



2017/18 Appropriations Request



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March 2017

***Pennsylvania's State System of Higher Education:
Serving the Commonwealth Today and into the Future
Fiscal Year 2017/18 Appropriations Request***

Table of Contents

Overview	1
2017/18 Appropriations Request	5
2017/18 Governor's Budget Recommendation	9
2017/18 Line Item Appropriation Request for Cheyney University of Pennsylvania's Keystone Academy (Supported by a General Fund Appropriation to PHEAA)	10
 Appendix A	
Mission Statement	A-1
Summary of Sources and Uses FY 2016/17 Educational and General Budget	A-2
Summary of Educational and General (E&G) Budget	A-3
PHEAA Appropriation for Cheyney Keystone Academy	A-4
Academic Program Data and Total Degrees Awarded 2006/07 through 2015/16	A-5
Fall Applications, Acceptances, and Enrollments of First-Time Freshmen of Pennsylvania Residents, by Race	A-6
 Appendix B	
Meeting the Needs of the Commonwealth and its Learners	B-1
Academic Program and Policy Review and Alignment; New Degree Programs	B-2
Investing in Student Success, Campus Safety	B-3
Enrollment and Degrees Awarded; History of Fall Headcount Enrollment	B-4
Fall Headcount Enrollment by University, 2007-16	B-5
Fall 2016 Enrollment Demographics	B-6
Students and Alumni by Pennsylvania County, Fall 2016	B-7
Fall Headcount Enrollment, Number of Degrees Conferred in Top Five Areas of Study	B-8
Projected Percent Change in the Number of High School Graduates, by County, 2015-2025	B-9
New Fall Undergraduate Transfer Students	B-10
E&G Appropriation vs. Tuition and Fees, 1983/84 to 2016/17; History of Total State Appropriations	B-11
History of E&G Revenue and Expenditures/FTE Student 1983/84 Through 2015/16	B-12
History of State Appropriations and Tuition Rates	B-13
Flexible Pricing Pilots	B-14
State Funding of Higher Education: 1-, 5-Year Change	B-15
Cost of Attendance and Net Price, Fall 2014 First-time, Full-time Freshmen	B-16
PHEAA State Grant Awards, All Undergraduate Programs	B-17
Educational and General Facilities Highlights	B-18
Energy Cost Savings	B-19
Employee Demographics; Retirements by Fiscal Year	B-20
Impact of Projected Employer Retirement Contribution Rates; Enrollment in Retirement Plans	B-21
Healthcare Premiums	B-22
Dixon University Center Actual Annualized FTE Employees and Current Year Budget	B-23
Programs and Services for Military Members and Veterans	B-24
2012-17 Performance Funding Program	B-25

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Pennsylvania's State System of Higher Education: *Serving the Commonwealth today and into the future*

More than three decades ago, the 14 universities that comprise Pennsylvania's State System of Higher Education came together under one mission: provide students a high-quality education at an exceptional value. Thirty-four years later, that mission hasn't changed.

Today, as has been true throughout the System's history, the vast majority of the more than 105,000 degree-seeking students who attend these universities—nearly 90 percent—are Pennsylvania residents. Most will remain here after they graduate, to live, to work, and to raise their families. They are, in a very real sense, Pennsylvania's future.

The funding the Commonwealth provides to the State System each year represents an important investment in that future—one that generates not only an immediate high rate of return, but also produces long-term benefits for Pennsylvania. Two simple facts bear this out:

- The most recent economic and employment impact study conducted on behalf of the universities found that the State System produces nearly \$11 of economic activity for every \$1 invested by the Commonwealth through the annual appropriation. The State System and its universities are responsible for an estimated 62,000 jobs across Pennsylvania, in addition to the more than 13,000 employees within the System itself.

- More than half a million State System university alumni live in Pennsylvania. They are business owners, healthcare workers, and teachers; graphic designers, computer specialists, and engineers. They are community and civic leaders. They are the very foundation of Pennsylvania's economy.

The State System is proud of what its talented faculty, staff, students, and alumni do for the Commonwealth every day; and is equally grateful for the support state taxpayers provide to help make it possible for each of the universities to achieve its mission.

FINANCIAL CHALLENGES

But, to be brutally honest, the State System is in crisis. Never before in its history, or, perhaps even in the much longer histories of the individual universities, has the System faced such serious fiscal challenges.

From a funding standpoint, the State System today is receiving about the same level of funding from the state as it did in 1999, not even adjusting for inflation. The national recession, which began in early 2008 and still has a lingering effect here in the Commonwealth, deeply affected the State System, as it did public university systems across the United States.

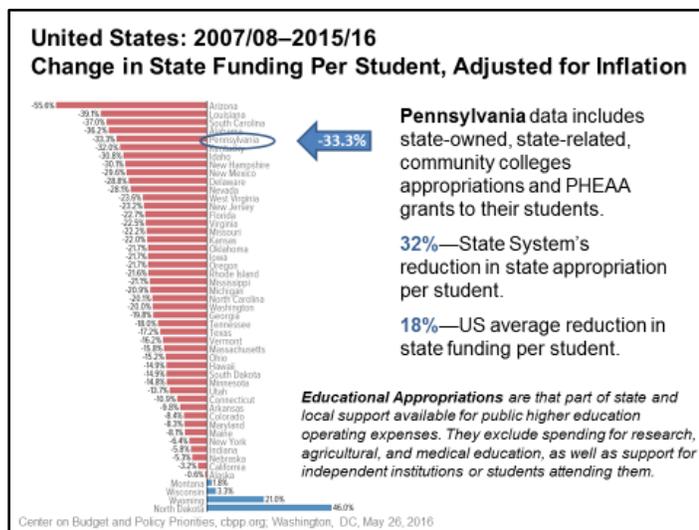
Nationally, states reduced funding to higher education by a combined nearly \$3 billion during the recession. Not until the last several years have states' economies recovered enough that they could begin to restore some of those reductions.

Here in Pennsylvania, the recovery has taken longer. It wasn't until the last two years that the Commonwealth was able to begin to reinvest in the State System and in higher education in general, including the community colleges, state-related universities, independent institutions, and the Pennsylvania Higher Education Assistance Agency (PHEAA). Everyone associated with the State System is grateful for that new investment.

Even with two consecutive years of increases in its appropriation, however, the current year's funding level leaves the System \$60 million below its pre-recession high.

Additionally, the universities have seen their combined enrollments decline for six straight years—by almost 13 percent since fall 2010—primarily the result of the steadily declining number of high school graduates in the state. With such a large percentage of State System students being Pennsylvania residents—as is appropriate, being that it is the Commonwealth's public university system—and most being “traditional” students between the ages of 18 and 25 who enroll in college right out of high school, most of the universities have been affected by this downward trend.

The twin effects of lagging state support and declining enrollments have combined to challenge the finances of many of the institutions. Even so, the Board of Governors has held strong to its commitment to maintain affordable tuition. The Board has been able to limit price increases to students through aggressive



cost management practices as the universities have become more efficient in their day-to-day operations.

PREPARING FOR THE FUTURE

To ensure the System will thrive in the future, the universities will need the continued support of the Commonwealth and its taxpayers. Simply providing more money, however, will not solve the challenges facing the universities.

Change is inevitable, as difficult as it might be. The System must look deep within itself—at the way the universities operate and the way they are organized—to determine what the System, collectively, should look like and how it should be positioned in the future in order to best serve students and the Commonwealth.

Under the direction of the Board of Governors, the State System is conducting a strategic system review, an in-depth, top-to-bottom examination of virtually everything it does—asking the difficult questions; leaving no stone unturned. Much of the background work already has been done; the deeper analysis will begin shortly.

Despite the myriad of challenges facing the entire System, all of those associated with

it—and others who believe in the value of public higher education in the Commonwealth—must embrace this review as an opportunity, not just to help ensure the System’s future, but to help make that future even brighter. It’s not just about managing the current challenges, but making certain that the universities are doing their very best to serve students, their future employers, and the entire Commonwealth—community by community, region by region.

There is no doubt the System and its universities serve Pennsylvania and its citizenry well. The funding the System receives from the Commonwealth each year represents an important investment in that citizenry—one that yields an extremely high rate of return, as mentioned earlier.

ANTICIPATING THE COMMONWEALTH’S NEEDS

The universities already work continually with employers in their regions and beyond to help ensure the programs they offer are relevant in today’s economic environment, and that they are meeting the state’s educational and workforce needs. Nothing demonstrates the System’s commitment to this effort more than the recent work with the Georgetown University Center on Education and the Workforce.

This three-pronged project began with a detailed study that demonstrated the increasing importance of college graduates in the state’s workforce and highlighted the significant role the State System universities play in supporting that workforce. The second component included a series of reports that commented on the state of the workforce, including industry, jobs, and socio-economic indicators for Pennsylvania and its regions.

The final piece of the package involved a series of even more detailed studies that divided the state into five regions and

provided a variety of key data for each, including each area’s population, unemployment and poverty rates, educational attainment level, employment level, and projected job growth by industry and occupation. The universities will be able to use the projections, as well as information included in an accompanying supply/demand “gap analysis,” as they plan their future academic offerings, while students will be able to use them to identify majors with the greatest potential for career success.

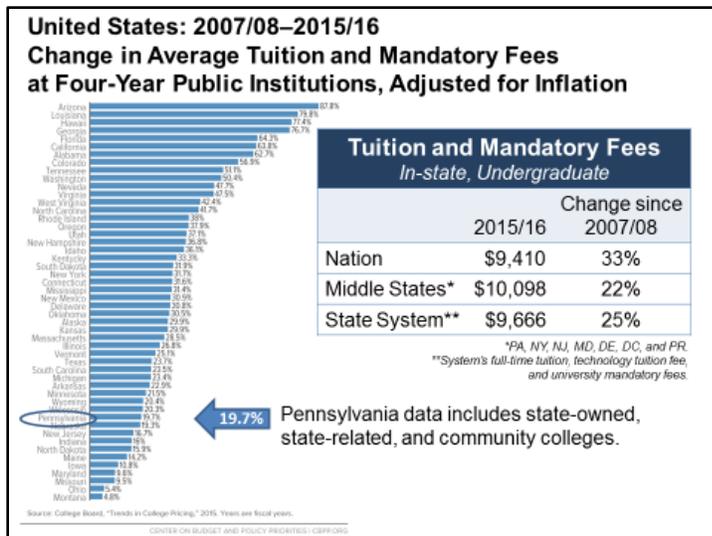
The most recently completed study found that new job growth combined with the need to replace workers who will retire or otherwise leave the workforce will create nearly 1 million skilled job openings in the state through 2024. Those occupations where the demand will be highest will include accountants and auditors, registered nurses, computer systems analysts, and general and operations managers.

This information will assist not only the State System universities as they plan their academic programming, but also will benefit economic development agencies and other entities throughout the Commonwealth as they seek to address a variety of workforce-related issues.

These are the kinds of contributions the State System makes to the Commonwealth every day, but that are becoming more difficult because of the enormous fiscal challenges with which the universities constantly struggle. The effects at the campus level have been dramatic.

MAKING ENDS MEET

Because of budget shortfalls, the universities have been required to make nearly \$325 million in combined budget reductions over the last dozen years. There are some 1,000 fewer permanent employees working at the universities today than there were just seven years ago.



At least in part because of its commitment to controlling and even reducing many of its operating costs, the State System has been able to limit annual tuition increases for nearly a decade. In most recent years, those increases have been kept to about the rate of inflation. This, in turn, has enabled the State System universities to keep their total price of attendance—combined tuition, fees, room, and board—at about the national average for all four-year public colleges and universities and significantly below the median in the Middle States region, according to the College Board’s most recent annual survey of college costs.

A combination of spending cuts and cost savings resulting from a variety of strategies, including strategic sourcing, energy management, automating processes and services, deferring maintenance, realigning programs, and sharing administrative services, achieved the budget reductions.

A recent external review indicated the State System is a national leader in providing cost-effective, quality, shared services for its universities. While the sharing of services already has produced millions of dollars in annual savings across the State System, the universities are continuing their efforts to identify even more ways to save through collaboration and individually.

All of the efforts mentioned above will continue, but a significantly greater investment by the Commonwealth is required in order for the Board of Governors to continue to hold down the cost of tuition in the future while providing an excellent educational experience for students.

Accordingly, the Board of Governors on October 9, 2016, approved a 2017/18 appropriation request of \$505.2 million, an increase of \$61 million. That request partially accounts for increased personnel costs that will result from recent agreements reached among the Commonwealth and the State System and their various labor unions. A review of the State System revenue and cost projections follows.

2017/18 Appropriations Request for Pennsylvania's State System of Higher Education *Educational and General (E&G) Budget Overview*

Today, Pennsylvania's State System of Higher Education (State System) is receiving a state appropriation of \$444.2 million. For the past two years, the Commonwealth's budget has provided the State System with increased appropriations of \$20.7 million (5.0 percent) and \$10.8 million (2.5 percent), respectively, following seven years of reduced or stagnant appropriations. The State System is appreciative of the increased support provided by the General Assembly and Governor Wolf, and acknowledges the continued fiscal challenges facing the Commonwealth.



The state appropriation funds about 27 percent of the System's Educational and General (E&G) budget, with tuition and fees funding most of the remaining 73 percent. Most System universities are continuing to experience enrollment declines, which will have a corresponding adverse effect on tuition and fee revenues. At the same time, mandatory expenditure requirements are expected to continue to increase. The System's fiscal emphasis is on addressing the structural gap between revenues and expenses through strategic business model changes to ensure financial sustainability and relevancy of academic programs.

System universities are facing a 2016/17 System-wide budgetary gap of approximately \$40 million, resulting from mandatory cost increases that exceeded available revenue. This continues recent years' trends of mandatory expenditure requirements eclipsing annual revenue, which has resulted in the universities eliminating an estimated \$325 million in base budget costs over the last 12 years. The universities continue to look for

additional ways to streamline their administrative processes and academic offerings; to strategically redirect resources; to implement efficiency initiatives; and to aggressively manage physical, financial, and human resources.

In addition to the targeted cost savings mentioned above, universities continually reinvest existing resources into new and higher priority strategic areas. This year alone, universities reinvested more than \$58 million into high-need areas, such as implementation of new academic programs, strategic enrollment management, student success and affordability, instructional technology expansion and campus-wide technology upgrades, distance education, and academic facilities renovation. These efforts are essential to ensure the continued alignment of academic programs with workforce needs while attracting, retaining, and graduating students of diverse backgrounds, serving them through various delivery modalities and student-focused learning.

