nate	Faculty	Distance Education	1/9/2024	08/21/23 -12/18/23	\$ 2,000.00
Louth	Paul	Faculty	Distance Education	1/9/2024	08/21/23 -12/18/23	\$ 2,000.00
Foster	Susan	Part-time Faculty	Dana School of Music	1/10/2024	01/16/24 - 04/28/24	\$ 2,000.00

YOUNGSTOWN STATE UNIVERSITY
SUPPLEMENTAL, ADDITIONAL AND SECONDARY PAY ASSIGNMENTS
10/16/2023 - 1/15/2024
GRANT FUNDED SUPPLEMENTAL PAY ASSIGNMENTS

LAST NAME	FIRST NAME	EMPLOYMENT TYPE	ORIGINATING DEPARTMENT	RECEIVED IN HR	DATES DUTIES PERFORMED	PAYMENT AMOUNT
Wilson	Marcelle	Part-time Faculty	History	10/19/2023	07/01/23 - 11/10/23	\$ 900.75
Bonhomme	Brian	Faculty	History	10/19/2023	07/01/23 - 11/10/23	\$ 900.75
Pallante	Martha	Faculty	History	10/19/2023	07/01/23 - 11/10/23	\$ 900.75
DeBlasio	Donna	Part-time Faculty	Humanities & Social Sciences	10/19/2023	07/01/23 - 11/10/23	\$ 900.75
Ge	Weiqing	Faculty	Grad Studies in Health and Rehab Sciences	12/13/2023	07/01/23 - 08/15/23	\$ 3,979.00
Farris	Jaelyn	Part-time Faculty	Psychological Services and Counseling	12/22/2023	09/01/23 - 05/15/24	\$ 6,155.00
Matanin	Marcia	Faculty	Teacher Education & Leadership	1/4/2024	07/01/23 - 08/15/23	\$ 2,000.00
Li	Frank	Department Chair	Engineering	1/9/2024	01/01/24 - 05/15/24	\$ 6,342.00
Borra	Venkata Shesha Vamsi	Faculty	Engineering	1/10/2024	08/16/23 - 01/15/24	\$ 8,992.00
Matanin	Marcia	Faculty	Teacher Education & Leadership	1/16/2024	08/16/23 - 05/15/24	\$ 10,000.00
Krivosh	Patti	Part-time Faculty	Teacher Education & Leadership	1/16/2024	09/1/23 - 12/15/23	\$ 1,250.00
Krivosh	Patti	Part-time Faculty	Teacher Education & Leadership	1/16/2024	01/16/24 - 05/15/24	\$ 1,250.00
Rae	Allison	Professional Administrative	Excellence Training Center	1/16/2024	01/01/24 - 06/30/24	\$ 9,000.00
Loveland	Scot	Professional Administrative	APEX	1/30/2024	01/16/24 - 08/31/24	\$ 5,000.00
Cruz	Courtney	Faculty	Teacher Education & Leadership	1/30/2024	09/16/24 - 05/15/24	\$ 1,500.00

YOUNGSTOWN STATE UNIVERSITY
SUPPLEMENTAL, ADDITIONAL AND SECONDARY PAY ASSIGNMENTS
10/16/2023 - 1/15/2024
FACULTY SECONDARY APPOINTMENTS

LAST NAME	FIRST NAME	EMPLOYMENT TYPE	DEPARTMENT	JOB TITLE	BEGIN DATE	END DATE	PAYMENT AMOUNT
Bateman	Patrick	Faculty	Management and Marketing	Director, MBA Program	8/16/2023	8/15/2024	\$17,000.00
Bateman	Patrick	Faculty	Management and Marketing	Project Manager - Curriculum Chair	6/1/2023	5/31/2024	\$10,000.00
Blank	Sheila	Faculty	Centofanti School of Nursing	Interdisciplinary Initiatives Coordinator	8/28/2023	6/30/2024	\$11,000.00
Brozina	S. Cory	Faculty	Rayen College of Engineering	Associate Director, Rayen School of Engineering	7/1/2023	6/30/2024	\$10,000.00
Clutter	Susan	Faculty	Chemical and Biological Sciences	IRB Co-Chair	8/16/2023	8/15/2024	\$1,000.00
Coldren	Jeffrey	Department Chair	Psychological Sciences and Counseling	Coordinator, BCOE Teacher Data System	7/1/2023	6/30/2024	\$9,000.00
Coldren	Jeffrey	Department Chair	Psychological Sciences and Counseling	James P. Tressel Endowed Chair in Leadership	7/1/2023	6/30/2024	\$12,000.00
Cooper, Jr.	Chester	Faculty	Chemical and Biological Sciences	YSU Faculty Athletic Representative	5/7/2023	5/4/2024	\$2,250.08
Cortes	Pedro	Faculty	Rayen School of Engineering	Friedman Endowed Chair in Engineering	8/16/2023	5/15/2024	\$35,000.00
Durrell	Patrick	Faculty	Physics, Astronomy, Geology and Environmental Sciences	Warren M. Young Endowed Chair in Physics and Astronomy	8/16/2023	5/15/2024	\$3,213.00
Earnhardt	Adam	Faculty	Provost VP- Academic Affairs	Coordinator, General Education	5/7/2023	5/4/2024	\$14,296.27
Fluker	Amy	Faculty	Humanities and Social Sciences	Robert W. Reeder I Memorial Endowed Professorship in History	8/16/2023	8/15/2024	\$6,682.50
Fowler	Kendra	Faculty	Management and Marketing	BSBA Assessment Coordinator	6/1/2023	5/31/2024	\$4,500.00
Fuller	Adam	Faculty	Humanities and Social Sciences	Clayman Professor of Judaic and Holocaust Studies	9/16/2023	8/15/2024	\$9,000.00
Islam	Anwarul	Faculty	Rayen School of Engineering	Director, Engineering Accreditation	1/1/2024	6/30/2024	\$5,000.00
Korenic	Robert	Faculty	School of Computer Science, Information, and Engineering Technology	Associate Director, School of CSIET	7/1/2023	6/30/2024	\$10,000.00

YOUNGSTOWN STATE UNIVERSITY
SUPPLEMENTAL, ADDITIONAL AND SECONDARY PAY ASSIGNMENTS
10/16/2023 - 1/15/2024
FACULTY SECONDARY APPOINTMENTS

Larwin	Karen	Faculty	Teacher Education and Leadership Studies	IRB Chair	8/16/2023	8/15/2024	\$2,000.00
LAST NAME	FIRST NAME	EMPLOYMENT TYPE	DEPARTMENT	JOB TITLE	BEGIN DATE	END DATE	PAYMENT AMOUNT
Li	Frank	Department Chair	Rayen School of Engineering	Eynon-Beyer Memorial Chair in Metallurgy	8/16/2023	5/15/2024	\$10,000.00
Matanin	Marcia	Faculty	Teacher Education and Leadership Studies	Coordinator BCOE Partnerships and Accreditation	7/1/2023	6/30/2024	\$40,000.00
O'Connell	Joan	Faculty	Health Professions	Program Director	1/8/2024	5/11/2024	\$2,500.00
Ovaska	Tomi	Faculty	Economics	Paul J. Thomas Endowed Chair in Economics	1/1/2024	6/30/2024	\$7,500.00
Pallante	Martha	Faculty	Humanities and Social Sciences	Charles Darling Distinguished Chair in American Social History	8/16/2023	8/15/2024	\$27,218.75
Zhang	Yiyang	Faculty	Lariccia School of Accounting & Finance	Lariccia Family Professorship	1/1/2024	6/30/2024	\$7,500.00

Office of Human Resources Administrative Policy

2024-1 Supplemental Pay Assignments

Responsible Division/Office:	Office of Human Resources
Responsible Officer:	Chief Human Resources Officer
Revision History:	2023
Effective Date:	September 2023
Next Review:	2028

(A) Summary. Supplemental pay assignments are utilized when it is necessary and appropriate to have a current University employee perform services not included in the employee's assigned duties and responsibilities and to pay employees for these additional services.

(B) Supplemental Payment Definition. Payments that enable the University to generally deal with short-term staffing needs that require the assignment of additional duties on a limited basis beyond the scope of an employee's primary position. Supplemental pay may include the assignment of acting or interim duties on a limited basis in addition to their primary position or short-term staffing needs that require the assignment of work or additional duties outside the scope of an employee's primary position.

(C) Purpose. To establish procedures for the Office of Human Resources to manage supplemental pay assignments.

(D) Parameters.

a. Eligibility.

- i.** All full and Part-time Professional Administrative and Faculty employees may be assigned supplemental pay.
- ii.** Part-time faculty may only be assigned supplemental pay assignments during a semester when they have a current active primary position.
- iii.** Hourly employees are not eligible for supplemental pay assignments due to overtime considerations outside of the supplemental payment process.

b. Length of Appointment.

- i.** Supplemental payments for faculty may not exceed one (1) academic year.
- ii.** Payments for Professional Administrative employees may not exceed six (6) months.
- iii.** In special circumstances with the approval of the president these timelines may be extended.

c. Payment Types

- i.** Assignments outside the scope of an employee's primary position may include, but are not limited to, the following payment types:
 - a.** Acting or Interim duties for a limited nature for a limited period of time.
 - b.** Online Course Development and Re-development – procedures determined by the department of Cyberlearning.
 - c.** Faculty payments for use of a Virtual Assistant – calculated based on enrollment cap, total enrollments, and number of workload hours.
 - d.** Mentoring – Outside of full-time faculty service requirements.
 - e.** Honors Institute Instruction.

Office of Human Resources Administrative Policy

- f. Performing Arts – Event Performances, Camps, or related activities.
- g. Athletic Camps – Payments made for university run athletic camps.
- h. Student Teaching Supervision.
- i. Personal Care Attendant (Rich Center).
- j. Incentive Payments – Payments to employees provided for in employment agreements.
- k. Distinguished Service Awards.
- l. Faculty Off Campus Travel/Study Abroad in accordance with the OEA agreement.

d. Compensation.

- i. A justification of compensation must be provided with any supplemental pay request. The justification must describe how the payment amount was calculated and must be reasonable and consistent with the work being performed.
- ii. Funds necessary to cover the cost of the supplemental payments will be provided from the department's supplemental pay account.
- iii. If an employee is assigned an Acting or Interim assignment in addition to their current full-time assignment, the following pay schedule has been established:
 - 1. Vice President (Executive Officers) \$1,000 per month
 - 2. Associate. Vice President, Associate Provost, Dean \$900 per month
 - 3. Executive Director \$800 per month
 - 4. Director \$700 per month
 - 5. Manager or Associate Director \$600 per month
 - 6. Coordinator \$500 per month
- iv. Supplemental pay assignments for Acting or Interim assignments shall not be approved as a routine matter or on a reoccurring basis.
- v. Supplemental Pay Assignments to employees during any fiscal year shall not exceed \$5,000 unless approved by the President.
- vi. Compensation shall not be paid for duties, activities or service that is within the scope of an employee or faculty member's primary position.

e. Approvals.

- i. Employees may not perform any work assigned until the supplemental pay assignment is fully approved.
 - 1. Exceptions may be granted for emergency situations documented by the department supervisor and affirmed by the division executive officer.
- ii. Employees must agree to and cannot be unilaterally assigned a supplemental pay assignment.
- iii. Assignments must be approved by the following:
 - 1. Supervisor assigning work.
 - 2. Employees primary position supervisor.
 - 3. Financial Manager for the account being charged.
 - 4. Controller's Office – restricted funds/gifts/endowments and/or Academic Budget Officer
 - 5. Division Officer.
 - 6. Office of Human Resources
 - 7. Supplemental Pay Committee – Full-time Faculty payments over \$500.
 - 8. VP Finance & Business Operations – payments over 5,000.
 - 9. President – payments over \$5,000.

Office of Human Resources Administrative Policy

- f. Part-time Hours.** If the employee assigned the additional duties is employed on a part-time basis, the number of hours per week required to complete the assignment must be identified.
- g. Bargaining Unit Members.** Bargaining unit members should refer to their collective bargaining unit agreements for supplemental pay assignment procedures and requirements.
- h. Faculty Reassigned Time.**
 - i.** Faculty members cannot receive supplemental payment for activities when reassigned time was provided. Reassigned time is compensated under the faculty nine (9) month base salary.
 - 1.** Exceptions may be granted for the following reasons:
 - a.** Both reassigned time and supplemental pay assignment are specifically required under a grant or an endowment.
 - b.** The Provost or their designee determines it is in the best interest of the University and approves a combination of partial reassigned time and partial supplemental pay assignment to accomplish the additional duties assigned.

Office of Human Resources Administrative Policy

2024-2 Secondary Faculty Appointment

Responsible Division/Office:	Office of Human Resources
Responsible Officer:	Chief Human Resources Officer
Revision History:	2023
Effective Date:	September 2023
Next Review:	2028

(A) Summary. Faculty Secondary appointments are utilized when it is necessary and appropriate to have a current Full-time Faculty Member perform services not included in the faculty member's assigned duties and responsibilities and to pay full-time faculty for these additional services.

(B) Secondary Appointment Definition. Payments that enable the University to generally deal with staffing needs that require the assignment of work or additional duties beyond the scope of a faculty member's primary position.

(C) Purpose. To establish procedures for the Office of Human Resources to manage faculty secondary appointments.

(D) Parameters.

a. Eligibility.

- i. Current full-time faculty members in active status.
- ii. Department Chairs may be eligible for secondary appointment when requested and approved by the Provost and Vice President for Academic Affairs.
- iii. Faculty on sabbatical or FIL are not eligible for secondary appointments.
- iv. Faculty on leave are not eligible for secondary appointments.

b. Payment Types.

- i. Faculty secondary appointments are utilized for the following assignments:
 - a. To act as a Director, Associate Director, Program Manager, Coordinator or similar position for programs, partnerships, or other department activities.
 - b. Endowed Chair or Professorship positions.

c. Length of Appointment.

- i. Appointments may be assigned at the conclusion of the academic year to ensure work is continued and services are provided over the summer outside of the faculty member's 9-month appointment.
- ii. Program Director, Associate Director, Manager, Coordinator, or similar positions may be considered during the academic year when it is in the best interests of the university.
- iii. Faculty may be appointed to an Endowed chair or professorship appointment for up to a one-year period.

d. Compensation.

- i. A justification of compensation must be provided with each secondary appointment request. The justification must describe how the payment amount was calculated and must be reasonable and consistent with the work being performed.
- ii. Funds necessary to cover the cost of faculty secondary appointments will be provided from the department's budget (course, college or program fees, endowments, grant, or general funds).
- iii. Payments to employees shall not exceed \$5,000. In special circumstances, with the approval of the President, these fiscal limitations may be exceeded.
- iv. Compensation shall not be paid for duties, activities or service that is within the scope of an employee or faculty member's primary position.

e. Approvals.

- i. Employees may not perform any work assigned until the secondary appointment is fully approved.
 1. Exceptions may be granted for emergency situations documented by the department supervisor and affirmed by the Provost and Vice President of Academic Affairs.
- ii. Employees must be willing to accept the secondary appointment.
- iii. Assignments must be approved by the following:
 1. Department Chair/Director assigning work
 2. Dean
 3. Financial Manager for the account being charged
 4. Controller's Office – restricted funds/gifts/endowments
 5. Academic Budget Officer
 6. Provost and Vice President of Academic Affairs
 7. Office of Human Resources
 8. VP Finance & Business Operations – payments over \$5,000
 9. President – payments over \$5,000

f. Faculty Reassigned Time.

- i. Faculty members cannot receive supplemental payment for activities when reassigned time was provided. Reassigned time is compensated under the faculty nine (9) month base salary.
 1. Exceptions may be granted for the following reasons:
 - a. Both reassigned time and supplemental pay assignment are specifically required under a grant or an endowment.
 - b. The Provost or designee determines it is in the best interest of the University and approves a combination of partial reassigned time and partial supplemental pay assignment to accomplish the additional duties assigned.



TO: Board of Trustees, Youngstown State University
Dr. Sergul A. Erzurum
Mr. Richard C. Fryda
Mr. Charles T. George
Dr. Anita A. Hackstedde
Mr. Bill Johnson
Mr. Joseph J. Kerola
Mrs. Jocelyne Kollay Linsalata
Mrs. Laura A. Lyden
Mr. Michael A. Peterson
Mr. Allen L. Ryan, Esq.
Mrs. Molly S. Seals
Mr. Eric A. Spiegel
Ms. Julie L. Centofanti, Student Trustee
Ms. Natalie M. Dando, Student Trustee

FROM: Dana Lantz, Director Equal Opportunity, Policy Development & Title IX

RE: 3356-2-04 Search waivers for hiring of faculty and professional/administrative staff report pursuant to (F)(6) for the March 2024 Board of Trustees Meeting

Below please find the report information as required by 3356-2-04 Search waivers for hiring of faculty and professional/administrative staff pursuant to section (F)(6). The information contained herein consists of search waivers approved during the time period beginning October 16, 2023, through and including December 15, 2023.

No Search Waivers were approved during this time period.

Youngstown State University (YSU)
ARP, 403(b) and 457(b) Retirement Plans
Activity Report
of
Fiduciary Committee
to
Board of Directors
December 28, 2023

The Fiduciary Committee (Committee) was appointed by the Board of Trustees of YSU to be the fiduciary committee for the ARP, 403(b) and 457(b) Retirement Plans (Plan). This report is provided periodically to inform the Board, at a high level, of the activities of the Committee.

The Committee actively carried out its responsibilities during the 12-month period from January 1, 2023, to December 31, 2023 (Reporting Period), taking the following actions, among others:

1. The Committee met twice during the Reporting Period.
2. The Committee reviewed semi-annual reports from its independent investment advisor, and investment co-fiduciary, on the investments offered in the Plan. This reporting included a review of the following elements, among others: (a) any matters affecting the Plan's investment firms, (b) any matters affecting the investment managers and their staff, (c) any variance from the investment manager's stated investment style, (d) performance of the investments relative to peers and an appropriate benchmark, (e) risk and (f) costs.
3. At each semi-annual meeting the Committee's independent investment advisor provided an overview of the domestic and international capital markets.
4. The Committee received a detailed report on the underlying investments that make up the Plan's target date retirement fund offering.
5. Working with the Committee's independent investment advisor, one investment change was made. The Federated Hermes Kaufman Small Cap Growth Fund R6 (FKALX) was replaced with Harbor Small Cap Growth Retirement (HNSGX).
6. The Committee periodically reviewed plan participant demographic information from the plan recordkeeper.
7. From time to time the Committee received education on investment-related items.
8. The Committee received semi-annual updates on legal and regulatory developments that affect the Plan.

9. Minutes were kept of each meeting.

Neve McCall, VP for Finance / CFO

1-3-2024

Date signed

Neve McCall, Committee Chair

1-3-2024

Date signed

**RESOLUTION TO MODIFY
SOCIAL MEDIA USE ON OFFICIAL AND AFFILIATED UNIVERSITY SITES
POLICY 3356-4-09.1**

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

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

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

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

**Board of Trustees Meeting
March 7, 2024
YR 2024-**

3356-4-09.1 Social media use on official and affiliated university sites.

Responsible Division/Office: Office of Marketing and Communications
 Responsible Officer: AVP of University Relations
 Revision History: June 2014; March 2019; March 2024
 Board Committee: Institutional Engagement
 Effective Date: ~~March 7, 2019~~ March 7, 2024
 Next Review: ~~2024~~ 2029

-
- (A) Policy statement. The university recognizes the importance of social media as an evolving technology to communicate relevant information and enhance the university's reputation and profile.
- (B) Purpose. To provide guidance for current and future use of official and affiliated university social media sites.
- (C) Scope. This policy applies to individuals including university faculty, staff, volunteers and students, including student employees, who create or contribute to official or affiliated university social media sites.
- (D) Definitions.
- (1) "Social media." ~~Internet-based~~ - internet-based applications, websites, platforms, blogs, wikis, networks, and mobile-based technologies that enable users to create and share information.
 - (2) "Official university social media site." ~~Any~~ - any social media sponsored, controlled, or managed by a university college, school, department, program, office, or unit.
 - (3) "Affiliated social media site." ~~Any~~ - site social media created as part of an individual's work or university responsibilities or by a university-sponsored organization as part of its activities.
 - (4) "Post." ~~Publication~~ - publication of content in any form on social media.
- (E) Parameters.

- (1) The university's office of marketing and communications shall establish, and when appropriate, revise guidelines and/or best practices for university-sponsored and affiliated social media sites. (Please refer to the office of marketing and communications/marketing webpage).
- (2) University sponsored and affiliated social media sites and postings are subject to all applicable state and federal regulations such as the Family Educational Rights and Privacy Act ("FERPA") and copyright rights, university policies, guidelines, and best practices established by the office of marketing and communications, and "The Code of Student Rights, Responsibilities, and Conduct."
- (3) Individual departments, colleges, programs, or administrative offices may establish additional guidelines specific to their areas of study or responsibilities. However, these guidelines must be reviewed and approved by the university's information technology department and office of marketing communications prior to implementation.

Youngstown State University Foundation
Gift Processing Summary

	Second Quarter			Year-to-Date		
	<u>FY'24</u>	<u>FY'23</u>	<u>Difference FY24/FY23</u>	<u>FY'24</u>	<u>FY'23</u>	<u>Difference FY24/FY23</u>
Development (New Gifts and New Pledges):						
YSU	\$2,120,736.56	\$1,196,417.30	\$924,319.26	\$3,511,739.45	\$2,141,343.22	\$1,370,396.23
YSUF	\$2,063,671.67	\$1,198,735.94	\$864,935.73	\$3,106,936.06	\$3,825,758.43	-\$718,822.37
Total Development (New Gifts and New Pledges)	\$4,184,408.23	\$2,395,153.24	\$1,789,254.99	\$6,618,675.51	\$5,967,101.65	\$651,573.86
Planned Giving/Charitable Gift Annuities	\$200,000.00	\$870,000.00	-\$670,000.00	\$490,000.00	\$870,000.00	-\$380,000.00
Pledge Payments (For Pledges Currently or Previously Included as Development):						
YSU	\$965,681.35	\$596,818.75	\$368,862.60	\$1,226,772.50	\$773,516.25	\$453,256.25
YSUF	\$550,850.52	\$1,361,626.12	-\$810,775.60	\$618,193.80	\$1,962,957.44	-\$1,344,763.64
Total Pledge Payments	\$1,516,531.87	\$1,958,444.87	-\$441,913.00	\$1,844,966.30	\$2,736,473.69	-\$891,507.39
Number of Gifts						
New Gifts	1,567	1,777	-210	2,007	2,183	-176
Pledges	35	35	0	43	40	3
Payments	107	120	-13	184	200	-16
Planned Gifts/Charitable Gift Annuities	1	3	-2	3	3	0

**RESOLUTION TO MODIFY
FACULTY TENURE, 3356-1-02**

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

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

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

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

**Board of Trustees Meeting
March 6, 2024
YR 2024-**

3356-1-02 Faculty tenure.

Responsible Division/Office: Academic Affairs
Responsible Officer: Office of Academic Affairs
Revision History: March 2019
Board Committee: ~~Academic and Student Affairs~~ Academic Excellence and Student Success
Effective Date: ~~March 7, 2019~~ March 7, 2024
~~Minor Revision~~ ~~March 14, 2023 (rule number)~~
Next Review: ~~2024~~ 2029

- (A) Policy statement. Section 3345.45 of the Revised Code permits the board of trustees of each state university to review its policy on faculty tenure and update it to promote excellence in instruction (teaching), research, service, commercialization, or any combination of those areas. The law specifies that commercialization may be one of the included pathways to tenure. The following are examples of commercialization:
- (1) Creation of intellectual property.
 - (2) Protection of the intellectual property.
 - (3) Marketing of the intellectual property.
 - (4) Licensing of the intellectual property.
 - (5) Manufacturing a product based on the license.
 - (6) Sale of the technology covered by the license.
- (B) Purpose. To be in compliance with section 3345.45 of the Revised Code, the board of trustees is ensuring that commercialization is included as one of the areas for faculty to emphasize as a pathway to tenure.
- (C) Procedures. The tenure process is governed by the collective bargaining agreement between Youngstown state university and the Youngstown state university chapter of the Ohio education association and the policies of Youngstown state university board of trustees.

- (1) In granting tenure to eligible faculty, Youngstown state university recognizes and promotes excellence in instruction (teaching), research, service, commercialization or any combination thereof.
- (2) Faculty are evaluated in the areas of instruction (teaching), service, and scholarship, which may include commercialization activities.
- (3) Prior to the provost rendering a decision on tenure, the provost shall consult with the board of trustees at their December meeting.
- (4) The chief human resources officer will prepare and submit a summary of all personnel actions including tenure with promotion to the university affairs committee for recommendation for approval at the following March board of trustees meeting.

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3356-1-02 Faculty tenure.

Responsible Division/Office: Academic Affairs
Responsible Officer: Office of Academic Affairs
Revision History: March 2019
Board Committee: Academic Excellence and Student Success
Effective Date: March 7, 2024
Next Review: 2029

- (A) Policy statement. Section 3345.45 of the Revised Code permits the board of trustees of each state university to review its policy on faculty tenure and update it to promote excellence in instruction (teaching), research, service, commercialization, or any combination of those areas. The law specifies that commercialization may be one of the included pathways to tenure. The following are examples of commercialization:
- (1) Creation of intellectual property.
 - (2) Protection of the intellectual property.
 - (3) Marketing of the intellectual property.
 - (4) Licensing of the intellectual property.
 - (5) Manufacturing a product based on the license.
 - (6) Sale of the technology covered by the license.
- (B) Purpose. To be in compliance with section 3345.45 of the Revised Code, the board of trustees is ensuring that commercialization is included as one of the areas for faculty to emphasize as a pathway to tenure.
- (C) Procedures. The tenure process is governed by the collective bargaining agreement between Youngstown state university and the Youngstown state university chapter of the Ohio education association and the policies of Youngstown state university board of trustees.

- (1) In granting tenure to eligible faculty, Youngstown state university recognizes and promotes excellence in instruction (teaching), research, service, commercialization or any combination thereof.
- (2) Faculty are evaluated in the areas of instruction (teaching), service, and scholarship, which may include commercialization activities.
- (3) Prior to the provost rendering a decision on tenure, the provost shall consult with the board of trustees at their December meeting.
- (4) The chief human resources officer will prepare and submit a summary of all personnel actions including tenure with promotion to the university affairs committee for recommendation for approval at the following March board of trustees meeting.

**RESOLUTION TO AUTHORIZE RECOMMENDATION OF
CANDIDATES FOR HONORARY DEGREES/COMMENCEMENT
SPEAKERS**

WHEREAS, the policies of the Board of Trustees provide for the recommendation of candidates for honorary degrees/commencement speakers for the next academic year who are reviewed and recommended by the Senate Executive Committee, the Provost/Vice President for Academic Affairs, and the President of the University.

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees of Youngstown State University does hereby authorize that the selection for honorary degrees in the 2024-2025 academic year be granted from the candidates listed in the roster attached hereto.

**Board of Trustees Meeting
March 6, 2024
YR 2024-**

Potential Commencement Speakers pending Board Approval

Chris Allen

WCBA Alumni Service Award recipient. Allen is the North American Talent Acquisition Manager, Vallourec USA, the world leader in premium tubular solutions primarily serving the energy markets (oil and gas, powergen). He graduated from YSU with a bachelor's degree in Telecommunications Studies in 1992. Allen started his career with Vallourec Star in 2013 as HR staffing manager of the Youngstown Operations and was later promoted to the North American Talent Acquisition Manager to expand recruitment of external talent from Canada, the United States and Mexico. He is responsible for sourcing and recruiting of all external talent for interns as well as full-time employees. Allen has participated in many WCBA undergraduate student events serving as a mentor to business students. YSU students and graduates have been hired at Vallourec Star for both internships and full-time employment. Allen serves as a member of YSU's Pete's Pride and has assisted with enrollment, career development and community outreach efforts for the WCBA. Allen also serves as an executive board member for the American Red Cross, Lake to River Mahoning Valley Chapter.

Ashley Anderson

Ashley Anderson is a 2007 alumna with a Bachelor of Arts in Psychology, with a minor in Foreign Affairs. Her most recent position is Associate Communications Officer, UNHCR, the UN Refugee Agency. Her path to the UN included a position as a caseworker with Trumbull County Children's Services and volunteering with a nonprofit agency working with homeless children on the streets of India. Her master's thesis research at the Monterey Institute of International Studies in California led to an internship with the UN's High Commissioner for Refugees (UNHCR). She then became a consultant on the issues of migration, human trafficking and forced labor for the International Labour Organization, as well as other agencies in Geneva, Switzerland. In 2015, she left Geneva for Greece to help with the unfolding refugee crisis. Her experiences included participating in rescues of Syrian and Afghan refugees from boats in the Mediterranean Sea, to reuniting an Iraqi refugee family with their beloved pet "Kunkush", which made international news and turned into a children's book. She has worked in Ghana with the UN to aid refugees from the region. She was featured in the 2016 fall YSU magazine. She also was honored as part of the "Penguin Women on the Move" group of alumnae in 2018.

Bryan C. Brantley

A YSU alumnus with a BA in Political Science in 2001, Bryan Brantley is a partner at the law firm McGuire Woods in Pittsburgh, PA. He is a member of the firm's Board of Partners and the leader of the firm's Transportation Industry Group. He is a well-rounded litigator with national experience in a wide range of industries including transportation, retail, construction equipment, manufacturing and pharmaceuticals. Brantley has successfully resolved client's issues through dispositive motions, mediation, arbitration and favorable settlements. He currently serves as National Coordinating Counsel and manages a significant portfolio of litigation for a Fortune 50 transportation company as well as a major technology platform. Bryan serves as a member of the firm's Finance Committee and its Diversity and Inclusion Committee. In 2022, *The Legal*

Intelligencer, an American Lawyer Media publication, honored Brantley as a Professional Excellence Award winner. In 2014, he was elected as a fellow of the Leadership Council on Legal Diversity, an organization dedicated to identifying strong, diverse talent in the legal profession and providing them with leadership opportunities. He is also a recipient of the Distinguished Student Award, Katie Elizabeth Westbrook Award and CALI Excellence Award for the Future in Trial Advocacy. While earning his law degree, he was honored as a member of the Order of the Barristers.

Joe Mosca

Dr. Joseph Mosca worked at YSU from 1989 to 2019 as an assistant professor, associate professor, assistant to the dean, chair, associate dean, dean of the Bitonte College of Health and Human Services, and finally, interim provost and vice president of academic affairs. Following his retirement from YSU, Mosca served as interim executive director of Mahoning County Children Services. Mosca previously served on the board, including roles as board secretary and chairman. Mosca's awards include the Edna K. McDonald Cultural Awareness Award, the Watson Merit Award, the Distinguished Professorship, the Distinguished Service Award, and the 2023 Heritage Award, YSU's most prestigious award.

3356-10-05 Honorary degrees and commencement speakers.

Responsible Division/Office: Academic Affairs
Responsible Officer: Provost and VP for Academic Affairs
Revision History: October 1997; July 2009; June 2011;
June 2013; December 2015; December 2020;
March 2021
Board Committee: Academic Excellence and Student Success
Effective Date: March 4, 2021
Next Review: 2026

- (A) Policy statement. The board of trustees shall review and authorize the list from which commencement speakers and honorary degree candidates will be recommended by the academic events committee of the academic senate to the president. The board of trustees shall grant honorary degrees in recognition of a significant impact on the university, on the community, state or nation, or on society. Such degrees will be conferred at commencements, special convocations, and other events. The honorary degree shall be clearly designated on the diploma as “Honorary degree of” followed by the name of the degree.
- (B) The following honorary degrees are those usually awarded at Youngstown state university:
- (1) Bus. D. (doctor of business), customarily awarded to a person making a unique contribution in the business community.
 - (2) LL.D. (doctor of laws), customarily awarded to a person distinguished in general service to the state, to learning and to mankind.
 - (3) LH.D. (doctor of humane letters), customarily awarded to a person distinguished in the humanities.
 - (4) Sc.D. (doctor of science), customarily awarded to a person distinguished in the sciences.
 - (5) Lett.D. (doctor of letters), customarily awarded to an acknowledged scholar in a particular discipline.

- (6) Mus.D. (doctor of music), customarily awarded to a distinguished performer or composer.
- (C) Procedures for selecting and approving candidates.
- (1) Criteria for nomination of commencement speakers and honorary degree candidates are determined by the provost/vice president for academic affairs, subject to board of trustees' approval.
 - (2) Faculty, staff, board of trustees members and/or anyone associated with the university may submit nominations for commencement speakers and/or honorary degree candidates to the academic events committee of the academic senate or directly to the provost/vice president for academic affairs.
 - (3) Per the academic senate bylaws, the academic events committee of the academic senate "shall be responsible for making recommendations concerning policy governing academic events such as graduation ceremonies, honors convocations, inaugural ceremonies, and recommend candidates for honorary degrees and commencement speakers to the university's president."
 - (4) The academic events committee will review the credentials of all the nominated candidates and will submit a list of no less than fifteen and no more than twenty recommended candidates for approval by the board of trustees during its regular June meeting. The list may be amended and reapproved by the board at any time throughout the year.
- (D) Selection of the commencement speaker.
- (1) The provost, in consultation with the president, shall select a commencement speaker from the board-approved list.
 - (2) The president will inform the board of the selection of the commencement speaker no later than the board meeting preceding the commencement ceremony.
- (E) Selection of the honorary degree recipient.