The 2017/18 E&G budget reflects the following adjustments:

Enrollment

Fall 2016 enrollment statistics indicate a continuing enrollment decline at all but four System universities, resulting in an overall enrollment of almost 97,700 full-time equivalent (FTE) students, which is a reduction of approximately 2,200, or 2.2 percent. The general economic environment and declining number of high school graduates in the state are contributing factors. System-wide budget estimates for 2017/18 project relatively level overall enrollment next year. However, enrollment projections vary significantly by university; five universities anticipate their enrollment will continue to decline, while four project more students.

Employee Complement

The System has worked diligently in recent years to manage its human resources, filling only essential positions as they become vacant. With annual workforce cost increases outpacing anticipated revenue increases, the System continues to work to ensure the proper alignment of human and fiscal resources with the strategic directions and operational responsibilities of the System to meet the needs of students and the Commonwealth. Through a combination of retirements, voluntary separations, and furloughs, the System has approximately 1,000 fewer permanent employees today than seven years ago (fall 2009).

Given the combined impact of the fiscal climate, enrollment reductions, and the ongoing need to address program relevancy, universities continually evaluate workforce needs. Any potential complement adjustments typically are excluded from appropriation request estimates, as universities are at various stages in the planning process. In some cases, compensation estimates have

been reduced to reflect this commitment to workforce reduction; in other cases, universities continue to reflect Planned Use of Carryforward as a placeholder until university plans have been finalized.

Anticipated Revenue

State Appropriation—The state appropriation reflects the State System's request for \$505.2 million, an increase of \$61.0 million, or 13.7 percent.

Augmentation—University revenues collected in the Educational and General fund include tuition, fees, and other miscellaneous revenue sources (e.g., grants, gifts, sales and services, and investment income). Assuming relatively level System enrollment, and the one-time nature of miscellaneous revenue sources, revenues are projected to remain relatively flat.

Planned Use of Carryforward is another source of augmentation funds used in the Educational and General budget. Funds carried over from prior years are used to fund new academic program implementation, major equipment purchases and upgrades, facilities improvements, transitions through demographic changes, and—in 2016/17—to meet mid-year cost increases in new collective bargaining agreements. A reduction is projected in the use of these funds in 2017/18, supported by a corresponding anticipated reduction in expenditures through sustainable restructuring, completion of one-time capital projects and academic initiatives, and anticipated funding to address new collective bargaining agreements.

Anticipated Expenditures

Personnel

Salaries—State System universities operate in a competitive environment for faculty and staff. In order to continue to recruit and retain a talented workforce, pay increases associated with new agreements and anticipated adjustments for all employee groups have been addressed in the 2016/17 and 2017/18 estimates. Compensation for 2017/18 also incorporates an increase of 38 FTE, mostly faculty related to projected increases in enrollment and the start of new academic programs. These combined changes generate an estimated increase in employee salaries and wages of \$20 million in 2017/18, and contribute to the 2016/17 increase in salaries and wages of \$26.5 million. These pay adjustments also generate a corresponding fiscal impact on social security and retirement benefit costs.

Employee Benefits—Two of the System's primary cost drivers for 2017/18 continue to be retirement and healthcare costs. Overall, employee benefits expenditures are expected to increase \$16.8 million, or 4 percent.

The two primary Commonwealth pension programs—State Employees' Retirement System (SERS) and Public School Employees' Retirement System (PSERS)—continue to experience financial stress that is resulting in significant rate increases, as employers are required to make larger contributions. Approximately half

of the System's employees have chosen SERS or PSERS as their retirement vehicle. In accordance with Commonwealth budget guidelines, the most common SERS employer contribution rate is projected to increase from 30 percent of salaries to almost 33 percent of salaries, or an increase of 9 percent. PSERS rates are expected to increase 7 percent. Retirement rates associated with the alternative retirement programs remain the same, although retirement and Social Security costs increase as salaries and wages increase. The combined fiscal impact of pension rate changes alone will cost the System an additional \$8.3 million in 2017/18.

Of those employees who receive health benefits, approximately 65 percent are enrolled in the System's healthcare program. The employer share of healthcare costs for active and annuitant employees within the System-managed programs is expected to increase an average of 6 percent next year for employees and 2 percent for retirees, based upon a combination of national trends, the System's healthcare experience, participation in the wellness program, and the anticipated change in complement. These estimates also include additional costs required by federal healthcare reform. The remaining 35 percent of System employees receive healthcare coverage through the Pennsylvania Employees Benefit Trust Fund (PEBTF). The Commonwealth budget guidelines include a 4 percent increase in the 2017/18

employer contribution rates for employees and a 5 percent increase for retiree healthcare. Combined healthcare costs are anticipated to increase \$9.4 million, or 5 percent.

Operating

Student Financial Aid—Given the growing emphasis on affordability, retention, enrollment management, and the net price to the student, E&G expenditures for student financial aid have increased in recent years and continue to do so. Significant growth in the use of institutional unrestricted resources for student aid is reflected in 2016/17, corresponding with the recent flexibility provided by the Board of Governors and expectations regarding affordability and pricing. E&G student aid expenditures in 2017/18 are expected to grow \$1.9 million, or 4 percent, to almost \$51 million, representing a 22 percent increase over two years in university-funded assistance going directly to students and their families.

All Other Basic Operating Expenditures—Given the current fiscal environment, universities continue to limit nonmandatory spending. Therefore, anticipated expenditures for all other services, supplies, utilities, and materials are projected to decrease approximately \$2 million, or 1 percent.

Capital Expenditures and Transfers—Capital expenditures and transfers, which represent the universities' investment in their physical resources from the E&G

budget, are projected to decrease by \$7.0 million, or 9 percent, as one-time capital projects and academic initiatives were completed the prior year.

As described above, the System's anticipated 2017/18 expenditure requirements are driven primarily by known and anticipated mandatory cost increases in salaries and wages, pension programs, and healthcare costs. Assuming no change in the System's E&G appropriation or tuition rates, the System-wide expenditure requirements, combined with university revenue adjustments, result in a 2017/18 budget requirement of \$79.1 million.

E&G Appropriation

Additional support from the Commonwealth is critical to the continued success of Pennsylvania's public universities and the students they serve. A \$61.0 million increase in the State System's E&G appropriation would ensure continued access to and affordability of a high-quality education for the citizens of the Commonwealth. Funding at this level would allow the Board of Governors to hold down the cost of tuition while providing an excellent educational experience for students.

The cost of providing a college education will continue to rise, even with aggressive management of those rising costs. A greater investment from the Commonwealth in its public universities will lead to greater affordability and cost predictability for Pennsylvania students and their families.

Pennsylvania traditionally has ranked low in its funding of students in public higher education, even with its commitment to state-funded financial aid. The most recent national data (2015) indicates state funding per student at public universities averages \$6,966 per year. This year's average State System appropriation per student is \$4,548, or 35 percent below the national average. A commitment from the Commonwealth to

increase its investment in State System students by \$61.0 million would increase this funding per student to over \$5,100, moving the System closer to the national average. Doing so would mitigate the economic risk for families and students attempting to attain a college education, while ensuring the availability of a strong, educated work force for Pennsylvania.

Funding of the System's 2017/18 budget requirements is essential for continued

progress toward meeting these expectations and ensuring a high-quality, affordable education for the coming year and for years to come. A funding commitment at this level from the Commonwealth for its students at state-owned universities will facilitate making the fundamental changes that are both necessary and largely inevitable to reposition Pennsylvania's public university system for the 21st century.

2017/18 Governor's Budget Recommendation

The Governor's budget for 2017/18 recommends the State System receive an E&G appropriation of \$453.1 million, an increase of \$8.9 million, or 2 percent from the current fiscal year. The System is grateful for the increased funding recommended by Governor Wolf—especially at a time when the Commonwealth is facing significant challenges—and is appreciative that both the Governor and the General Assembly recognize the immense value of the State System and continue to support its universities and students. This support represents an important investment in Pennsylvania's future, one that pays huge dividends for the entire Commonwealth.

The System's budget request of \$505.2 million reflects a new funding requirement of \$79 million. The Board of Governors in October requested a \$61 million increase in the System's state appropriation. If the System were to receive the Governor's recommended appropriation increase of \$8.9 million, the remaining budget gap would be approximately \$70 million. The Governor's recommended appropriation level, in total, is \$52.1 million less than requested, resulting in significant

outstanding revenue requirements for 2017/18.

Additional support from the Commonwealth is critical to helping to ensure that Pennsylvania's public universities can continue to serve the needs of students, their future employers and the entire Commonwealth. The State System is committed to providing a high-quality education that is affordable to students. *(See Appendix A-3.)*

The Governor's budget also includes continued funding for deferred maintenance provided through the Keystone Recreation, Park and Conservation Fund (Key '93). This funding source, allocated from realty transfer tax revenue, was established in 1993 specifically to help address the System's \$1.7 billion deferred maintenance backlog in academic facilities. The Governor's budget estimates the System's allocation of Key '93 funds will increase by \$1.1 million to a total of \$17.1 million next year. Although relatively small in comparison to the deferred maintenance backlog, these funds are an integral component of each university's facility management plan. *(See Appendix B-18.)*

2017/18 Line Item Appropriation Request for Cheyney University of Pennsylvania's Keystone Honors Academy (Supported by a General Fund Appropriation to PHEAA)

The Cheyney University Keystone Honors Academy is an initiative developed by the State System in collaboration with the Commonwealth of Pennsylvania and the Pennsylvania Department of Education and in partnership with the U.S. Department of Education's Office of Civil Rights. The intent was to provide continuing support for the Academy and to provide scholarships for approximately 200 honor students. The current appropriation of \$1.8 million funds approximately 75 to 100 student scholarships annually and provides for limited programmatic support.

The Keystone Academy is a structured living and learning community for high-achieving students, many of whom are first-generation college students. Students learn leadership skills by serving as tutors, resident assistants, and leaders of campus clubs and organizations. The Academy also provides students with cultural and intellectual programming.

The Keystone Academy is a proven success in attracting, retaining, and graduating high-achieving Pennsylvania students. According to the most recent data available, 63 percent of Keystone Honors students graduate in four years; 60 percent of Keystone Academy graduates have gone on to graduate school.

The State System collaborates with the Pennsylvania Higher Education Assistance Agency (PHEAA) for the funding of the Academy and its scholarship program. The scholarship program provides students, who are Pennsylvania residents, with last-dollar scholarships to cover the cost of tuition, fees, room, board, and a one-time distribution of a laptop computer. The scholarships are for a maximum of eight

semesters for freshmen and prorated for transfer students. A limited portion of funding is used to support the administration of the program, to include programming mentioned above.

Cheyney University's investment plan for the future envisions increasing the number of high-achieving students by maximizing the use of existing cornerstones such as the Keystone Honors Academy.

On behalf of the System, PHEAA requested a \$3.5 million 2017/18 appropriation for the Cheyney Keystone Academy to provide access and opportunity to twice as many Pennsylvania residents than are currently served through this program. The funds would provide additional scholarships and continued enhancements to the academic and extracurricular environment for these students who would not otherwise be able to attend Cheyney University. The Keystone Academy and its last-dollar scholarship program are vital to the current and future students of Cheyney University and the Commonwealth at large.

The Governor's recommended funding provides level state appropriations for this program at \$1.8 million, but includes a recommended augmentation from PHEAA of an additional \$500,000. Funding assistance from PHEAA would be a welcome investment to Cheyney University and its Keystone Honors Program. If received, the university will use the additional resources to improve university recruitment, retention, and enrollment management, while increasing the number of Keystone Honors scholarship recipients. (See Appendix A-4.)

Appendix A

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Appendix A-1

Pennsylvania's State System of Higher Education Mission Statement

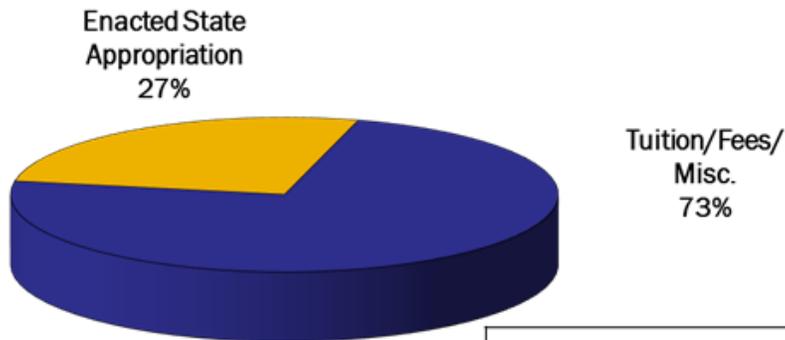
"The State System of Higher Education shall be part of the Commonwealth's system of higher education. Its purpose shall be to provide high quality education at the lowest possible cost to students. The primary mission of the System is the provision of instruction for undergraduate and graduate students to and beyond the master's degree in the liberal arts and sciences and in applied fields, including the teaching profession."

Act 188 of 1982

Appendix A-2

Pennsylvania's State System of Higher Education Summary of Sources and Uses FY 2016/17 Educational and General Budget

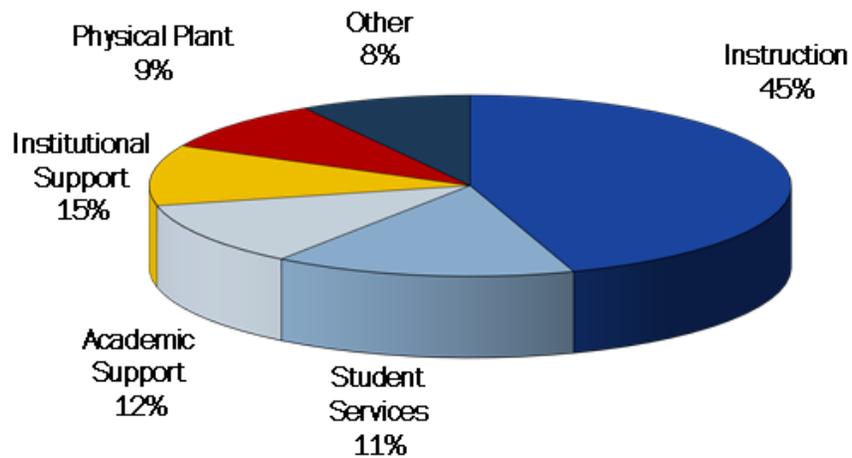
Sources



<u>Sources of Revenue</u>	<u>(\$000)</u>
Enacted State Appropriation	\$444,224
Tuition/Fees/Misc.	1,227,194
Total	\$1,671,418

<u>Uses of Revenue</u>	<u>(\$000)</u>
Instruction	\$748,598
Institutional Support	253,928
Academic Support	191,224
Student Services	180,915
Physical Plant	152,284
Other*	144,468
Total	\$1,671,418

Uses



*Includes financial aid, debt service for academic facilities, research, and public service

Appendix A-3

**Pennsylvania's State System of Higher Education
Summary of Educational and General (E&G) Budget**

(Dollar Amounts in Thousands)

	Actual 2015/16	Current 2016/17	Budget Request 2017/18	Governor's Budget 2017/18
Source of Funds				
State E&G Appropriation ¹	\$433,389	\$444,224	\$505,224	\$453,108
Augmentation:				
Educational and General ²	1,150,212	1,227,194	1,197,480	1,197,480
Revenue Shortfall ¹				52,116
Total	\$1,583,601	\$1,671,418	\$1,702,704	\$1,702,704
Use of Funds				
Personnel Expenditures	\$1,179,613	\$1,244,714	\$1,283,174	\$1,283,174
Operating Expenditures	310,140	346,801	346,666	346,666
Capital Assets/Transfers	93,848	79,903	72,864	72,864
Total	\$1,583,601	\$1,671,418	\$1,702,704	\$1,702,704
Students (FTE)³				
Undergraduate	88,821.75	86,305.66	86,059.82	86,059.82
Graduate	11,046.29	11,369.16	11,505.83	11,505.83
First Professional	NA	NA	NA	NA
Total	99,868.04	97,674.82	97,565.65	97,565.65
Employees (Unrestricted FTE)	11,542.33	11,599.91	11,632.42	11,632.42

¹Reflects the Educational and General Appropriation enacted for FY 2015/16 and FY 2016/17. Reflects the System's appropriation request for FY 2017/18. The Governor's recommendation of \$453.1 million for FY 2017/18 provides an \$8.9 million increase in the Educational and General Appropriation. This recommendation results in a budgetary shortfall of \$52.1 million for FY 2017/18.

²While the augmentation includes an assumption of a 1.8% tuition rate increase in FY 2017/18 in order to provide a balanced request, this does not foreclose the option of managing some costs through strategic workforce reductions, as needed. The Board of Governors will set tuition at its July 2017 Board meeting, based upon the System's financial requirements and state appropriations at that time.

³FTE Student is defined as follows: annual undergraduate credit hours produced divided by 30 credit hours; annual graduate credit hours produced divided by 24 credit hours.

Note: Numbers may not add due to rounding.

Appendix A-4

**Pennsylvania Higher Education Assistance Agency (PHEAA)
 Appropriation for Cheyney Keystone Academy
 of Pennsylvania's State System of Higher Education**
 (Dollar Amounts in Thousands)

Source of Funds	Actual 2015/16	Current 2016/17	Budget Request 2017/18	Governor's Budget 2017/18
Special Purpose Appropriation ¹	\$1,525	\$1,813	\$3,500	\$1,813
Other (PHEAA Augmentation) ¹	0	0	0	500
Revenue Shortfall	0	0	0	0
Total	\$1,525	\$1,813	\$3,500	\$2,313
Use of Funds				
Personnel Expenditures	\$328	\$416	\$533	\$436
Operating Expenditures ²	1,197	1,397	2,967	1,877
Capital Assets/Transfers	0	0	0	0
Total	\$1,525	\$1,813	\$3,500	\$2,313
Students (FTE)				
Undergraduate ³	89.00	75.00	175.00	110.00
Graduate	NA	NA	NA	NA
First Professional	NA	NA	NA	NA
Total	89.00	75.00	175.00	110.00
Employees (FTE)				
	4.00	4.50	5.50	4.50

¹The Governor's recommendation of \$1.813 million in FY 2017/18 provides level funding for the Keystone Academy Appropriation. In addition, the Governor recommended PHEAA augment this funding with \$500,000 of its revenue sources.

²Primarily scholarships.

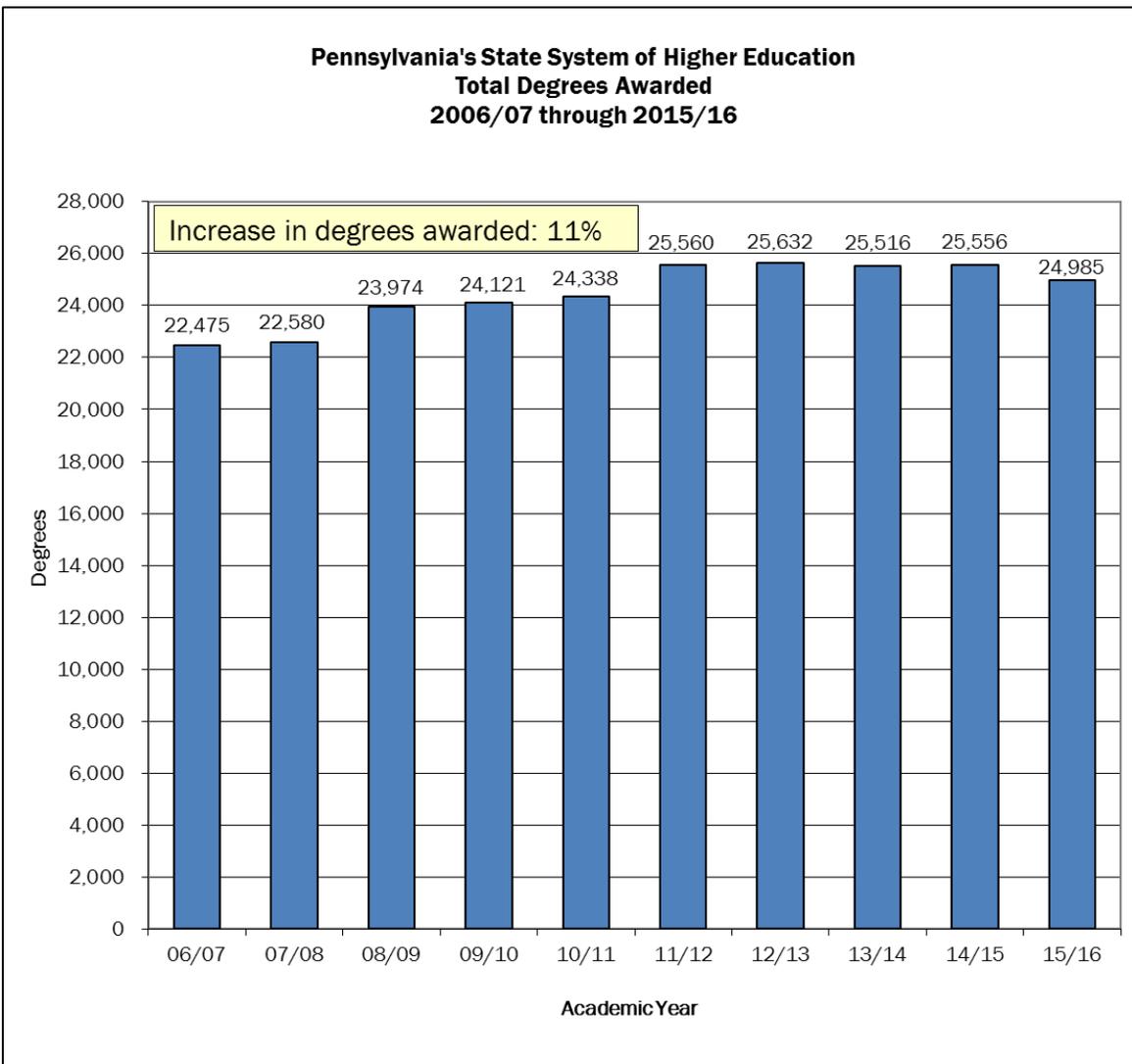
³If FY 2017/18 is funded at the Governor's recommended level, 110.00 FTE students may be served through this program.

Note: The line item appropriation has been funded as a special program within PHEAA's budget since FY 1999/2000. It is critical to the recruitment and retention of students at Cheyney University and is vital to the success of the institution and its students.

Appendix A-5

**Pennsylvania's State System of Higher Education
Academic Program Data**

Program Measure	Actual 2015/16	Projected 2016/17	Projected 2017/18
Associate Degrees Awarded	345	381	422
Bachelors Degrees Awarded	19,397	19,726	20,061
Graduate Degrees Awarded	5,243	5,409	5,580
Total Degrees Awarded	24,985	25,516	26,063



Appendix A-6

**Pennsylvania's State System of Higher Education
Fall Applications, Acceptances, and Enrollments of First-Time Freshmen
Of Pennsylvania Residents, by Race**

	2007	2008	2009	2010	2011	2012	2013 ¹	2014 ^{1,2,3}	2015 ^{1,2,3}	2016 ^{1,2,3}
AFRICAN AMERICAN OR BLACK										
Applications	13,474	15,108	15,412	17,334	16,158	14,801	10,779	12,543	13,624	13,741
Acceptances	5,773	6,321	6,236	6,656	6,682	6,501	6,871	7,854	8,830	8,922
Enrollments	1,862	1,830	1,873	1,802	1,862	1,913	2,013	2,095	1,994	1,981
Percent Accepted	42.8%	41.8%	40.5%	38.4%	41.4%	43.9%	63.7%	62.6%	64.8%	64.9%
Percent Accepted Who Enroll	32.3%	29.0%	30.0%	27.1%	27.9%	29.4%	29.3%	26.7%	22.6%	22.2%
HISPANIC										
Applications	2,383	2,774	2,862	3,323	5,079	4,069	3,553	4,542	4,687	4,946
Acceptances	1,399	1,532	1,606	1,776	3,075	2,387	2,563	3,234	3,504	3,651
Enrollments	500	502	559	647	987	788	866	983	1,002	956
Percent Accepted	58.7%	55.2%	56.1%	53.4%	60.5%	58.7%	72.1%	71.2%	74.8%	73.8%
Percent Accepted Who Enroll	35.7%	32.8%	34.8%	36.4%	32.1%	33.0%	33.8%	30.4%	28.6%	26.2%
AMERICAN INDIAN OR ALASKA NATIVE										
Applications	182	208	261	197	176	91	79	135	150	186
Acceptances	106	113	143	128	86	38	52	81	107	111
Enrollments	46	46	62	44	23	13	16	25	36	27
Percent Accepted	58.2%	54.3%	54.8%	65.0%	48.9%	41.8%	65.8%	60.0%	71.3%	59.7%
Percent Accepted Who Enroll	43.4%	40.7%	43.4%	34.4%	26.7%	34.2%	30.8%	30.9%	33.6%	24.3%
ASIAN										
Applications	1,009	1,062	1,244	1,223	1,177	1,190	1,134	1,199	1,169	1,409
Acceptances	643	669	784	740	724	729	783	888	896	1,089
Enrollments	194	209	211	175	166	179	209	208	201	223
Percent Accepted	63.7%	63.0%	63.0%	60.5%	61.5%	61.3%	69.0%	74.1%	76.6%	77.3%
Percent Accepted Who Enroll	30.2%	31.2%	26.9%	23.6%	22.9%	24.6%	26.7%	23.4%	22.4%	20.5%
NATIVE HAWAIIAN/PACIFIC ISLANDER ³										
Applications				61	42	65	29	55	60	62
Acceptances				30	32	40	22	38	38	36
Enrollments				11	14	14	12	17	6	8
Percent Accepted				49.2%	76.2%	61.5%	75.9%	69.1%	63.3%	58.1%
Percent Accepted Who Enroll				36.7%	43.8%	35.0%	54.5%	44.7%	15.8%	22.2%
UNKNOWN										
Applications	4,978	5,844	6,064	3,208	2,614	2,414	793	1,080	844	1,408
Acceptances	2,883	3,161	3,205	1,551	1,270	1,131	567	849	662	1,062
Enrollments	1,013	1,076	1,097	457	425	274	176	211	184	211
Percent Accepted	57.9%	54.1%	52.9%	48.3%	48.6%	46.9%	71.5%	78.6%	78.4%	75.4%
Percent Accepted Who Enroll	35.1%	34.0%	34.2%	29.5%	33.5%	24.2%	31.0%	24.9%	27.8%	19.9%

Appendix A-6 (continued)

**Pennsylvania's State System of Higher Education
Fall Applications, Acceptances, and Enrollments of First-Time Freshmen
Of Pennsylvania Residents, by Race**

	2007	2008	2009	2010	2011	2012	2013 ¹	2014 ^{1,2,3}	2015 ^{1,2,3}	2016 ^{1,2,3}
TWO OR MORE RACES³										
Applications				1,656	2,001	2,292	1,885	2,315	2,509	2,651
Acceptances				932	1,192	1,389	1,450	1,763	1,937	2,090
Enrollments				358	436	500	545	596	664	646
Percent Accepted				56.3%	59.6%	60.6%	76.9%	76.2%	77.2%	78.8%
Percent Accepted Who Enroll				38.4%	36.6%	36.0%	37.6%	33.8%	34.3%	30.9%
NONRESIDENT ALIEN (NRA)²										
Applications								8	2	9
Acceptances								8	2	9
Enrollments								1	1	5
Percent Accepted								100.0%	100.0%	100.0%
Percent Accepted Who Enroll								12.5%	50.0%	55.6%
WHITE										
Applications	49,292	52,460	53,598	57,208	55,592	52,126	44,978	43,447	42,737	41,681
Acceptances	34,678	36,249	38,062	39,801	39,964	38,025	36,783	36,438	36,342	35,265
Enrollments	14,078	14,688	15,266	15,349	15,117	13,768	13,460	13,292	12,426	11,823
Percent Accepted	70.4%	69.1%	71.0%	69.6%	71.9%	72.9%	81.8%	83.9%	85.0%	84.6%
Percent Accepted Who Enroll	40.6%	40.5%	40.1%	38.6%	37.8%	36.2%	36.6%	36.5%	34.2%	33.5%
TOTAL										
Applications	71,318	77,456	79,441	84,210	82,839	77,048	63,230	65,324	65,782	66,093
Acceptances	45,482	48,045	50,036	51,614	53,025	50,240	49,091	51,153	52,318	52,235
Enrollments	17,693	18,351	19,068	18,843	19,030	17,449	17,297	17,428	16,514	15,880
Percent Accepted	63.8%	62.0%	63.0%	61.3%	64.0%	65.2%	77.6%	78.3%	79.5%	79.0%
Percent Accepted Who Enroll	38.9%	38.2%	38.1%	36.5%	35.9%	34.7%	35.2%	34.1%	31.6%	30.4%

¹Methodology changed in 2013 to count only completed applications in calculation.

²Beginning in 2014, NRA applicants who meet state domicile requirements are included in Pennsylvania counts. Previously, they were considered out-of-state students.

³Native Hawaiian/Pacific Islander and Two or More Races first reported in 2010. Prior to 2010, Pacific Islander was reported with Asian.