- (1) Only the board of trustees is authorized to approve the awarding of an honorary degree.
- (2) The provost, in consultation with the president, shall recommend candidates for an honorary degree from the approved list for recognition at an appropriate event.
- (3) The board shall approve the awarding of the degree no later than the board meeting preceding the event at which the honorary degree is to be conferred.

Academic Master Plan Update

Item	Update
Personnel	<ul style="list-style-type: none"> • 13 applications to VSRP (12 accepted – 1 Geography denied) <ul style="list-style-type: none"> ○ 3 in Studio Art/Art Education ○ 1 in Geography ○ 1 in Fashion Merchandising ○ 7 in Music History & Literature/Music Performance • 1 non-renewal in Music Performance • Reallocation of 2 positions from Geography (BCLASSE) to GIS (STEM) – approved after considering the request of faculty members • Remaining 1 faculty member in Geography will stay in BCLASSE
Outcomes established for programs within the Detailed Analysis category	<ul style="list-style-type: none"> • The 12 undergraduate programs remaining in the Detailed Analysis category were renamed as “Focus Plus Programs” to indicate our commitment to focus on these programs with our support staff • The Enrollment Enterprise discussed in December’s BOT was initiated <ul style="list-style-type: none"> ○ All 12 programs were reviewed in a large group support staff meeting in January ○ Deans, Chairs, and faculty members from all 12 Focus Plus programs then met with Marketing and the Interim Provost from the end of January through the beginning of February to discuss ways to improve the programs and differentiate from competitors ○ Team folders were created and there is productive collaboration occurring for change ○ Follow-up meetings will occur in April
Position request form established and implemented	<ul style="list-style-type: none"> • New position request form established and implemented (see Resources) • New program request form and OAA policy also established and implemented (see Resources)
DWEI block credit transfer approved	<ul style="list-style-type: none"> • To be discussed in DWEI portion of BOT meeting
Dean Policy	<ul style="list-style-type: none"> • Policy is in the process of being developed that clarifies the roles, duties and expectations of college deans – progress made but not completed

Academic Master Plan Update

Item	Update
World Languages	<ul style="list-style-type: none"> • Met with faculty members, Chair, and Dean from English & World Languages department • Spanish faculty member, Gina Villamizar, led the authoring of the RFP for third party vendor • Inquiries were received from multiple companies • The committee, made of faculty members and administrators, met with a company at the end of February • The committee has requested a follow-up meeting with this company for Mid-March • A final decision will be made by the end of March
Undergraduate Online	<ul style="list-style-type: none"> • February 20th served as the official kick-off for the 9 programs to be launched Spring 2025 <ul style="list-style-type: none"> ○ General Studies, Psychology, Cybersecurity*, Computer Science, Criminal Justice, Allied Health, Sociology, Respiratory Care, and Graphic Design • Six additional programs are planned to launch Fall 2025 (BSBA General, BSBA Management, Accounting, Public Health, Communication Studies, and Economics^) <p>* Cybersecurity will be launched as a concentration in Computer Science ^ Economics has not yet been signed to a contract with Academic Partnerships</p>
AI Think Tank	<ul style="list-style-type: none"> • Group of faculty, staff, and administrators working together to develop active learning models and explore ethical AI usage • Creating policies and procedures around AI
Appalachian Grant	<ul style="list-style-type: none"> • Williamson Innovation Park • Dean of Students and Mental Health Services (Basement of DeBartolo)
General Education Transformation	<ul style="list-style-type: none"> • Policies and Procedures announced at Academic Senate February meeting – no concerns submitted to date to Dr. Palante • Successful meeting March 1 with the General Education Senate committee with no concerns • Expect the policies and procedures to pass Academic Senate during the March 13 meeting

MEMORANDUM

Date: January 22, 2024

To: Dr. Jennifer Pintar, Interim Provost and Vice President for Academic Affairs

From: Office of Research Services (ORS)

Re: FY24 Second Quarter Report

Please see attached the FY24 Second Quarter Report as prepared for delivery to the Academic Excellence and Student Success Committee of the Board of Trustees.

ORS staff managed 36 major grant administration activities during this quarter (23 submissions and 13 awards/contracts). Additionally, the IRB processed 74 new protocols and 20 modifications.

Notable highlights:

- ORS announced new internal funding opportunities (URC) to support research, scholarship, and creative arts projects
- Several proposals were submitted to the Ohio Dept of Higher Education to support behavioral health workforce, education for computer science teachers and for equipment
- YSU received awards from the Ohio Dept of Higher Education to support the behavioral health needs and from the National Center for Defense Manufacturing and Machining for hybrid manufacturing

Accompanying this submission is the FY24 Second Quarter Detail Report, which provides detail regarding institutional submissions and awards.

EXECUTIVE SUMMARY
 Second Quarter Report – FY24
 October 1, 2023 to December 31, 2023

Proposals submitted to External Agencies: Total

Q2 Total Dollars Requested:	\$5,410,203
Q2 Indirect Cost Requested:	\$109,730
Q2 Total Proposals Worked:	33
Q2 Total Proposals Submitted:	23

Projects Awarded from External Agencies: Total

Q2 Total Dollars Awarded:	\$2,891,976
Q2 Indirect Costs Awarded:	\$213,568
Q2 Total Projects Awarded:	13

Q2 YTD Comparison:

	FY23	FY24
<i>Q2 Submissions</i>	14	23
<i>Q2 Dollars Requested</i>	\$7,995,186	\$5,410,203
<i>Q2 Awards</i>	11	13
<i>Q2 Dollars Awarded</i>	\$1,849,591	\$2,891,976
<i>YTD Submissions</i>	37	43
<i>YTD \$ Requested</i>	\$14,543,707	\$8,820,168
<i>YTD Awards</i>	42	48
<i>YTD \$ Awarded</i>	\$6,515,769	\$9,295,209

FY23 Q2 Total Active Awards: 123

FY24 Q2 Total Active Awards: 128

FY23 Q2 Research Expenditures \$3,307,111

FY24 Q2 Research Expenditures: \$2,948,816

FY23 YTD Research Expenditures: \$6,008,822

FY24 YTD Research Expenditures: \$5,694,787

Proposals Submitted to External Agencies

Second Quarter Report – FY24
October 1, 2023 to December 31, 2023

PI Name	Department	Funding Agency	Amount Requested	Indirect Costs Requested	YSU Cost-Share
Hazy, J.	Criminal Justice & Consumer Science	Ohio Office of Criminal Justice	\$ 21,119	\$ 4,398	\$ -
Powe, N.	Grad Studies in Health and Rehab Sciences	North East Ohio Medical University	\$ -	\$ -	\$ 488
Bralich, J.	Humanities and Social Sciences	Trumbull Co Board of Commissioners	\$ 11,250	\$ -	\$ -
Durrell, P.	PAGES	Space and Telescope Institute	\$ 32,281	\$ 6,722	\$ -
Armstrong, F.	PAGES	University Corporation for Atmospheric Research	\$ 4,500	\$ -	\$ -
Sharma, S.	Engineering	Ohio Dept of Higher Education	\$ 91,738	\$ 4,647	\$ -
Cortes, P.	Engineering	National Science Foundation	\$ 450,000	\$ -	\$ -
Pesch, A.; Costarell, M.	Engineering	National Science Foundation	\$ 445,515	\$ -	\$ -
Cortes, P.	Engineering	Defense Advanced Research Projects Agency via Univ Texas El Paso	\$ 350,000	\$ 64,553	\$ -
Arslanyilmaz, A.	Comp Sci, Info and Eng Tech	Ohio Dept of Higher Education	\$ 679,116	\$ -	\$ -
Veisz, P.	Small Business Development Center	Ohio Dept of Development	\$ 122,450	\$ -	\$ -
Veisz, P.	Small Business Development Center	Small Business Administration	\$ 266,000	\$ -	\$ 107,189
Cianciola, E.	Office of Community Engagement	City of Youngstown	\$ 4,000	\$ -	\$ -
Baker, S.	Student Outreach and Support	Swipe out Hunger	\$ 6,000	\$ -	\$ -
Packard, F.	Student Counseling Services	Ohio Dept of Higher Education	\$ 274,982	\$ -	\$ -
Ekstrand, L.	Division of Workforce Education and Innovation	Ohio Dept of Higher Education	\$ 116,184	\$ 24,194	\$ -
McCartney, R.	Division of Workforce Education and Innovation	Ohio Dept of Higher Education	\$ 902,378	\$ -	\$ -
Ekstrand, L.	Division of Workforce Education and Innovation	Ohio Dept of Higher Education	\$ 1,366,467	\$ -	\$ -
Sexton, G.	WYSU-FM	Corporation for Public Broadcasting	\$ 95,830	\$ -	\$ -
Sexton, G.	WYSU-FM	Corporation for Public Broadcasting	\$ 34,233	\$ -	\$ -
Ekstrand, L.	Division of Workforce Education and Innovation	Ohio Dept of Development	\$ 74,090	\$ 5,216	\$ -



**YOUNGSTOWN
STATE UNIVERSITY**

Ekstrand, L.	Division of Workforce Education and Innovation	National Science Foundation	\$ -	\$ -	\$ -
Kuzma, D.	Janitorial Services	Mahoning Co Solid Waste Mgmt Dist	\$ 62,070	\$ -	\$ -
TOTAL			\$ 5,410,203	\$ 109,730	\$ 107,677

Projects Awarded from External Agencies

Second Quarter Report – FY24
October 1, 2023 to December 31, 2023

PI Name	Department	Funding Agency	Amount Awarded	Indirect Costs Awarded	YSU Cost-Share
Bonhomme, B.	Humanities and Social Sciences	Ohio History Connection	\$ 140,000	\$ 25,804	\$ 7,500
Frank, D.	Psychological Sciences and Counseling	Army Research Institute	\$ 67,640	\$ 14,085	\$ -
Case, W.	Dana school of Music	National String Project Consortium	\$ 6,650	\$ -	\$ 10,000
Sharma, S.	Engineering	Muskingum Watershed Conservancy District	\$ 60,264	\$ 3,660	\$ -
Cortes, P.	Engineering	National Center for Defense Manufacturing and Machining	\$ 1,428,800	\$ 98,576	\$ 127,796
Loveland, S.	Small Business Development Center	Ohio Dept of Development	\$ 15,000	\$ -	\$ -
Packard, F.	Student Counseling Services	Ohio Dept of Higher Education	\$ 537,825	\$ 20,065	\$ -
Cianciola, E.	Office of Community Engagement	United Way	\$ 8,534	\$ 1,777	\$ -
Cianciola, E.	Office of Community Engagement	City of Youngstown	\$ 4,000	\$ -	\$ -
Ruller, J.	Division of Workforce Education and Innovation	National Center for Defense Manufacturing and Machining	\$ 492,200	\$ 49,601	\$ 64,304
Anderson, C.	Student Activities	Fair Elections Center	\$ 1,000	\$ -	\$ -
Sexton, G.	WYSU-FM	Corp for Public Broadcasting	\$ 95,830	\$ -	\$ -
Sexton, G.	WYSU-FM	Corp for Public Broadcasting	\$ 34,233	\$ -	\$ -
TOTAL			\$ 2,891,976	\$ 213,568	\$ 209,600

CURRENT ACCREDITATION ACTIVITY
March 2024

Summary of recent site visits:

- The Association to Advance Collegiate Schools of Business (AACSB) has scheduled a pre-visit for March 26-28, 2024, in advance of the October 20-22 accreditation review.

Summary of recent accreditation actions:

- On August 3, 2022, the Higher Learning Commission (HLC) notified YSU of successful completion of the Year 4 Assurance Review with no recommended monitoring.
- On July 30, 2018, the HLC continued the accreditation of YSU with the next Reaffirmation of Accreditation scheduled to occur in 2027-28.

Details:

Program	Status
Art National Association of Schools of Art and Design (NASAD)	The annual affirmation and audit statements were submitted on June 26, 2023. NASAD was notified of a change of institutional representative for 2024. A Notice of Intention to Apply for Renewal Membership (ten year) was submitted for Spring 2026. An optional accreditation review consultative visit is scheduled and confirmed for Fall 2024. NASAD site evaluation team members are confirmed for a visit during Spring 2026.
Athletic Training Commission on Accreditation of Athletic Training Education (CAATE)	The Master of Athletic Training program was granted initial accreditation for five years by CAATE in 2018. The MAT program is currently in good standing with CAATE. The program completed its self-study site visit with the CAATE peer reviewers in March 2023. A ten-year reaccreditation was awarded in August 2023.
Business AACSB International—The Association to Advance Collegiate Schools of Business	AACSB International approved the extension of accreditation in January 2020. Accreditation of the undergraduate and graduate business programs was extended for the standard five years. An AACSB pre-visit is scheduled for March 26-28, 2024. The next accreditation review will be October 20-22, 2024, with the Continuous Improvement Review due August 21, 2024.
Chemistry American Chemical Society (ACS)	The Committee on Professional Training (CPT) of the American Chemical Society (ACS) notified YSU in September 2023 that its BS Chemistry

Program	Status
Chemistry (continued)	program has met all requirements in the ACS guidelines for reaccreditation. The CPT recommended continuation of ACS accreditation through 2029.
Counseling Council for Accreditation of Counseling and Related Educational Programs (CACREP)	The Council for Accreditation of Counseling and Related Educational Programs (CACREP) granted full accreditation to the MS. Ed. in Counseling—Addiction Counseling, Clinical Mental Health Counseling, School Counseling, and Student Affairs/College Counseling program tracks for the full eight-year period, until March 31, 2031.
Dental Hygiene Commission on Dental Accreditation (CODA)	The self-study for continuing accreditation of the Dental Hygiene program was submitted in September 2017. This was the initial site visit following the transition from the Associate of Applied Science (AAS) degree to the Bachelor of Science in Dental Hygiene (BSDH) degree. A site visit occurred in November 2017, and the program was awarded full accreditation status, Approval Without Reporting Requirements, at the 2018 ADA CODA Summer Commission meeting. The accreditation cycle for allied dental programs is seven years. The next site visit will be in 2025.
Dietetics Program Academy of Nutrition and Dietetics (AND) Accreditation Council for Education in Nutrition and Dietetics (ACEND)	<p>The two ACEND-accredited dietetics programs are the Didactic Program in Dietetics and the Dietetics Future Model/DFM (MPH-RDN graduate track).</p> <p>The graduate level MPH-DFM (Master’s in Public Health-Dietetic Future Model) continues in good standing, but the decision has been made to not seek future reaccreditation in 2023 due to lack of enrollment. An accreditation decision letter was issued in July 2023 approving the close-out plan. The program will remain accredited until December 31, 2026. The program director will provide the accrediting body with yearly reports on program progress and support until the close date.</p> <p>The BSAS-Didactic Program in Dietetics is in good standing and accredited through June 2028.</p>

Program	Status
Dietetics (continued)	<p>A DPD Compliance Report showing alignment of clinical coursework with 2022 Accreditation Knowledge requirements was submitted in January 2024.</p> <p>The DPD-MHHS 4+1 (Didactic Program in Dietetics-Master’s in Health & Human Services) allows students to meet the new eligibility requirements for the Registered Dietitian credential (RDN) that specify a master’s degree or higher (as applied for supervised practice). Graduates of the DPD who do not wish to become Registered Dietitians may graduate with the BSAS and earn the Nutrition and Dietetic Technician credential without further educational or experiential learning requirements.</p>
<p>Education and Licensure Programs The Council for the Accreditation of Educator Preparation (CAEP)</p> <p>Accreditation occurs at the unit (BCOE) level.</p>	<p>The Council for the Accreditation of Educator Preparation (CAEP) conducted a site visit of YSU’s Beeghly College of Education on April 2-4, 2017. CAEP’s Accreditation Council granted accreditation status effective Fall 2017 through Fall 2024. The next site visit will occur in Fall 2024.</p>
<p>Engineering Engineering Accreditation Commission of the Accreditation Board for Engineering and Technology (ABET)</p>	<p>The Electrical Engineering, Civil Engineering, Chemical Engineering, and Mechanical Engineering programs are fully accredited by ABET until 2026. Industrial Engineering went from “program deficiency” to “program weakness,” a finding which means that the program has been removed from “show cause.” Industrial Engineering is now fully accredited until 2026.</p>
<p>Engineering Technology Engineering Technology Accreditation Commission of the Accreditation Board for Engineering and Technology (ETAC-ABET)</p>	<p>The AAS and BSAS Engineering Technology programs (CCET, EET, and MET) are accredited through September 30, 2024.</p> <p>Applications to renew accreditations for all AAS & BSAS Engineering Technology Programs were submitted. The accreditation team’s comprehensive visit occurred Fall 2023 and the team’s final report will follow.</p>

Program	Status
Engineering Technology (continued)	<p data-bbox="768 237 1416 520">Following its October 2023 visit, the ABET accreditation team expressed one concern for all programs related to insufficiency of staffing in the STEM advising office (the team’s concerns do not impact accreditation). Once hiring of additional staff to help with advising students in MET is completed, it will be reported to remove this concern.</p> <p data-bbox="768 569 1416 814">The team expressed one specific concern for the MET BSAS and AAS programs regarding a procedure to collect and use data toward improving the programs. YSU has submitted a proposed procedure, and progress will be reported to remove this concern. A detailed response letter was submitted on January 14, 2024.</p>

Program	Status
<p>Exercise Science Committee on Accreditation for the Exercise Sciences (CoAES) / Commission on Accreditation of Allied Health Education Programs (CAAHEP)</p>	<p>The Committee on Accreditation for the Exercise Sciences (CoAES) granted initial accreditation of the undergraduate Exercise Science program on May 18, 2018. The accreditation is for five years. The yearly report was submitted in July 2023. A site visit is expected this academic year.</p>
<p>Forensic Science American Academy of Forensic Sciences (AAFS)</p>	<p>Application for initial accreditation is pending. Program self-study and site visit will follow.</p>
<p>Long-Term Care Administration National Association of Long-Term Care Administrator Boards (NAB)</p>	<p>The Long-Term Care Administration program submitted its accreditation review to the National Association of Long-Term Care Administrator Boards (NAB) in Spring 2022, and the submission was approved by NAB. Due to the discontinuation of the Long-Term Care program, the decision was made to bring the long-term care administration track into the Master of Health and Human Services. This program is currently seeking NAB accreditation of the Healthcare/Long-Term Care Administration track. The Master in Health and Human Services accreditation application was submitted with a site visit on October 2-3; a rejoinder report was sent October 13. The NAB accreditation committee has voted to hold the application in abeyance through the 2024 mid-year meeting to allow YSU to meet the mandatory requirements.</p>
<p>Medical Laboratory Technology National Accrediting Agency for Clinical Laboratory Sciences (NAACLS)</p>	<p>The Medical Laboratory Technology program self-study and response were submitted in Spring 2020. A virtual site visit was conducted in July 2020. The program as awarded ten years of accreditation through 2030. The annual report was submitted in October 2022.</p>
<p>Medical Laboratory Science National Accrediting Agency for Clinical Laboratory Sciences (NAACLS)</p>	<p>The Medical Laboratory Science completion program submitted its self-study on April 1, 2022. The site visit was completed in October 2022, and no issues were cited. The program has been awarded the maximum ten-year accreditation through 2032.</p>

Program	Status
<p>Music National Association of Schools of Music (NASM)</p>	<p>In 2012, the NASM Commission on Accreditation voted to continue YSU and the Dana School of Music in good standing. In July 2016, the NASM Commission on Accreditation accepted YSU's Application for Plan Approval of Dana's Bachelor of Music in Music Recording.</p> <p>The NASM Commission on Accreditation has scheduled an accreditation full review and site visit for April 7-9, 2024.</p>
<p>Nursing Ohio Board of Nursing (OBN)</p> <p>Accreditation Commission for Education in Nursing (ACEN)</p> <p>Commission on Collegiate Nursing Education (CCNE)</p> <p>Council on Accreditation of Nurse Anesthesia Educational Programs (COA) St. Elizabeth Health Center School for Nurse Anesthetists, Inc. (YSU MSN nurse anesthesia option only)</p>	<p>The OBN has scheduled an approval visit for the ADN program for March 11-12, 2024.</p> <p>A candidacy application will be submitted to ACEN for the new Associate Degree in Nursing (ADN) program in Fall 2024.</p> <p>ACEN recently granted continuing accreditation for the BSN programs for the maximum eight years. The next evaluation visit will occur in Spring 2030.</p> <p>CCNE recently granted continuing accreditation for the BSN, MSN, and post-graduate APRN certificate programs for the maximum ten years. The next evaluation visit will occur in Spring 2032.</p> <p>The last MSN class will graduate in December 2022. The Doctor of Nursing Practice program matriculated on May 17, 2021. Both programs are accredited. The next evaluation will occur in Spring 2027.</p>
<p>Physical Therapy Commission on Accreditation in Physical Therapy Education (CAPTE)</p>	<p>The MPT has been discontinued. Accreditation now applies to the DPT program approved by HLC in 2008. Ten-year accreditation was reaffirmed in 2014 with a compliance report due in 2015. This report was submitted, and CAPTE granted the program continuing accreditation.</p> <p>The current status of the program is accredited. A progress report was submitted September 1, 2022. After review, the program was granted continued accreditation. Annual reports are required, and a site visit will occur in Spring 2025.</p>

Program	Status
<p>Public Health (Consortium of Eastern Ohio Master of Public Health) Council on Education for Public Health (CEPH)</p>	<p>The MPH is offered by a consortium of institutions including YSU. Initial accreditation was earned in 2003. In October 2009, the Council on Education for Public Health (CEPH) renewed accreditation for seven years until 2016. A 2016 site visit resulted in all compliant findings. In June 2017, the program received official notification of full accreditation with the seven-year accreditation term ending July 1, 2024. In order to align with site visit workload, CEPH offered on December 6, 2021, to extend the CEOMPH accreditation term until July 1, 2025, which was accepted.</p>
<p>Respiratory Care Commission on Accreditation for Respiratory Care (CoARC)</p>	<p>Continuing re-accreditation status for the next ten years was conveyed for the BSRC entry into practice on July 21, 2021, at the CoARC quarterly meeting.</p> <p>Both the BSRC degree advancement (completion program) and the Master of Respiratory Care programs were conferred accreditation status in July 2021 at CoARC’s quarterly board meeting.</p> <p>Virtual site visits for these two programs were completed May 10-11, 2021, without programmatic issues. Provisional initial accreditation was conferred at the CoARC quarterly board meeting. In the interest of substantial financial savings, the site visits were scheduled as one CoARC visit. The site visits were performed virtually while retaining the multiple program savings.</p> <p>All three programs performed a Report of Current Status (RCS) evaluation in July 2022 that was accepted by CoARC to have met or exceeded all accreditation standards for the year. The program continues to meet CoARC’s high academic standards.</p> <p>YSU has increased capacity of the BSRC entry into practice program, placing initial cohort enrollment at 25 allowable students per cohort to enter, which is maximum for classroom capacity, clinical rotation sites, and accreditation standards.</p>

Program	Status
<p>Social Work Council on Social Work Education (CSWE)</p>	<p>At its February 2021 meeting, the Commission on Accreditation (COA) voted to reaffirm accreditation for eight years, ending in October 2027 due to a one-meeting deferment received this cycle.</p> <p>The BSW program requested permission from CSWE to offer the program fully online (virtual synchronous). The request for online delivery status was submitted December 2022 and approved by email notification on May 19, 2023, with a formal approval notice forthcoming.</p> <p>The BSW and MSW programs are scheduled for re-accreditation assessment in 2027.</p>
<p>Theatre National Association of Schools of Theatre (NAST)</p>	<p>Due to cuts in the number of tenure-track faculty and ongoing staffing issues, the Dana School of Music and University Theatre officially resigned its NAST accreditation effective May 3, 2018, and will not seek reaccreditation until these issues have been resolved. Additional faculty reduction preceding the 2021-2022 academic year has further delayed the program's ability to reapply for specialized accreditation.</p>
<p>World Languages and Cultures American Council on the Teaching of Foreign Languages (ACTFL) Recognition for Italian Education and Spanish Education</p>	<p>The appropriate accrediting bodies were notified that the Italian Education and Spanish Education programs have been deactivated.</p>

Update on Assessment of Student Learning

YSU has made and continues to make progress in fostering meaningful and relevant assessment of student learning.

Assessment of Student Learning Activities

- **Academic Assessment:** Academic programs engage in assessment reporting on a five-year cycle through an Assessment Plan, Assessment Update, or a Cycle Reflection. Reports were due October 31, 2023. Programs can request a submission extension. Programs identified for sunset through APEEI with enrolled students complete a shortened Teach Out Update. As of February 5, 2024, 72% of academic programs have submitted reports, with another 20% requesting extensions through the end of the academic year. Institute for Teaching and Learning staff members have been working with program coordinators and chairs to encourage submission. Volunteer reviewers through the Assessment Council are in the process of completing submission reviews. Feedback will then be shared with programs and made available to chairs and deans by March 2024.
- **Co-Curricular Assessment:** Co-curricular programs will be asked to submit annual assessment reports by June 30, 2024. Training and resources will start to be available to coordinators in April. Co-curricular programs across campus continue to engage at high levels with assessment reporting.
- **Statewide Collaboration:** The Assistant Director of Assessment continues to meet monthly with other Ohio assessment coordinators from Bowling Green State University, Cleveland State University, University of Akron, Kent State University, University of Toledo, and Shawnee State University to ensure YSU meets standards related to the assessment of student learning.

Current Student Data Collection

- **National Survey of Student Engagement:** YSU participated in the National Survey of Student Engagement (NSSE) in Spring 2023. All first-year and senior students were invited to participate. In addition to providing the standard survey questions, the NSSE asked students to complete two topical modules: Civic Engagement and First Year Experience/Senior Transitions. The NSSE survey had a 20% response rate. NSSE information was shared in the fall through an overview webinar, reports folders available to anyone with a YSU login credential, and tailored college-level reports. The Institute for Teaching and Learning is partnering this spring with the Office of Community Engagement to share specific civic engagement data through the Office of Community Engagement newsletter. The Spring NSSE Lunch and Learn series will take place on March 13, March 20, April 10, and April 24.

ACADEMIC PROGRAMS UPDATE MARCH 2024

1. Undergraduate Program Development:

Undergraduate Program Actions Requiring Board of Trustees Action and/or Notification or Approval by the Ohio Department of Higher Education

Since the last set of YSU Board of Trustees meetings, the Ohio Department of Higher Education (ODHE) has approved the following undergraduate program changes:

- No changes to report.

2. Graduate Program Development:

Graduate Program Actions Requiring Board of Trustees Action and/or Notification or Approval by the Chancellor's Council on Graduate Studies (CCGS)

- A request for a combined Bachelor's to Master's program in **BSAS Forensic Science, BS Chemistry, BA Chemistry, and BS Biochemistry** to an **MS in Chemistry** was approved by CCGS.
- A request for a combined Bachelor's to Master's program in **Bachelor of Science in Computer Science** to a **Master in Computing Information Systems** was approved by CCGS.
- A request for a combined Bachelor's to Master's program in **Bachelor of Science in Mathematics, Computer Science, Information Technology, Economics, Psychology, Biology, Chemistry, Physics, Geology, Environmental Science, Industrial and Systems Engineering** to a **Master of Science in Data Science and Statistics** was approved by CCGS.
- A request for a combined Bachelor's to Master's program in **Bachelor of Engineering in Chemical Engineering, Civil Engineering, Industrial and System Engineering, Electrical Engineering, and Mechanical Engineering** to a **Master of Science in Chemical Engineering, Civil & Environmental Engineering, Industrial & System Engineering, Electrical & Computer Engineering, and Mechanical Engineering** was approved by CCGS.
- A request to suspend admission to the **Master of Music in Music Composition** program is being prepared to send to CCGS for approval.
- A request to suspend admission to the **Master of Music in Jazz Studies** program is being prepared to send to CCGS for approval.

- A request for a combined Bachelor's to Master's program in **Bachelor of Arts in Communication** to a **Master of Arts in Professional Communication** is being prepared to send to CCGS for approval.
- A new **Graduate Certificate in Computer Science Endorsement** was approved by campus committees (CCGS approval is not necessary) and will be available for fall 2024 admission.
- A new **Post-Master's Graduate Certificate in Counseling Practice** was approved by campus committees (CCGS approval is not necessary) and will be available for fall 2024 admission.
- A request to change the name of the **Master of Science in Engineering in Electrical Engineering** to the **Master of Science in Engineering in Electrical and Computer Engineering** was approved by CCGS. The new name is a better indication of the program's curriculum.

Sabbatical and Faculty Improvement Leaves
Approved for AY 2024-2025

One semester (FIL):

Mari Alschuler, Social Work (Spring 2025; moved to AY 2025-2026)

Daniel Ayana, History (Fall 2024)

Kyosung Choo, Mechanical Engineering (Fall 2024)

Maria Conti Maravillas, English (Spring 2025)

Joseph D'Uva, Art (Spring 2025)

Timothy Francisco, English (TBD)

Guohong Han, Management (Spring 2025)

Two semesters (Sabbatical):

Sherri Woods, Social Work

**Research Professorship List
Faculty Awarded for 2024-2025**

1. Dr. Snjezana Balaz, Physics, Astronomy, Geology, and Environmental Science
“Doped Lithium Borate (LBO) Glass as a Novel Neutron Detector” – Awarded 9 Hours
2. Dr. Dragana Crnjak, Art
“Painting as Private and Public Space” – Awarded 9 Hours
3. Dr. Sahar Ehsani, Rayen School of Engineering
“Heavy metals in the Mahoning River” – Awarded 9 Hours
4. Dr. Douglas Genna, Chemical and Biological Sciences
“The Recycling of Lithium-ion Batteries” – Awarded 9 Hours
5. Dr. Edmund Ickert, Graduate Studies in Health and Rehabilitation Sciences
“Effect of Interdisciplinary High Fidelity Patient Simulation (HFPS) on Student Performance and Teamwork” – Awarded 6 Hours
6. Dr. Carrie Jackson, Psychological Sciences and Counseling
“Overrepresentation of Minority Students in Special Education” – Awarded 6 Hours
7. Dr. Alina Marculetiu, Management and Marketing
“Exploring the Institutional Pressures and Practices Nexus in Sustainable Supply Chain Management: A Meta-Analytic Investigation” – Awarded 6 Hours
8. Dr. Byung-Wook Park, Rayen School of Engineering
“Bioprinting of Engineered Biohybrid Materials – Photothermal Responsive Living Therapeutics” – Awarded 9 Hours
9. Dr. Jae Ryu, Rayen School of Engineering
“Dissimilar welding technology for functional biomedical implants” – Awarded 9 Hours
10. Dr. Suresh Sharma, Rayen School of Engineering
“Impact of Climate Change on Chagrin River Flooding and Flood Inundation Mapping at Selected Locations” – Awarded 9 Hours
11. Dr. Rongyao Zhang, Lariccia School of Accounting and Finance
“Spillover Effect of Bad News along Sustainable Supply Chain: Evidence from Firm’s Bankruptcy Shock” – Awarded 9 Hours
12. Dr. Yiyang Zhang, Lariccia School of Accounting and Finance
“Information Technology Expertise and ESG Performance” – Awarded 6 Hours

YOUNGSTOWN STATE UNIVERSITY FEBRUARY 2024

DIVISION OF STUDENT AFFAIRS | EVENT HIGHLIGHTS!

THURSDAY, FEBRUARY 1

Pick Up Your Copy of the Jambar!

YSU for Recovery
Every Thursday | 2:00pm-3:00pm
Rec Center, Meditation Studio

A safe, judgment-free space where students can come to express their struggles with substance abuse and mental health. Attendance is confidential and referrals will be provided for students that need help. For information, contact Mason Edmunds at mgedmonds-guest@ysu.edu. *Sponsored by Campus Rec*

Poets Anonymous
Every Thursday | 3:30pm-4:30pm
Training Room, Kilcawley Center

Poets Anonymous is a weekly workshop run by Poetry Club Vice President, Maysa Smith! It will be a safe space for people to share, brainstorm, work, and revise their writing in a small group setting. Do not feel obligated to bring finished work, it will be a very relaxed environment and the goal is to support and help one another! *Sponsored by YSU Poetry Club*

FRIDAY, FEBRUARY 2

**YSU Track & Field
Mid Major Invitational**
1:00pm | Watson Tressel Training Site
Free admission

JambarTV Broadcast
1:00pm | <https://www.youtube.com/@JambarTVbyTheJambar/videos>

Friday Nights at the Cove
4:00pm-6:00pm | Kilcawley Center, The Cove
It's Friday, which means it's time for another Friday Night at the Cove. Bring a friend or meet a new one here. This Friday join the YSU Poetry Club for an Open Mic Night, Poetry Reading, and Karaoke! *Sponsored by Student Affairs and YSU Poetry Club*

SATURDAY, FEBRUARY 3

**YSU Track & Field
Mid Major Invitational**
9:30am | Watson Tressel Training Site
Free admission

**YSU Men's Swimming & Diving
vs Duquesne (Diving Only)**
11:30am | Beeghly Natatorium | Free admission

**YSU Women's Swimming &
Diving vs Duquesne**
11:30 am | Beeghly Natatorium | Free admission

**YSU Women's Basketball
vs Milwaukee**
12:00pm | Beeghly Center
Free for YSU students with a YSU ID

MONDAY, FEBRUARY 5

**Crafternoons at the Cove:
Ceramic Penguin Banks**
2:00pm-4:00pm | The Cove, Kilcawley Center
(Student Activities' Side)

Have a New Year's Resolution to save more money? Come paint a miniature penguin piggy bank to house your spare change! *Sponsored by Student Activities and Guinathon*

Crate Stacking and Pizza
4:00pm-6:00pm | Rec Center
Join the Adventure Rec Team for an afternoon of crate stacking and pizza! For more information, contact adventurerec@ysu.edu. *Sponsored by Campus Rec*

TUESDAY, FEBRUARY 6

Learn to Ballroom Dance
7:00-8:00pm | Beeghly Center, Room 100
Come learn how to dance with the YSU Dance Club! Professional dance instructor, Matthew Feehley, will be teaching us a variety of ballroom styles. No experience or partner necessary! Email ysudancedclub@gmail.com with questions. *Sponsored by YSU Dance Club*

THURSDAY, FEBRUARY 8

Pick Up Your Copy of the Jambar!