Source: Datawarehouse

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Appendix B

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Appendix B-1

Pennsylvania's State System of Higher Education *Meeting the Needs of the Commonwealth and its Learners:* *Preparing Students for Tomorrow's Workforce*

As a major producer of college-educated workers in the Commonwealth, Pennsylvania's State System of Higher Education is a key contributor to the economic future of the state and its residents. The State System is committed to aligning its overall programming with the needs of students and employers—in the campus communities, in the surrounding regions, and throughout the Commonwealth.

As the result of a series of recent studies conducted independently and in conjunction with the Georgetown University Center on Education and the Workforce, the System has developed the *Workforce Intelligence Toolkit*, a collection of data-based resources the universities can use to plan for the future and to even further increase their impact on Pennsylvania's economy.

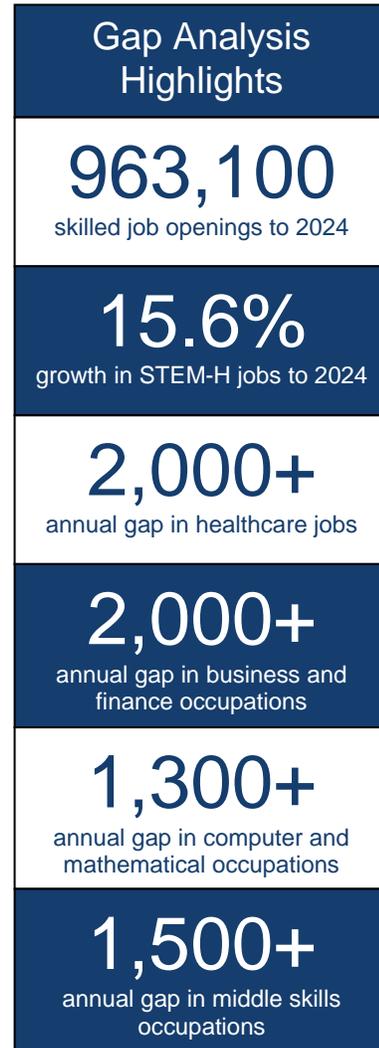
The most recent component of the toolkit comprises a supply-demand gap analysis, which identifies the projected "gaps" that would exist between the number of job openings expected to occur through 2024 and the number of persons who would have the necessary education and skills to fill those jobs, given the current array of educational offerings available. The analysis produced three sets of data-driven reports, which colleges and universities can use to plan for the future and fill in the potential gaps:

Degrees of Value Report: Demonstrates the increasing importance of bachelor's degree holders in Pennsylvania's workforce and highlights the significant role the State System plays in supporting that workforce;

Workforce Characteristics Reports: Provide insight about the economic and socio-demographic characteristics of Pennsylvania's workforce, by individual region and statewide;

Supply/Demand Reports: Provide analyses of employer demand and higher education supply for Pennsylvania and its workforce regions in order to answer the following questions:

1. **Job Forecast:** *What is the outlook for skilled jobs?*
2. **Industry Demand:** *Which specific industries are driving growth?*
3. **Demand Gaps:** *Where are workforce gaps expected in the future?*
4. **Education Supply:** *What is the education and talent supply?*



The gap analysis determined that Pennsylvania will see strong growth in demand for skilled workers through 2024. Specifically, the study found:

- Pennsylvania employers will need to fill 536,200 new positions—both skilled and low-skilled—through 2024, a job-growth rate of 9.5 percent.
- Skilled jobs will grow the fastest, with 303,800 new positions being created, a growth rate of 10.9 percent. The number of low-skilled jobs will increase by 8.1 percent.
- STEM-H (science, technology, engineering, mathematics and healthcare) jobs—a subset of skilled jobs—will grow even more significantly, by 15.6 percent.
- New job openings combined with the openings that will occur because of current workers retiring or otherwise leaving the labor force, will result in 963,100 skilled job openings needing to be filled.
- Skilled occupations for which there will be particularly high demand will include accountants and auditors, registered nurses, computer systems analysts, and general and operations managers.

Notable gaps exist between the kinds of skilled workers PA employers will need in the future and the skills that universities in the state are currently producing.

- The gap analysis evaluated 445 skilled occupations in Pennsylvania to identify occupational categories where employer demand at the state level will exceed what universities are likely to provide over the years to 2024.
- Substantial gaps are projected for registered nurses, accountants and auditors, computer systems analysts, maintenance and repair workers, computer programmers, licensed practical and vocational nurses, software developers, dental hygienists, sales representatives, and market research analysts.
- Fourteen occupations in the healthcare practitioners and technical category indicate a combined average annual gap of more than 2,000 annual openings to 2024, including nurses, dental hygienists, medical and clinical laboratory technicians, and veterinarians.
- Twenty occupations in business and financial operations show a combined average annual demand gap of 2,000 openings, including accountants and auditors, market research analysts, and claims adjusters.
- Ten occupations in computer and mathematical occupations have combined excess employer demand totaling 1,300 openings annually, including computer systems analysts, information security analysts, computer programmers, and software developers.
- An average annual demand gap of over 1,500 positions is projected in middle skill jobs. The highest demand gaps will include maintenance and repair workers, industrial machinery mechanics, computer-controlled machine tool operators, and machinists.
- STEM-H was a significant driving force of job growth, demand, and gaps, including jobs in healthcare practitioner roles, business and finance, computing, and mathematics.

The gap analysis is only one component of a larger resource base that the State System and universities can use for program development, strategic planning, engagement with businesses, and support for current and prospective students. Other factors that also could influence decision-making include higher education trends, student aspirations, university goals, live data analysis, and direct employer input. These should be considered together with the gap analysis results.

View all of the reports at: <http://www.passhe.edu/inside/bog/Pages/Gap-Analysis-Reports.aspx>

Appendix B-2

Pennsylvania's State System of Higher Education *Academic Program and Policy Review and Alignment: Universities Adapting to Change to Ensure Student Success*

Pennsylvania's State System of Higher Education and its 14 universities last year embarked on a critical analysis of its academic policies, with a view toward streamlining pathways to student success, minimizing the impact of differential and multiple starting points for students, and removing obstacles to graduation. This resulted in a complete overhaul of the Academic Residency, Student Transfer, General Education, and New Program Approval policies as well as the creation of a new Accelerated Bachelor's to Master's Degree and Early/Dual Admission to First Professional Master's Degree Program policy.

Putting students first is critical to increasing degree production and the State System is committed to doing its part to assist Pennsylvania reach its goal of having 60 percent of its adults holding a meaningful credential by 2025.

In keeping with the State System's mission and its strategic plan, the 14 member universities continually review their academic programs to ensure they line up with the 21st century educational and career-readiness needs of students and of their future employers. With the recent development of the *Workforce Intelligence Toolkit*, the universities are better equipped than ever to ensure that alignment.

Several studies were conducted both independently and in conjunction with the Georgetown University Center on Education and the Workforce over the last two years to help the System and the universities better understand the Commonwealth's workforce environment. These studies have provided the universities with a tremendous amount of data they can use as they plan their academic programming into the future. The Lumina Foundation, the Bill and Melinda Gates Foundation, and the Joyce Foundation provided grants to fund the initial study.

That study noted that about one-third of Pennsylvania's nearly 5.6 million workers currently have a bachelor's degree or higher. According to the Center's projections, by 2020 more than 60 percent of jobs in Pennsylvania and nationally will require at least some postsecondary education. More than one-third of the projected job openings expected to occur between now and then will require a bachelor's degree or higher.

As employers' needs change, the State System is adapting its program offerings to ensure a well-educated Commonwealth workforce. The State System has been actively involved in that process for some time, a fact confirmed by the Georgetown Center study.

From their historic roots as normal schools and teachers' colleges, the State System universities have grown into comprehensive universities, greatly expanding their array of academic programs, the majority of which are accredited by professional organizations regionally and nationally.

While collectively the universities still produce the largest number of new teachers in the state, education no longer represents the largest major among students. Business is now the most popular field of study, accounting for 16 percent of graduates receiving a bachelor's degree from a System university. Meanwhile, the number of bachelor's degrees awarded by the universities in the STEM (science, technology, engineering, and mathematics) and health-related fields—

collectively referred to as STEM-H—has increased by 40 percent since 2009, representing the System’s fastest growing area of study. (See *Appendix B-8*)

The number of graduates with STEM-H degrees is expected to continue to rise. Anticipating the Commonwealth’s needs, almost half of the new degree programs developed and introduced by the State System universities within the previous five years have been in the STEM-H fields.

Academic program review not only can result in the development of new programs, but also can affect existing programs, as well. All degree programs are subject to periodic review. As the result of that review, a program can continue unchanged, it can be updated and reorganized, or it can be either placed in moratorium or discontinued entirely.

Over the last five years, the 14 State System universities combined have introduced or reorganized 421 degree, minor, and certificate programs. At the same time, the universities have either placed in moratorium or discontinued 370 programs no longer in demand. The results of the latest round of reviews completed in 2016 follows:

- Seven degree programs were reorganized. Reorganized programs are those that have been significantly revised or updated to meet new career and/or certification requirements and market demands.
- Five degree programs were placed in moratorium. A program placed in moratorium does not admit new students. While a program is in moratorium, the university conducts an assessment to determine whether a redesign of the program would be appropriate or whether it should be discontinued. Normally, the period of moratorium lasts no more than five years. Students enrolled in a program when it is placed in moratorium are able to complete their degree.
- Twenty-five degree programs were discontinued. Discontinued programs no longer have any students enrolled in them and are eliminated from the curriculum.
- Fifteen new degree programs were approved by the Board of Governors in the last 12 months. Before a new program is approved, it must meet stringent standards that include a demonstrated need in the Commonwealth and evidence that students will enroll in sufficient numbers to sustain it. New programs are designed to meet new student and workforce demands. Many of the newly approved programs are being or will be offered online, where they will be available to students anywhere/anytime. All new programs are subject to a formal review after five years; in order to continue, a program must demonstrate sustained enrollment and evidence of appropriate student learning outcomes.

A brief summary of new degree programs approved in the last year follows.

New Degree Programs

California University of Pennsylvania

- **Doctor of Criminal Justice in criminal justice**

This program is for individuals who already are working as agency leaders, supervisors, and investigators, and who are seeking an educational opportunity that will allow them to advance their careers. It will be delivered primarily through Cal U.'s nationally recognized Global Online division and is intended to be completed in two years with students taking courses part time.



East Stroudsburg University of Pennsylvania



- **Doctor of Education in educational leadership and administration**

This program enhances leadership and administrative skills of both PreK through 12 and higher education leaders. It initially was offered in conjunction with Indiana University of Pennsylvania (IUP). East Stroudsburg now offers the program independently. It continues to provide entering students a “challenging and contemporary graduate curricula” that includes a variety of research opportunities.

Indiana University of Pennsylvania

- **Doctor of Philosophy in counselor education and supervision**

This full-time, residential program builds on the prerequisite 60-graduate-credit, entry-level practitioner degree in counseling. The curriculum is based on the most current Council for Accreditation of Counseling and Related Educational Programs standards, with a high focus on scholarship and research. The program prepares counselor educators who are equipped to enter academia or positions of leadership with a specialization in scholarship, research, supervision, and teaching. At the master's level, many practitioners are licensed by the state as professional counselors and provide direct service to clients. To date, all 50 states have licensure for professional counselors.



- **Bachelor of Science in public health**

This program will meet the growing workforce need in public health and related healthcare fields. Graduates will understand the science of human health and the epidemiology of infectious and chronic diseases, as well as the complications of the U.S. and global healthcare systems with regard to access and ethics of the disparities in healthcare delivery. The program provides students options to focus in three academic areas: epidemiology and biostatistics; environmental and occupational health; and behavioral and mental health. Existing relationships with local and regional community stakeholders will be strengthened as the proposed program develops field placements for students and career placements for graduates.

- **Master of Science in athletic training**

This program responds to the recent decision by several national organizations to change the first professional degree in the field from a bachelor's to a master's. Students will be able to enroll in the graduate program either through early graduate school admission as part of a 3+2 program or after first earning an undergraduate degree from IUP or another institution. The professional degree in athletic training will provide students both classroom education and clinical training, maintaining partnerships and affiliation agreements with a variety of local and regional healthcare facilities and local high schools and colleges.

Kutztown University of Pennsylvania

- **Doctor of Education in transformational teaching and learning**



This program is for practicing classroom teachers who hold a master's degree and are ready to take on the role of practitioner-scholar. Graduates of the program will be able to apply research to contemporary educational issues and needs, build community-school partnerships, and lead transformational change in the schools using a social justice

approach. While traditional Ph.D. programs prepare graduate students for conducting research in a specialized area of educational practice, this program is for the career educator – the individual who envisions his or her career as a lifelong practitioner-scholar in the classroom, working with children and adults to improve lives.

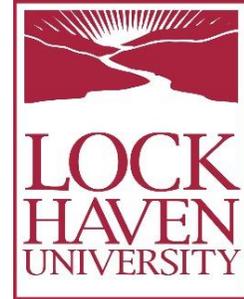
- **Bachelor of Science in information technology**

This program covers the broader, fundamental technology areas of computer science, with a focus on the design, development, implementation, support, and management of computer-based information systems. Students take courses relating to security, networking, database, and web development. The curriculum provides students with the core concepts necessary for a career in numerous related fields, such as system or database administrator, network administrator or technician, web designer, and cybersecurity. Students learn to solve problems utilizing current technology, with an emphasis on emerging standards and trends. Students are required to complete a capstone project as part of a two-semester software engineering sequence.

Lock Haven University of Pennsylvania

- **Bachelor of Applied Science in professional studies**

This degree completion program is especially for adult learners who have earned an associate or technical degree/certification from a regionally accredited community college or non-regionally accredited post-secondary technical school. It enables non-traditional, working adult students to gain the additional knowledge, skills, and credentials they need to enhance their career and life success. Students will be able to complete the courses they need to fulfill the requirements for a bachelor's degree while choosing a specialty from among entrepreneurship, management, or Spanish.



Slippery Rock University of Pennsylvania

- **Bachelor of Science in industrial and systems engineering**



This program, which builds upon the university's engineering degree in petroleum and natural gas, provides graduates with the knowledge and capabilities required to work in areas including project and program management, supply chain

management, quality measurement and improvement, ergonomics, technology development, strategic planning, change management, and financial engineering. Industries in which graduates could be employed include aerospace, manufacturing, banking, consulting, construction, energy, forestry, insurance, medical services, and transportation.

West Chester University of Pennsylvania

- **Doctor of Psychology in clinical psychology**

This program follows a practitioner-scholar model that prepares students for leadership roles as culturally competent psychologists. The program is unique in that students choose one of two specialty tracks: child and adolescent health or post-traumatic stress. Graduates will be able to employ evidence-based interventions to assess, treat, and prevent mental, emotional, and behavioral disorders, particularly among individuals who are at greatest risk and demonstrate the greatest need. The program provides significant training in assessment and therapeutic interventions through didactic coursework and supervised clinical training experiences beginning in the first year.



- **Bachelor of Science in international business**

This program requires students to take courses with an international emphasis from departments within and outside of the College of Business and Public Affairs. Students are required to complete the business core courses, international business courses, and a set of electives. They are encouraged to use their electives to earn a complementary minor from a program outside of the business school. The interdisciplinary approach broadens students' competency at identifying, analyzing, and resolving business challenges in an international context and from a range of perspectives. Students also are encouraged to advance their foreign language skills and complete an international education experience.

- **Bachelor of Science in urban and environmental planning**

This program prepares graduates to work as professional planners, geographic information systems (GIS) analysts, and environmental specialists and in related fields. It trains students with cutting-edge geospatial technologies and provides them with a deep knowledge of local and regional sustainability concerns.

- **Master of Science in human resource management**

This program, offered online, is for working HR professionals who are looking to advance their careers. It focuses on the development of core competencies in the areas of compensation and benefits, employee and labor relations, ethics, global human resources, human resource metrics, leadership and change management, and workforce planning.

- **Master of Science in transformative education and social change**

This program is for current educators—both classroom teachers and others working in community education settings—who are seeking to examine their profession and improve the field of education. It provides those who enroll with an opportunity to identify concerns and to conduct research that will have a direct impact on their professional lives, communities, and workplaces.

- **Master of Urban and Regional Planning**

This program helps meet a growing demand for urban and regional planners in the region. Professional planners help influence future neighborhoods, as well as local, regional, and metropolitan areas, providing guidance for sustainable development and addressing social, environmental, political and economic problems of communities.

Appendix B-3

Pennsylvania's State System of Higher Education *Investing in Student Success, Campus Safety*

Student success is reflected in graduation rates, student debt, and post-graduation employment. Helping to ensure that success requires universities to address many non-academic factors, from campus safety to alcohol and drug use to mental health issues.

National leaders in the field of college access, retention, and graduation emphasize that universities have a responsibility to provide students with the support they need to achieve. The National Bureau of Economic Research has stated that college graduation and persistence is directly linked to greater expenditures on student services that contribute to students' emotional and physical well-being and to their intellectual, cultural, and social development.

Demographic factors such as age, socioeconomic status, race, military status, ethnicity, and gender can have a significant impact on student success. The 14 State System universities enroll the largest percentage of Pennsylvania residents who are Pell grant recipients, those with the greatest financial need. As a group, these students also often have a greater need for additional academic and other support services. In order to provide an educated workforce that is prepared to meet the needs of the Commonwealth and its citizens, the State System must be able to further invest in these vital services.

The national response to addressing sexual misconduct, sexual violence, and harassment at universities has had an extraordinary impact on the administrative and financial operations of State System universities. With the Board of Governors leading the effort, the universities are enhancing and creating the safest environments possible for students, employees, and visitors.

Each university has expended significant resources to develop policies and procedures to address federal Title IX sexual harassment/assault issues. Financial and human resources have been repositioned to address the appointment of Title IX coordinators on each campus, to address ongoing awareness and prevention education for students and employees, and to train staff in how to facilitate Title IX investigations and grievance procedures.

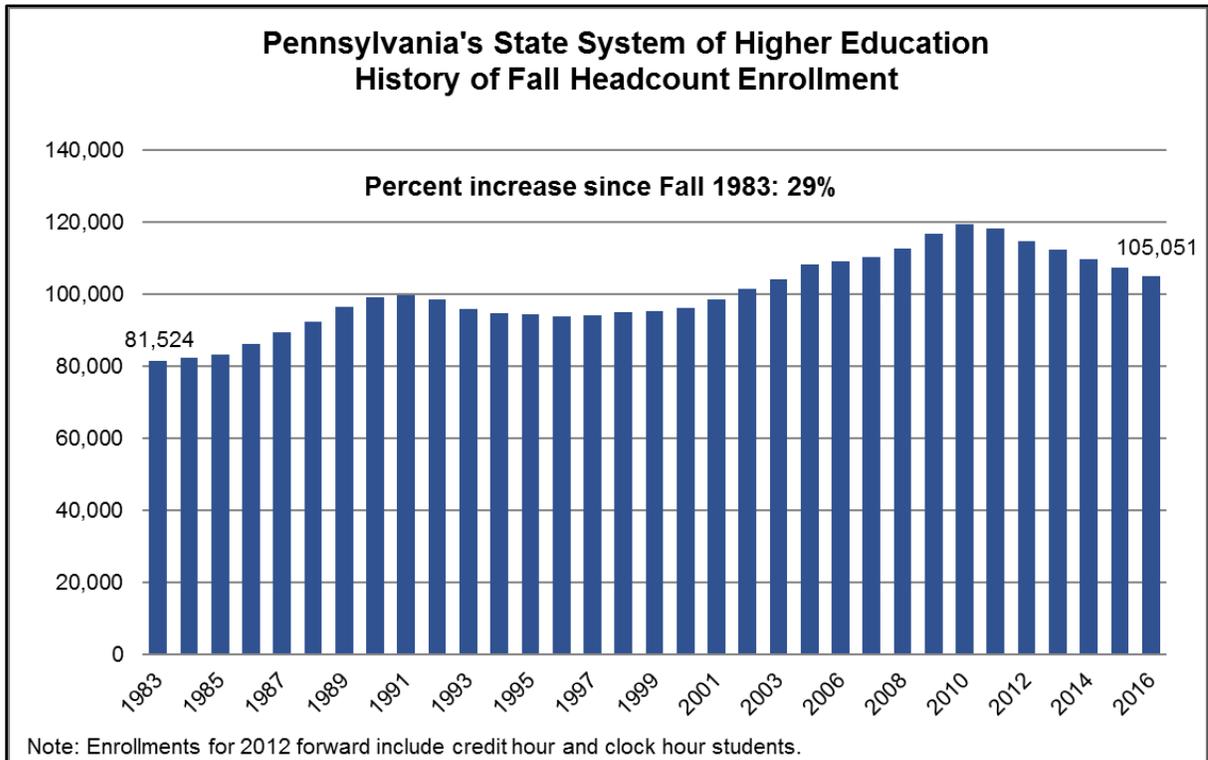
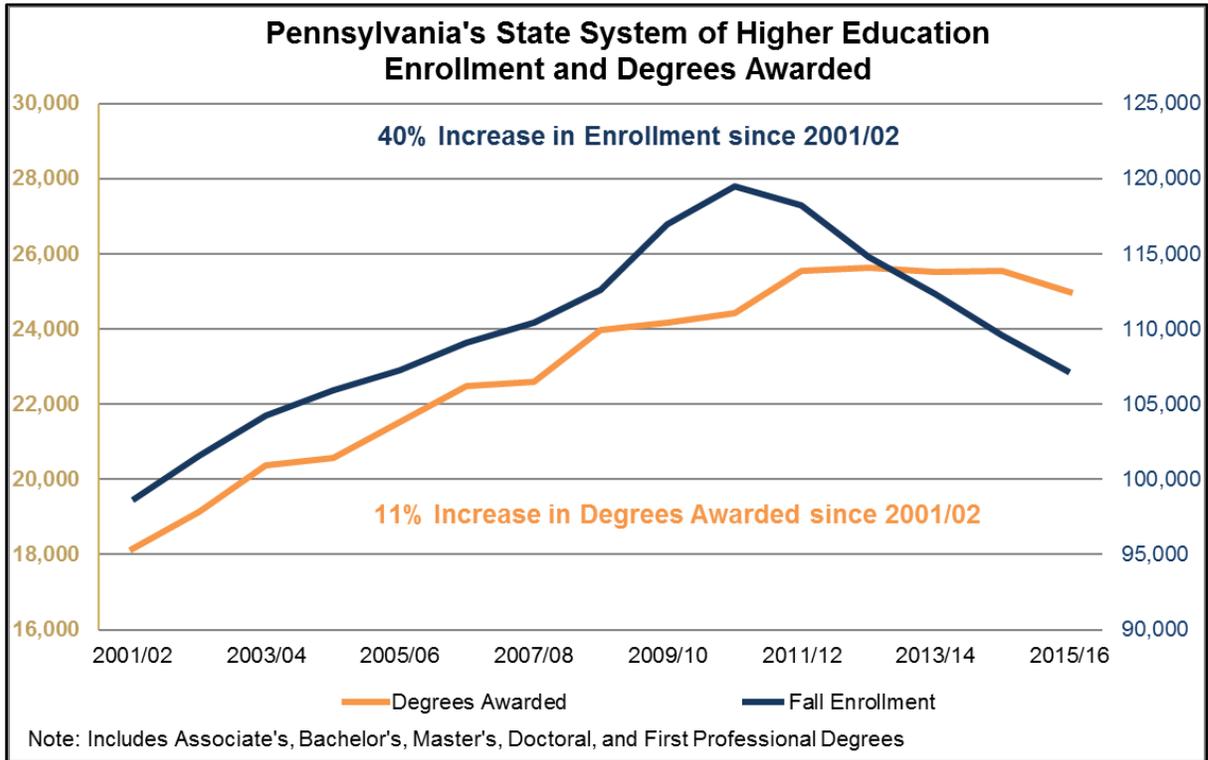
Going forward, the universities will need to add victim advocate positions, employ appropriately trained investigators, conduct campus climate surveys, and address survey findings.

The State System will continue to take a strategic and deliberate approach to educating about and responding to safety issues and to collaborating to proactively address safety and compliance concerns.

Campus Safety

- State System universities have 75 percent fewer incidents of serious crimes than the state average.
- The number of serious crimes on the university campuses is about one-third of what it was in 1986, and continues to decline.
- University police are commissioned, trained, armed, and have similar jurisdiction rights as municipal police.

Appendix B-4



Appendix B-5

Pennsylvania's State System of Higher Education
Fall Headcount Enrollment by University

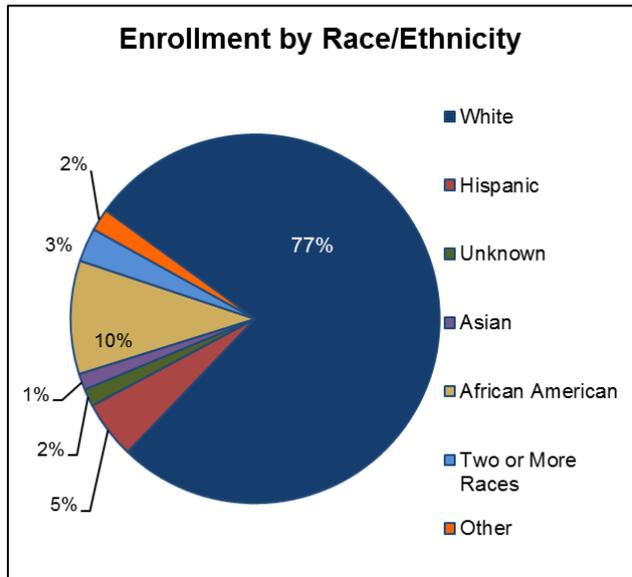
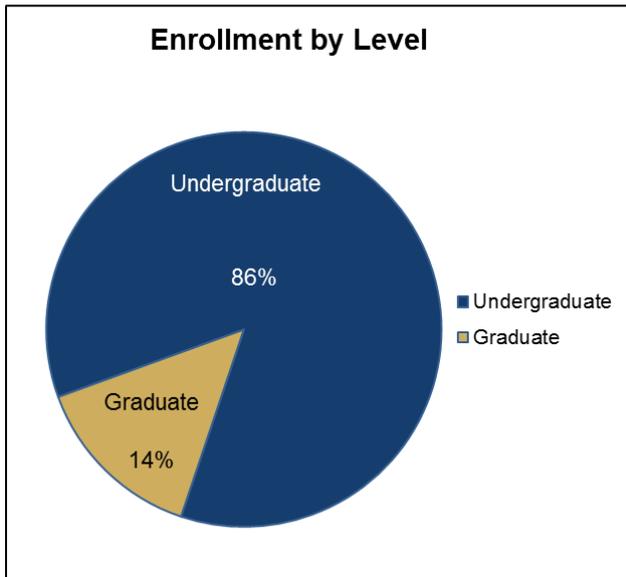
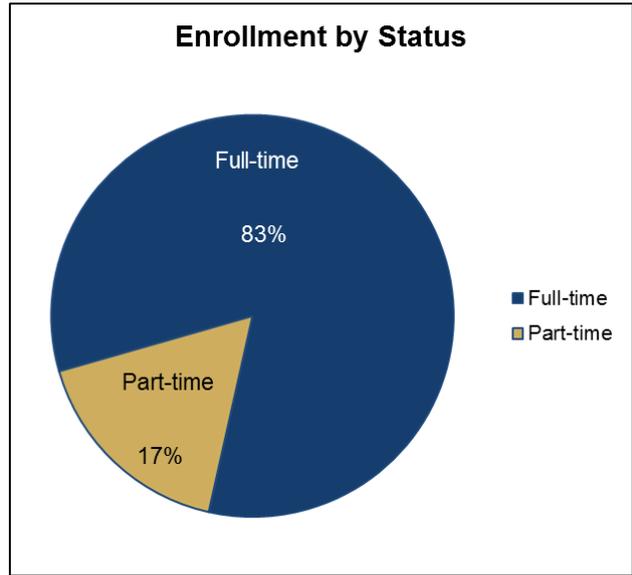
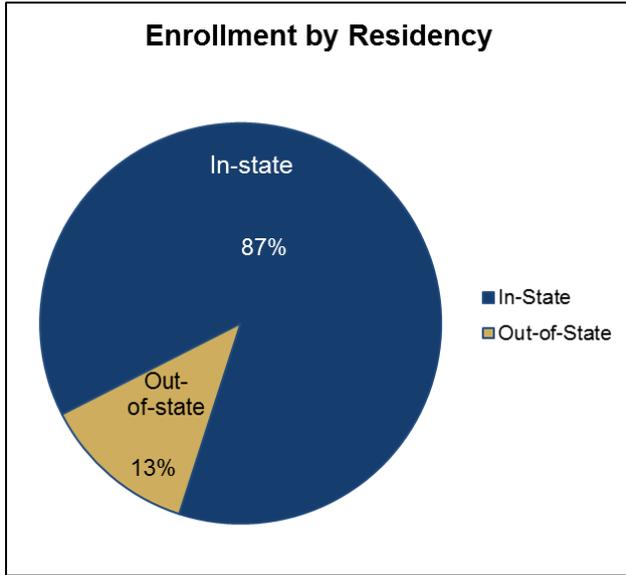
University	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bloomsburg	8,745	8,855	9,512	10,091	10,159	9,950	10,127	9,998	9,777	9,658
California	8,206	8,519	9,017	9,400	9,483	8,608	8,243	7,978	7,854	7,553
Cheyney	1,436	1,488	1,488	1,586	1,200	1,284	1,212	1,022	711	746
Clarion	6,795	7,100	7,346	7,315	6,991	6,520	6,080	5,712	5,368	5,224
East Stroudsburg	7,053	7,234	7,576	7,387	7,353	6,943	6,778	6,820	6,828	6,830
Edinboro	7,686	7,671	8,287	8,642	8,262	7,462	7,098	6,837	6,550	6,181
Indiana	14,018	14,310	14,638	15,126	15,132	15,668	14,997	14,571	14,035	13,114
Kutztown	10,295	10,393	10,634	10,707	10,283	9,804	9,513	9,218	9,000	8,513
Lock Haven	5,241	5,266	5,329	5,451	5,366	5,328	5,260	4,917	4,607	4,220
Mansfield	3,338	3,422	3,569	3,411	3,275	3,155	2,988	2,752	2,393	2,209
Millersville	8,306	8,320	8,427	8,729	8,725	8,368	8,279	8,047	7,988	7,927
Shippensburg	7,765	7,942	8,253	8,326	8,183	7,724	7,548	7,355	7,058	6,989
Slippery Rock	8,325	8,458	8,648	8,852	8,712	8,559	8,347	8,495	8,628	8,881
West Chester	13,219	13,619	14,211	14,490	15,100	15,411	15,845	16,086	16,606	17,006
System Totals	110,428	112,597	116,935	119,513	118,224	114,784	112,315	109,808	107,403	105,051

Note: Includes all Census enrollments--undergraduate, graduate, full-time, and part-time. Enrollments for 2012 forward include credit hour and clock hour students.