Pete the Penguin's 91st Birthday
10:00am-12:00pm Lower Arcade (main lobby),
Kilcawley Center

It's our beloved mascot's birthday. What do you give to a penguin who has everything? He says, "Nothing—I am giving presents to YOU!" What a guy! There will be 91 presents from Pete and his friends at Pepsi—some are big, and some are small! Come and pick a number and Pete himself will hand you the corresponding present. We'll snap a picture and show it on our Instagram account, @YSU_Penguin_Experience. Enjoy some birthday cake as well. Prizes include Pepsi swag, YSU gear, and a Pepsi or Mountain Dew mini fridge! Must show YSU ID to participate. One gift per person. *Sponsored by Student Activities, Student Government, and Pepsi*

**PNC Financial Education Webinar
Designed for Students: Repaying
Student Loan Debt**
4:00pm | Virtual

As a recent graduate, you may soon find yourself responsible for multiple expenses in addition to student loans. Learn guidelines for establishing a positive cash flow and explore student loan repayment plans. You don't have to be a PNC customer to participate. Register now at pnc.com/myfinanceacademy. A recording will be available at the link for 30 days after the event. *Hosted by PNC Bank*

YSU for Recovery
Every Thursday | 2:00pm-3:00pm
Rec Center, Meditation Studio

A safe, judgment free space where students can come to express their struggles with substance abuse and mental health. Attendance is confidential and referrals will be provided for students that need help. For questions, please contact Mason Edmunds at mgedmonds-guest@ysu.edu.

Poets Anonymous
Every Thursday | 3:30-4:30pm
Training Room, Kilcawley Center

This is a weekly workshop run by Poetry Club Vice President, Maysa Smith! It's a safe space for people to share, brainstorm, work, and revise their writing in a small group setting. Do not feel obligated to bring finished work. It's a relaxed environment and the goal is to support and help one another! *Sponsored by YSU Poetry Club*

**YSU Men's Basketball
vs Milwaukee**
6:30 pm | Beeghly Center
Free for YSU students with a YSU ID

FRIDAY, FEBRUARY 9

JambarTV Broadcast
1:00pm | <https://www.youtube.com/@JambarTVbyTheJambar/videos>



International Coffee Hour
3:00pm-5:00pm | Rec Center, Aerobics Studio
Coffee hour will include fun games and activities for international students to engage in while enjoying the social environment at the Rec Center. *Sponsored by Campus Rec and International Programs Office*

Friday Nights at the Cove
4:00pm-6:00pm | Kilcawley Center, The Cove
Come spend some time with your Housing & Residence Life tribe, learn about Domestic Partner Violence Awareness, and receive useful resources. *Sponsored by the Office of Student Experience*

SATURDAY, FEBRUARY 10

YSU Men's Basketball vs Green Bay
1:30 pm | Beeghly Center
Free for YSU Students with a YSU ID

TUESDAY, FEBRUARY 13

**Let's Talk About Black History
Month**
10:30am-12:30pm | Kilcawley Center, The Hub
Sit in on important conversations about Black History Month and topics related to race and society. Knowledge, experiences, and perspectives of YSU students, faculty, and staff will be central to the discussions held. This event will be safe and casual for ALL. Feel free to just listen, or jump in and ask the panel some questions of your own! Participate, and you could win great prizes! *Sponsored by Student Activities, Black Student Union, and African Caribbean Student Union*

Social Impact Job & Internship Fair
1:00pm-4:00pm | McKay Auditorium, Beeghly Hall

Job and internship fair featuring employers from non-profit, social service, and government agencies. Opportunities include public service, communication, advocacy, community outreach, law enforcement, grant writing, behavioral health, social work, and more! *Sponsored by Office of Career Exploration & Development*

Learn to Ballroom Dance
7:00-8:00pm | Beeghly Center, Room 100

Come learn how to dance with the YSU Dance Club! Professional dance instructor, Matthew Feehley, will be teaching us a variety of ballroom styles. No experience or partner necessary! Email ysudancedclub@gmail.com with questions. *Sponsored by YSU Dance Club*

WEDNESDAY, FEBRUARY 14

Rec Your Heart
2:00pm-4:00pm | Rec Center, Front Lobby

Don't have plans on Valentine's Day? Join us for some self-care and songs. Make your own bath bomb and sing your heart out with some karaoke! For more information, contact Dina Fabry at dmfabry@ysu.edu. *Sponsored by Campus Rec*

Penguin Snowman Competition
4:00pm-5:00pm | Rec Center Lobby
Come and build a snow penguin for our competition! The winner will receive a prize! *Sponsored by Campus Rec*

**YSU Men's Basketball
vs Robert Morris**
6:30 pm | Beeghly Center
Free for YSU students with a YSU ID

THURSDAY, FEBRUARY 15

Pick Up Your Copy of the Jambar!

YSU for Recovery
Every Thursday | 2:00pm-3:00pm
Rec Center, Meditation Studio

A safe, judgment free space where students can come to express their struggles with substance abuse and mental health. Attendance is confidential and referrals will be provided for students that need help. For questions, please contact Mason Edmunds at mgedmonds-guest@ysu.edu. *Sponsored by Campus Rec*

Poets Anonymous
Every Thursday | 3:30-4:30pm
Training Room, Kilcawley Center

This is a weekly workshop run by Poetry Club Vice President, Maysa Smith! It's a safe space for people to share, brainstorm, work, and revise their writing in a small group setting. Do not feel obligated to bring finished work. It's a relaxed environment and the goal is to support and help one another! *Sponsored by YSU Poetry Club*

FRIDAY, FEBRUARY 16

**YSU Men's Tennis
vs Northern Illinois**
10:00 am | YSU Indoor Tennis Center | Free admission

JambarTV Broadcast
1:00pm | <https://www.youtube.com/@JambarTVbyTheJambar/videos>

Friday Nights at the Cove
4:00pm-6:00pm | Kilcawley Center, The Cove

It's Friday, which means it's time for another Friday Night at the Cove. Bring a friend or meet a new one here. Put your 'talent' hats on because this Friday is Open Mic! Come and show the YSU world your talents and skills. *Sponsored by the Office of Student Experience*

*February is jam-packed
with events from the
Division of Student Affairs.*



Scan for the full list of upcoming Student Affairs events, or contact studentaffairs@ysu.edu for more info.

YOUNGSTOWN STATE UNIVERSITY

FEBRUARY 2024

DIVISION OF STUDENT AFFAIRS | EVENT HIGHLIGHTS!

SATURDAY, FEBRUARY 17

Love & Basketball: Family Day 10:00am-1:30pm

Do you live on campus and might be a little home sick? Bring the entire family for our very first Spring Family Day! Come enjoy a day filled with fun activities, special meal, and attend a basketball game and cheer on our lady Guins as they play Green Bay! Sponsored by Housing & Residence Life



Intramural Badminton Tournament | Can you make a bird fly?

6:00pm | Rec Center, Court D

The competition commences February 17th at 6pm at the Rec Center. You can either make a team or join a team. Sign up by February 15th. Cost: \$5 individual fee, \$12 intramural sports passport. Register at <https://www.imleagues.com>. For questions, contact Michael Hettinger at cmhettinger@ysu.edu. Sponsored by Campus Rec

YSU Women's Basketball vs Green Bay

1:30 pm | Beeghly Center

Free for YSU students with a YSU ID

SUNDAY, FEBRUARY 18

IM NBA Skill Contest Registration Where Amazing Happens

10:00am | Rec Center

The competition commences February 18th starting at 10am at the Rec Center. Sign up by February 15th. Cost: \$5 individual fee, \$12 intramural sports passport. Register at <https://www.imleagues.com>. For questions, contact Michael Hettinger at cmhettinger@ysu.edu. Sponsored by Campus Rec

YSU Men's Tennis vs Xavier

11:00 am | YSU Indoor Tennis Center | Free admission

MONDAY, FEBRUARY 19

Crafternoons at the Cove: Woolen Hearts Collaboration with American Heart Association

2:00pm-4:00pm | Kilcawley Center, The Cove
(Student Activities' Side)

Join us to make something special for your Valentine by wrapping your (cardboard) heart in whatever color yarn you choose! YSU's student chapter of the American Heart Association will join us to educate students on heart-healthy facts! Sponsored by Student Activities and the Student Chapter of the AHA

TUESDAY, FEBRUARY 20

Step Afrika! Live Performance 7:00pm | Chestnut Room, Kilcawley Center

Celebrate an array of energetic and contemporary dance and art forms—culminating in the dance form of STEPPING! Welcome the cast of Step Afrika! 101 to YSU. Step Afrika! blends percussive dance styles practiced by historically African American fraternities and sororities; traditional African dances; and an array of contemporary dance and art forms into a cohesive, compelling artistic experience. Performances are much more than dance shows; they integrate songs, storytelling, humor, and audience participation. For more information, email killeper@ysu.edu. Free and open to the public. Parking is available at the Wick Avenue Parking Deck (M30) for a \$5 fee payable in cash only. Sponsored by YSU Student Activities, Kilcawley Center, Campus Recreation, the Office of Student Experience, and Housing & Residence Life

Learn to Ballroom Dance

7:00-8:00pm | Beeghly Center, Room 100

Come learn how to dance with the YSU Dance Club! Professional dance instructor, Matthew Feehley, will be teaching us a variety of ballroom styles. No experience or partner necessary! Email ysudanceclub@gmail.com with questions. Sponsored by YSU Dance Club

PNC Financial Education Webinar Designed for Students: Credit Scores and Reports

7:00pm | Virtual

Understand how credit scores and reports work to help you keep your finances healthy and achieve your financial goals, such as buying a new home, leasing a car or paying off debt. You don't have to be a PNC customer to participate. Register now at pnc.com/myfinanceacademy. A recording will be available at the link for 30 days after the event. Sponsored by PNC Bank

WEDNESDAY, FEBRUARY 21

Housing Fair

10:30am-1:30pm | Kilcawley Center, Lower Arcade

Still searching for a place to call home in the fall? Stop by to visit with local property managers to learn about available spaces, pricing, specials, and more. Sponsored by College Pads. For more info visit <https://housingfinder.ysu.edu>. Contact: Erin Driscoll, eedriscoll@ysu.edu

Lead From Where You Are: Craft Your Story to Design Career Success

1:00pm | Virtual

Ginny Clarke is a leadership expert, speaker, and author with over 30 years of experience in recruiting and talent management. She is a trusted advisor who guides organizations toward success by focusing on conscious choices and personal accountability. Her story will help you deepen your self-awareness, identify your strengths, determine what success means for you and tell your own compelling story. Scan to register. Join PNC Diversity & Inclusion for this special Black History Month event.



Trivia & SPIN

5:30pm-6:30pm | Rec Center, SPIN Studio

Get some exercise for both your body and your brain with SPIN trivia! Come with a team or solo and be prepared to think as you pedal! Sponsored by Campus Rec

Order of Omega Scholarship Night

6:00pm-8:00pm | Rossi Room, Kilcawley Center

This event will honor Greek Life members that made the honor roll and have demonstrated academic excellence. The evening will feature dessert and research presentations by Greek Life students. Sponsored by Student Activities

THURSDAY, FEBRUARY 22

Pick Up Your Copy of the Jambar!

YSU for Recovery

Every Thursday | 2:00pm-3:00pm
Rec Center, Meditation Studio

A safe, judgment free space where students can come to express their struggles with substance abuse and mental health. Attendance is confidential and referrals will be provided for students that need help. For questions, please contact Mason Edmunds at mgedmonds-guest@ysu.edu

Poets Anonymous

Every Thursday | 3:30-4:30pm
Training Room, Kilcawley Center

This is a weekly workshop run by Poetry Club Vice President, Maysa Smith! It's a safe space for people to share, brainstorm, work, and revise their writing in a small group setting. Do not feel obligated to bring finished work. Sponsored by YSU Poetry Club

Rec Up Your Reqs

4:00pm-6:00pm | Rec Center, Basketball Courts

Come to the Rec and test your strength at a one-rep max bench challenge for NIRSA week! Prizes for the top three participants! Sponsored by Campus Rec

FRIDAY, FEBRUARY 23

JambarTV Broadcast

1:00pm | <https://www.youtube.com/@JambarTVbyTheJambar/videos>



IPO: International Coffee Hour

3:00pm-5:00pm | Lariccia Cultural Lab, Jones Hall

Sponsored by Simply Slavic Cultural Festival.

Penguin Nights: Sci Fi Edition!

9:00pm-1:00am | All Over Kilcawley Center

This time we are taking you to outer space, to alien realms, and the future! Don't miss this version of a YSU favorite late-night events. We're including laser tag, free food, the dance party of the future, classic video games, Not Your Granny's Bingo with great prizes as usual, and the Star Wars Mos Eisley Cantina with strange and unearthly mocktails. All student guests have a chance to win an iPad! Sponsored by Student Activities and Kilcawley Center

SATURDAY, FEBRUARY 24

Bouldering Competition

9:00am-5:30pm, 10AM check in | Rec Center

Open to the public. Come test your bouldering skills in our annual competition to win lots of prizes. Cost: \$20 for members, \$25 for nonmembers. Scan to register. For more information, contact adventurerec@ysu.edu. Sponsored by Campus Rec



SUNDAY, FEBRUARY 25

Intramural Faculty and Staff Bocce Tournament

6:00pm | Cassese's MVR

The faculty & staff bocce competition commences February 27th at 6pm at Cassese's MVR. You can either make a team or join a team. The deadline to sign up is February 25th. Sponsored by Campus Rec

MONDAY, FEBRUARY 26

Tech Talk

12:00pm-1:00pm | Kilcawley Center, Penguin
Plugin

YSU offers a variety of multimedia platforms for students to create and share content! Use YSU-provided technology to create video projects and creative works! Please consider bringing any computers, tablets, or phones you use on a regular basis! This Tech Talk is intended for YSU Students. Topics include:

- Vidcast: Video & Screencast
- Microsoft Stream: Video & Screencast
- Canva: Unleash your Creative Side with a Digital Canvas!
- Sharing your Content with Peers or Turning in for Class!

Sponsored by IT Training Services

TUESDAY, FEBRUARY 27

Tech Talk

12:00pm-1:00pm | Kilcawley Center, Penguin
Plugin

YSU offers a variety of multimedia platforms for students to create and share content! Use YSU-provided technology to create video projects and creative works! Please consider bringing any computers, tablets, or phones you use on a regular basis! This Tech Talk is intended for YSU Students. Topics include:

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- Microsoft Stream: Video & Screencast
- Canva: Unleash your Creative Side with a Digital Canvas!
- Sharing your Content with Peers or Turning in for Class!

Sponsored by IT Training Services

Monthly Wellness Connection

Last Tuesday of Every Month | 1:30pm-3:30pm
Rec Center, Lobby

Stressed out? Stop by and engage in a monthly wellness activity! Sponsored by Campus Rec

Puppy Yoga

4:00pm-5:00pm | Rec Center, Aerobics Studio

Practice yoga poses with puppies! Sponsored by Campus Rec

Taylor Swift SPIN

5:30pm-6:30pm | Rec Center, SPIN Studio

SPIN to Taylor Swift songs! Swift outfits are welcomed! Registration: <https://store.reccenter.ysu.edu>. For more information, contact Dina Fabry at dmfabry@ysu.edu. Sponsored by Campus Rec

YSU Women's Basketball vs Cleveland State

6:30 pm | Beeghly Center

Free for YSU students with a YSU ID

WEDNESDAY, FEBRUARY 28

YSU Men's Basketball vs Detroit Mercy

6:30 pm | Beeghly Center

Free for YSU students with a YSU ID



Get the YSU App! Events, news, services, courses,
maps, meet students and classmates.
Get it on Google Play or the App Store.



**ACADEMIC
PARTNERSHIPS®**

Youngstown State University Semi Annual Review Winter 2024



Marketing Expertise

COLLECTIVE YEARS OF MARKETING LEADERSHIP

165
YEARS

The AP Marketing Leadership team brings a strong and capable skillset to the partnership. With more than 165 collective years of experience, the team is well versed in the marketing area and equipped to meet the demands of the ever-changing marketing landscape.

TECHNICAL CAPABILITIES

25+
PLATFORMS

In support of the full-funnel marketing approach, AP has many tech-enabled platforms that aid in delivering the desired student experience.

Integrated Platforms:

- Salesforce
- Marketing Cloud
- InContact
- Google Analytics 360
- Optimize 360
- CMS
- Tableau
- Python
- Tealium
- Google BigQuery
- Calendly
- Bit.ly
- Twilio
- Validity
- Litmus
- Fresh Address
- SEM Rush

The AP Marketing team is a comprehensive, full-funnel organization that focuses on acquisition through graduation.

Areas of Support:

- Digital Media
- Content Creation
- Creative
- SEO/Organic
- Video
- User Experience
- Analytics
- Operations
- Field Marketing
- Performance Marketing

40+
MARKETERS

FUNCTIONAL AREAS

Insights, Measurement & Analytics Tools

The sample of tools below are utilized by AP to manage the student journey efficiently and provide market insights

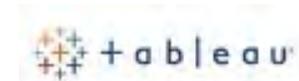


Google Analytics 360 Suite

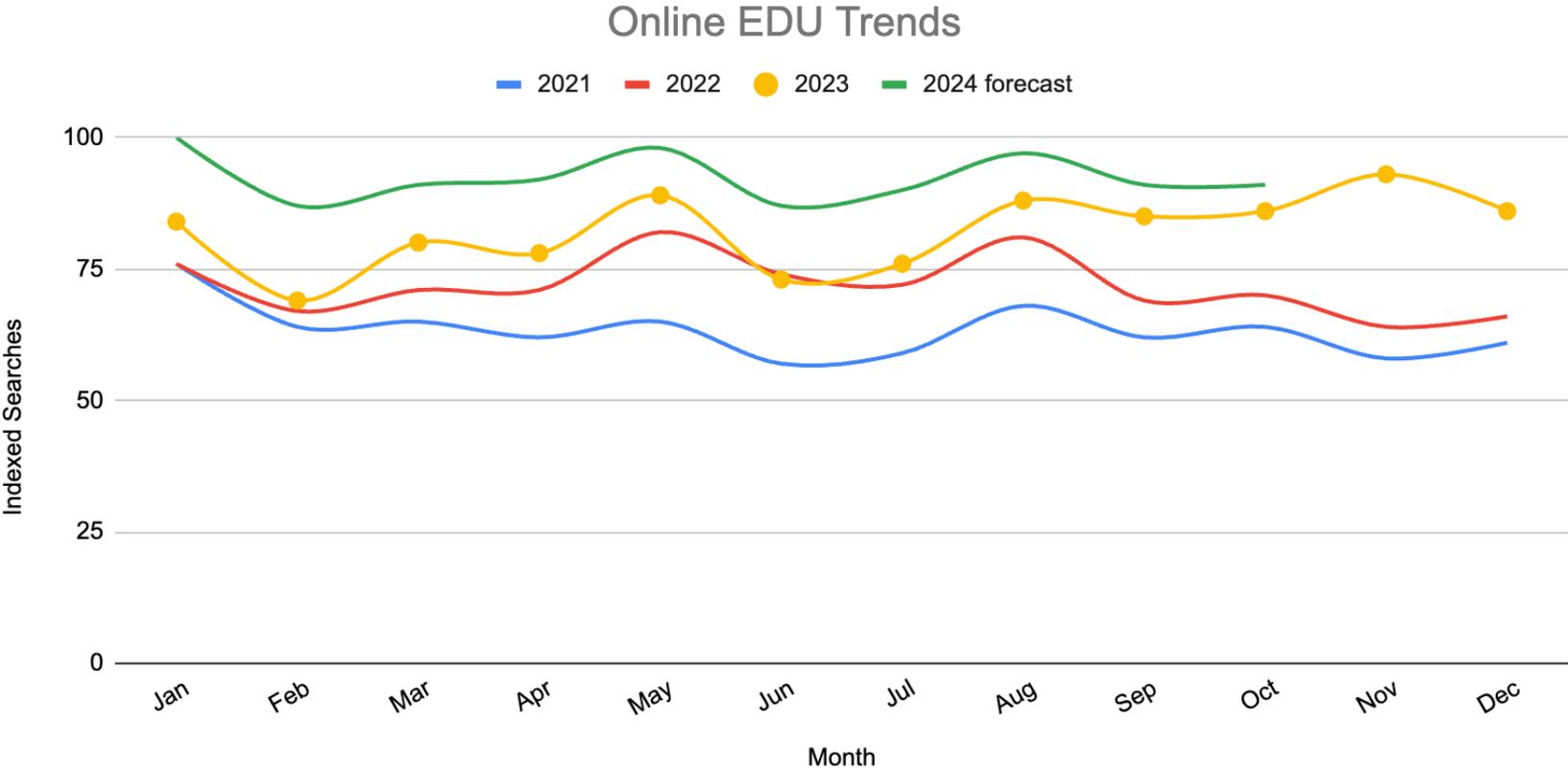


25+

Platforms and Tools



Online EDU Trends

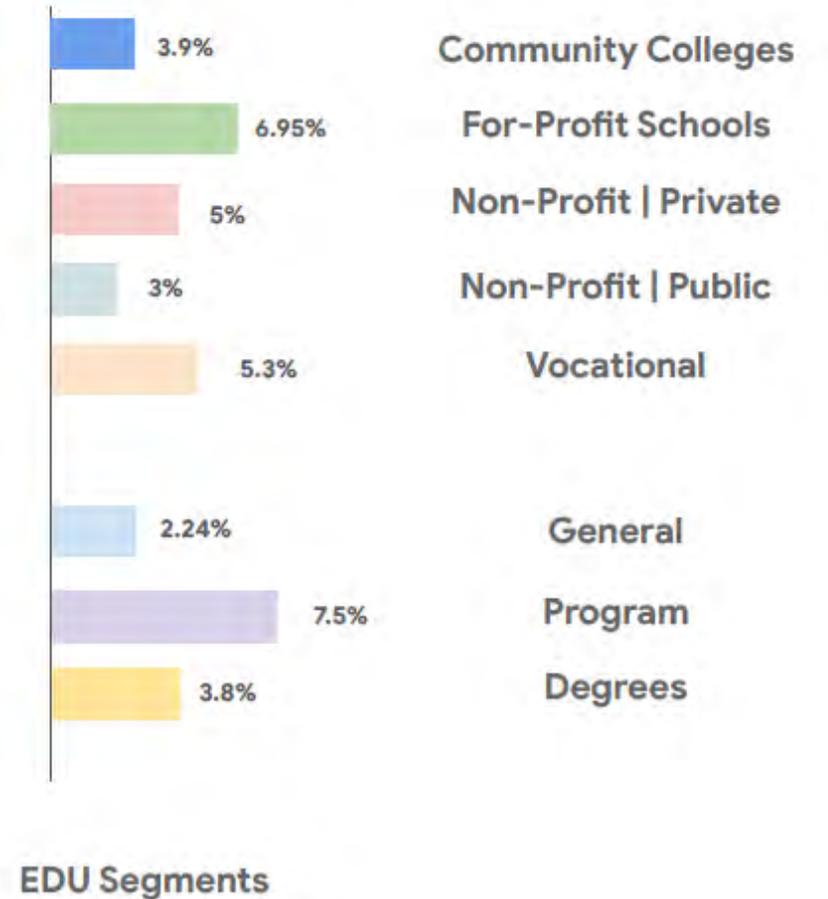
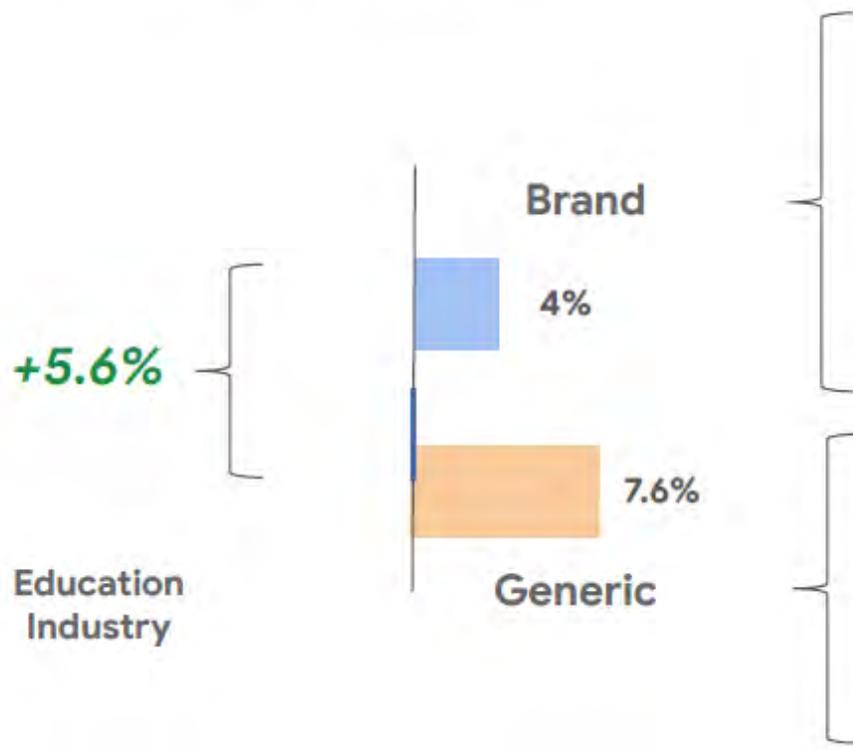


The second half of '23 saw strong YoY growth +15% and '24 is expected to see continued growth.



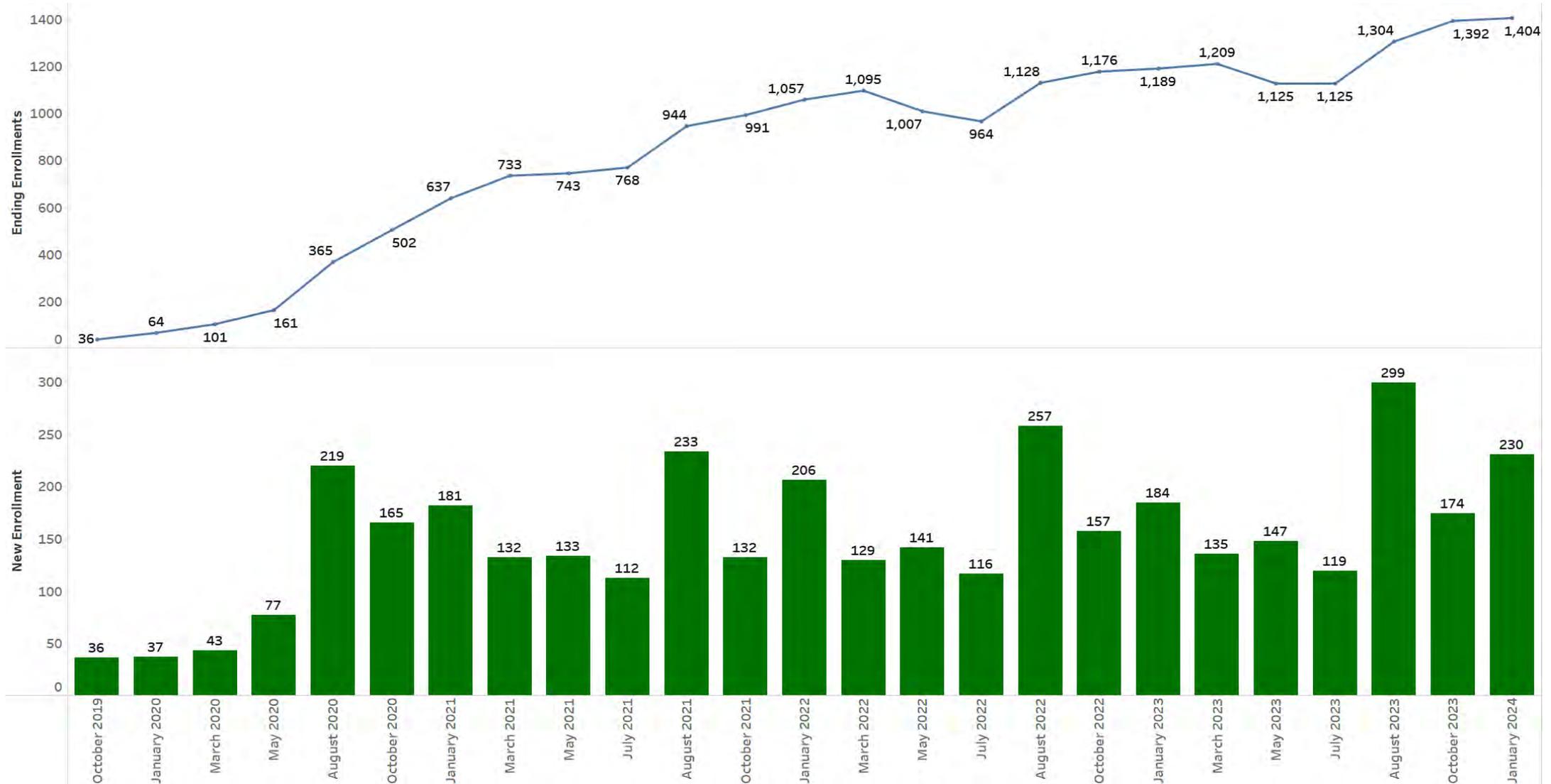
State of the Industry

Q4 Query Indexed
Volume & YoY Growth



Enrollment Summary – Total University

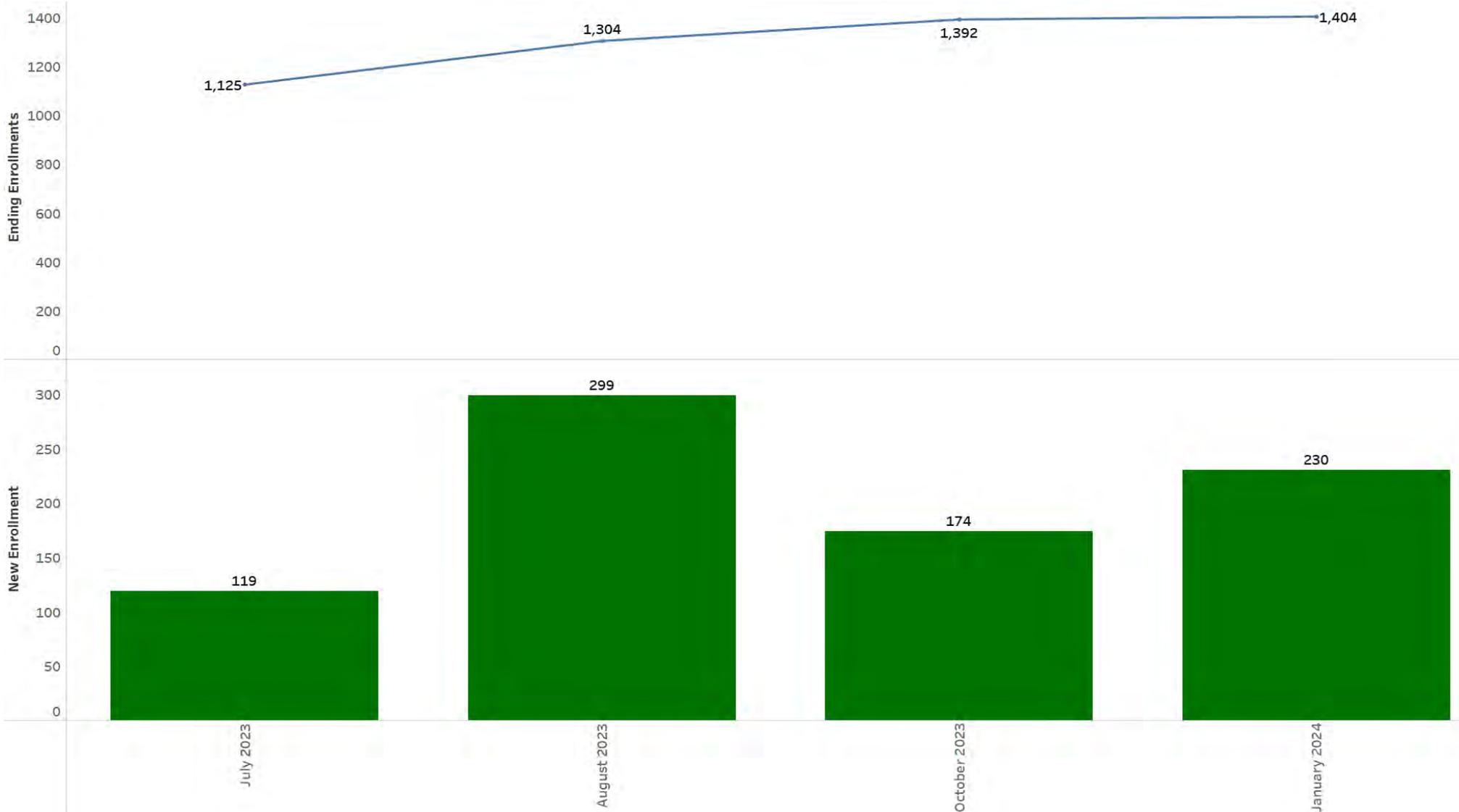
Since Inception



Enrollment Summary – Total University

July 2023 – January 2024

Jan NE +25% YoY
EE +18% YoY



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AP Enrollment Data



YSU MBA Programs

Current

- MBA General
- MBA Healthcare Management
- MBA Human Resources
- MBA Marketing
- MBA Organizational Leadership