Appendix B-6

**Pennsylvania's State System of Higher Education
Fall 2016 Enrollment Demographics**

Headcount: 104,799*



*Note: Fall census headcount enrollment (undergraduate, graduate, full-time, and part-time). Credit hour only; excludes clock hour students.

Appendix B-7

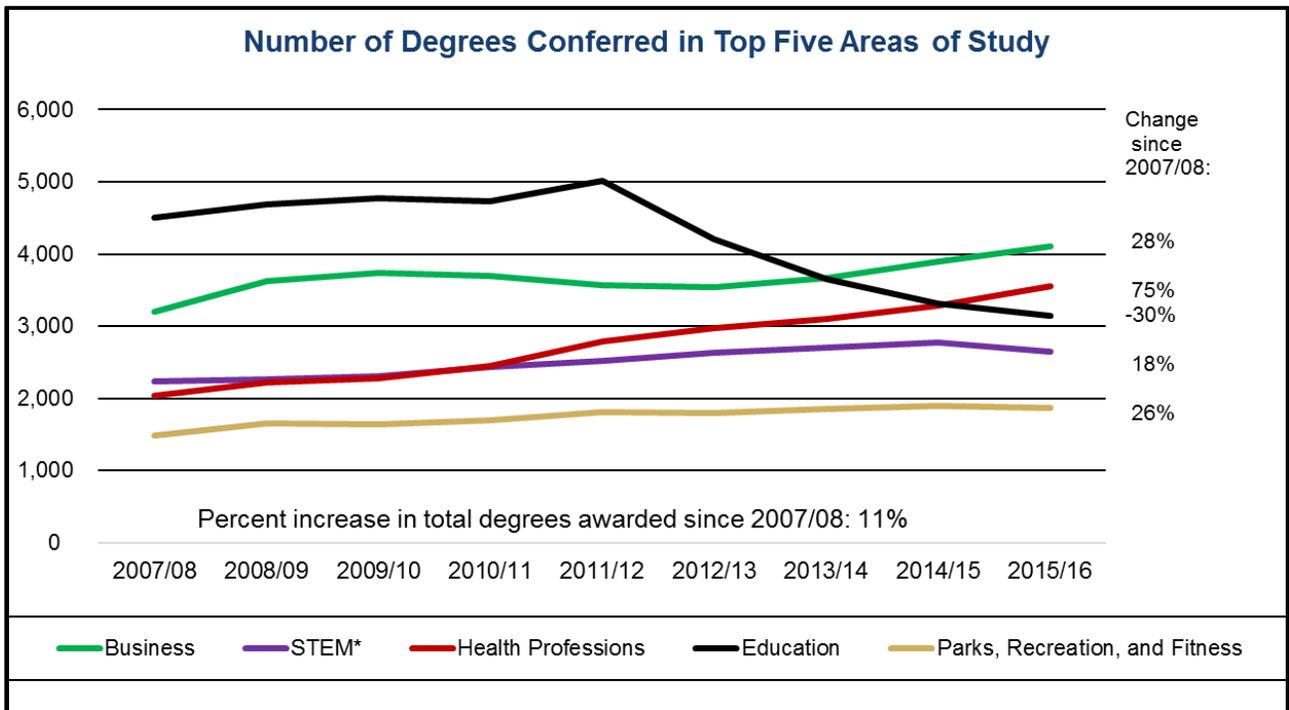
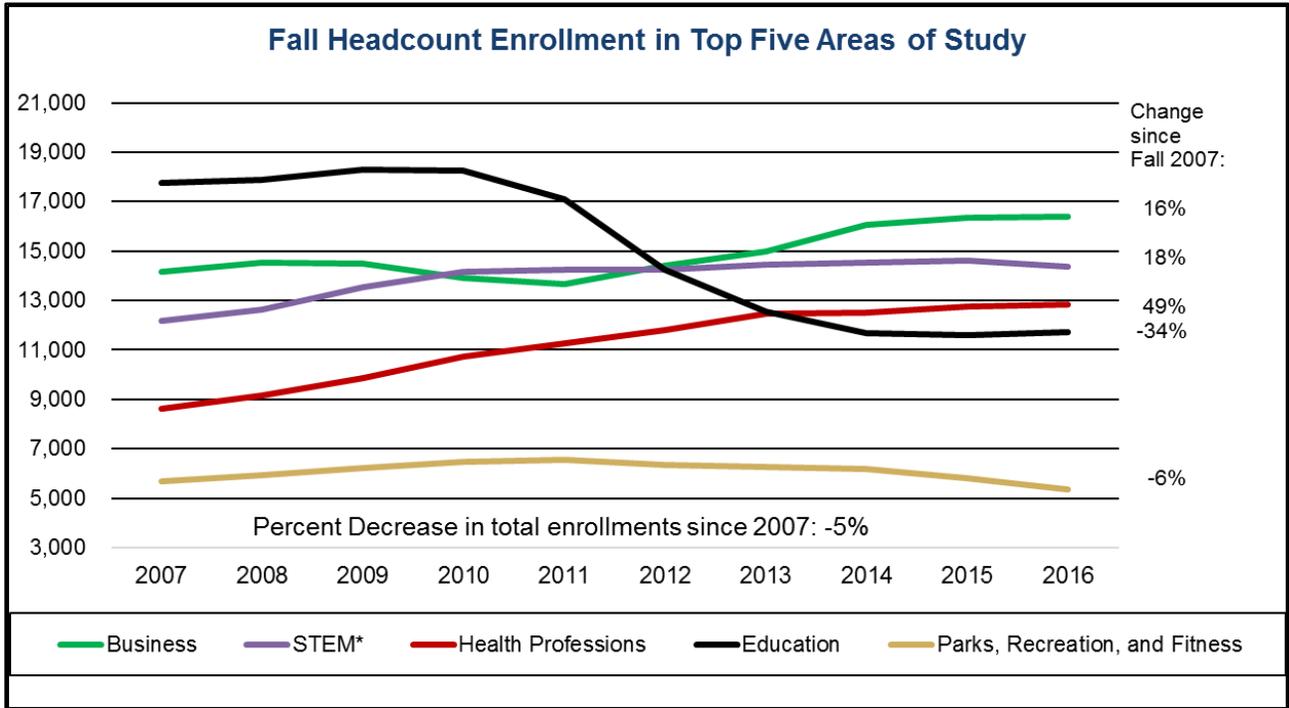
**Pennsylvania's State System of Higher Education
Students and Alumni by Pennsylvania County, Fall 2016**

County	Enrolled Students	Living Alumni
Adams	672	3,890
Allegheny	6,696	51,918
Armstrong	708	4,756
Beaver	1,057	7,798
Bedford	198	1,479
Berks	3,431	22,431
Blair	557	3,853
Bradford	571	3,570
Bucks	3,949	21,286
Butler	2,017	15,054
Cambria	1,022	6,589
Cameron	44	269
Carbon	437	2,576
Centre	687	5,288
Chester	6,224	33,894
Clarion	839	4,031
Clearfield	880	4,668
Clinton	601	4,166
Columbia	1,030	5,707
Crawford	897	6,589
Cumberland	2,262	16,526
Dauphin	1,868	12,780
Delaware	4,360	20,390
Elk	343	2,064
Erie	3,094	17,460
Fayette	1,029	7,184
Forest	36	289
Franklin	1,404	7,449
Fulton	59	533
Greene	229	1,380
Huntingdon	185	1,319
Indiana	1,602	8,392
Jefferson	578	3,512
Juniata	118	742
Lackawanna	947	5,528
Lancaster	4,658	30,750

County	Enrolled Students	Living Alumni
Lawrence	779	5,161
Lebanon	724	5,514
Lehigh	2,542	17,189
Luzerne	1,429	9,017
Lycoming	1,036	6,900
McKean	292	1,816
Mercer	1,029	6,968
Mifflin	272	1,492
Monroe	2,437	7,234
Montgomery	5,270	31,920
Montour	283	1,459
Northampton	2,389	13,747
Northumberland	890	5,196
Perry	260	1,947
Philadelphia	5,300	16,324
Pike	588	1,411
Potter	108	828
Schuylkill	1,033	6,187
Snyder	284	1,604
Somerset	332	2,705
Sullivan	33	265
Susquehanna	189	1,253
Tioga	551	3,245
Union	327	1,963
Venango	729	4,936
Warren	303	2,306
Washington	1,878	13,343
Wayne	330	1,599
Westmoreland	2,368	21,161
Wyoming	102	754
York	2,890	16,536
Total Pennsylvania	92,266	558,090
Non-Pennsylvania	12,785	234,941
Grand Total	105,051	793,031

Appendix B-8

Pennsylvania's State System of Higher Education



Appendix B-10

Pennsylvania's State System of Higher Education New Fall Undergraduate (UG) Transfer Students

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	Ten Year Change	% of 2016 Total Transfers
A. Community Colleges													
Community College of Allegheny County	387	395	402	424	445	435	391	398	422	400	359	-7.2%	5.4%
Community College of Beaver County	81	68	77	83	79	72	69	61	55	68	75	-7.4%	1.1%
Bucks County	131	134	161	167	169	205	190	161	203	156	139	6.1%	2.1%
Butler County	225	198	188	226	186	219	229	230	205	191	210	-6.7%	3.2%
Pennsylvania Highlands	39	53	20	30	45	48	44	54	56	49	42	7.7%	0.6%
Delaware County	299	303	334	357	354	417	441	431	419	439	443	48.2%	6.7%
Harrisburg Area	354	435	478	506	604	571	529	596	501	494	495	39.8%	7.4%
Lehigh Carbon	194	217	199	217	243	188	214	224	163	178	165	-14.9%	2.5%
Luzerne County	135	144	131	128	163	130	124	124	121	109	112	-17.0%	1.7%
Montgomery County	192	194	198	260	278	295	304	273	268	270	258	34.4%	3.9%
Northampton County	268	271	325	352	452	364	352	397	351	355	384	43.3%	5.8%
Community College of Philadelphia	60	65	81	82	77	87	78	117	97	136	156	160.0%	2.3%
Reading Area	93	119	110	121	124	93	126	106	91	87	89	-4.3%	1.3%
Westmoreland County	175	177	143	159	184	182	142	167	185	156	151	-13.7%	2.3%
Total Community Colleges	2,633	2,773	2,847	3,112	3,403	3,306	3,233	3,352	3,137	3,088	3,078	16.9%	46.3%
Percent of Minority Community College Students	10.8%	10.8%	11.9%	12.7%	15.0%	15.9%	18.9%	20.1%	21.2%	22.8%	24.2%		
Community Colleges as % of Transfer Total	40.3%	41.7%	43.0%	42.1%	44.4%	44.6%	44.2%	45.5%	45.0%	46.0%	46.3%		
Community Colleges as % of Total New UG Students	13.5%	10.4%	10.4%	10.7%	11.6%	11.5%	11.8%	12.4%	11.8%	12.1%	12.4%		
B. State-Related													
Lincoln	5	8	7	7	9	4	9	4	2	4	3	-40.0%	0.0%
Penn State	337	361	364	432	384	387	355	344	265	281	326	-3.3%	4.9%
Pitt	139	139	130	132	123	118	104	166	114	90	106	-23.7%	1.6%
Temple	48	47	42	63	49	72	70	48	43	56	40	-16.7%	0.6%
Total State-Related	529	555	543	634	565	581	538	562	424	431	475	-10.2%	7.1%
State-Related as % of Total	8.1%	8.3%	8.2%	8.6%	7.4%	7.8%	7.4%	7.6%	6.1%	6.4%	7.1%		
C. Intra-system Transfers	678	682	626	656	765	729	718	714	722	654	582	-4.8%	9.7%
D. Other Colleges and Universities	2,700	2,641	2,612	2,990	2,935	2,789	2,823	2,747	2,694	2,541	2,514	-5.0%	37.8%
Total New Undergraduate Transfer Students	6,540	6,651	6,628	7,392	7,668	7,405	7,312	7,375	6,977	6,714	6,649	1.9%	100.0%
Percent of Minority Transfer Students	11.7%	12.1%	12.0%	13.2%	16.2%	16.7%	20.5%	21.2%	22.5%	24.6%	23.9%		
New Transfer Students as Percent of Total New UG	33.5%	24.9%	24.1%	25.4%	26.2%	25.8%	26.6%	27.3%	26.2%	26.2%	26.8%		