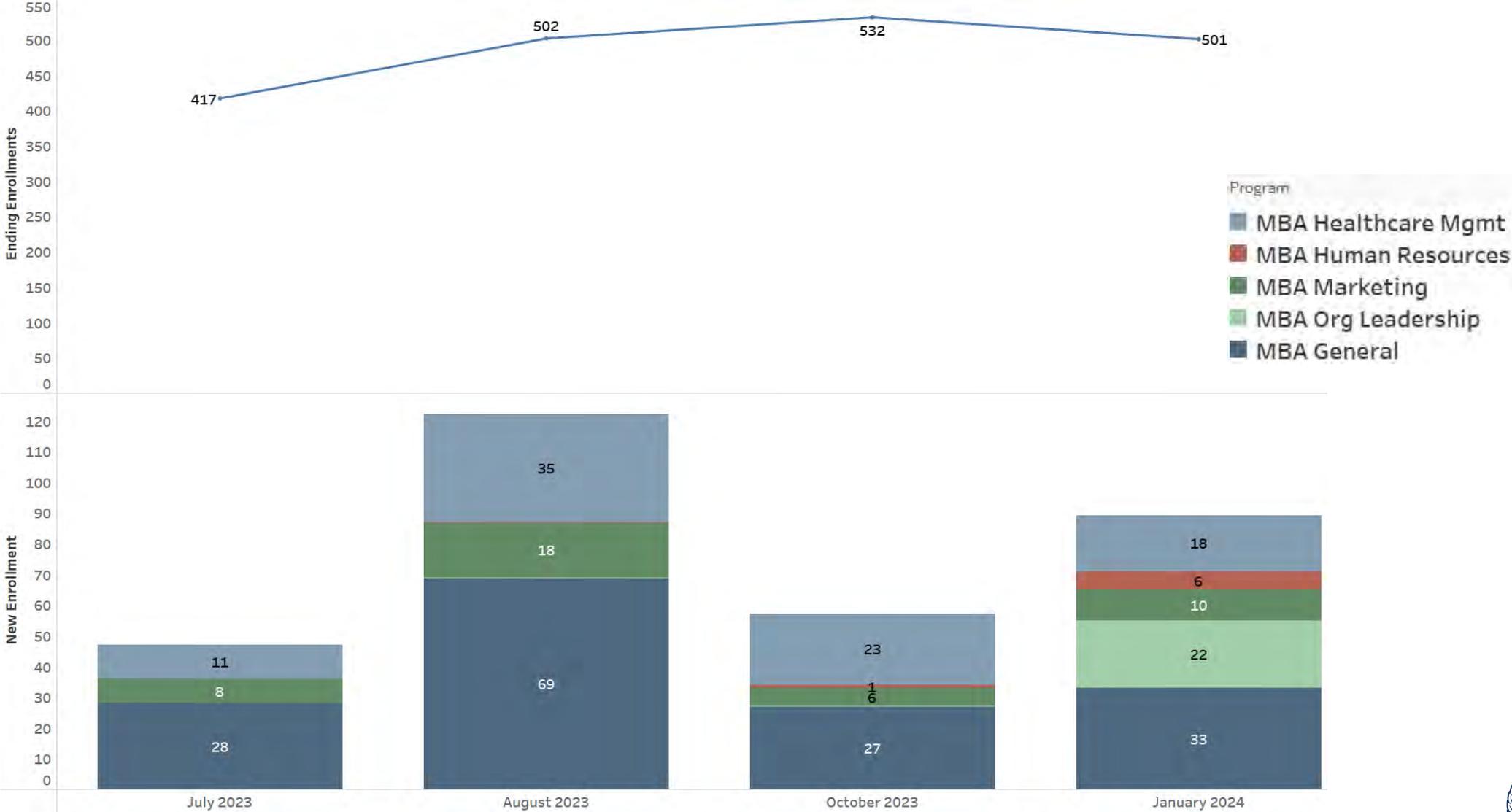
Market Trends

- MBA Leadership
- MBA Business Analytics

Enrollment Summary: MBA

July 2023 – January 2024

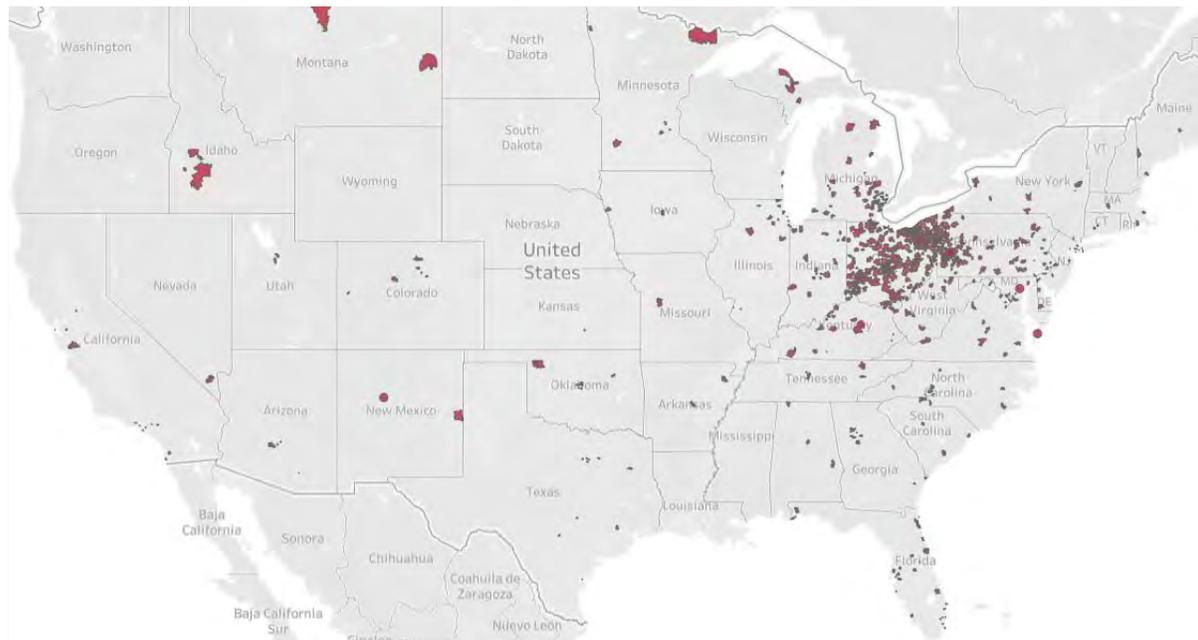
Jan NE +13% YoY
EE +2% YoY



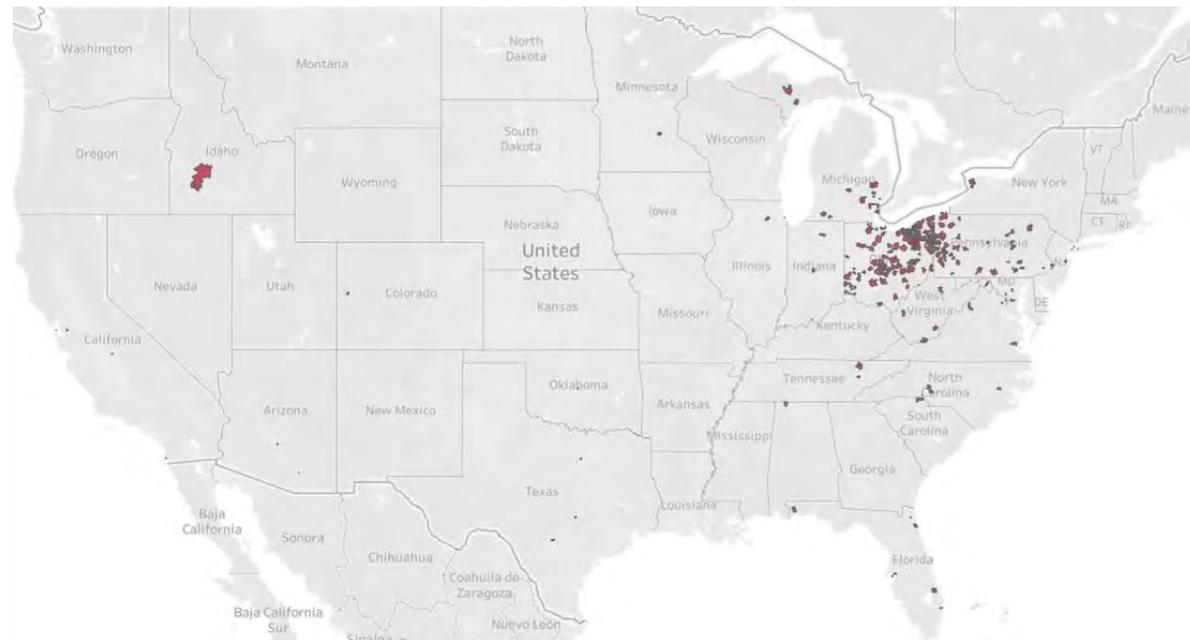
MBA Heat Maps

Full Year 2023

Leads



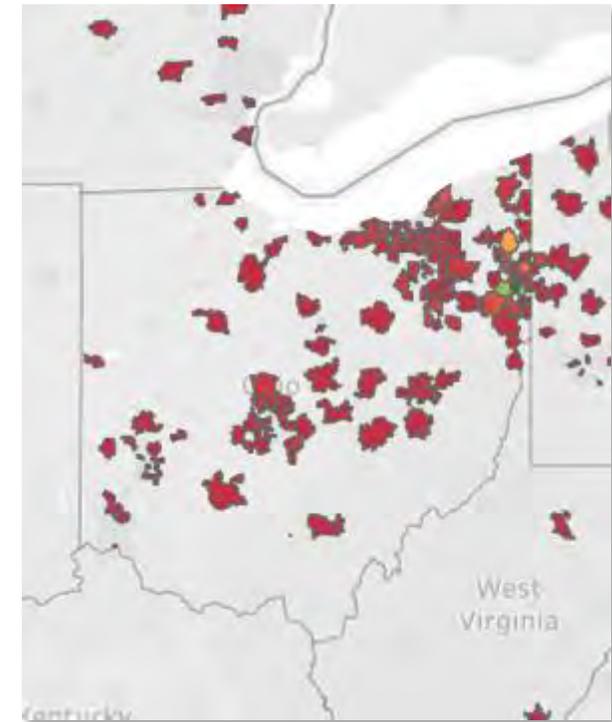
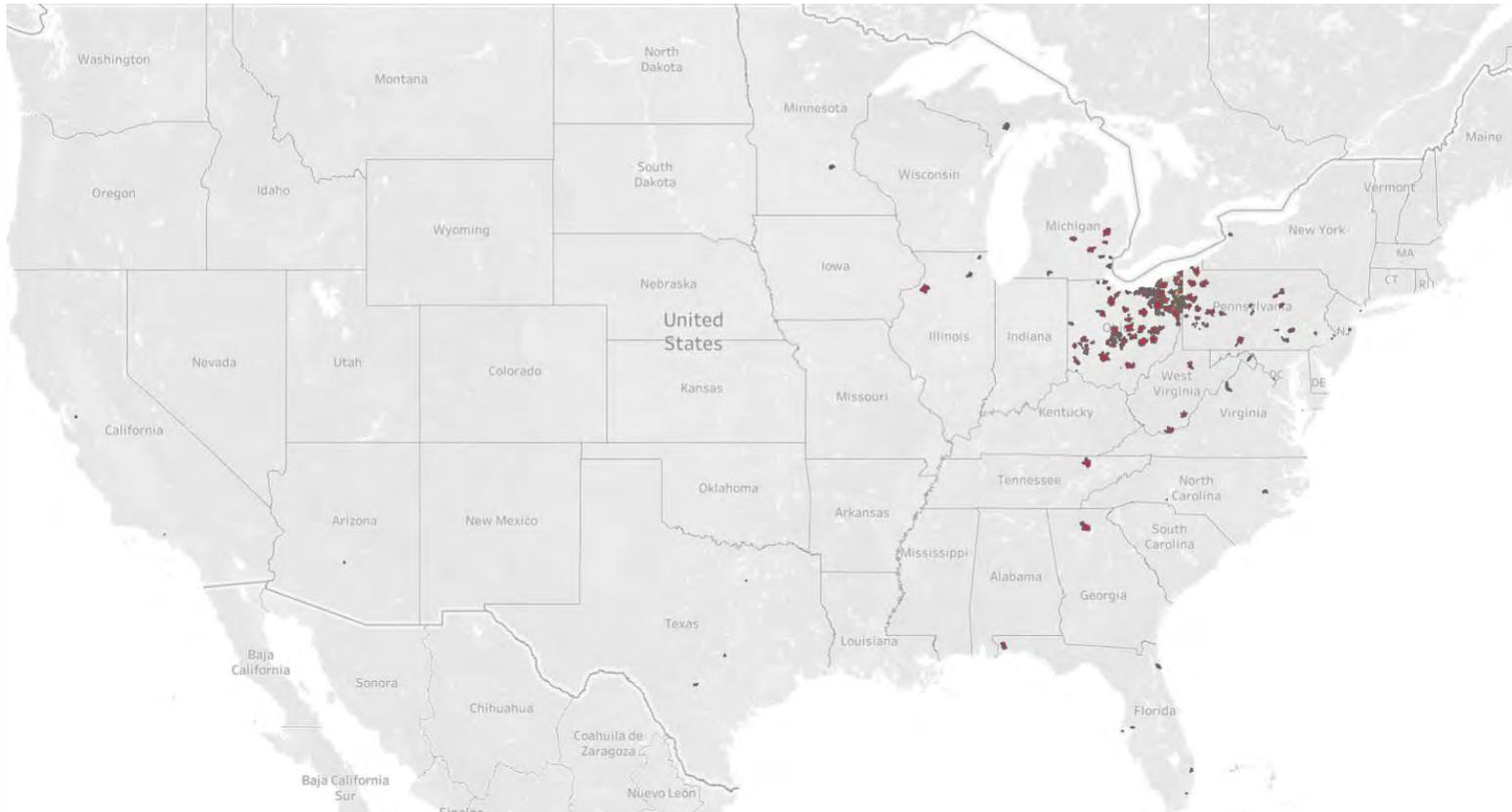
Applications



MBA Heat Maps

Full Year 2023

New Enrollments

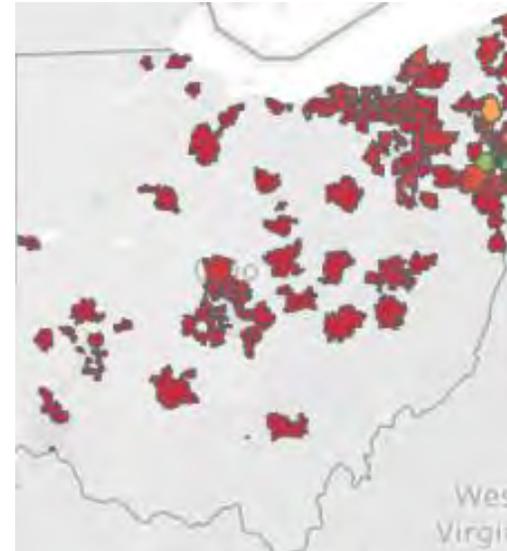


YSU MBA New Enrollment Heat Map - Ohio

YSU MBA new enrollments continue to grow across the region. In 2021, Ohio based students were coming from 103 zip codes across the state and that has grown to 176 in 2023.



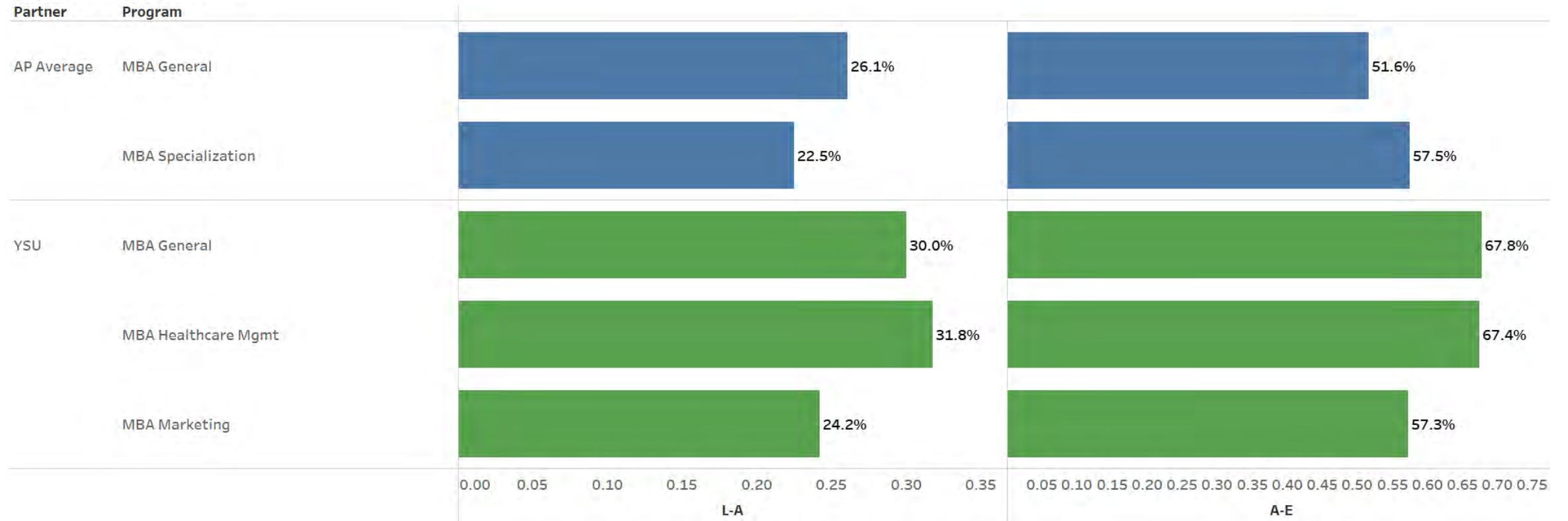
MBA NE 2021
103 zip codes



MBA NE 2023
176 zip codes

MBA Conversion Rates

12-Month Operational Conversion



YSU Education Programs

Current

- Principal Certificate
- Superintendent Licensure
- Teacher Leader Endorsement
- Ed.D. – Educational Leadership
- Ed.D. – Educational Leadership Health and Human Services
- Ed.D. – Educational Leadership with Superintendent Licensure
- MS Ed. Educational Administration
- MS Ed. Educational Administration with Principal Licensure
- MS Ed. Special Education – Autism and Related Disabilities
- MS Ed. Special Education – Intervention Specialist Mild-Moderate Disabilities
- MS Ed. Teacher Education – C&I Digital Teaching and Learning
- MS Ed. Teacher Education – C&I Literacy
- MS Ed. Teacher Education – C&I Teacher Leader

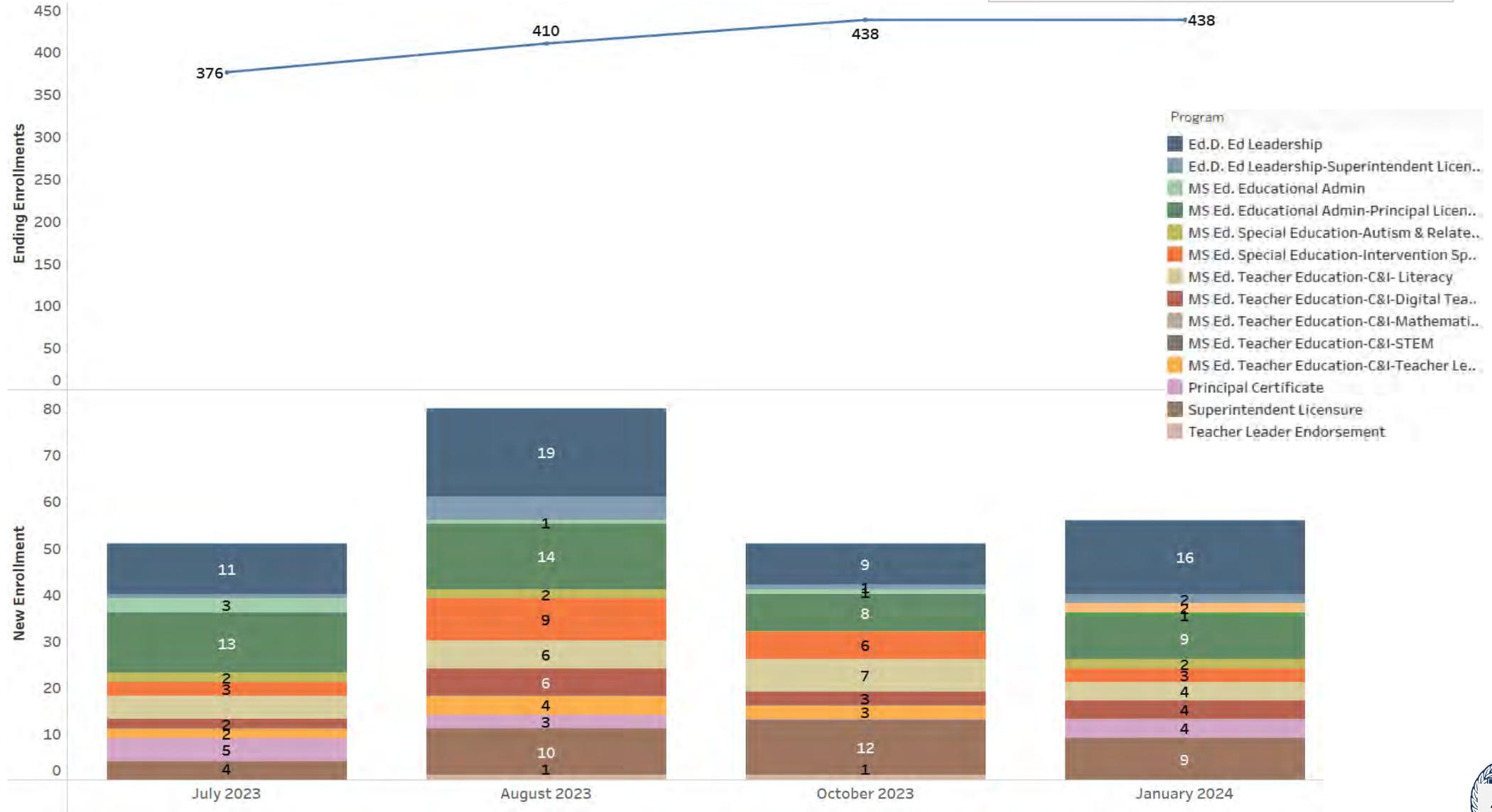
Launching

- Ed.D. – Educational Leadership - Higher Education & Admin
- Higher Education & Admin – Post Master's Certificate

Enrollment Summary: Education

July 2023 – January 2024

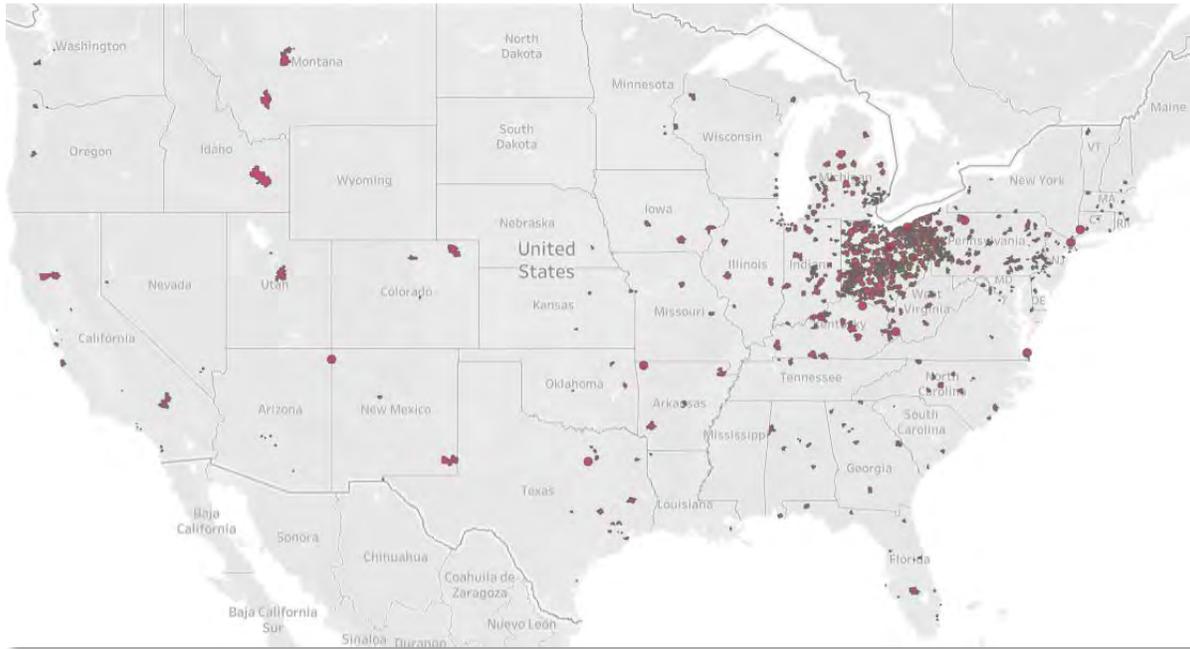
Jan NE -8%% YoY
 Jan EE +23% YoY
 Full year (2022 vs 2023) NE +15%



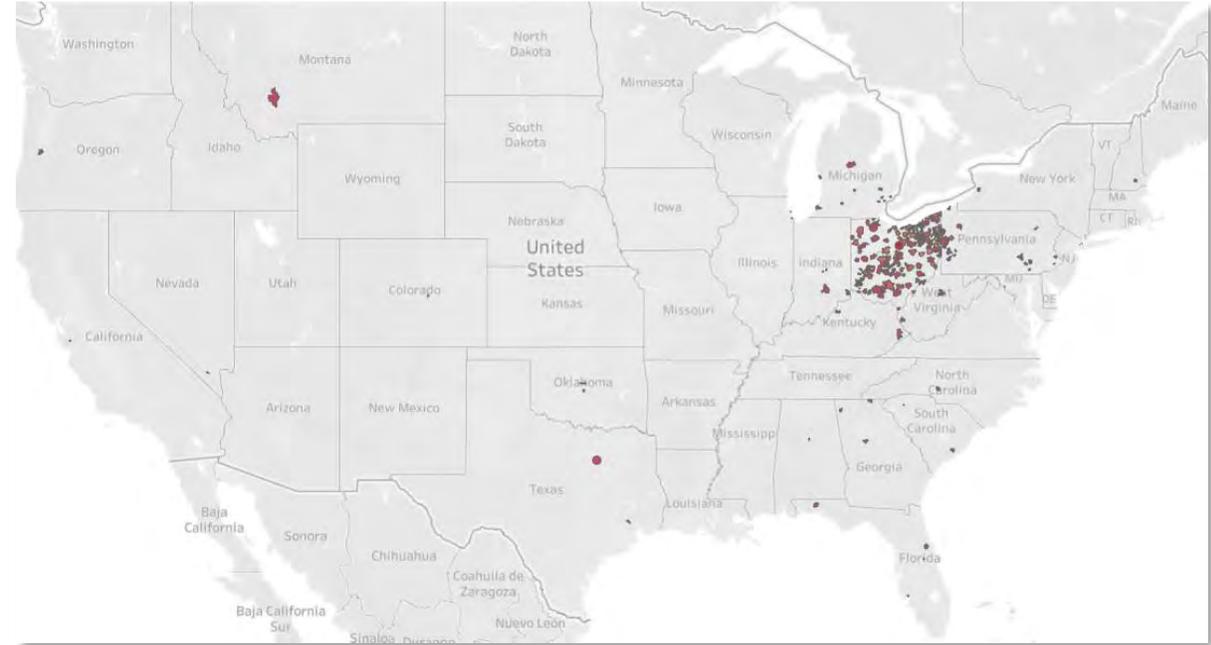
Education Heat Maps

Full Year 2023

Leads



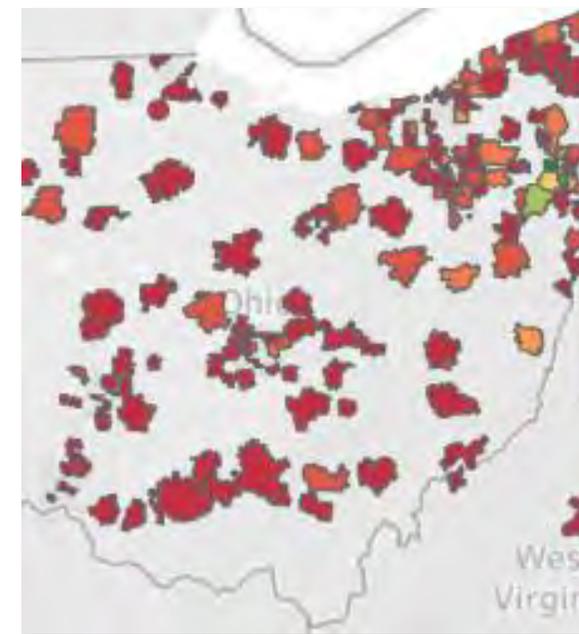
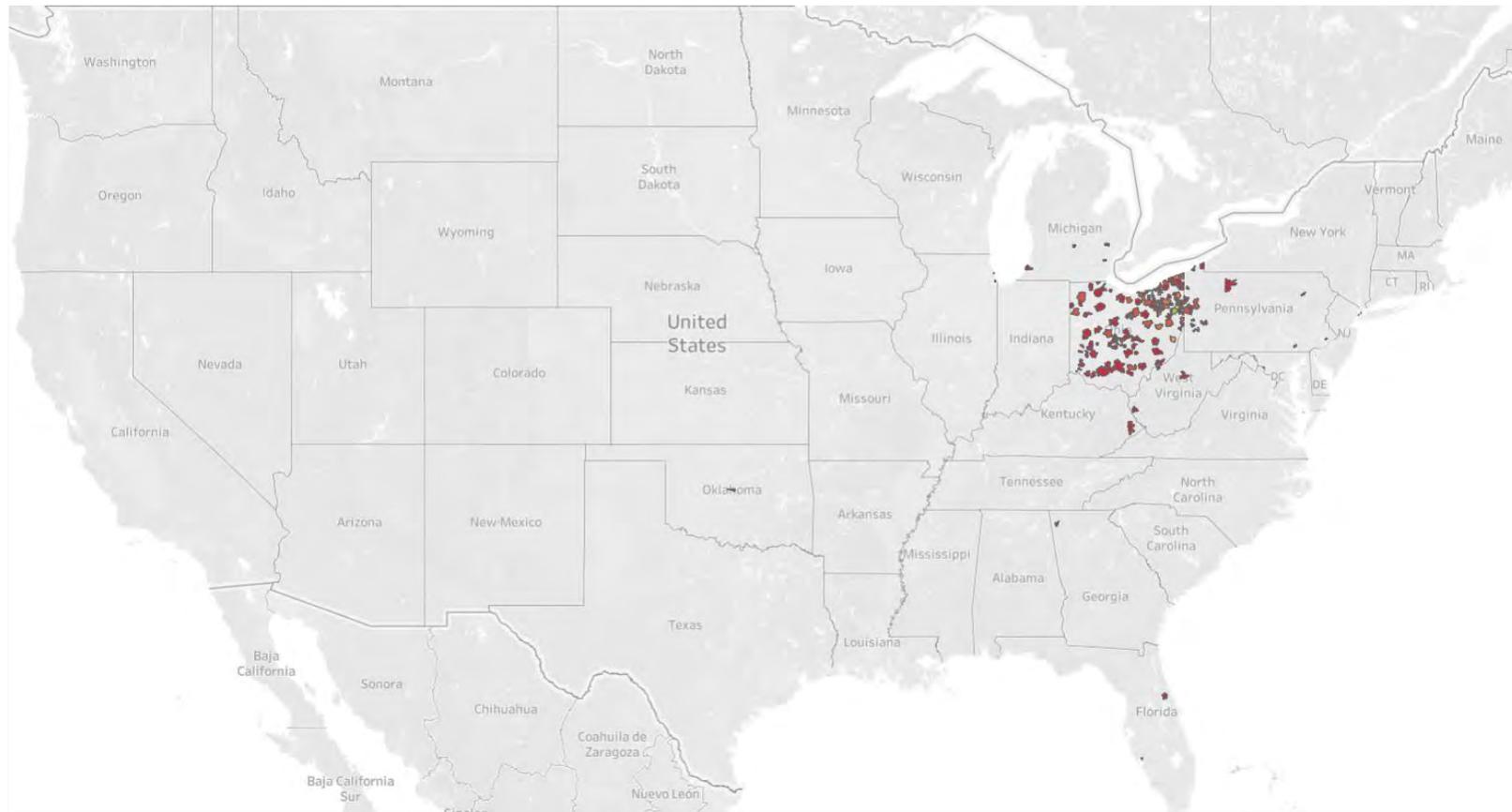
Applications



Education Heat Maps

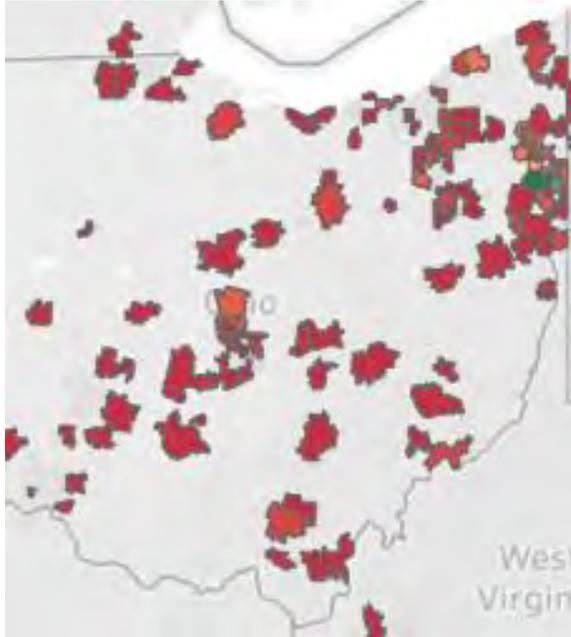
Full Year 2023

New Enrollments

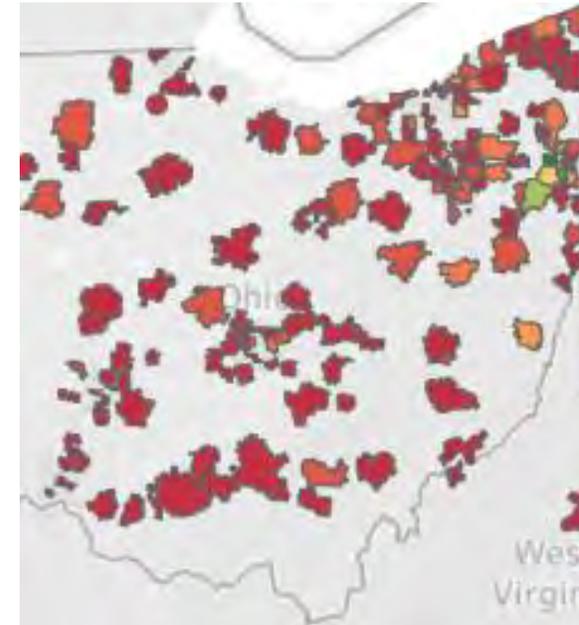


YSU EDU New Enrollment Heat Map - Ohio

YSU EDU new enrollments continue to grow across the region. In 2021, Ohio based students were coming from 96 zip codes across the state and that has grown to 182 in 2023.