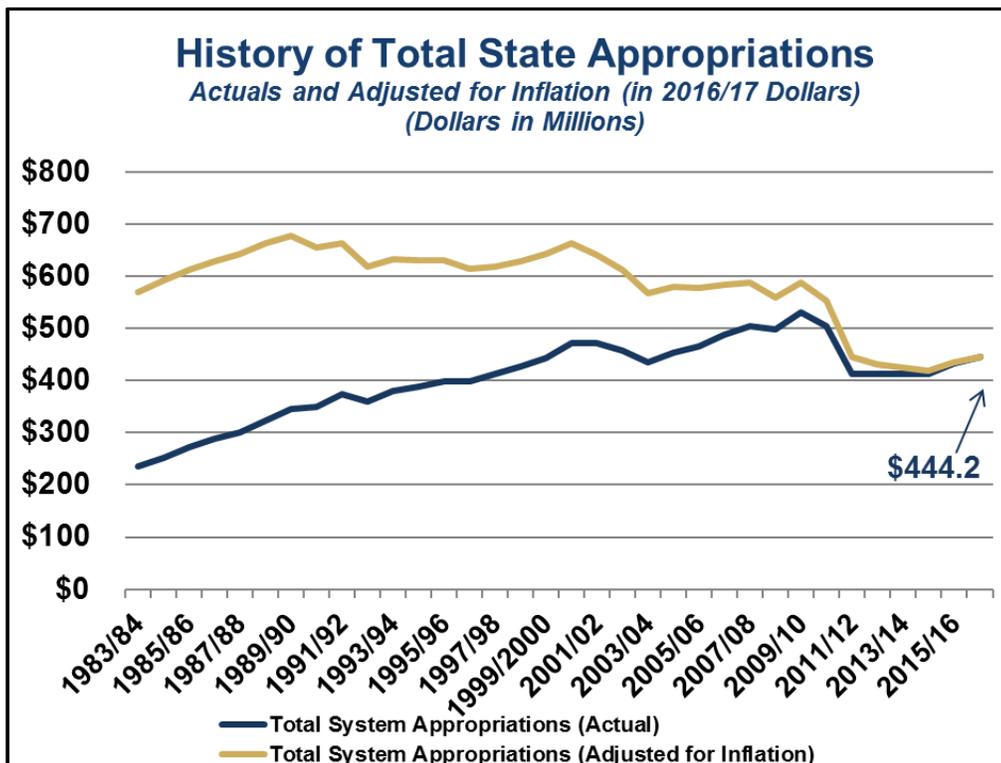
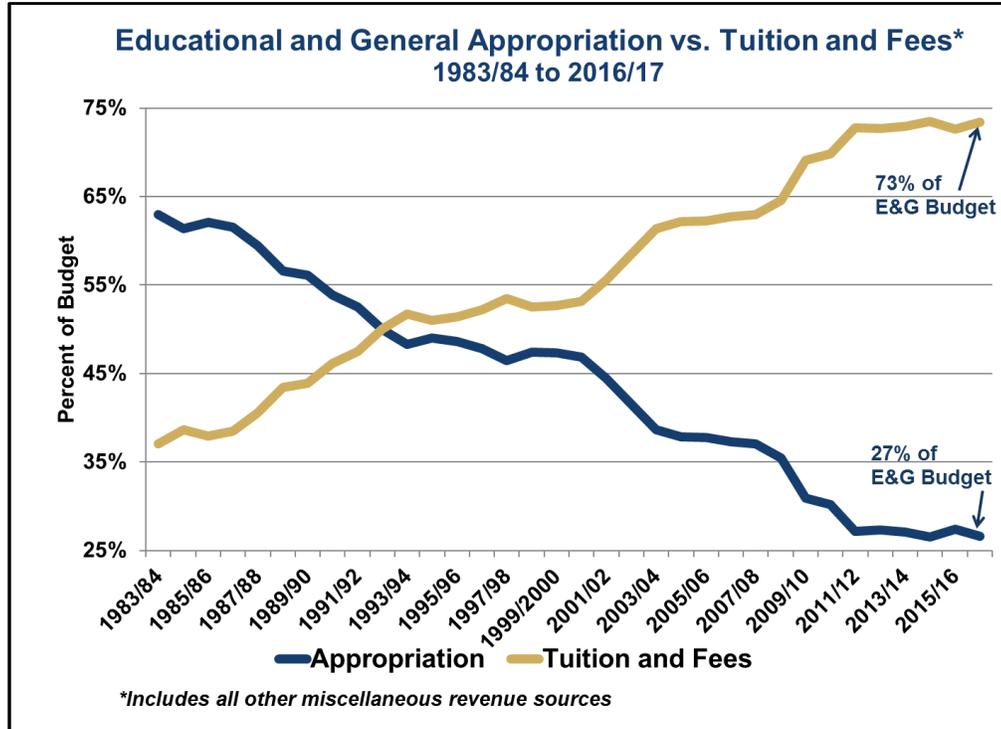
Note: Minority students include Two or More Races

Official Reporting Date: End of the 15th day of classes

2008, 2009, and 2010 historical data has been revised to include updated information. Prior years are as reported previously.

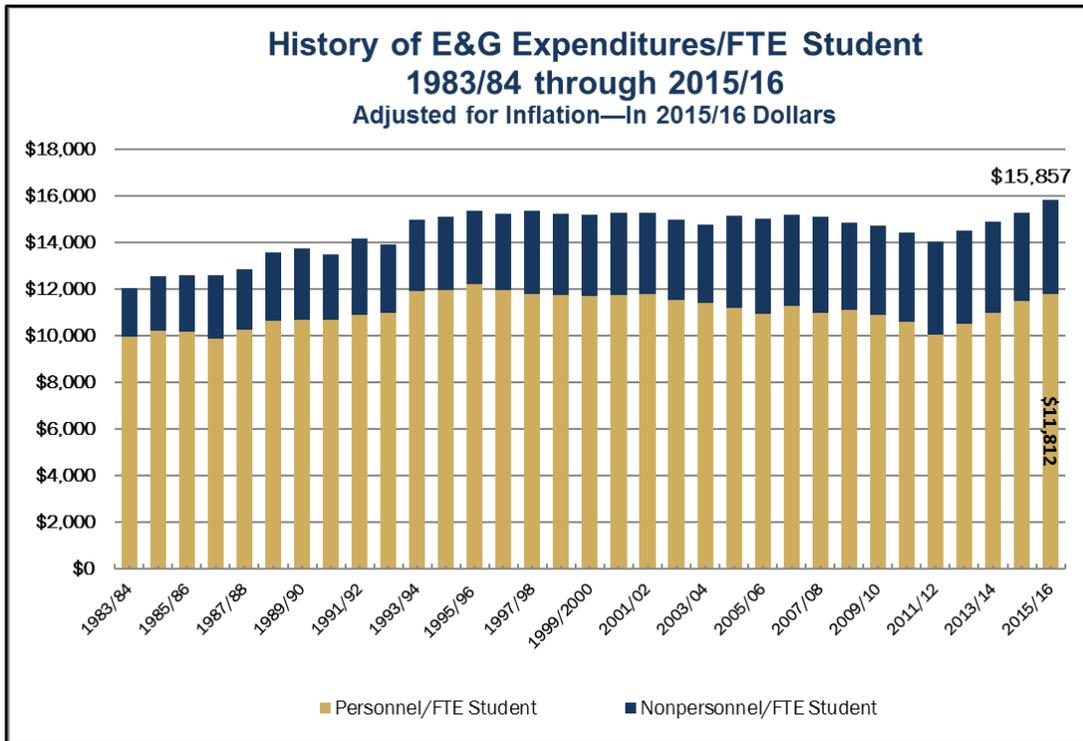
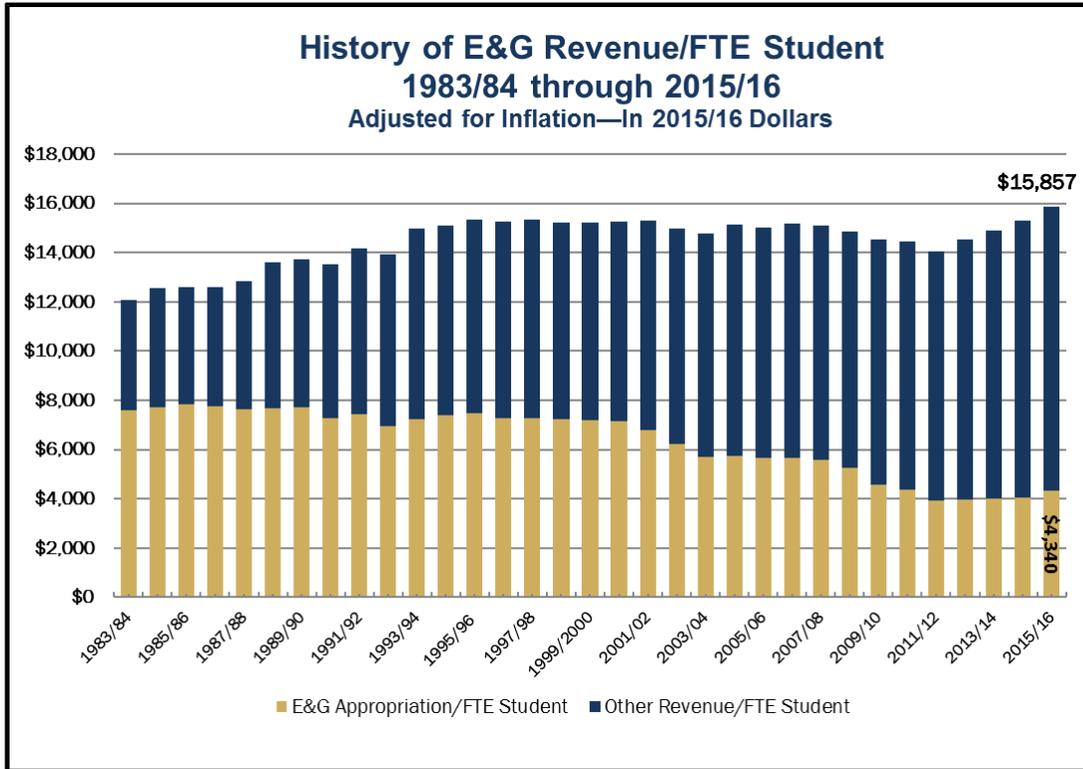
Appendix B-11

Pennsylvania's State System of Higher Education



Appendix B-12

Pennsylvania's State System of Higher Education



Appendix B-13

**Pennsylvania's State System of Higher Education
History of State Appropriations and Tuition Rates**

Fiscal Year	E&G Appropriation	% Change From Prior Year	% Of Total E&G Budget	Total Appropriations	% Change From Prior Year	Resident Undergraduate Tuition Rate	\$ Change From Prior Year	% Change From Prior Year	Total Annualized FTE Enrollment
1983/84	\$235,053,000	2.0%	63%	\$235,053,000	2.0%	\$1,480			78,273
1984/85	\$250,051,000	6.4%	61%	\$252,723,000	7.5%	\$1,570	\$90	6.1%	78,575
1985/86	\$263,803,000	5.5%	62%	\$272,115,000	7.7%	\$1,600	\$30	1.9%	78,773
1986/87	\$279,381,000	5.9%	62%	\$287,756,000	5.7%	\$1,680	\$80	5.0%	81,001
1987/88	\$295,350,000	5.7%	59%	\$300,805,000	4.5%	\$1,830	\$150	8.9%	84,462
1988/89	\$311,594,000	5.5%	57%	\$322,699,000	7.3%	\$2,078	\$248	13.6%	86,643
1989/90	\$338,496,000	8.6%	56%	\$345,281,000	7.0%	\$2,178	\$100	4.8%	90,243
1990/91	\$343,526,321	1.5%	54%	\$349,491,000	1.2%	\$2,278	\$100	4.6%	92,560
1991/92	\$370,960,000	8.0%	53%	\$373,625,000	6.9%	\$2,628	\$350	15.4%	93,210
1992/93	\$357,976,000	-3.5%	50%	\$359,352,000	-3.8%	\$2,828	\$200	7.6%	91,415
1993/94	\$372,085,000	3.9%	48%	\$379,023,000	5.5%	\$2,954	\$126	4.5%	88,460
1994/95	\$386,320,278	3.8%	49%	\$386,520,000	2.0%	\$3,086	\$132	4.5%	87,168
1995/96	\$396,890,000	2.7%	49%	\$398,587,000	3.1%	\$3,224	\$138	4.5%	86,522
1996/97	\$396,890,000	0.0%	48%	\$398,487,000	0.0%	\$3,368	\$144	4.5%	86,106
1997/98	\$411,513,000	3.7%	47%	\$413,142,000	3.7%	\$3,468	\$100	3.0%	87,288
1998/99	\$424,887,000	3.2%	47%	\$426,570,000	3.3%	\$3,468	\$0	0.0%	88,017
1999/00	\$437,634,000	3.0%	47%	\$443,858,000	4.1%	\$3,618	\$150	4.3%	89,354
2000/01	\$450,763,000	3.0%	47%	\$471,821,000	6.3%	\$3,792	\$174	4.8%	91,057
2001/02	\$452,763,000	0.4%	44%	\$471,821,000	0.0%	\$4,016	\$224	5.9%	93,559
2002/03	\$439,181,000	-3.0%	41%	\$457,667,000	-3.0%	\$4,378	\$362	9.0%	95,998
2003/04	\$417,222,000	-5.0%	39%	\$434,784,000	-5.0%	\$4,598	\$220	5.0%	97,456
2004/05	\$433,435,000	3.9%	38%	\$453,628,000	4.3%	\$4,810	\$212	4.6%	98,735
2005/06	\$445,354,000	2.7%	38%	\$465,197,000	2.6%	\$4,906	\$96	2.0%	100,390
2006/07	\$467,622,000	5.0%	37%	\$487,873,000	4.9%	\$5,038	\$132	2.7%	102,443
2007/08	\$483,989,000	3.5%	37%	\$504,240,000	3.4%	\$5,177	\$139	2.8%	103,359
2008/09	\$477,322,000	-1.4%	35%	\$497,168,470	-1.4%	\$5,358	\$181	3.5%	105,566
2009/10	\$444,470,000	-6.9%	31%	\$530,423,000	6.7%	\$5,554	\$196	3.7%	109,637
2010/11	\$444,470,000	0.0%	30%	\$503,355,000	-5.1%	\$5,804	\$250	4.5%	112,030
2011/12	\$412,751,000	-7.1%	28%	\$412,751,000	-18.0%	\$6,240	\$436	7.5%	109,741
2012/13	\$412,751,000	0.0%	27%	\$412,751,000	0.0%	\$6,428	\$188	3.0%	106,977
2013/14	\$412,751,000	0.0%	27%	\$412,751,000	0.0%	\$6,622	\$194	3.0%	104,459
2014/15	\$412,751,000	0.0%	26%	\$412,751,000	0.0%	\$6,820	\$198	3.0%	102,323
2015/16	\$433,389,000	5.0%	27%	\$433,389,000	5.0%	\$7,060	\$240	3.5%	99,868
2016/17	\$444,224,000	2.5%	27%	\$444,224,000	2.5%	\$7,238	\$178	2.5%	97,675

Appendix B-14

Pennsylvania's State System of Higher Education Flexible Pricing Pilots

Since January 2014, the Board of Governors of Pennsylvania's State System of Higher Education has approved 27 flexible pricing pilots developed by the universities. The pilot programs address unique market conditions affecting each of the universities and are evaluated over a two- or three-year period to determine their effectiveness, and whether they should continue and, perhaps, be duplicated at other System universities. The approved pilots described below are effective fall 2014, fall 2015, or fall 2016.