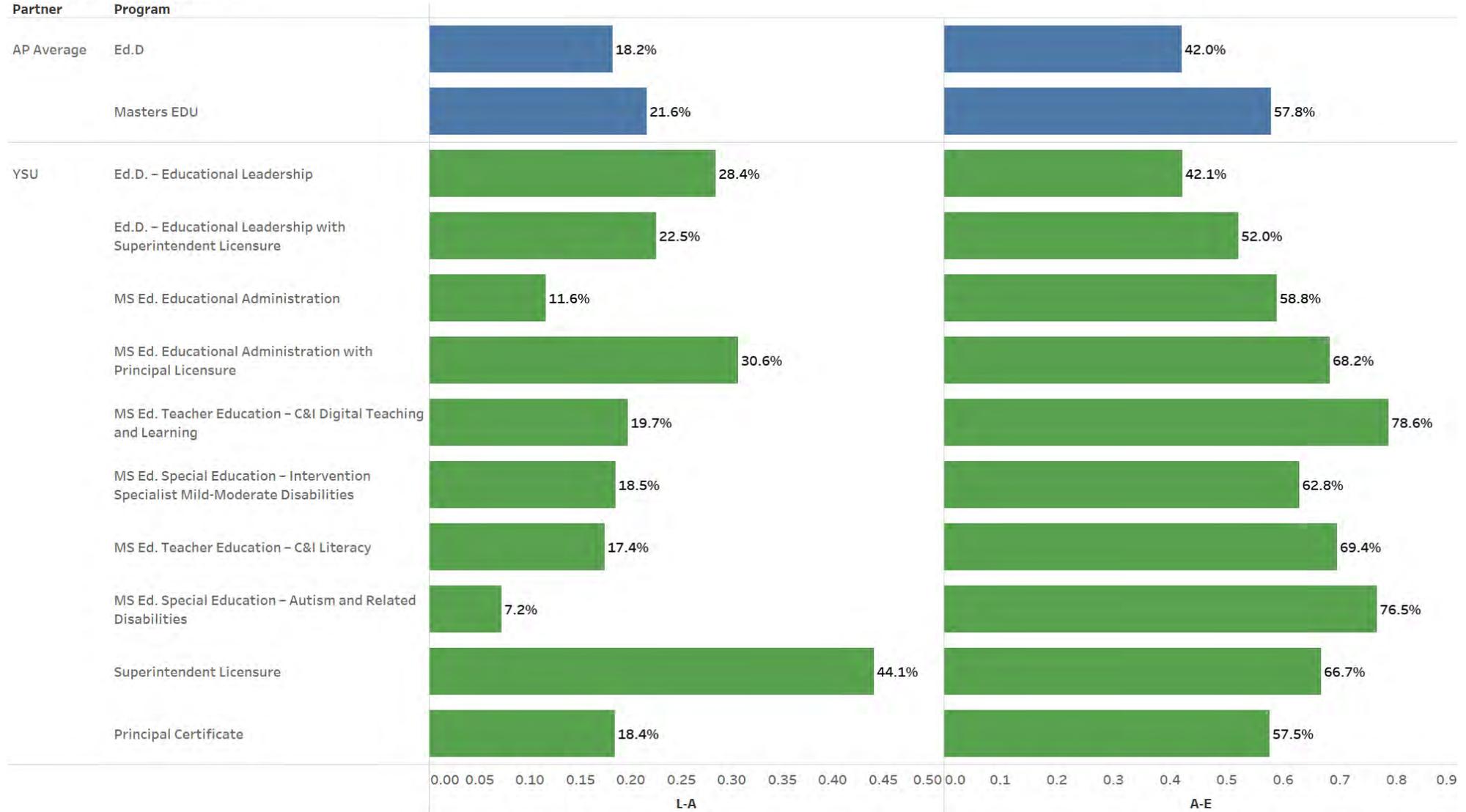
EDU NE 2021
96 zip codes



EDU NE 2023
182 zip codes

Education Conversion Rates

12-Month Operational Conversion



YSU Nursing Programs

Current

- RN-BSN
- Adult Gero Acute Care NP – Advanced Placement Post-Master’s Cert
- Adult Gero Acute Care NP – Post Master’s Cert
- Nurse Educator Post-Graduate Cert
- FNP – Advanced Placement Post Master’s Cert
- FNP – Post Master’s Cert
- MSN – Adult Gero Acute Care NP
- MSN – FNP
- MSN – Nurse Education

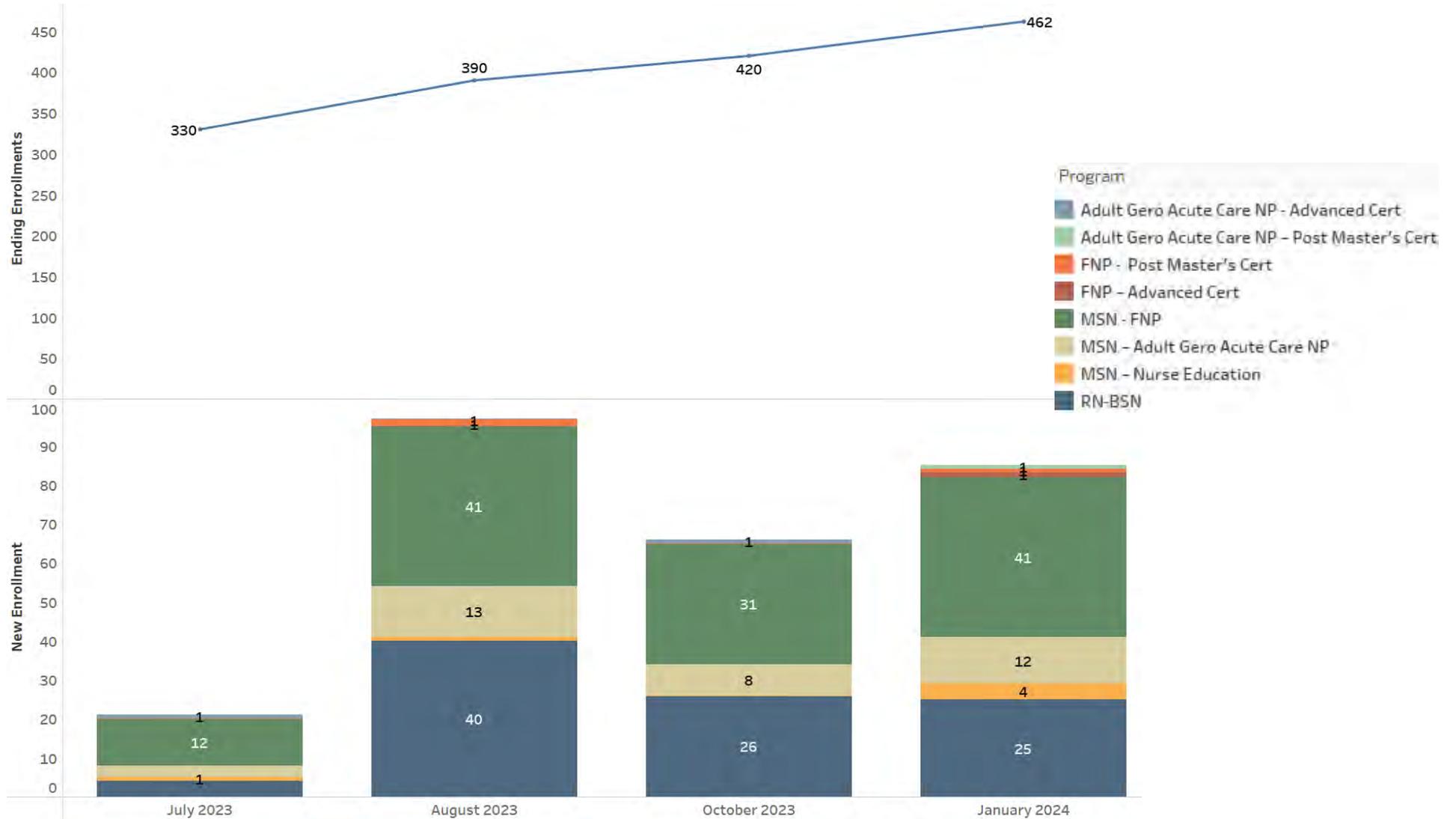
Market Trends

- RN-MSN
- BSN-DNP
- Psych Mental Health NP

Enrollment Summary: Nursing

July 2023 – January 2024

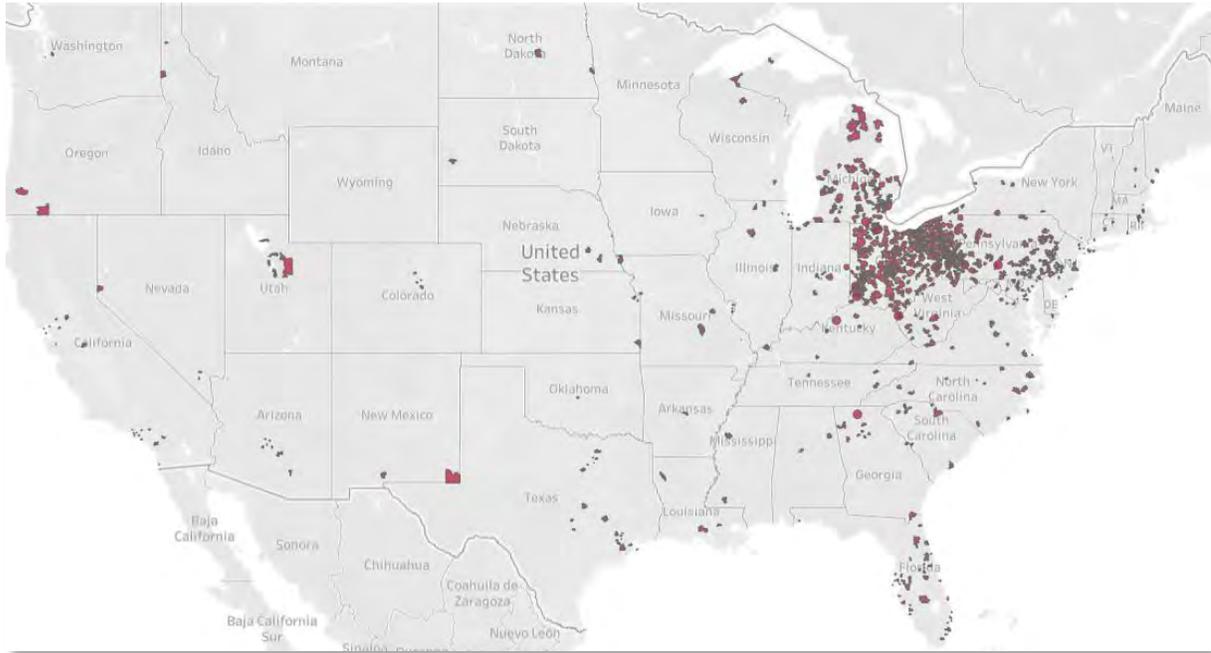
Jan NE +93% YoY
EE +37% YoY



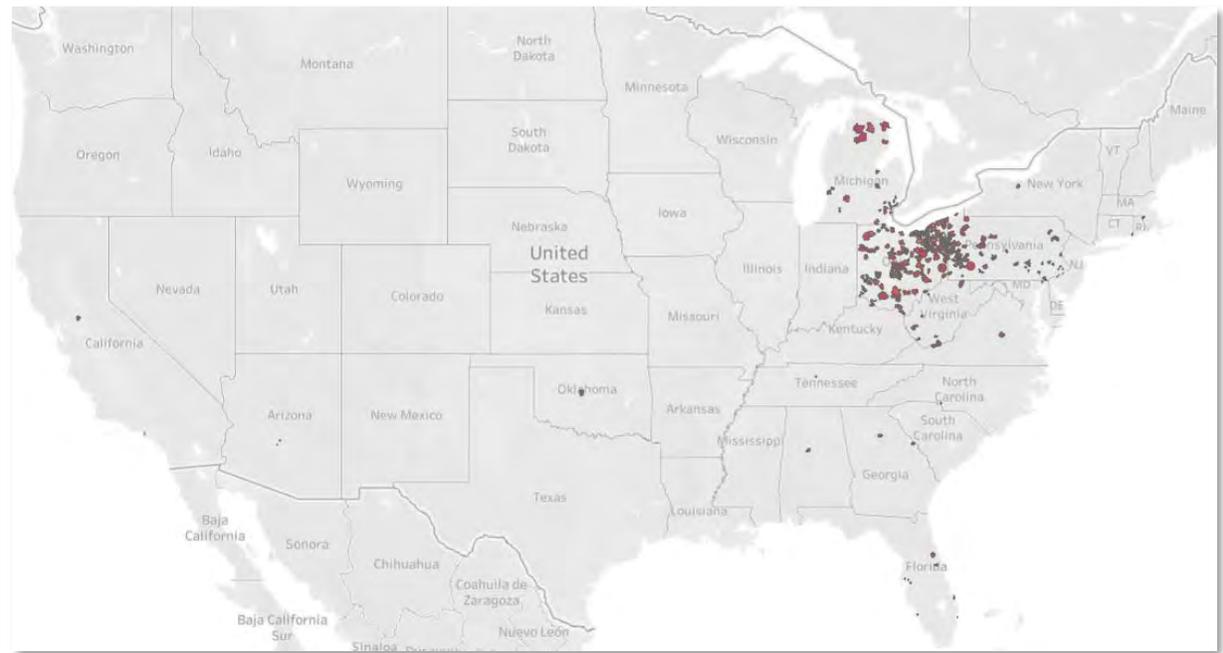
Nursing Heat Maps

Full Year 2023

Leads



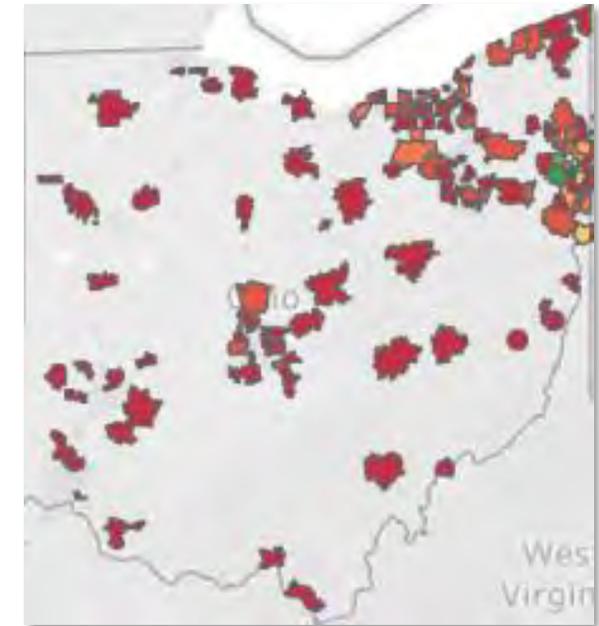
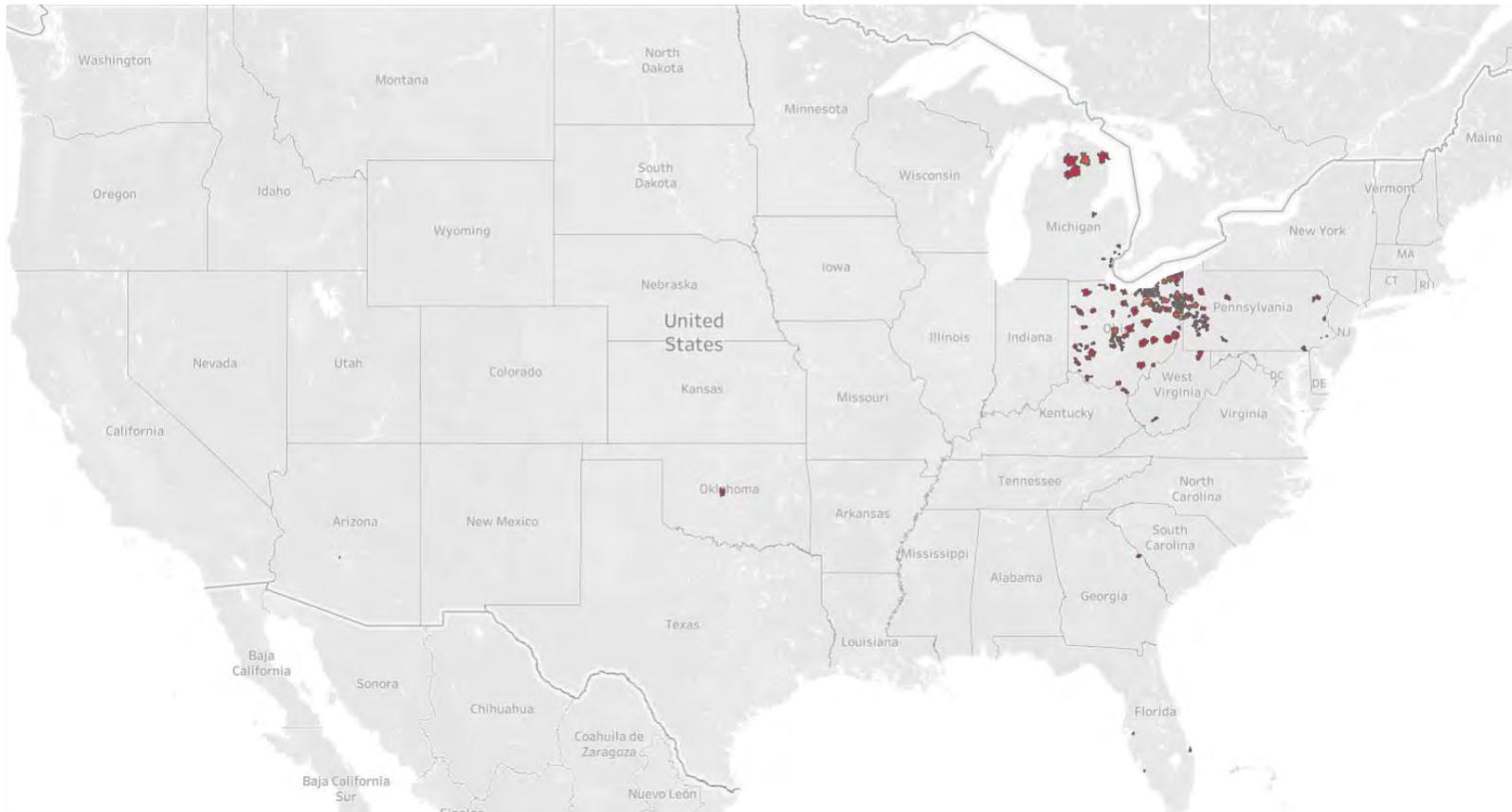
Applications



Nursing Heat Maps

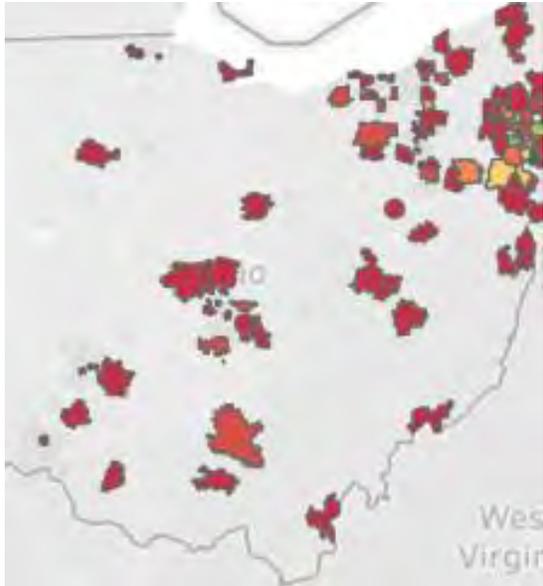
Full Year 2023

New Enrollments

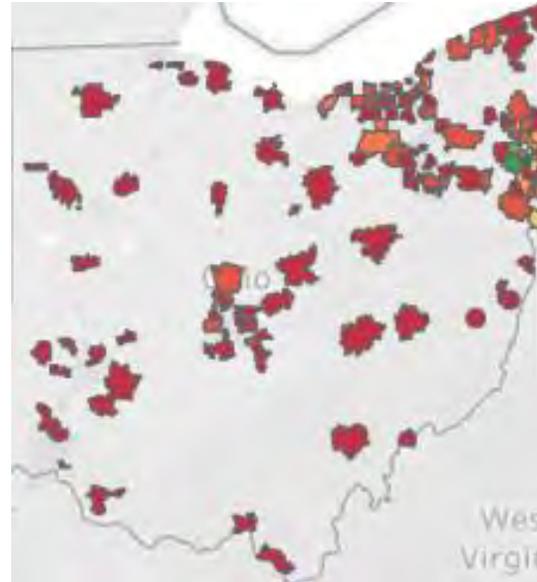


YSU Nursing New Enrollment Heat Map - Ohio

YSU NUR new enrollments continue to grow across the region. In 2021, Ohio based students were coming from 87 zip codes across the state and that has grown to 150 in 2023.



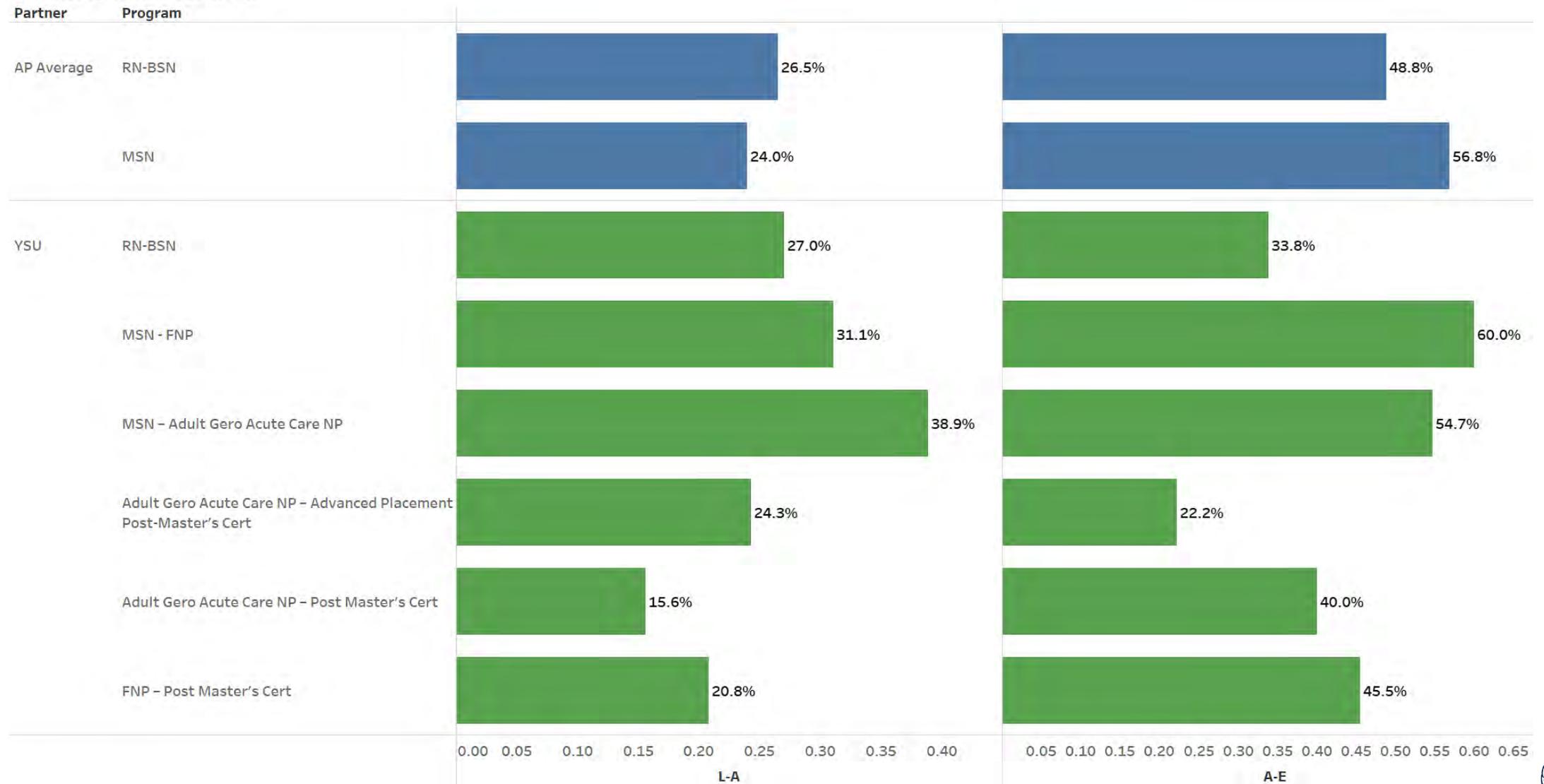
NUR NE 2021
87 zip codes



NUR NE 2023
150 zip codes

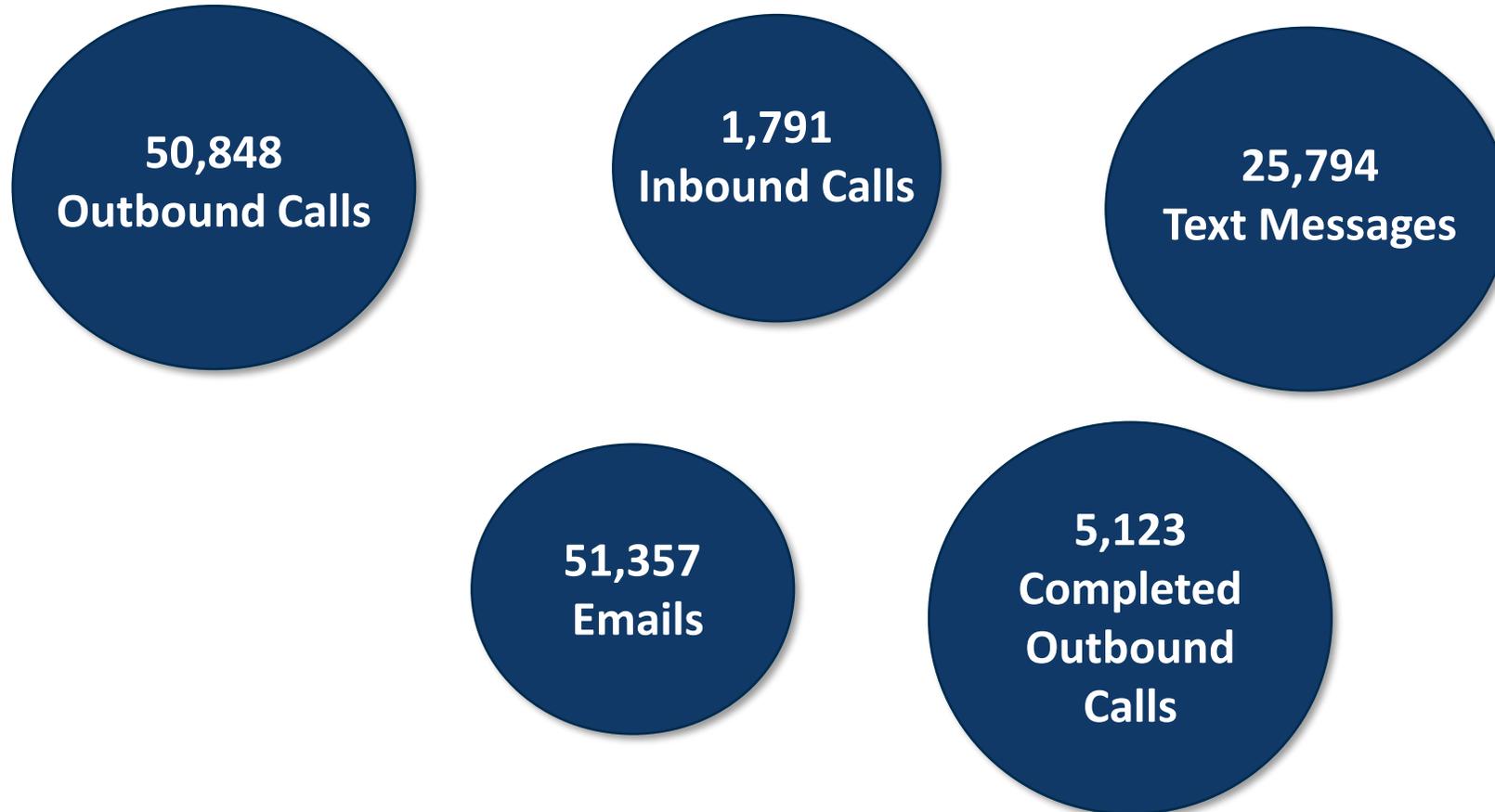
Nursing Conversion Rates

12-Month Operational Conversion



YSU Enrollment Activity

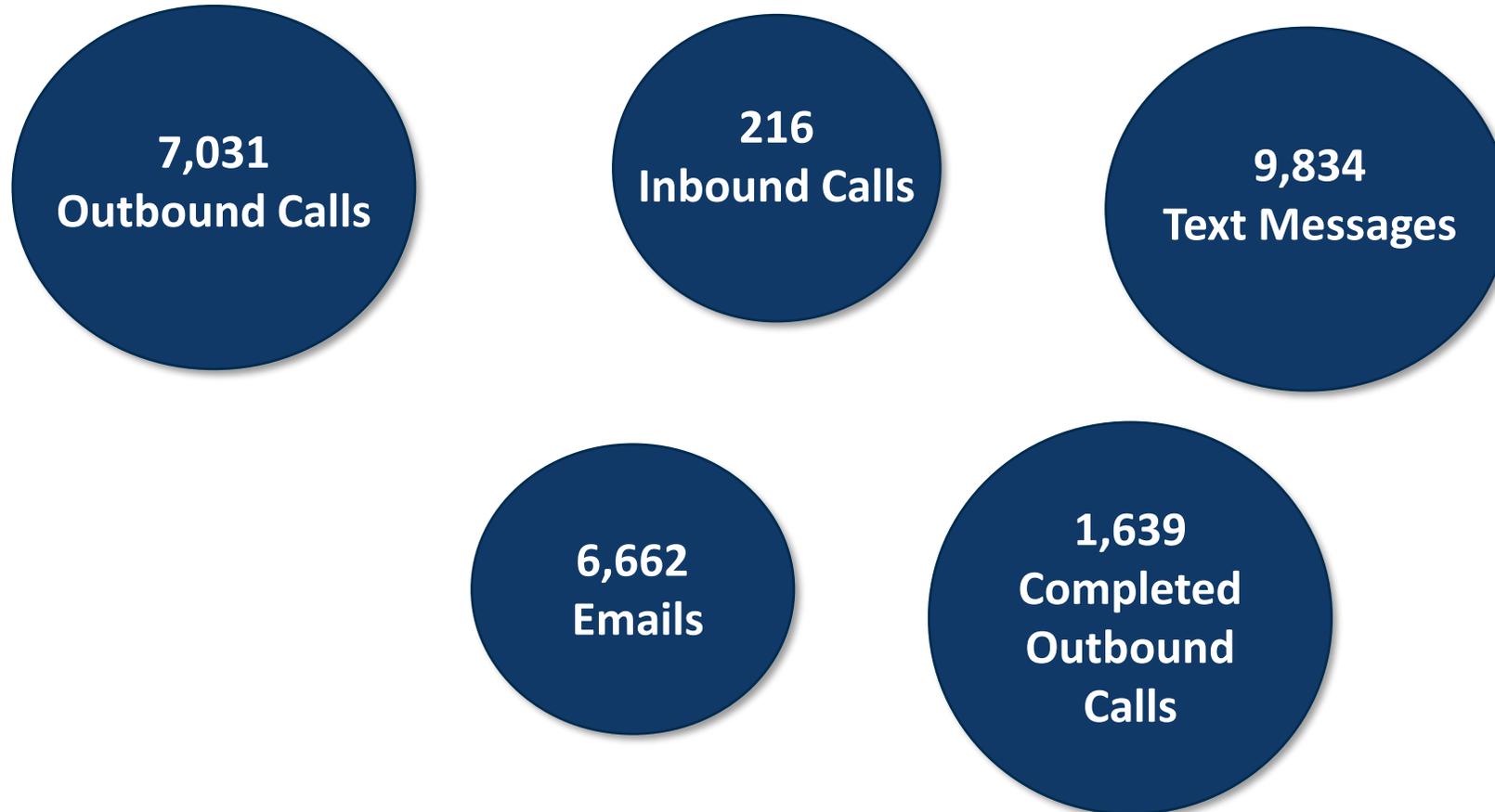
July 2023 – January 2024



*Prospective students are only contacted after providing their consent and may opt out of receiving further contact at any time.

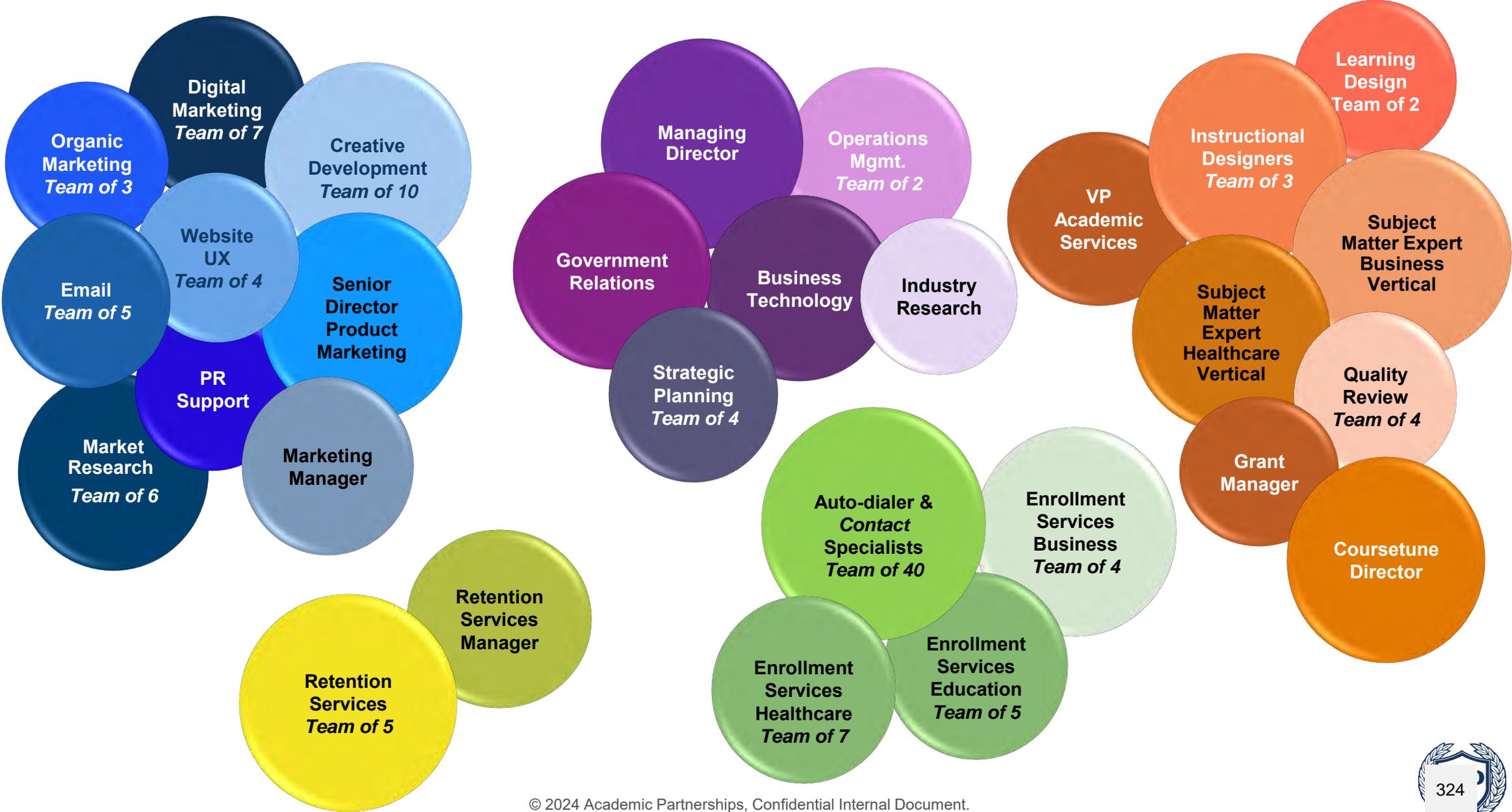
YSU Retention Activity

July 2023 – January 2024



*Prospective students are only contacted after providing their consent and may opt out of receiving further contact at any time.

Breadth of Expertise and Support for YSU Today: 124 + Senior Leadership



YSU 3rd Term Persistence

2021 – 2023

YSU continues to have strong 3rd term persistence (above the AP average for almost all program areas).

Business

- 2023: 84% (avg: 70%)

Education

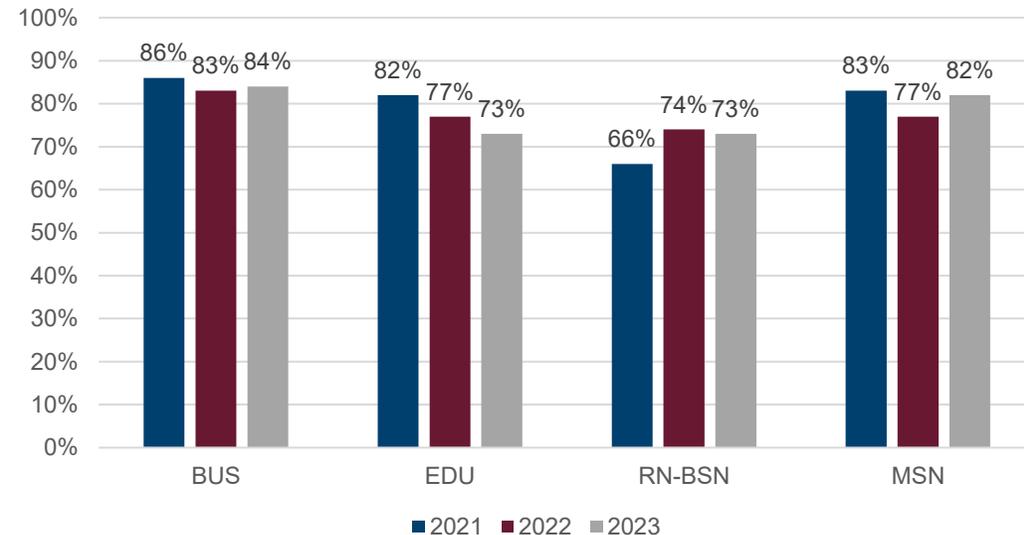
- 2023: 73% (avg: 77%)

Nursing

- RN-BSN: 73% (avg: 67%)
- MSN: 82% (avg: 76%)



YSU 3rd Term Persistence
Jan-Oct YoY



- *Third term persistence is defined as the percentage of new enrollees who started and are then active in their third term start*
- *This measure is strongly correlated with graduation rates*
- *Third term persistence is only a snapshot and includes the higher step-outs during the summer*



AP Survey Initiative

AP Wants to Better Understand Your Students

Understanding your students and their experiences creates value by generating insights that facilitate the evaluation and identification of opportunities and actions, fostering a continuous improvement process. Student insights are developed by conducting primary research, such as one-on-one interviews and surveys, throughout the student journey.

2023 Student Research Highlights

12

Studies

25

Partners

~6,000

Survey Responses

~200

Interviews



With a network of over 125 colleges and universities, serving more than 100,000 students, AP and our University Partners are in a unique position to be the leading authority on online college student behavior.

How Student Research Benefits Our Partners

Our goal is to have all University Partners participate in student research initiatives. Participation helps to increase the sample of students, so it is statistically significant and enables us to develop Partner/Program-specific benchmark data for comparisons.

- ✓ **Benchmark your institution's data to peer institutions and the total AP network**
 - *Institutions in your region*
 - *Institutions with like degree programs*
 - *Institutions with similar classifications*
- ✓ **Develop greater understanding of specific student groups at your institution**
 - *Online MBA students at your institution*
 - *Students admitted to online programs at your institution but have not enrolled*
 - *Graduates of online programs at your institution*
- ✓ **Empower our partnership's ability to improve the student experience**
 - *Our 2023 Melt study helped build an analytical model to identify registered students at risk of melting to mitigate through intervention efforts. The model has been deployed at scale and in the Fall 1 start we saw melt reduce by over 1 percentage point compared to prior year.*



What We Learned From Students in 2023

We deepened our understanding of students by learning about their motivations, challenges, and needs as they move along the student journey.

Importance of optimizing key touchpoints in the upfront research and consideration phases of the student journey

- More than three-quarters of students (78%) consider 3 or less schools
- Most students (60%) apply to just one school

Incorporating peer-generated reviews and testimonials into student communication can positively influence their consideration and application decisions

- More than 40% of students actively searched for peer-reviews and testimonials during their research process
- Of those searching for it (56%) said they found peer-related content that prompted them to consider a “new” school - one not previously considered. Nearly 80% of these people then applied to this school.

Common sources of anxiety for students starting programs may result in both non-enrollment, despite admission, and "melt" where students enroll but do not start courses by the census date

- Unforeseen life events, concerns about ability to balance school and work commitments, and cost are the biggest drivers of not enrolling after being admitted – cited by 64% of that student group
- Almost half (45%) of students who melt also cite ability to balance work and school commitments, unforeseen life events, and cost as their top concerns prior to enrolling

Students completing AP-supported programs report strong ROI and high satisfaction

- Recent grads show a 20% increase in salary one year after degree completion and can pay back their tuition in 1.2 years on average
- 85% of recent grads consider their degree worth the investment and 81% would recommend their program to a friend or colleague

Consider how these and other student insights can be applied at your institution.



Our Plan to Continue Learning from Students in 2024

We have a robust research agenda focused on amplifying the voice of AP's Partners' students to inform decision-making across our business and to deepen our understanding of the student experience throughout their journey.

Here's a preview of some of the initiatives we have planned for the coming year

Interest / Discovery	Evaluation	Application	Enrollment	Attendance: Progression & Graduation	Affiliation & Career Advancement
Understand drivers of 2023 online student demand trends and develop outlook for 2024				Build detailed view of the core student of AP Partners' programs including their motivations / behaviors	Scale student ROI study to develop views by Partner, program type, and build benchmarks
		Survey students that start, do not start, or melt to hindsight satisfaction and understand their "why" and opportunities / actions to take	Understand and track how students perceive and use emerging technology (e.g., Gen AI)		



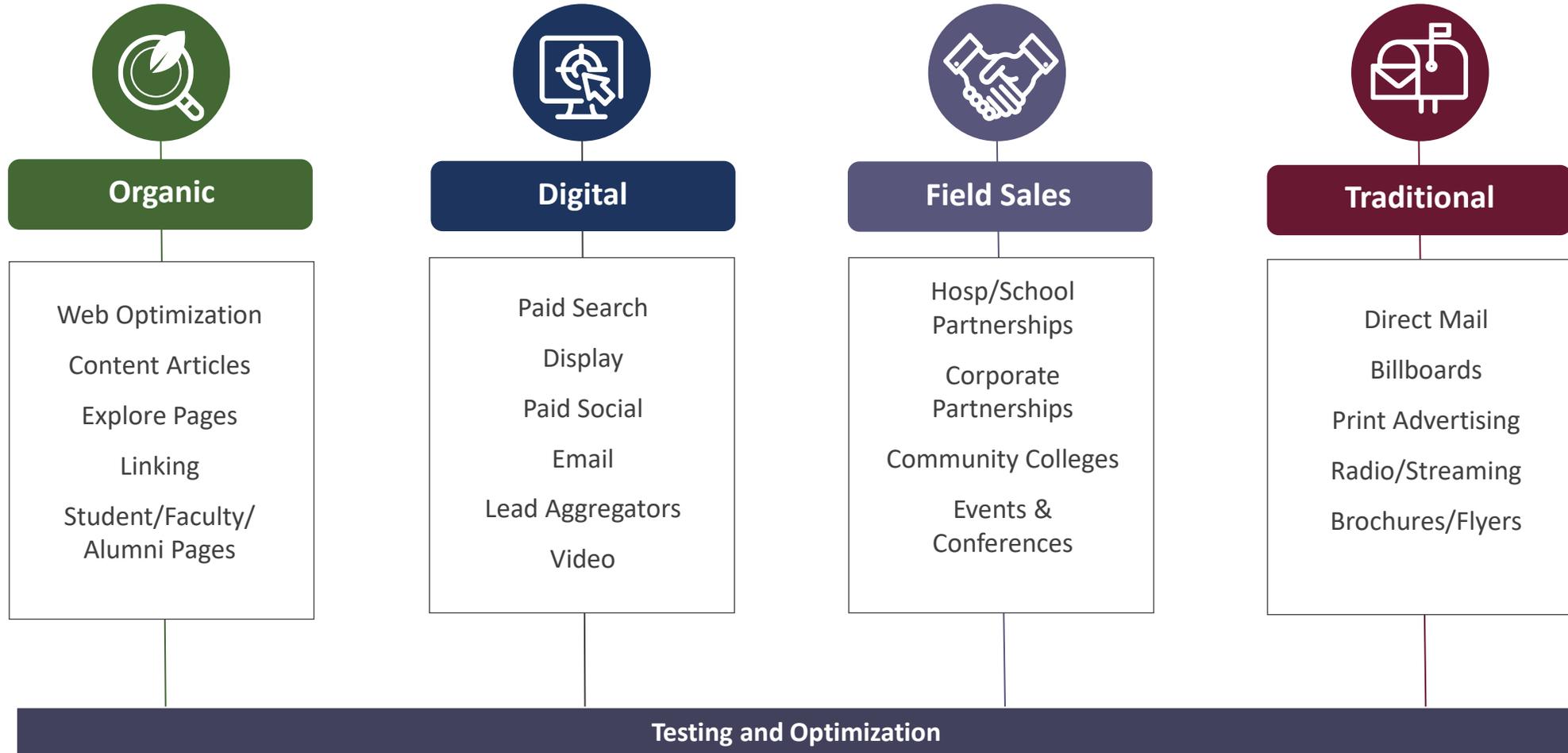
We need your help to make these projects successful and look forward to your participation!



INTEGRATED MARKETING UPDATE



The Toolbox





Youngstown State Education Field



Mark Ulbrich

Associate Executive Director
Masters in Educational Administration
30+ Years in Education

2023-2024 EDUCATION PERFORMANCE: (August 2023- January 2024)

- **Total Events: 103**
- **76 B2B Meetings to Grow School District Partnerships and Branding**
- **# of Teachers Engaged: 500+ leads**

FIELD STRATEGIES:

- **Targeted Onsite Events:** The Education Field Team developed individual game plans to target new accounts and new schools for on-site, in-person events to engage with educators.
- **Strategic Expansion-** Focus to expand field efforts beyond the state of Ohio into Pennsylvania.
- **Continued Virtual Outreach:** Field Team provides continued virtual outreach through monthly live & on-demand webinars focused on teachers within specific subject areas, as well as towards current and future district leaders.
- **Referral Initiative:** Targeted outreach efforts focused on obtaining referrals from principals, assistant principals, and other school leaders who may know of educators within their buildings that are seeking to advance their education.





Youngstown State Healthcare Field

Colleen Worthington

Executive Director

Masters in Business Admin

19 Years Higher Ed Experience

UPDATES-

- **New YSU Healthcare Representative, Colleen Worthington, started in November 2023.**
- **Covering: Ohio, Pennsylvania, and Michigan**

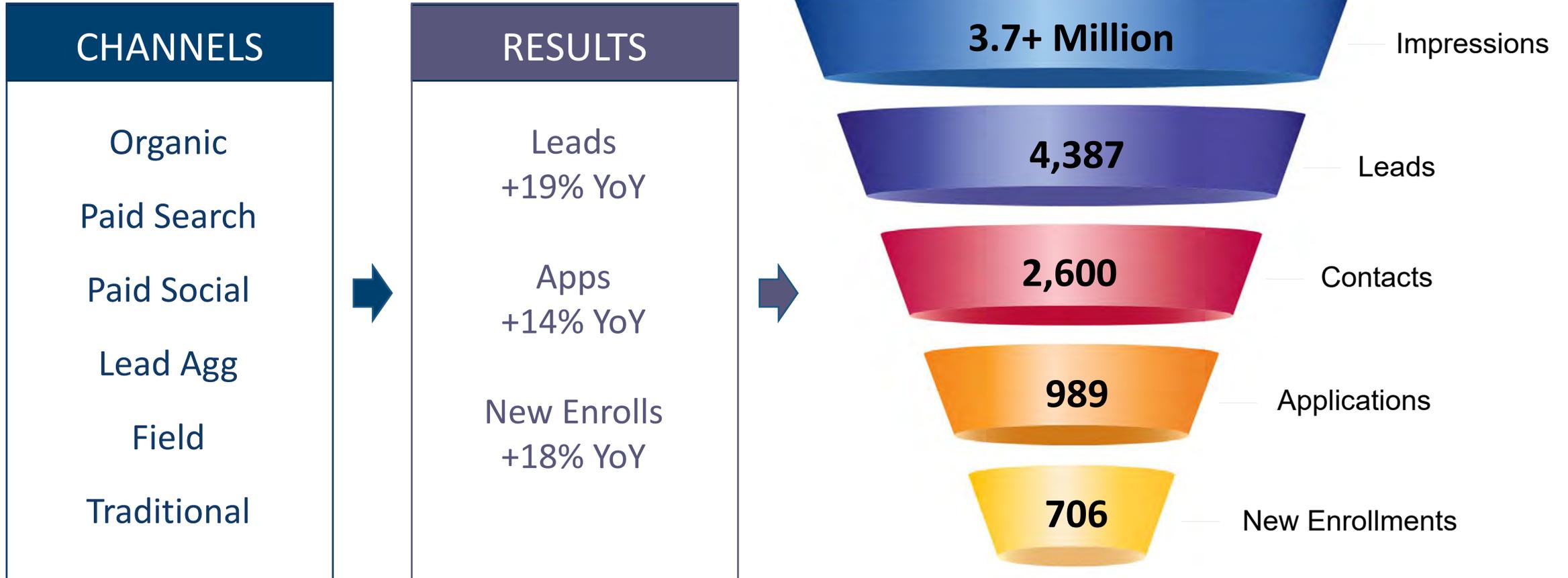
CURRENT INITIATIVES-

- **Targeted MSN Outreach** - AGACNP March 19th (Certified Nurses Day) with Ohio's largest healthcare systems: MetroHealth, Cleveland Clinic, University Hospitals, and Mercy Health, and other MAGNET/ANCC supported facilities in PA & MI.
- Additionally targeting engagement with NICHE's list of 77 supported facilities across OH, PA, and MI.

TYPES OF EVENTS EXECUTED:

- **Onsite Events:** Colleen has aggressively filled her calendar with onsite departmental hospital events (floor rounding), nurse orientations, nursing leader presentations, cohort events, education fairs, application-days, conferences, and community college presentations.
- **Virtual Outreach:** Weekly & on-demand webinars, one-on-one phone consultations, email/phone/SMS campaigns.
- **Social Media Marketing & Engagement:** Facebook & Facebook Live Presentations, LinkedIn Targeted Nursing Leader Outreach, Twitter, and Instagram

Pipeline Results *(Aug 2023 - Jan 2024)*



Digital Media Optimization



SEM

- Continuous keyword analysis and expansions
- Competitive keyword analysis, impression and click share
- Bidding technology optimizations
- Match type expansions and refinements
- Geographic expansions and optimizations



Display

- Vendor testing
- Audience and behavioral targeting refinements
- Ad placement optimizations
- Geographic expansions and optimizations



Lead Aggregators

- Vendor testing
- CPC/CPL bidding strategy refinement and optimizations
- Budgeting refinements based on downstream metrics



Social Media

- Social Media Listening
- Audience targeting testing and refinements
- Ad Placement testing and refinements
- Ad copy and creative (image, video) enhancements



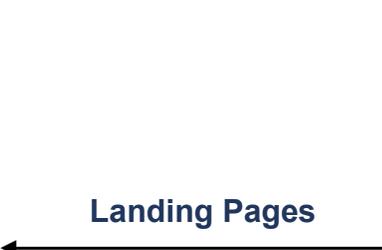
Media Partnerships

- Google, Bing, Facebook, etc. partnerships research and insights to inform trends, demand, betas, and optimizations opportunities



Landing Pages

- UX Testing
- Messaging optimizations
- Quality score refinements
- Page speed monitoring
- Conversion rate monitoring for optimizations



Landing Page Performance *(Aug 2023 - Jan 2024)*

Overview

Traffic from all paid media efforts direct users to dedicated landing pages tailored to the specific ad placements

Total Results

Visits: 53,244

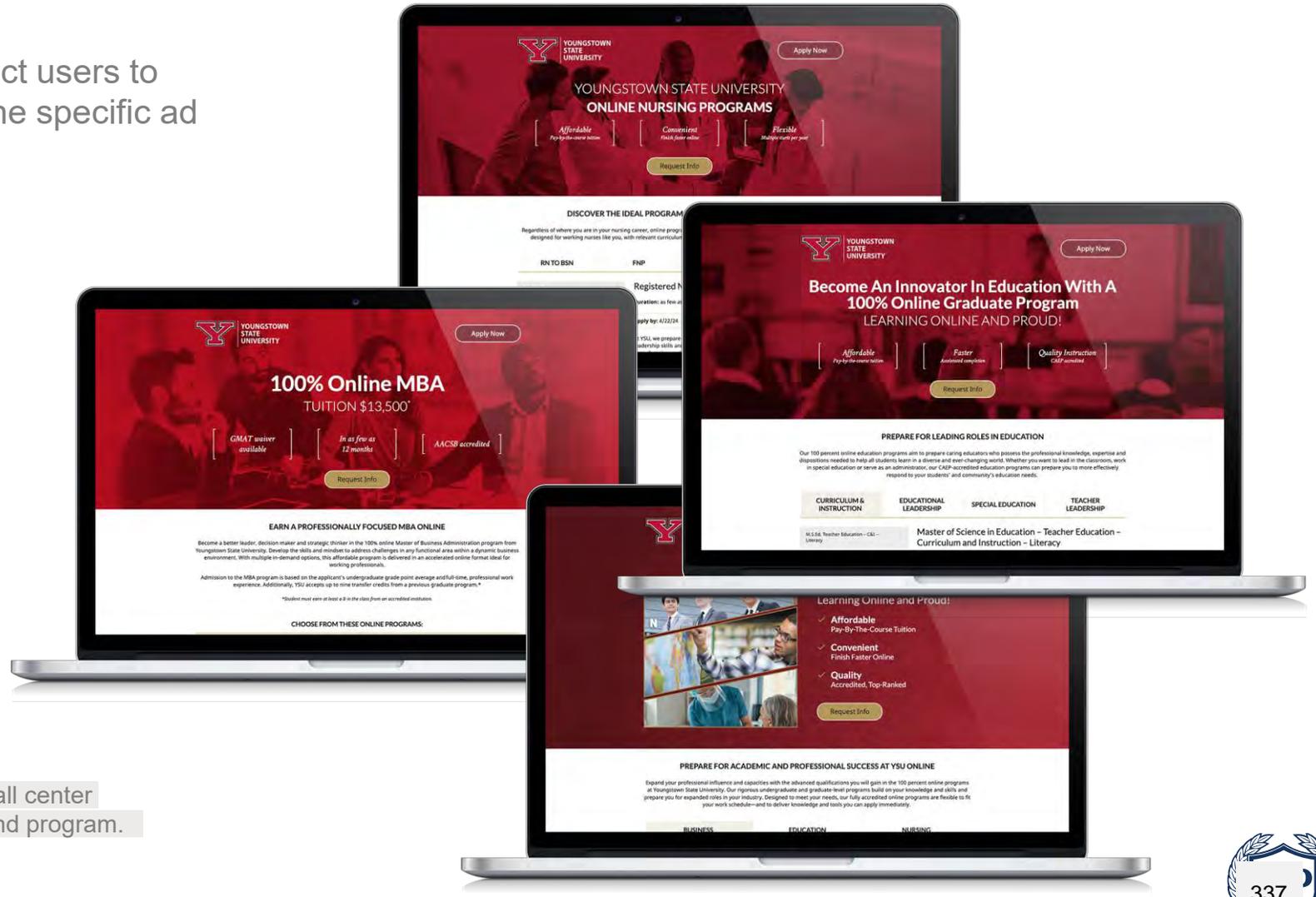
Leads: 3,108

Conversion Rate: **5.77%**

Conversion: A website visitor who submits a "Request More Information" or "Apply Now" form on a webpage.

Conversion Rate Benchmark = 4.84%

Lead: Any actionable information that is received at the call center relating to a specific individual, university partner, and program.



YSU | Brand SAP - Hero Redesign

Hypothesis: If we switch out the hero background image from displaying one person with the words going across their face to a brighter background with images of people in seemingly different disciplines who are unobstructed by the copy, it will increase form fills because the page will appeal to a wider array of people and interests. *Desktop only test.*

Control



Visits: 1,311
Conversion Rate: 6.10% (80)

Variation



Visits: 1,330
Conversion Rate: 5.04% (67)
Strength: <1%

Total Conversion Rate Increase: -21.13%, 106 bps, 80% stat sig

Result: The redesigned hero did NOT increase conversions. While it did lead to a slight increase in Request Info conversions, it harmed the Apply Now conversions by much more. Overall, CTA button clicks within the hero were also down. Next step is to test more localized images in the 3 boxes.

Source: Intellimize. Date Range: July 12 – October 10, 2023

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YSU | Brand SAP - Hero Redesign [Take 2]

Hypothesis: If we switch out the hero background image from displaying a blurry computer image with the words going across it to a solid background with images of multiple local representations of students in seemingly different disciplines, it will increase form fills because the page will appeal to a wider array of people and interests. *Desktop only test.*

Control



Visits: 603
Conversion Rate: 4.81% (29)

Variation



Visits: 1,053
Conversion Rate: 6.55% (69)
Strength: >99%

Total Conversion Rate Increase: 26.61%, 174 bps, 90% stat sig

Results: The redesigned hero consistently beat out the control design throughout the life of this test. Will implement the winning variation design as the default experience.

Source: Intellimize. Date Range: Nov 16 – Jan 23, 2024

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YSU | EDU – Hero Headline

Hypothesis: If we use a headline with clear and compelling copy that immediately conveys the value of joining the program, then more users will fill out the form because they feel as though it's more personal towards helping them succeed.

Control

100% ONLINE
GRADUATE EDUCATION PROGRAMS

LEARNING ONLINE AND PROUD!

Affordable
Pay-by-the-course tuition

Faster
Accelerated completion

Request Info

100% ONLINE
GRADUATE EDUCATION PROGRAMS

LEARNING ONLINE AND PROUD!

Faster
Accelerated completion

Request Info

Visits: 1,367
Conversion Rate: 3.95% (54)

Variation

Become An Innovator In Education With A 100% Online Graduate Program

LEARNING ONLINE AND PROUD!

Affordable
Pay-by-the-course tuition

Faster
Accelerated completion

Request Info

Become An Innovator In Education With A 100% Online Graduate Program

LEARNING ONLINE AND PROUD!

Quality Instruction
CAEP accredited

Request Info

Visits: 1,347
Conversion Rate: 4.45% (60)

Total Conversion Rate Increase: **11.32%, 50 bps, No stat sig**

MOBILE ONLY CR Increase: **12.78%, 59 bps, No stat sig**

Results: The new headline won out on mobile by a significant margin but lost slightly for desktop traffic. Since mobile makes up the vast majority of this URL's traffic, we WILL be implementing the variation headline as the default experience.

Source: Intellimize. Date Range: Nov 9 – Jan 24, 2024

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YSU | BUS MBA – Hero Headline

Hypothesis: If we use a headline with clear and compelling copy that immediately conveys the value of joining the program, then more users will fill out the form because they feel as though it's more personal towards helping them succeed.

Control

The control banner features the Youngstown State University logo in the top left, an 'Apply Now' button in the top right, and the headline '100% Online MBA' with 'TUITION \$13,500*' below it. Two callouts are present: 'GMAT waiver available' and 'In as few as 12 months'. A 'Request Info' button is at the bottom. The mobile card below it has the same logo and headline, but includes 'AACSB accredited' with left and right arrows, and a 'Request Info' button at the bottom.

Visits: 2,057
Conversion Rate: 6.81% (140)

Variation

The variation banner features the Youngstown State University logo in the top left, an 'Apply Now' button in the top right, and the headline 'Advance In Business With A 100% Online MBA Program' with 'TUITION \$13,500*' below it. Two callouts are present: 'GMAT waiver available' and 'In as few as 12 months'. A 'Request Info' button is at the bottom. The mobile card below it has the same logo and headline, but includes 'AACSB accredited' with left and right arrows, and a 'Request Info' button at the bottom.

Visits: 2,025
Conversion Rate: 7.06% (143)

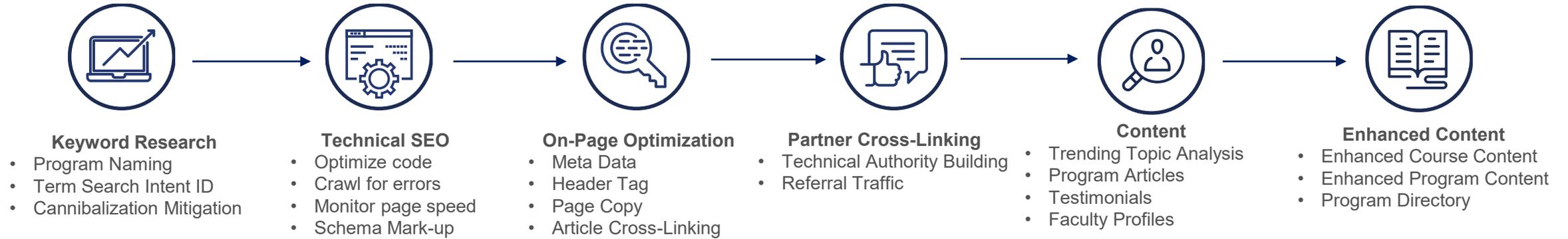
Total Conversion Rate Increase: 3.62%, 26 bps, No stat sig

Results: The new headline lost for the mobile audience, which makes up most of this URL's traffic. We will NOT be implementing the variation headline as the default experience.

Source: Intellimize. Date Range: Nov 9 – Jan 24, 2024

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Organic / Search Engine Optimization (SEO)



Strategy:

- Continual optimization and auditing of our partner site to ensure lead and enrollment growth. This is an ongoing strategy that will be continually supported.



Online Program Pages



Partner Site Performance (Aug 2023 - Jan 2024)

Overview

Traffic from web searches and referral links (crosslinking)

Total Results

Visits: 54,867

Leads: 641

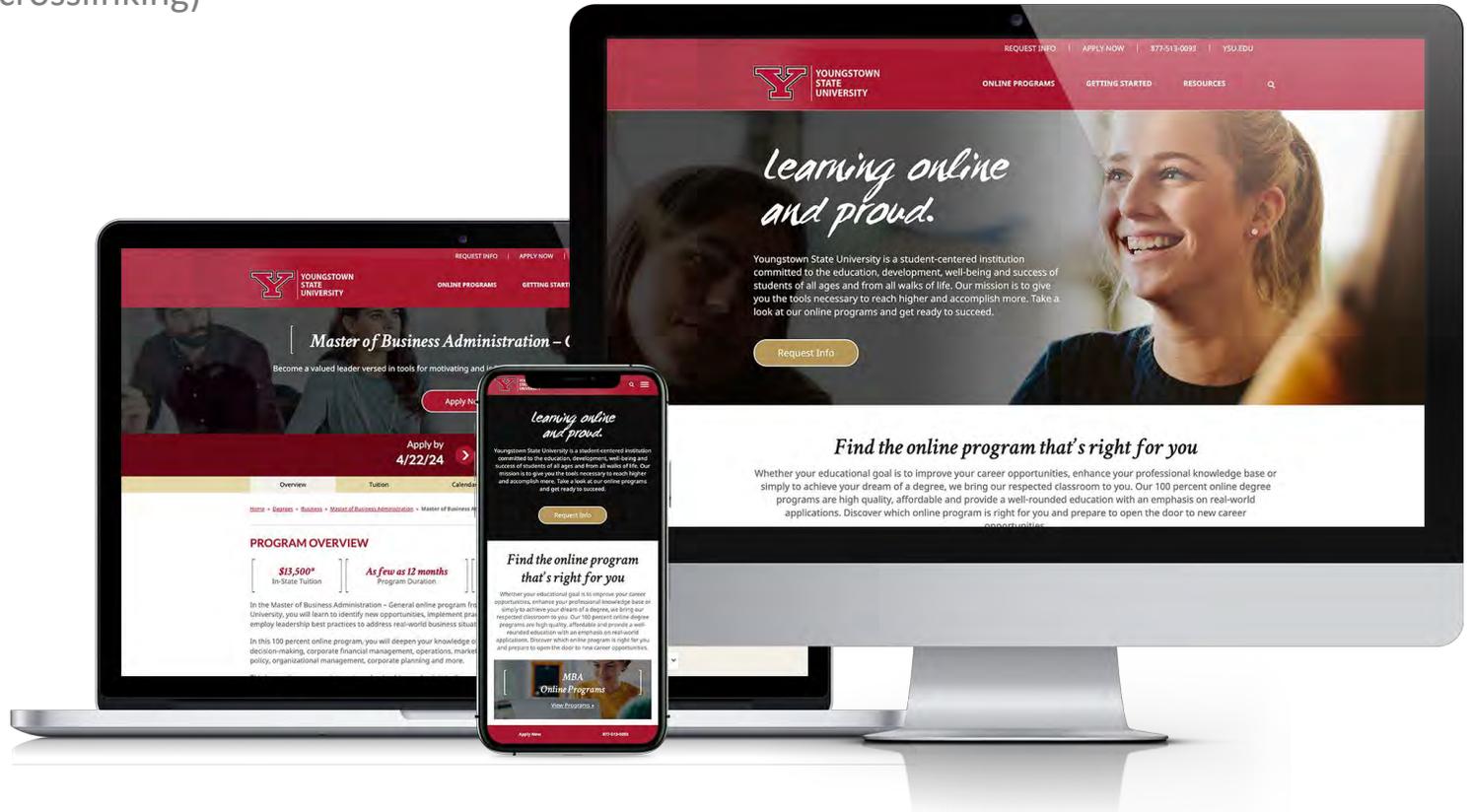
Conversion Rate: 10.81%

Note: Organic traffic only, no article traffic.

Conversion: A website visitor who submits a "Request More Information" or "Apply Now" form on a webpage.

Conversion Rate Benchmark = 9.87%

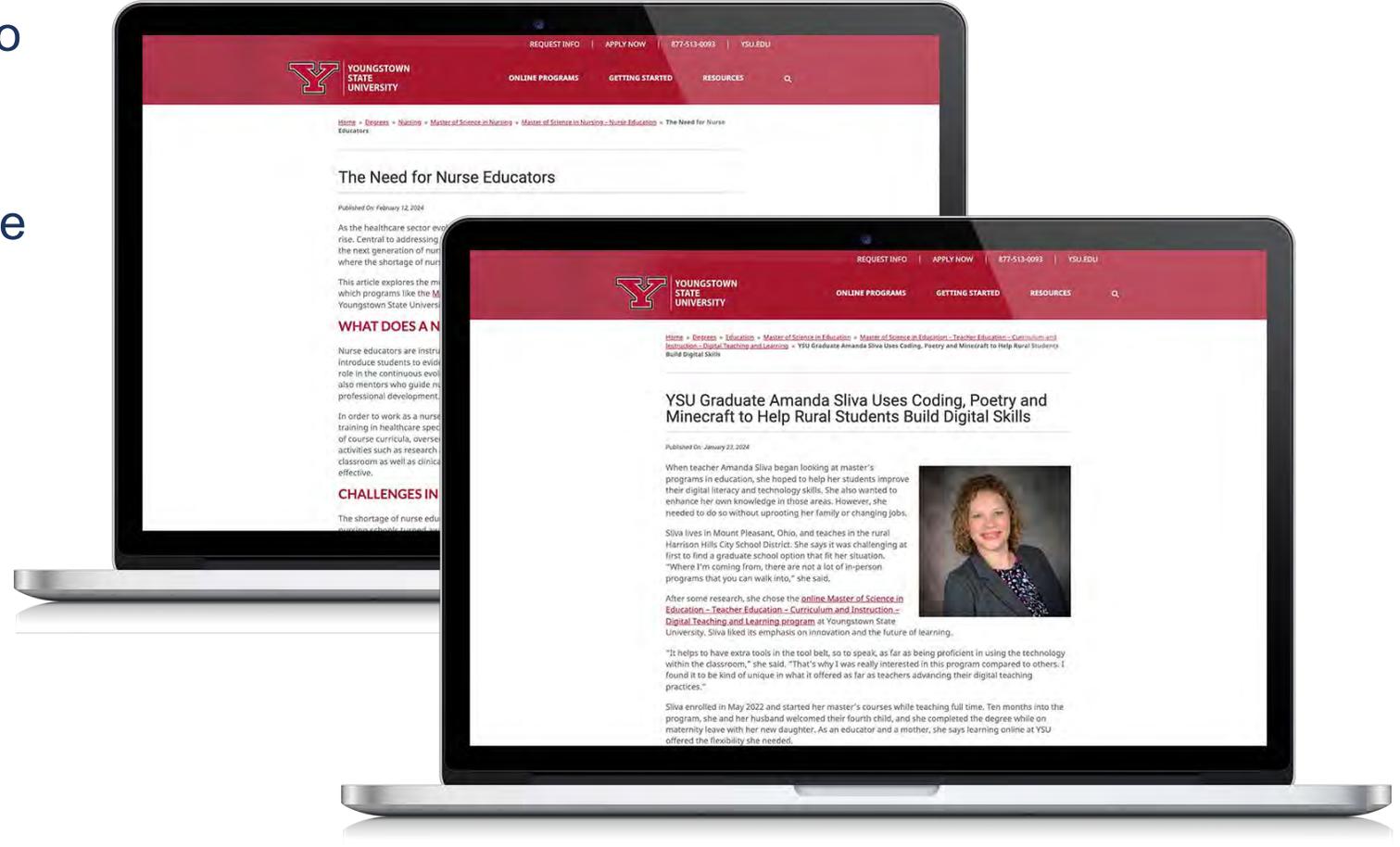
Lead: Any actionable information that is received at the call center relating to a specific individual, university partner, and program.



Organic Highlights

Article development continues to drive organic growth.

- 115 articles published all time
- 17 total articles published in 2023
- Article page views: 30,919



Paid Search Highlights

Strategy:

- Bidding on high-level brand, vertical-specific, and program specific terms .
- Brand campaigns running across SOA and non-brand campaigns running in-state and contiguous for all programs and key programs .
- Running expanded text ads, image ads, and responsive search ads with value props emphasizing program, affordability, online format, time to complete, and start dates.

Performance:

- 31% increase in leads YoY.
- 23% increase in apps YoY.
- 24% increase in enrollments YoY.
- Slight decrease in L-A from 21% to 21%.

Sponsored

online.yzu.edu/nursing/rn_to_bsn

100% Online RN to BSN - Convenient & Flexible

Our RN to BSN is designed for working nurses with a desire to transform healthcare. Earn your nursing degree on your own schedule. Choose from multiple start dates per year. Courses: Professional Nursing, Nursing Informatics, Culture in Nursing, Evidence-Based Practice, Nursing Leadership. Committed Faculty. \$,7,700 RN to BSN Tuition.

[Admissions](#) · [Tuition](#)

Sponsored

online.yzu.edu/mba/online

MBA in Marketing Online - In As Few As 12 Months

Develop expertise in consumer behavior and marketing strategies used across industries. Earn a 100% online MBA in Marketing from Youngstown State University. Apply now! Multiple Start Dates. GMAT Waiver Available. 100% Online. Leadership Focused. Affordable Tuition. 2.7+ GPA Required. In-Demand MBA Options. GMAT/GRE Waiver Available. Accelerated Courses. AACSB-Accredited.

[Apply Now](#) · [Calendar](#) · [Affordable Tuition](#) · [Flexible Admissions](#)

Sponsored

online.yzu.edu/msn/online

MSN Programs Online - Convenient Format



Grow as a nurse and further enrich your nursing practice with an online MSN degree. Earn a 100% online MSN degree from Youngstown State University. Get started today! Multiple Start Dates. Affordable Tuition. Convenient Schedule.

[Calendar](#) · [MSN FNP Online](#) · [MSN AG-ACNP Online](#)

Sponsored

online.yzu.edu/nursing/rn_to_bsn

100% Online RN to BSN - As Few as 10 Months



We offer 100% online coursework, affordable tuition, and a supportive faculty. Apply now! Earn your nursing degree on your own schedule. Choose from multiple start dates per year. Committed Faculty. \$,7,700 RN to BSN Tuition.

[Tuition](#) · [Admissions](#)

Sponsored

online.yzu.edu/education/programs

Online Grad Education Programs - Youngstown State University

Prepare for for impactful leadership roles through our CAEP-accredited online programs. Earn your graduate degree in education 100% online with Youngstown State University. Degree programs: MSEd, EdD, Certificates. Accelerated Coursework. 100% Online...

[Multiple Start Dates](#) · [Flexible Admissions](#)

[Youngstown · Moser Hall](#)

Paid Social Highlights

Strategy:

- Currently running on Meta leveraging motion graphic and static image creative.
- Using lookalike and interest-based audience targeting for prospective students.
- LinkedIn included in-mail message ads and static display.

Performance:

- Decrease in leads 57% YoY.
- Decrease in apps 45% YoY.
- Decrease in enrollments 16% YoY.
- L-A increased from 14% to 18%.



Lead Agg Highlights

Strategy:

- Utilizing both paid (CPC) and organic buying models to balance efficiency.
- Leveraging HEA, BUS, and EDU vertical sites.

Performance:

- Leads decreased slightly by 3% YoY.
- Apps increased 50% YoY.
- Enrollments increased 100% YoY.
- LtA increased from 11% to 17%.

Youngstown State University
The program offered by Youngstown State University is currently accepting students in your area. Get program details on admissions, tuition & fees, scheduling, and more. Click the program below to learn more:

- [Online RN to BSN](#)



Online RN to BSN ▾

[View Details](#)

Youngstown State University
The programs offered by Youngstown State University are currently accepting students in your area. Get program details on admissions, tuition & fees, scheduling, and more. Click the program below to learn more:

- [Online Master's of Business Administration - MBA in General](#)
- [Online Master's of Business Administration - MBA in Healthcare Management](#)
- [Online Master's of Business Administration - MBA in Marketing](#)



Select Program ▾

[View Details](#)

YOUNGSTOWN STATE UNIVERSITY

Online

- Master of Science in Education - Educational Administration
- Master of Science in Education - Educational Administration (With Principal Licensure Option)
- Master of Science in Education - Special Education - Autism and Related Disabilities
- Master of Science in Education - Special Education - Intervention Specialist Mild - Moderate Disabilities
- Master of Science in Education - Teacher Education - Curriculum & Instruction - Digital Teaching and Learning
- Master of Science in Education - Teacher Education - Curriculum and Instruction - Literacy
- Master of Science in Education - Teacher Education - Curriculum and Instruction - Teacher Leader



[LEARN MORE](#)

Email: Lead Gen & Re-engagement

Strategy:

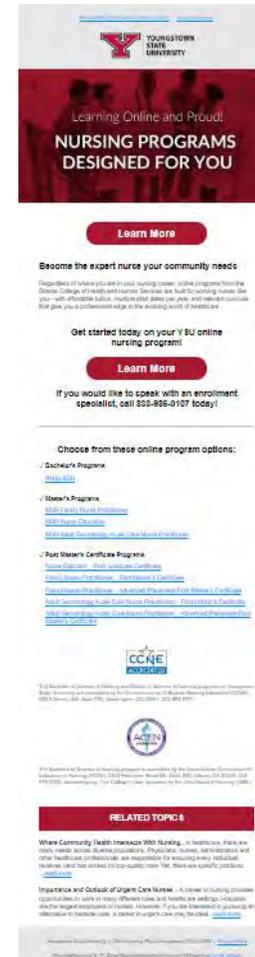
Refresh Lead Gen emails

- Engage target audience to increase interest and request more information.
- Re-engagement emails
- Nurture an existing prospect to encourage them to apply now.

Tactics:

Refresh existing assets

- Subject Lines
- Preview text
- Body Copy
- Images
- A/B Tests



NUR Lead Gen



EDU Lead Gen

The Roadmap for the Next 6 Months

All Verticals

- New articles featuring programs and students
- Testing and improving digital landing pages
- Develop and deploy new brand awareness videos
- Update YSU branding on all pages

Undergrad

- Undergraduate vertical launch
- Discovery meetings and program launches for Spring and Fall 2025

Business

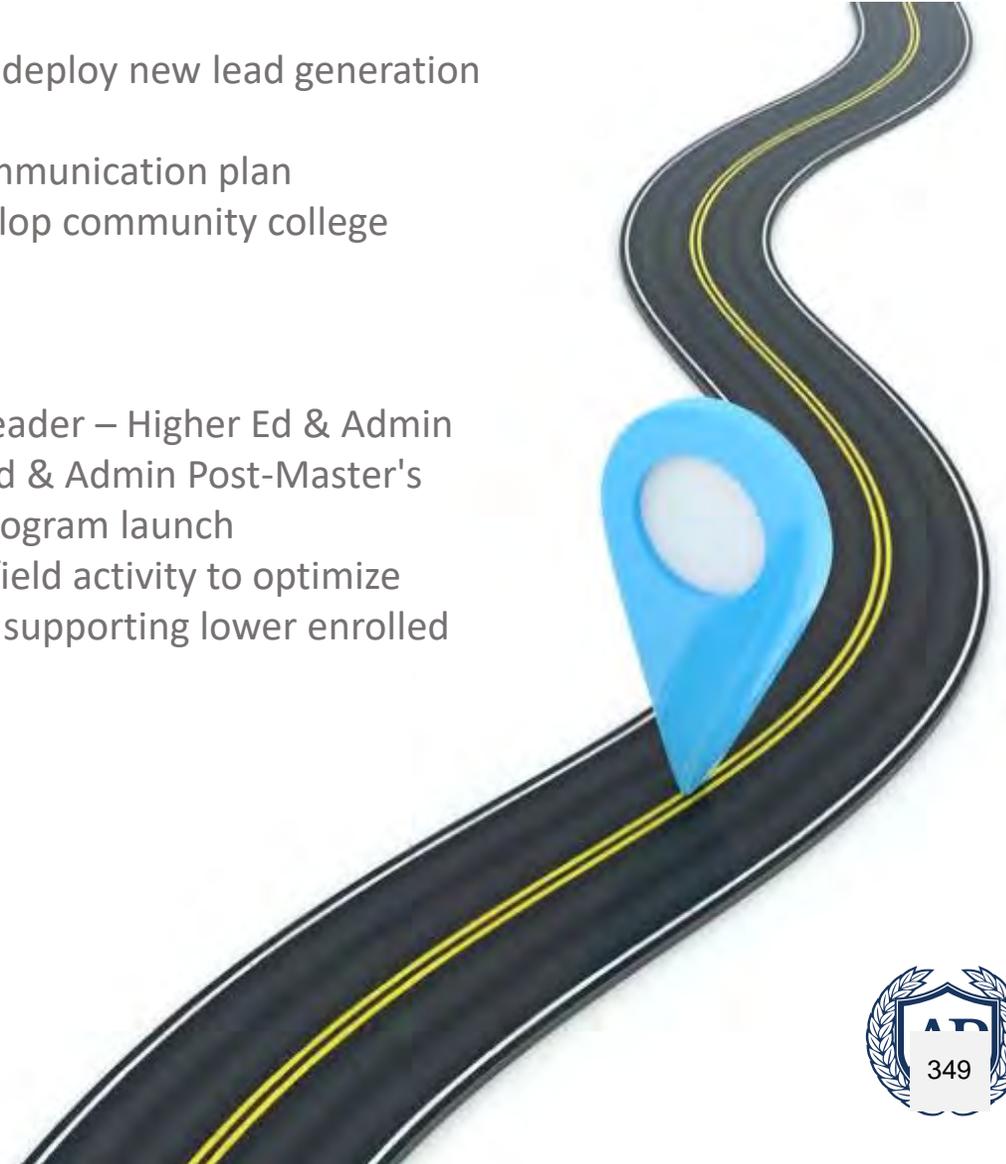
- Develop and deploy new lead generation email

Healthcare

- Develop and deploy new lead generation email
- Optimize communication plan
- Further develop community college strategy

Education

- Ed.D. in Ed Leader – Higher Ed & Admin and Higher Ed & Admin Post-Master's Certificate program launch
- Incorporate field activity to optimize results while supporting lower enrolled programs



Thank You!



Program Information	
CIP Code	0
Program Name	Program Name
Subject Prefix	AAAA
Modality	Choose

Program Type
Choose

Program Rank Percentile
0%

Market Data	
Dimension	Percentile
Student Demand	0%
Employment	0%
Google Search YoY	0%
Competitive Intensity	0%
Avg. Program Completions (in-market)	0%
BLS 10-Year Future Growth (CAGR)	0%
BLS 3-Year Historical Growth (CAGR)	0%
International Page Views (12 Months)	0%

Academic Data	
Dimension	Data
Previous Fall Graduates	
Number of Majors	
Student Credit Hours Previous Academic Year	
Number of Full-Time Faculty	
Full-Time Faculty WLH (Teaching hours only)	
FT Faculty Non-teaching Reassigned Time (Total)	
Full-Time Overload Spend	
Part-Time Faculty WLH	
Part-Time Faculty Spend	
YoY Program Retention	
Staffing Needs (count)	

Economic Data (SCH)	
Dimension	Data
Contribution %	
Gross Revenue	
State Appropriation	
Discounts	
Net Revenue	
Instructional Cost	\$ -
Contribution	

Rationale for Program / Adjustments
Enter rationale here. Rationale must align with the strategic plan.

Impact on Program, Department, College or Institution
Enter impact here. If this program requires accreditation, enter specific details for staffing, equipment and facilities.

Position Information	
Position Type	Choose
Rationale	Choose
Category (CUPA-HR)	
Salary (CUPA-HR)	\$ -
Modality	Choose

Program
Program Name

Program Rank Percentile
0%

Rationale for Position
Enter rationale here. If this is a position for a new program, please indicate how many full-time faculty are needed.

Impact on Program, Department, College or Institution
Enter impact here.

Information and Data Populated from Program Information Sheet					
Market Data		Academic Data		Economic Data (SCH)	
Dimension	Percentile	Dimension	Data	Dimension	Data
Student Demand	0%	Previous Fall Graduates	0	Contribution %	0%
Employment	0%	Number of Majors	0	Gross Revenue	\$ -
Google Search YoY	0%	Student Credit Hours Previous Academic Year	0	State Appropriation	\$ -
Competitive Intensity	0%	Number of Full-Time Faculty	0	Discounts	\$ -
Avg. Program Completions (in-market)	0%	Full-Time Faculty WLH (Teaching hours only)	0.00	Net Revenue	\$ -
BLS 10-Year Future Growth (CAGR)	0%	FT Faculty Non-teaching Reassigned Time (Total)	0	Instructional Cost	\$ -
BLS 3-Year Historical Growth (CAGR)	0%	Full-Time Overload Spend	\$ -	Contribution	\$ -
International Page Views (12 Months)	0%	Part-Time Faculty WLH	0		
		Part-Time Faculty Spend	\$ -		
		YoY Program Retention	0%		
		Staffing Needs (count)	0		

Position Information	
Position Type	Choose
Rationale	Choose
Category (CUPA-HR)	
Salary (CUPA-HR)	\$ -
Modality	Choose

Program
Program Name

Program Rank Percentile
0%

Rationale for Position
Enter rationale here. If this is a position for a new program, please indicate how many full-time faculty are needed.

Impact on Program, Department, College or Institution
Enter impact here.

Information and Data Populated from Program Information Sheet					
Market Data		Academic Data		Economic Data (SCH)	
Dimension	Percentile	Dimension	Data	Dimension	Data
Student Demand	0%	Previous Fall Graduates	0	Contribution %	0%
Employment	0%	Number of Majors	0	Gross Revenue	\$ -
Google Search YoY	0%	Student Credit Hours Previous Academic Year	0	State Appropriation	\$ -
Competitive Intensity	0%	Number of Full-Time Faculty	0	Discounts	\$ -
Avg. Program Completions (in-market)	0%	Full-Time Faculty WLH (Teaching hours only)	0.00	Net Revenue	\$ -
BLS 10-Year Future Growth (CAGR)	0%	FT Faculty Non-teaching Reassigned Time (Total)	0	Instructional Cost	\$ -
BLS 3-Year Historical Growth (CAGR)	0%	Full-Time Overload Spend	\$ -	Contribution	\$ -
International Page Views (12 Months)	0%	Part-Time Faculty WLH	0		
		Part-Time Faculty Spend	\$ -		
		YoY Program Retention	0%		
		Staffing Needs (count)	0		

Position Information	
Position Type	Choose
Rationale	Choose
Category (CUPA-HR)	
Salary (CUPA-HR)	\$ -
Modality	Choose

Program
Program Name

Program Rank Percentile
0%

Rationale for Position
Enter rationale here. If this is a position for a new program, please indicate how many full-time faculty are needed.

Impact on Program, Department, College or Institution
Enter impact here.

Information and Data Populated from Program Information Sheet					
Market Data		Academic Data		Economic Data (SCH)	
Dimension	Percentile	Dimension	Data	Dimension	Data
Student Demand	0%	Previous Fall Graduates	0	Contribution %	0%
Employment	0%	Number of Majors	0	Gross Revenue	\$ -
Google Search YoY	0%	Student Credit Hours Previous Academic Year	0	State Appropriation	\$ -
Competitive Intensity	0%	Number of Full-Time Faculty	0	Discounts	\$ -
Avg. Program Completions (in-market)	0%	Full-Time Faculty WLH (Teaching hours only)	0.00	Net Revenue	\$ -
BLS 10-Year Future Growth (CAGR)	0%	FT Faculty Non-teaching Reassigned Time (Total)	0	Instructional Cost	\$ -
BLS 3-Year Historical Growth (CAGR)	0%	Full-Time Overload Spend	\$ -	Contribution	\$ -
International Page Views (12 Months)	0%	Part-Time Faculty WLH	0		
		Part-Time Faculty Spend	\$ -		
		YoY Program Retention	0%		
		Staffing Needs (count)	0		

Program Proposal Policy

Purpose: The Program Proposal Policy reflects a proactive approach to academic program review and development. By focusing on market potential and fostering collaboration among departments, faculty, and staff, the university aims to enhance its academic offerings and maintain its competitiveness in an ever-changing higher education landscape. This policy underscores the university's commitment to excellence, innovation, and strategic growth, positioning it as a leader in higher education.

Scope: This policy applies to all academic programs, both new and existing, at Youngstown State University. By encompassing undergraduate and graduate levels, it ensures a comprehensive approach to program enhancement across all areas of study.

Timeline: The timeline for enacting this policy varies significantly due to several factors influencing the progression of program enhancements from proposal to market launch. The duration is subject to fluctuation based on the overall request load during submission periods, the timing and frequency of meetings convened to review and approve submissions, and the requisite approval process mandated by the state. Given the multifaceted nature of these variables, the timeline for program enhancements may experience fluctuations and adjustments to accommodate the complexities inherent in each stage of the process. As such, stakeholders involved in program development and review should remain flexible and proactive in navigating the dynamic timeline, ensuring that the policy's objectives of strategic investment and academic excellence are upheld throughout the entirety of the enhancement process.

For a program to go live in the fall of the following academic year, stakeholders must consider this timeline:					
Current Academic Year					Following Academic Year
February 1	March 1	April	November 15	December 1	Fall Program Start
Last day for Academic Programs Committee (APC) to consider program requests for the following academic year.	Last Senate meeting when program changes for the following academic year catalog will be approved.	Registration for summer and fall semesters opens (new programs will not appear in current year's academic catalog).	Last day for General Education Committee to consider requests for the following academic year.	Last day for the University Curriculum Committee (UCC) to consider requests for the following academic year.	Programs going through this program request process are slated to start in the following academic year.
			Programs should be aware of these important dates for curriculum (course) changes because these changes impact academic programs.		

Table of Contents:

- [Step 1: Proposal Submission](#)
- [Step 2: Curriculum Alignment](#)
- [Step 3: Go-To-Market Plan](#)
- [Step 4: Final Program Approvals & Launch](#)
- [References](#)

Procedure:

Step 1: Proposal Submission:

- a. Program sponsors submit their portion of the Program Proposal Form for new programs or enhancements to existing ones to the Office of Academic Affairs.
- b. The Chief Marketing Officer will then complete the form utilizing internal and external data sources for scoring to ensure a thorough assessment of each proposal's potential impact and viability.
- c. Program sponsors will then present the Program Proposal Form to Deans' Council to provide dialogue and collaboration.
- d. The Academic Program Proposal (APP) Team will then review proposed programs to ensure diverse perspectives and expertise are considered in the decision-making process.
 - i. This APP Team consists of representatives from OAA, Marketing, Enrollment, Advising, International (if applicable), veterans and the Registrar's offices.
 1. For graduate programs the Graduate School will also be represented in this review process. Graduate program submissions will require an additional review through the [Chancellor's Council on Graduate Study \(CCGS\)](#).
- e. After this meeting, the proposal will either be advanced to the next step, sent back for further analysis, or be rejected.

Step 2: Curriculum Alignment:

- f. Programs advanced to Step 2 will begin Curriculum Alignment. During this step, a two, three, or four-year curriculum guide is developed highlighting new courses, shared courses, and existing courses that will be used in the new program.
 - i. Sponsoring departments play a crucial role in providing detailed curriculum guides for review. This collaborative effort ensures that program enhancements are grounded in academic rigor and relevance.
 - ii. Identifying new courses, changes to existing ones, and opportunities for cross-departmental collaboration underscores the interdisciplinary nature of modern education.
- g. Rationale must be provided for proposed changes to help stakeholders understand the strategic objectives behind each enhancement.

- h. Consideration and alignment to any community learning engagement .
- i. Anticipated timelines for changes in modality must be included to facilitate effective planning and resource allocation.
- j. A modality plan must also be included to identify whether this program should be face-to-face, hybrid, or completely online.
- k. The entire Curriculum Alignment plan will be reviewed by OAA. If approved, the program moves to Step 3: Go-to-Market Plan. If not approved, the program either undergoes further review, or is rejected.

Step 3: Go-to-Market Plan:

- l. Program sponsors from programs approved to go to Step 3: Go-to-Market Plan, will engage with the Chief Marketing Officer and Office of Academic Affairs to ensure a comprehensive marketing plan tailored to each program's target audience is developed.
- m. Funding for the launch and the program's sustainability will be discussed.
 - i. Aligning budget plans with domestic and international (if applicable) target markets ensures efficient allocation of resources and maximizes the return on investment.
 - ii. Consultation with the YSU Foundation and financial aid to align scholarship opportunities.
- n. Performance metrics such as KPIs, ROI, and conversion analytics will be outlined to provide a framework for evaluating the success of marketing efforts and program launches.

Step 4: Final Program Approvals & Launch:

- o. Initiating the academic senate / graduate council approval process underscores the importance of faculty governance and academic standards in program development.
- p. Commencing any required state approvals ensures compliance with regulatory requirements, facilitating a smooth and timely launch process.

References

 [Program Scorecard & Position Request](#)

**RESOLUTION TO MODIFY
CLOSED CIRCUIT TELEVISION SYSTEM USE POLICY, 3356-4-11**

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

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

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

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

**Board of Trustees Meeting
March 7, 2024
YR 2024-**

3356-4-11 Closed circuit television system use.

Responsible Division/Office: YSU Police Department
Responsible Officer: VP for Finance and Business Operations
Revision History: March 2014; March 2019; [March 2024](#)
Board Committee: Finance and Facilities
Effective Date: ~~March 7, 2019~~ [March 7, 2024](#)
Next Review: ~~2024~~ [2029](#)

- (A) Policy statement. To standardize the installation and regulate the use of closed circuit television (“CCTV”) and any other related surveillance systems at Youngstown state university in order to deter crime, enhance campus security, and assist the Youngstown state university police department (“YSU-PD”) in its response to safety and security issues on university property.
- (B) Definitions.
- (1) “Equipment.” ~~Any~~ - [any](#) item, system, technology device, or process, including software, used alone or in conjunction with a network for the purpose of gathering, monitoring, recording or storing an image, images, and/or audio. Images and/or audio may be viewed in real-time and/or captured and preserved for possible review at a later date.
 - (2) “Monitoring.” ~~The~~ - [the](#) process of observing or reviewing recordings that are captured by CCTV equipment either in real-time or that have been prerecorded and are reviewed at a later date and time.
 - (3) “Recording.” ~~The~~ - [the](#) process of capturing images and/or audio using CCTV systems and saving those images to a storage medium.
 - (4) “University property.” ~~All~~ - [all](#) land, structures, or other real property owned, operated, leased or controlled by Youngstown state university. This includes both internal and external areas, including but not limited to common spaces, grounds, and parking lots.

- (5) “Internet protocol (~~‘IP’~~).” ~~“The”~~ - the communication protocol used in the collection and transmission of recordings on the CCTV network. All surveillance devices shall utilize open internet protocols and standards.
- (6) “Public areas.” ~~“Any”~~ - any portion of university property that is operated and controlled by Youngstown state university, including buildings and facilities, in which a person does not have a reasonable expectation of privacy.
- (7) “Private areas.” ~~“Any”~~ - any portion of university property where a person would have a reasonable expectation of privacy, e.g., restrooms, residence rooms, personal offices, or locker rooms, or any other area designated as a clothing changing area. Personal offices do not include reception, informational or waiting areas.
- (8) “Restricted access areas.” ~~“University”~~ - university property that is not accessible to the general public. Restricted access areas may be accessible to university employees, but do not include private areas.

(C) Parameters.

- (1) The YSU-PD is responsible for implementation of this policy, including the approval, placement, and monitoring of all CCTV surveillance systems (~~“CCTV system[s]”~~) on university property.
- (2) This policy does not apply to the use of video or visual surveillance, monitoring or recording, covert or otherwise, by the YSU-PD for criminal investigations or as authorized by a court of law.
- (3) This policy does not apply to the legitimate academic use of cameras or video recordings for educational or journalism purposes, the general use of webcams by the university, the use of video recording for public performances, events, or interviews, or for university academic or research purposes
- (4) This policy does not imply or guarantee that the CCTV system will be monitored in real time.

(5) The CCTV system will be utilized in a professional, ethical and legal manner.

(6) Cameras may or may not transmit data to the video retention arrays. Live view only cameras will only provide a live view and will not provide any recorded data for the area where installed.

(D) Procedures.

(1) Any and all requests for use of CCTV systems and/or equipment will be ~~made in writing to the chief of the YSU-PD~~ requested in the university tech portal. The request will include the name of the college or department making the request, the purpose or reason for the request, and the desired installation area. YSU-PD will review each proposal and the review will consider security issues, institutional needs, technological standards, installation, wiring, networking, licensing, and cost. The chief of the YSU-PD will make the final decision on new equipment installations and changes to equipment placement.

(2) Cameras will only be permitted to be placed in public or restricted access areas and on university property. Cameras will not be placed in private areas or in a public area in order to view into private areas.

(3) Any equipment currently in place as of the date of this policy will come under the control and authority of YSU-PD. YSU-PD will determine if the equipment currently in place meets the institutional needs of the university and current technological standards for a CCTV recording system. YSU-PD will determine if any new equipment is permitted or if any current equipment is to be replaced or removed. No equipment is permitted unless recorded and controlled by YSU-PD or a specific exception is given by the YSU-PD. If an exception is given, the college or department is still required to comply with all other terms of this policy.

(4) All equipment, where able, will utilize IP technology to transmit recordings, unless an exception is granted by YSU-PD. All legacy equipment currently in use at Youngstown state university will be

converted to university standard technology within twelve months from the date of this policy, unless an extension is granted by YSU-PD.

- (5) When an incident is reported or circumstances raise safety or security issues, the YSU-PD may authorize others to observe or review recordings or images.
- (6) In those areas that require on-site viewing or monitoring of CCTV equipment such as student residence halls, the director of the applicable office or department will designate an appropriate individual to serve as the contact with YSU-PD regarding the equipment and will, at the beginning of the spring and fall semesters, provide a list to the YSU-PD of persons authorized to view or monitor the CCTV equipment. Viewing of these images shall be done only in restricted areas unless an exception is granted by the YSU-PD.
- (7) Each department or college with CCTV equipment will designate an appropriate individual within the department or college to serve as a contact with the YSU-PD regarding the equipment.
- (8) Each department or college will be responsible for the cost of the equipment ~~within the department or college~~, [the cost of labor/installation, and software licensing](#).
- (9) The chief of the YSU-PD shall be notified of any future university construction or any upgrading of existing university facilities prior to approval of the final designs of said facility if said facility is to include CCTV equipment. The chief of the YSU-PD or a designee appointed by the chief of the YSU-PD shall provide input into the placement of CCTV equipment during the design phase. The chief of the YSU-PD will make the final decision on new equipment installations.
- (10) The chief of the YSU-PD, [or their designee](#) shall be responsible for contracting any services for the responsibility of repair and service of all equipment.

- (11) Any complaints involving violations of this policy shall be made to the university's office of general counsel and/or the chief of the YSU-PD.
- (E) Retention and release of information.
- (1) Retention of all recorded information is the responsibility of the YSU-PD except in the case of exceptions granted by the chief of the YSU-PD.
 - (2) It is the goal of the YSU-PD to retain recordings in a secure location and for thirty days; however, there are numerous factors that can limit retention, including but not limited to equipment capabilities. Specific image and/or audio files may be required to be kept for a longer period at the direction of the office of general counsel and/or YSU-PD.
 - (3) Recordings with information about a specific student are considered law enforcement records unless the university uses the recording for discipline purposes or makes the recording part of a student's education record.
 - (4) Requests to view or to receive recording files from persons not authorized to access the system will be reviewed by the office of general counsel and the YSU-PD. The files will be distributed in an appropriately secured method. A log shall be maintained by the YSU-PD indicating the date and time range of the files, camera views, and the identification of the person receiving the files.
 - (5) The recordings are considered security records under section 149.433 of the Revised Code because they are used to protect and maintain the security of the university. A record kept by a public office that is a security record is not a public record under section 149.43 of the Revised Code and is not subject to mandatory release or disclosure under that section. Any record requests, including subpoenas, will be directed to the office of general counsel for a response.
 - (6) Any documentation, written or electronic, which identifies the location of all cameras installed on campus are considered security records under section 149.433 of the Revised Code, because they

are used to protect and maintain the security of the university. A record kept by a public office that is a security record is not a public record under section 149.43 of the Revised Code and is not subject to mandatory release or disclosure under that section. Any record requests, including subpoenas, will be directed to the office of general counsel for a response. [Information/location of cameras/recording parameters is considered a security record.](#)

**RESOLUTION TO MODIFY
EMERGENCY RESPONSE POLICY, 3356-4-20**

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

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

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

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

**Board of Trustees Meeting
March 7, 2024
YR 2024-**

3356-4-20 **Emergency response.**

Responsible Division/Office: Office of the President
Responsible Officer: President
Revision History: September 2013; March 2019; [March 2024](#)
Board Committee: Institutional Engagement
Effective Date: ~~March 7, 2019~~ [March 7, 2024](#)
Next Review: ~~2024~~ [2029](#)

(A) Policy statement. In the event of an emergency, the president or designee are authorized to declare that an emergency situation exists and to invoke the university’s comprehensive emergency management plan.

(B) Definitions.

(1) “Emergency.” ~~“An”~~ - [an](#) event or condition that presents an imminent risk of death, serious injury, or illness to the university community, suspension or significant disruption of university operations, significant physical or environmental damage, or significantly affects the university’s financial well-being. Specific emergencies or classes of emergencies are listed in the university’s comprehensive emergency management plan.

(2) “Comprehensive emergency management plan.” ~~“A”~~ - [a](#) statement of policy and procedures regarding emergency management. It assigns tasks and responsibilities to university officials specifying, and in some cases redefining, their roles during specific emergency situations. The comprehensive emergency management plan (“~~plan~~”) is also the university’s published authoritative strategies and directives to prepare for, mitigate, respond to, and recover from actual or potential emergencies university-wide. The plan references second-level “departmental emergency operations plans” that prescribe changes in functional responsibilities and operations by and/or within that specific department during an emergency.

(C) Authorities and responsibilities.

- (1) Reacting to reported or predicted campus or environmental situations, the president or designee is authorized to declare that an emergency exists and to direct the implementation of the plan.
 - (2) The president or designee has the authority to invoke the full force of state and local laws and to exercise all necessary emergency authority to respond to any threat to lives and property and to restore normal university operations with minimal interruption.
 - (3) The plan may, depending upon the type of emergency, redefine authorities within the university during a specific emergency.
 - (4) With the declaration of a university emergency, all officers and essential personnel of the university are directed to undertake appropriate and rapid response to exercise the utmost diligence in the discharge of duties required of them for the duration of the emergency and to comply with all university emergency procedures, applicable regulations, as well as state and local laws. Work rules and associated compensation will be governed by applicable labor contracts and university policy.
 - (5) All members of the university community (including faculty, students, staff, and visitors) are required to comply with emergency procedures, to cooperate with university response personnel as well as with public officials and emergency service operatives in executing emergency plans, and to obey and comply with the lawful directions of properly identified officers.
 - (6) In response to a specific emergency, and depending on the circumstances, the president may direct each executive officer where to report.
 - (7) The university will plan and implement an annual emergency management training program for identified members of the university community.
- (D) Implementation.
- (1) The president directs that the university, led by the chief of university police and the director of environmental ~~and occupational~~ health and safety, shall create, maintain, and annually

update the university's comprehensive emergency management plan. The plan shall include, at a minimum, the following:

- (a) The common goal to maximize human safety and survival, minimize danger, preserve and protect property and critical infrastructure, provide for responsible communication with the university community and the general public during and after an emergency, and restore normal activities;
 - (b) Plans, and the associated use of university resources, to prevent or otherwise mitigate potential emergencies;
 - (c) The establishment of a university emergency planning and response team;
 - (d) Collaboration with local emergency management partners;
 - (e) An effective means of public emergency notification;
 - (f) Departmental level emergency operations planning, education, and training;
 - (g) Adoption of the national incident management system; and
 - (h) A university communication and education plan for emergency response.
- (2) The president will direct each executive officer to ensure their awareness of, and compliance with, this policy and with the plan and to further ensure that such awareness and compliance is promulgated throughout each of their respective divisions.

**RESOLUTION TO APPROVE
INTERFUND TRANSFERS**

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

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

NOW, THEREFORE, BE IT RESOLVED, that the Board of Trustees of Youngstown State University does hereby approve the transfer of funds, attached hereto.

**Board of Trustees Meeting
March 7, 2024
YR 2024-**



YOUNGSTOWN STATE UNIVERSITY
Interfund Transfers Requiring Board Approval
Transfers Outside of the Operating Budget
Requested Transfers for Third Quarter FY2024

FROM	TO	AMOUNT	REASON
Sick Leave Conversion Fund (Designated Fund)	Beeghly Center Renovation Gifts (Restricted Plant Fund)	\$705,500	Interest free interfund loan to provide bridge financing for Beeghly Center Bleacher Project. To be repaid with gift funds. Total project budget is \$1,800,500.

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

Revenue	Fiscal Year 2024		Actual as a % of Budget	Budget Indicator	Trend Indicator
	Budget	Actual			
Tuition and mandatory fees	\$ 90,121,431	\$ 85,357,663	94.7%	●	↑
Other tuition and fees	9,056,683	8,144,854	89.9%	●	↑
Student charges	1,162,200	628,324	54.1%	●	↔
State appropriations	48,514,162	24,445,210	50.4%	●	↑
Recovery of indirect costs	1,882,813	843,492	44.8%	●	↓
Investment income	2,207,859	1,791,935	81.2%	●	↑
Other income	854,852	546,840	64.0%	●	↑
Auxiliary enterprises	18,600,045	17,189,760	92.4%	●	↑
Total	\$ 172,400,045	\$ 138,948,078	80.6%	●	↑

● On/Above target

● Caution

● Warning

One-year trend: 3.9%

Expenses	Fiscal Year 2024		Actual as a % of Budget	Budget Indicator	Trend Indicator
	Budget	Actual			
Wages	\$ 82,477,693	\$ 38,776,508	47.0%	●	↑
Benefits	30,833,068	17,743,720	57.5%	●	↑
Scholarships	16,593,788	12,782,221	77.0%	●	↑
Operations	21,343,586	18,128,413	84.9%	●	↑
Plant & maintenance	15,173,440	6,879,551	45.3%	●	↑
Fixed asset purchases	1,796,313	428,520	23.9%	●	↑
Transfers	6,083,961	6,041,368	99.3%	●	↑
Total	\$ 174,301,849	\$ 100,780,301	57.8%	●	↑

● On/Below target

● Caution

● Warning

One-year trend: 8.5%

Student Center Renovation Project

Projected Costs and Funding Sources (draft, as of 2/29/2024)

Renovation Costs:

		<i>Notes</i>
Construction*	\$ 34,585,282	Construction slated for March 2025.
Architectural & Engineering fees	2,914,718	Under contract now with WTW and Strollo Architects.
Contingency	3,500,000	
Temporary relocations	2,900,000	Conservative estimate, options being explored.
	<u>\$ 43,900,000</u>	

**Includes construction and other related expenses: furniture, fixtures and equipment; branding; percent for the arts; moving and misc. expenses.*

Funding Sources:

OH capital appropriations	\$ 9,753,000	New FY25-26 appropriation pending in H.B. 2 (not final).
OH capital re-appropriations	3,153,591	Unused appropriations from prior capital biennia.
OH Strategic Community Funds	4,800,000	Special request pending.
Kilcawley & Housing Plant Reserves	1,521,612	Balance of inter-fund loan approved by the BOT in Dec. 2023.
Private gifts (cash received by Mar. 2025)	1,393,106	Add'l pledged gifts received in the future will help service debt.
Bonded indebtedness	23,278,691	Payback cost (principal + interest) is \$44.7 million over 30 years.
	<u>\$ 43,900,000</u>	

NOTE: All amounts are estimates for planning purposes and subject to change.

Debt Service Results (Current Interest Rates)



- Assuming current interest rates and a project fund of \$23.3 million, the University would recognize **\$44.7 million in additional debt service**

FYE (6/30)	Existing D/S	Proposed Series 2025			Aggregate D/S
		Principal	Interest	Total D/S	
2024	4,966,905	-	-	-	4,966,905
2025	6,851,211	-	316,337	316,337	7,167,548
2026	7,347,847	-	1,095,013	1,095,013	8,442,859
2027	7,401,848	-	1,095,013	1,095,013	8,496,860
2028	7,508,531	-	1,095,013	1,095,013	8,603,543
2029	7,601,043	-	1,095,013	1,095,013	8,696,055
2030	7,590,855	-	1,095,013	1,095,013	8,685,868
2031	5,590,019	410,000	1,084,763	1,494,763	7,084,781
2032	5,582,231	435,000	1,063,638	1,498,638	7,080,869
2033	5,579,763	455,000	1,041,388	1,496,388	7,076,150
2034	5,570,566	480,000	1,018,013	1,498,013	7,068,578
2035	356,400	505,000	993,388	1,498,388	1,854,788
2036	353,800	530,000	967,513	1,497,513	1,851,313
2037	355,700	555,000	940,388	1,495,388	1,851,088
2038	357,000	585,000	911,888	1,496,888	1,853,888
2039	-	615,000	881,888	1,496,888	1,496,888
2040	-	645,000	850,388	1,495,388	1,495,388
2041	-	680,000	817,263	1,497,263	1,497,263
2042	-	715,000	782,388	1,497,388	1,497,388
2043	-	750,000	745,763	1,495,763	1,495,763
2044	-	790,000	707,263	1,497,263	1,497,263
2045	-	830,000	666,763	1,496,763	1,496,763
2046	-	870,000	624,263	1,494,263	1,494,263
2047	-	915,000	579,638	1,494,638	1,494,638
2048	-	965,000	532,638	1,497,638	1,497,638
2049	-	1,015,000	483,138	1,498,138	1,498,138
2050	-	1,065,000	431,138	1,496,138	1,496,138
2051	-	1,120,000	375,113	1,495,113	1,495,113
2052	-	1,180,000	314,738	1,494,738	1,494,738
2053	-	1,245,000	251,081	1,496,081	1,496,081
2054	-	1,315,000	183,881	1,498,881	1,498,881
2055	-	1,385,000	113,006	1,498,006	1,498,006
2056	-	1,460,000	38,325	1,498,325	1,498,325
Total	73,013,717	21,515,000	23,191,043	44,706,043	117,719,760

Projects in Progress:

Campus Roof Replacements

YSU 2324-02

\$2M (Capital Funds) Prime AE Group, RJK Roofing

This project will replace sections of roofs on Cushwa Hall and the Edmund J. Salata Complex. The Salata Complex roof is complete, but replacement of the skylights on Cushwa Hall had to wait until the semester ended because of disruption to the building. Work is essentially complete. Only punch-list items remain.

Projects Out for Bids:

- Ward Beecher Planetarium Renovations – Bids Open February 21st
- Building Envelope Renovations – Bids Open February 28th

Projects at Controlling Board for Release of Funds:

- None at this time.

Request for Architect/Engineer Qualifications Advertisements:

- None at this time.

Projects in Development for 2024/2025:

Garfield Building Renovations Phase 1

YSU 2324-15

\$1.5M (Capital Funds) Prime AE Group

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

Emergency Generator Upgrades

YSU 2324-19

\$1M (Capital Funds) YSU Staff

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

Lyden House Elevator Renovation
YSU 2324-10

\$300k (Local Funds) Domokur Architects, Murphy Cont.

Upgrades and replacement of the elevator car and all associated equipment in Lyden House. This project was competitively bid and a contract is now being prepared. This project will commence in May of 2024.

Building Envelope Renovations
YSU 2324-01

\$1.7M (Capital Funds) Domokur Architects

Building exterior repairs to Beeghly Center and Maag Library. This project will bid in early 2024 and be complete by September 2024.

Student Center Renovation
YSU 2324-22

\$41M (Capital Funds/Local/Philanthropy) WTW Architects

We have started the design process, and the project is moving forward. We are looking to bid this project early in 2025 with a May 2025 construction start.

Ward Beecher Planetarium Renovations
YSU 2324-24

\$1.1M (Insurance) Prime AE Group

The roof, interior dome, and some electronic equipment will be renovated/replaced in this project. This project will bid in early 2024.

Building Exterior Doors and Windows
YSU 2324-29

\$1.75M (Capital Funds) YSU Staff

This project will address worn and damaged door and window systems on building exteriors across campus. This project will bid in early 2024 for a fall 2024 completion.

Additional Projects in Development:

- **Silvestri Hall Lower Level** – Renovation of the lower level of Silvestri Hall for Workforce Development.
- **Beeghly Center Seat Replacement** – Replacement of the seats within the Beeghly Center main gym.
- **Accessibility Services Relocation**

Youngstown State University

Gratitude Marker Gift Agreement

This Gratitude Marker Gift Agreement (“Agreement”), effective as of the date of _____ is made and entered into by and between DONOR NAME, whose address is DONOR ADDRESS (“Donor”) and Youngstown State University (“University”). In consideration of the mutual promises and benefits hereunder, the parties agree as follows:

1. Gift. In consideration of Donor’s gift of \$ _____ (“Gift”), Youngstown State University will acknowledge the Gift by placing a Gratitude Marker on campus at a mutually agreeable location in the vicinity of _____. It is understood and agreed to by Donor that the cost to purchase and install the Gratitude Marker will be satisfied from the Donor’s Gift funds. The University shall install the Gratitude Marker once it has received at least 50% of the Gift.

The Donor may request an area on campus for the Gratitude Marker to be located, however, Youngstown State University reserves the right in its sole discretion to select the specific location of the Gratitude Marker. In addition, the University reserves the right to relocate the Gratitude Marker to another area on campus. If the University decides to relocate the Gratitude Marker, the University shall work with the Donor, or the Donor’s designee, to determine another appropriate location for the Gratitude Marker.

Attached is a list of recommended words, phrases and logos that the Donor may consider in designing the Gratitude Marker. The Donor may also make other recommendations for the design of the Gratitude Marker. Youngstown State University reserves the right in its sole discretion to approve all designs, words, phrases, and logos on the Gratitude Marker.

2. Payment of the Gift. The Gift is an irrevocable pledge that will be paid to the Youngstown State University Foundation over a period of ____ years, according to the following payment schedule:

Payment of \$ _____ on (Date)

The Donor may accelerate the payment of any or all of the Gift at any time.

3. Termination of Agreement. Youngstown State University may terminate this Agreement and all rights and benefits of the Donor herein, including removing or renaming the Gratitude

Marker: (a) In the event of any default in payment of the Gift as provided in this Agreement; (b) In the unlikely event that Youngstown State University determines in its reasonable and good faith opinion that circumstances have changed such that the Gratitude Marker would adversely impact the reputation, image, mission, or integrity of Youngstown State University, or (c) At the end of the useful life of the Gratitude Marker, as reasonably determined by the University.

Upon any such termination of this Agreement, the University shall have no further obligation to the Donor and shall not be required to return any portion of the Gift already paid.

4. Damage of Gratitude Marker. If the Gratitude Marker is destroyed or severely damaged, the University shall work with the Donor, or the Donor's designee, to determine another appropriate form of recognition for the Gift.

5. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Ohio without regard to any conflict of laws principles.

ACCEPTED AND AGREED TO:

DONOR NAME

YOUNGSTOWN STATE UNIVERSITY

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Youngstown State University Gratitude Markers

Words *Including, but not limited to*

Tradition • Excellence • Education • Athletics • Academics • Knowledge • Service • Selflessness • Work Ethic
Talent • Curiosity • Grit • Industry • Graduate • Degree • Faculty • Research • Fraternity • Sorority • Student
Pride • Honor • The Arts • Loyalty • Discovery • Perverserance • Animus Liberatus • Persistence • Impact
Distinction • Dedication • Growth • Merit



THE CLIFFE COLLEGE
OF CREATIVE ARTS

EXCELLENCE

THE
BENNY FACTOR
FAMILY

TRADITION



SCHOOL OF SCIENCE,
TECHNOLOGY,
ENGINEERING,
MATHEMATICS

FORTITUDE

HAIL
TO
THEE
O'YOUNGSTOWN

LOYALTY

IN MEMORY OF
BENNY FACTOR

HONOR



CENTOFANTI
School of Nursing

SERVICE



YOUNGSTOWN STATE UNIVERSITY
FOUNDATION



YOUNGSTOWN
STATE
UNIVERSITY

Gratitude Markers



CONCEPT ART IS PROPERTY OF
BURKLAND MONUMENTS 2023

Friends and alumni can show their support to YSU and the YSU Foundation through scholarships, programs, colleges, or other areas of need all while commemorating the gift with a gratitude marker in an area of campus that is of the donor's choosing. Gratitude markers will recognize and celebrate a donor's commitment, dedication, and loyalty toward YSU while beautifying campus and instilling a sense of place, tradition, and legacy. Donors will have the ability to customize their gratitude marker to reflect their YSU journey.

\$1 MILLION MARKER

Specifications:

Height - 9 ft
Length - 48 in
Width - 48 in



\$500,000 MARKER

Specifications:

Height - 5.5 ft
Length - 34 in
Width - 34 in





YOUNGSTOWN STATE UNIVERSITY
Reportable Budget and Interfund Transfers
Quarter Ended December 31, 2023

BUDGET TRANSFERS WITHIN THE OPERATING BUDGET (i.e., General Fund and Auxiliaries):

FROM	TO	AMOUNT	REASON
Institution Wide Budget Reserve	Institution Wide General Insurance	\$300,000	To fund increased insurance costs.

TRANSFERS OUTSIDE OF THE OPERATING BUDGET:

FROM	TO	AMOUNT	REASON
Various Funds (Auxiliary Plant Funds)	Student Center - Project (Restricted Plant Fund)	\$1,886,059	Approved by Board in December 2023.
Various Funds (Designated and General Fund)	IT Security Firewall (Designated Fund)	\$560,763	Approved by Board in December 2023.
Student Center - Gifts (Restricted Plant Gift Fund)	Student Center - Project (Restricted Plant Fund)	\$1,028,660	Transfer to project fund.
Housing Service Plant Reserve (Auxiliary Plant Fund)	Housing Internet Upgrade (Auxiliary Plant Fund)	\$165,726	Transfer to project fund.

Youngstown State University
Fiscal Year 2024 Second Quarter Diversity Spend Report
October 1, 2023 through December 31, 2023

	FY2024				FY2023			
	2nd QTR	Percent of Addressable	YTD	Percent of Addressable	2nd QTR	Percent of Addressable	YTD	Percent of Addressable
Diversity Spend - Goods and Services (excludes EDGE and construction)								
MBE	\$ 329,155	5.43%	\$ 583,484	5.45%	\$ 184,251	3.78%	\$ 345,672	3.46%
Disability Challenged	-	-	-	-	159,830	3.28%	270,740	2.71%
Recycled Materials	-	-	-	-	-	-	-	-
Veteran Owned	19,495	0.32%	68,529	0.64%	22,439	0.46%	62,589	0.63%
Woman Owned	35,320	0.58%	42,603	0.40%	41,954	0.86%	68,693	0.69%
Total Diversity Spend	\$ 383,970	6.33%	\$ 694,616	6.48%	\$ 408,474	8.38%	\$ 747,694	7.49%
Total Addressable Spend - Goods and Services	\$ 6,064,120	100.00%	\$ 10,714,777	100.00%	\$ 4,872,949	100.00%	\$ 9,984,169	100.00%
EDGE Spend - Goods, Services, and Construction*								
EDGE	\$ 153,973	1.80%	\$ 322,949	2.05%	\$ 40,826	0.51%	\$ 190,636	1.12%
Total EDGE Spend	\$ 153,973	1.80%	\$ 322,949	2.05%	\$ 40,826	0.51%	\$ 190,636	1.12%
Total Addressable Spend - Goods, Services, and Construction	\$ 8,533,209	100.00%	\$ 15,748,495	100.00%	\$ 8,016,109	100.00%	\$ 17,056,187	100.00%

* Includes payments to subcontractors

Definitions:

MBE (Minority Business Enterprise): The MBE program is designed to assist minority businesses in obtaining state government contracts for goods and services. (Unlike the Encouraging Diversity, Growth and Equity program, the MBE program does not apply to construction contracts.) The State of Ohio developed the program because it recognized the need to encourage, nurture and support the growth of minority businesses to foster their development and increase the number of qualified competitors in the marketplace.

EDGE (Encouraging Diversity, Growth, and Equity Program): The EDGE program is designed to assist socially and economically disadvantaged businesses in obtaining state government contracts in the following areas: construction, architecture and engineering; professional services; goods and services; and information technology services. (In contrast to the Minority Business Enterprise program, the EDGE program does apply to construction contracts.) The State of Ohio developed the program because it recognizes the need to encourage, nurture, and support the growth of economically and socially disadvantaged businesses to foster their development and increase the number of qualified competitors in the marketplace.

Youngstown State University (YSU) does not discriminate on the basis of race, color, national origin, sex, sexual orientation, gender identity and/or expression, disability, age, religion or veteran/military status in its programs or activities. Please visit YSU's Commitment to Accessibility webpage for contact information for persons designated to handle questions about this policy.

Youngstown State University
Diversity Spend Detail Report - Goods and Services
(excludes EDGE and construction)
October 1, 2023 through December 31, 2023

Minority Business Enterprise (MBE)			
Name	Address	Type of Contract	Purchases
AG PrintPromo Solutions	540 Graham Road, Cuyahoga Falls, Ohio 44221	Printing Services	\$ 2,728
Brown Enterprise Solutions	5935 Wilcox Place, Suite E, Dublin, Ohio 43016	Computer Supplies	301,215
Brown Enterprise Solutions/Staples - Tier 2	5935 Wilcox Place, Suite E, Dublin, Ohio 43016	Office Supplies	11,119
CDW Government Inc - Tier 2	230 N Milwaukee Ave, Vernon Hills, Illinois 60061	Computer & Audio/Visual Equipment	11,200
Consolidus, LLC - Tier 2	526 S Main St STE 804, Akron, Ohio 44311	Office & Promotional Supplies	722
Amazon - Tier 2	PO Box 81207, Seattle, Washington 98108-1207	Miscellaneous Supplies	2,171
	Subtotal - MBE		\$ 329,155
Disability Challenged			
Name	Address	Type of Contract	Purchases
N/A			\$ -
	Subtotal - Disability Challenged		\$ -
Recycled Materials			
Name	Address	Type of Contract	Purchases
N/A	-	-	\$ -
	Subtotal - Recycled Materials		\$ -
Veteran Owned			
Name	Address	Type of Contract	Purchases
Amazon - Tier 2	PO Box 81207, Seattle, Washington 98108-1207	Miscellaneous Supplies	\$ 143
NPI Audio Visual	26500 Renaissance Parkway, Cleveland, Ohio 44128	Audio Visual Equipment	17,995
Protech-N-Shred	P.O. Box 85, Cortland, Ohio 44410	Document Shredding	1,357
	Subtotal - Veteran Owned		\$ 19,495
Woman Owned			
Name	Address	Type of Contract	Purchases
Amazon - Tier 2	PO Box 81207, Seattle, Washington 98108-1207	Miscellaneous Supplies	\$ 898
Brown Enterprise Solutions/Staples - Tier 2	5935 Wilcox Place, Suite E, Dublin, Ohio 43016	Office Supplies	431
CDW Government Inc - Tier 2	230 N Milwaukee Ave, Vernon Hills, Illinois 60061	Computer & Audio/Visual Equipment	6,400
Roar Postal Supplies & Solutions	10600 W. 108th Terrace, Overland Park, Kansas 66210	Postal Supplies	329
Ryan Carpet Sales & Services Inc.	70 Victoria Road, Austintown, Ohio 44515	Flooring	24,165
School Health Corporation	5600 Apollo Drive, Rolling Meadows, Illinois 60008	Exercise Equipment	74
The Workroom	8782 Chesterton Drive, Poland, Ohio 44514	Window Coverings	2,095
Consolidus, LLC - Tier 2	526 S Main St STE 804, Akron, Ohio 44311	Office & Promotional Supplies	398
Union Eyes Optical Inc.	Suite B, 229 Churchill Hubbard Road, Youngstown, Ohio 44505	Public Safety Supplies	530
	Subtotal - Woman Owned		\$ 35,320
	Total Diversity Spend		\$ 383,970

Youngstown State University
EDGE Spend Detail Report
October 1, 2023 through December 31, 2023

Encouraging Diversity, Growth, and Equity (EDGE)

	Address	Project	Purchases
Murphy Contracting Company *Contractor Connection Inc.	1828 Perry Drive SW, Canton, Ohio 44706	Moser Hall Renovations-Phase 2	\$ 49,500.00
Western Reserve Mechanical	3041 South Main St., Niles, Ohio 44446	Repairs and Maintenance-Non Construction	104,473
	Total EDGE Spend		\$ 153,973

*EDGE subcontractors



Division of Workforce Education & Innovation

Youngstown State University



GOAL: CONDUCT AND SUPPORT RESEARCH THAT PROVIDES RELEVANT AND MEANINGFUL EDUCATIONAL EXPERIENCES FOR STUDENTS AND FACULTY THAT ADDS VALUE TO AREA CITIZENS AND REGIONAL PARTNERS

Strategy: Identify areas of research, service, and scholarship, in alignment with the Excellence Training Center (ETC) at Kohli Hall, that focus on teaching and life-long learning and mutually beneficial community engagement



Sokolov Honors College

Amy Cossentino
*Associate Provost/Dean
Honors College*

Eileen Esposito
*Academic
Operations Specialist*

Mollie Hartup
Director

Elizabeth Cianciola
Director

Sybil Daniels
*Academic Operations
Specialist*

Johnny Ware
Asst Director

Carrie Clyde
Asst Director

Kalie Davies-Anderson
*Program Coordinator –
Grants & Evaluations*

Melissa Chizmar
Program Coordinator

Tressel Institute for Leadership & Teamwork (endowment funded)

Jenna Binsely
Associate Director

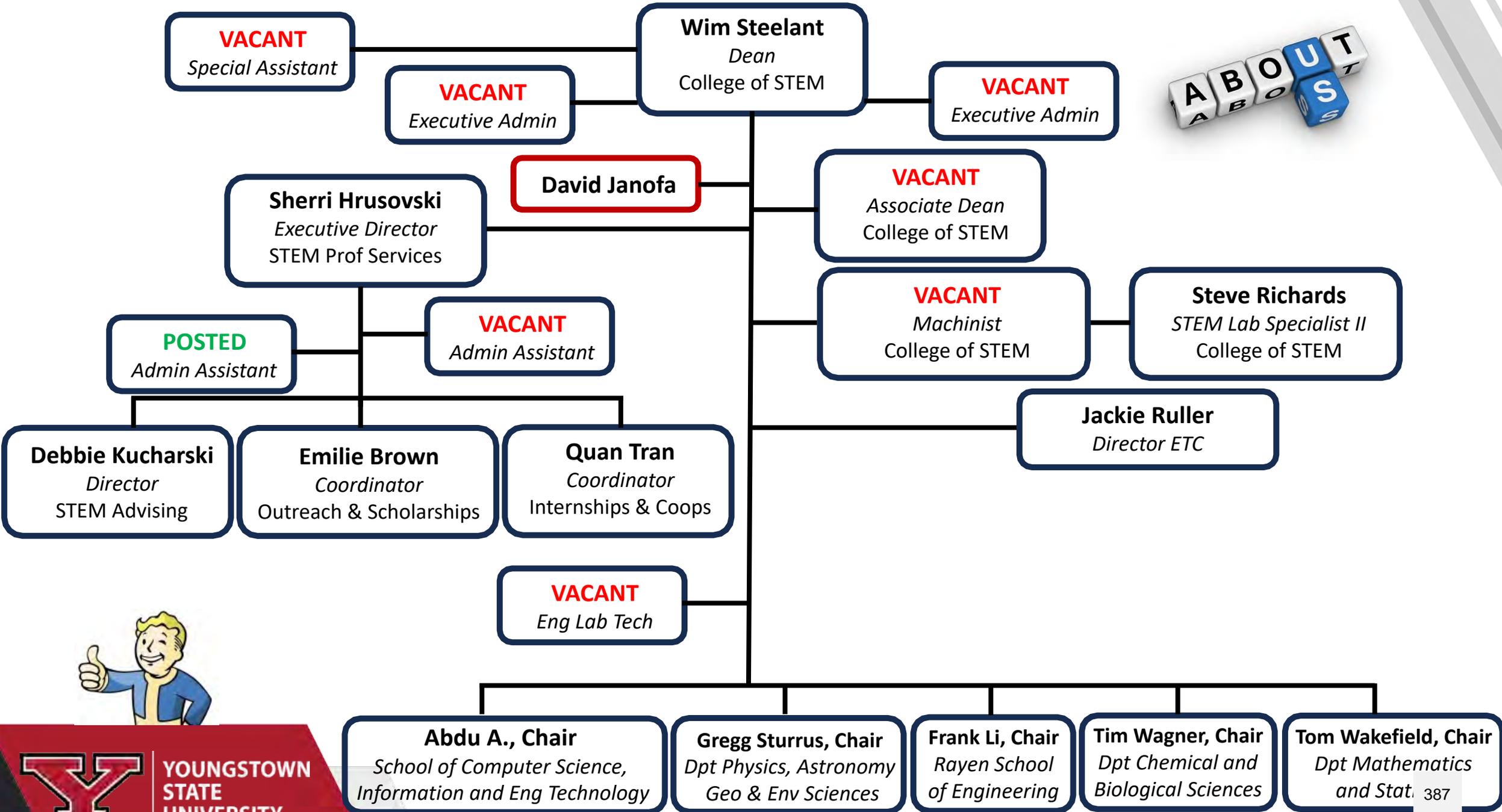
Nine Academic Leaders

Office of Community Engagement (all grant funded)

Presley Bowser
Assistant Director

Andrea Tharp
*Assistant Director
0.5 FTE*

Levi Smith
*Budget Admin,
Finance & Operations*





VACANT
Special Assistant

VACANT
Executive Admin

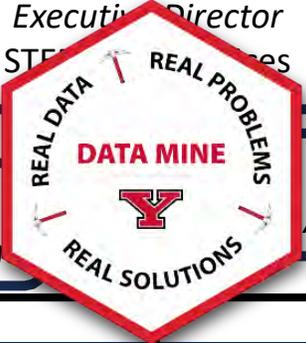
Wim Steelant
Dean
College of STEM

VACANT
Executive Admin

Sherri Hrusovski
Executive Director
STEM Initiatives

David Janofa

VACANT
Associate Dean
College of STEM



POSTED
Admin Assistant

VACANT
Admin Assistant

VACANT
Machinist
College of STEM

Steve Richards
STEM Lab Specialist II
College of STEM

Debbie Kucharski
Director
STEM Advising

Emilie Brown
Coordinator
Outreach & Scholarships

Quan Tran
Coordinator
Internships & Coops

Jackie Ruller
Director ETC
WEI



VACANT
Eng Lab Tech



Abdu A., Chair
School of Computer Science,
Information and Eng Technology

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