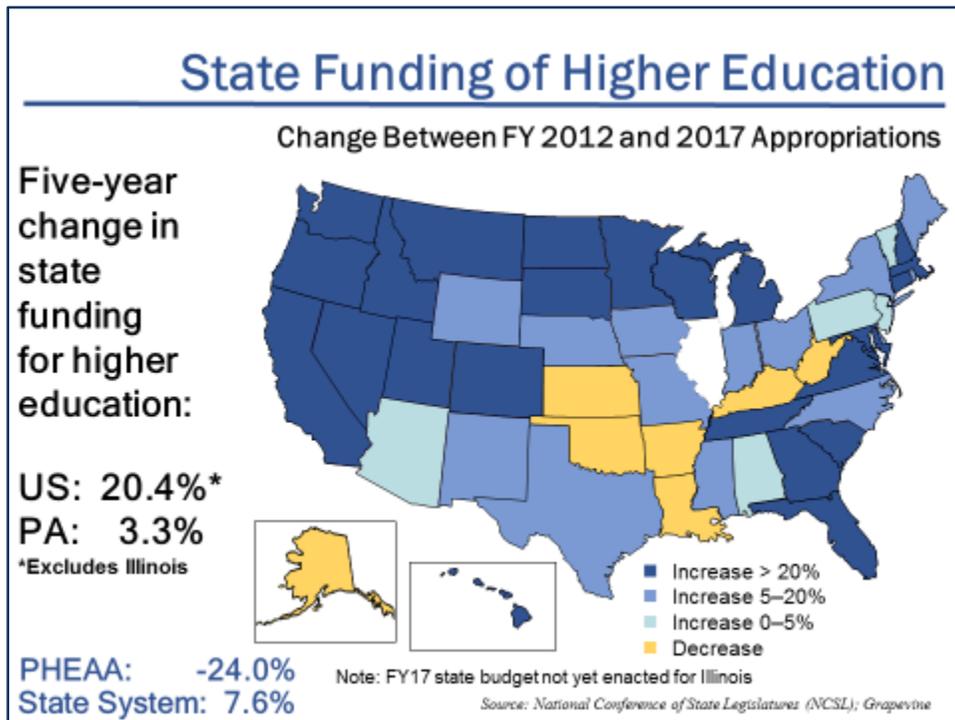
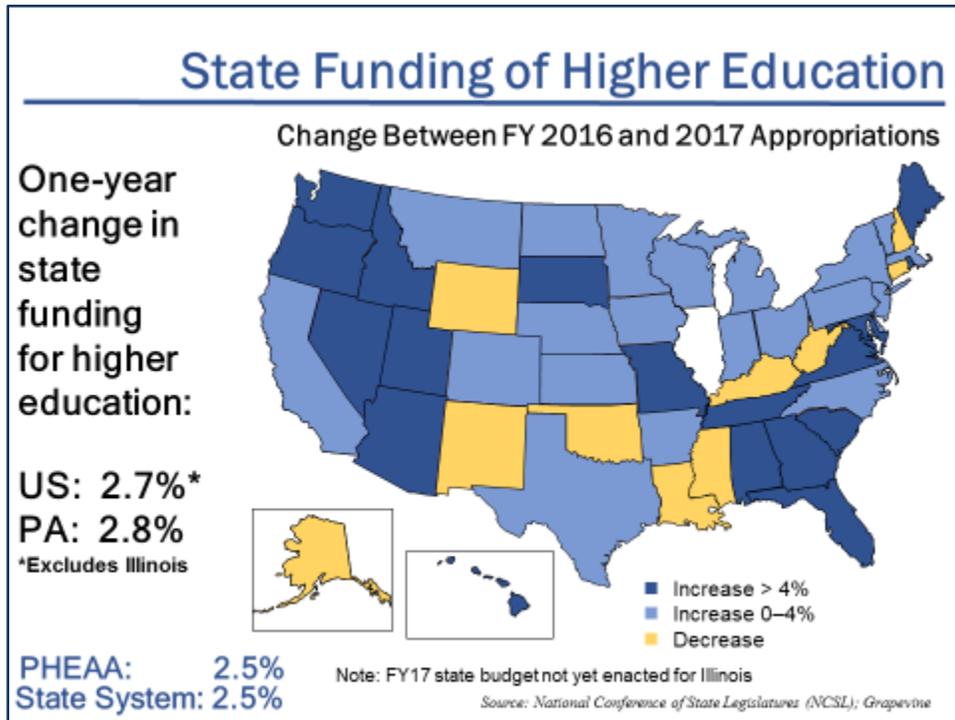
Tuition

- **California, Mansfield, and Slippery Rock Universities:** Reduces tuition by 10 to 15 percent for active members of the military, their spouses, and dependents enrolled in online programs.
- **Cheyney, East Stroudsburg, Millersville, and West Chester Universities:** Reduces by 10 percent the tuition charged to students who take courses at the State System's Center City location in downtown Philadelphia.
- **Edinboro and Mansfield Universities:** Offers newly enrolled out-of-state students more competitive tuition rates that are still greater than the in-state rate.
- **Indiana (IUP), Mansfield, Millersville, and Shippensburg Universities:** Charges in-state, undergraduate tuition on a per-credit basis, in lieu of charging a flat, full-time rate.

Fees

- **Clarion, East Stroudsburg, Edinboro, Lock Haven, Mansfield, Millersville, and Slippery Rock Universities:** Establishes course- or program-specific fees to more appropriately cover the costs of offering high-cost courses or programs in nursing, science, technology, health-related areas (STEM-H), art, and/or music.
- **California and Lock Haven Universities:** Revises the undergraduate educational services fee to be charged on a per-credit basis for undergraduate students, in lieu of charging a flat, full-time rate.

**Pennsylvania's State System of Higher Education
State Funding for Higher Education: 1-, 5-Year Change**



Appendix B-16

Pennsylvania's State System of Higher Education Cost of Attendance and Net Price Fall 2014 First-time, Full-time Freshmen

	Pennsylvania's State System of Higher Education Total Averages	PA State Related Total Averages*	Selected PA Private Peer Total Averages**
Average Cost of Attendance (includes books and miscellaneous personal expenses)	\$23,752	\$30,390	\$46,607
Total number of students in First-time, Full-time Cohort	19,611	26,699	12,008
Total Number of the Cohort receiving any type of financial aid	17,496	21,201	11,243
Percent of the Total Cohort receiving any type of financial aid	89%	79%	94%
Percent of the Total Cohort receiving any Federal, State, Local or Institutional Grant Aid***	57%	61%	92%
Average total award amount of Federal, State, Local or Institutional Grant Aid	\$6,057	\$8,795	\$19,949
Percent of the Total Cohort receiving Institutional Grant Aid	23%	50%	91%
Average total award amount of Institutional Grant Aid	\$2,675	\$6,577	\$17,500
Percent of the total Cohort receiving Student Loan Aid	79%	60%	73%
Average total award amount of Student Loan Aid	\$8,241	\$8,460	\$9,345
Average Total Net Price for Those Receiving Aid - (Cost of Attendance minus Average Grants)	\$17,696	\$21,595	\$26,659
with Loans - (Cost of Attendance minus Average Grants and Loans)	\$9,454	\$13,134	\$17,314

*Weighted average of main and branch campuses. For those that do not have on-campus housing, off-campus rates were used to determine Cost of Attendance.

**Weighted average of Delaware Valley College, DeSales University, Geneva College, Lebanon Valley College, Mercyhurst College, Misericordia University, Mount Aloysius College, Philadelphia University, Robert Morris University, Saint Francis University, Saint Joseph's University, Seton Hill University, Thiel College, Ursinus College, Villanova University, Waynesburg University, Westminster College, Widener University-Main Campus, Wilkes University, and York College.

***Grant Aid--All "free" financial aid to the student; that which does not need to be repaid. Includes need-based and merit-based awards, such as Pell grants, PHEAA grants, scholarships, waivers, tuition discounts, etc.

Source: IPEDS Fall 2014 Tuition (based on First-time, Full-time, On-campus), IPEDS 2014-2015 Student Financial Aid. NOTE: Most recent data available.

Appendix B-17

Pennsylvania Higher Education Assistance Agency (PHEAA) State Grant Awards
All Undergraduate Programs (Excluding Summer School)

Number of Awards

Year	Independent		State System	State-Related	Community Colleges			Business & Technical		Total PA	Out-of-State	Total
	4-Year	2-Year			State-Related	Nursing	Technical	Out-of-State				
2009/10	47,836	3,424	33,719	37,210	21,709	1,080	10,861	155,839	12,210	168,049		
2010/11	47,100	3,412	35,223	37,350	25,041	1,074	12,020	161,220	13,053	174,273		
2011/12	48,323	3,570	36,503	38,658	35,764	1,098	11,283	175,199	13,630	188,829		
2012/13	48,551	3,540	33,400	36,191	31,315	1,137	10,247	164,381	12,375	176,756		
2013/14	46,395	3,394	31,743	33,928	28,224	1,156	9,929	154,769	9,484	164,253		
2014/15	45,211	3,546	31,773	33,718	27,240	1,123	9,125	151,736	9,675	161,411		
2015/16	41,972	3,335	30,400	31,464	23,202	968	6,721	138,062	5,198	143,260		

Value of Awards

Year	Independent		State System	State-Related	Community Colleges			Business & Technical		Total PA	Out-of-State	Total
	4-Year	2-Year			State-Related	Nursing	Technical	Out-of-State				
2009/10	\$141,966,971	\$9,025,189	\$86,716,731	\$108,626,637	\$16,574,287	\$2,468,656	\$26,836,101	\$392,214,572	\$4,912,973	\$397,127,545		
2010/11	\$123,154,986	\$8,015,549	\$78,257,066	\$91,687,606	\$14,841,175	\$2,184,034	\$24,918,481	\$343,058,897	\$4,499,881	\$347,558,778		
2011/12	\$149,001,696	\$10,136,377	\$99,796,407	\$116,389,863	\$27,621,794	\$2,807,642	\$28,043,851	\$433,797,630	\$5,692,492	\$439,490,122		
2012/13	\$154,943,909	\$9,694,541	\$86,563,092	\$111,365,064	\$29,547,335	\$3,044,721	\$26,627,407	\$421,786,069	\$5,236,611	\$427,022,680		
2013/14	\$151,678,344	\$9,728,287	\$91,584,343	\$110,527,312	\$29,872,717	\$3,058,023	\$26,412,919	\$422,861,945	\$4,902,903	\$427,764,848		
2014/15	\$135,968,598	\$9,358,661	\$85,391,838	\$101,608,390	\$26,767,110	\$2,885,565	\$22,879,034	\$384,859,196	\$4,771,184	\$389,630,380		
2015/16	\$139,076,524	\$9,874,881	\$85,537,267	\$103,252,807	\$25,746,922	\$2,729,820	\$18,386,469	\$384,604,690	\$2,761,213	\$387,365,903		

Full-year Average Award

Year	Independent		State System	State-Related	Community Colleges			Business & Technical		Total PA	Out-of-State	Total
	4-Year	2-Year			State-Related	Nursing	Technical	Out-of-State				
2009/10	\$3,317	\$3,250	\$2,817	\$3,234	\$1,185	\$2,810	\$3,292	\$2,950	\$424	\$2,747		
2010/11	\$2,939	\$2,853	\$2,436	\$2,739	\$936	\$2,468	\$2,795	\$2,523	\$364	\$2,343		
2011/12	\$3,540	\$3,522	\$3,007	\$3,397	\$1,250	\$3,140	\$3,456	\$3,022	\$443	\$2,810		
2012/13	\$3,671	\$3,452	\$2,878	\$3,491	\$1,569	\$3,326	\$3,576	\$3,143	\$448	\$2,927		
2013/14	\$3,741	\$3,644	\$3,197	\$3,654	\$1,793	\$3,381	\$3,675	\$3,333	\$551	\$3,151		
2014/15	\$3,430	\$3,330	\$2,996	\$3,385	\$1,708	\$3,168	\$3,398	\$3,097	\$525	\$2,922		
2015/16	\$3,751	\$3,658	\$3,145	\$3,682	\$1,950	\$3,585	\$3,697	\$3,375	\$572	\$3,261		

Source: PHEAA State Grant Program Year-by-Year Summary Statistics Report

Appendix B-18

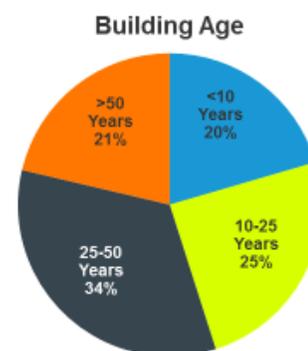
Pennsylvania's State System of Higher Education Educational and General (E&G)* Facilities Highlights

Challenges for State System University Facilities

- Fifty-five percent of the State System's E&G facilities have not had a major renovation in 25 years and require a significant capital investment.
- State System universities have historic facilities, which are less efficient to operate and tend to be more costly to maintain and repair.
- Commonwealth procurement requirements such as the Separations Act and Prevailing Wage increase construction durations and costs. Other Pennsylvania higher education sectors do not have these requirements.
- Although the universities invest annually in their facilities, the State System does not have sufficient resources to do so in the most cost-effective manner.

State System E&G Facilities

- Number of Buildings: **632**
- Total GSF: **16.39 Million**
- Replacement Value: **\$5.8 Billion**
- Deferred Maintenance and Capital Renewal Backlog: **\$1.7 Billion**



55% of E&G Facilities have not had a significant renovation in the last 25 years. At 25 years, facilities maintenance and repair costs increase dramatically.

Funding Sources for Buildings and Infrastructure

- **University Operating Funds**—These funds are used for maintenance and operations of the physical plant including grounds, janitorial, preventative maintenance, repairs, and deferred maintenance (including Key'93 funds). Last year State System universities spent about \$37 million on repairs and modernization of its facilities; national models suggest at least \$75 million should be invested annually in this area to keep up with deferred maintenance.
- **Key'93**
 - Enacted by Act 50 of 1993, funded with revenue from the Real Estate Transfer Tax.
 - Funding eliminated in FY 2009/10 and FY 2010/11; restored in FY 2011/12.
 - Used to address deferred maintenance backlog requirements.
 - It is estimated that \$1 spent to immediately address small deferred maintenance requirements saves \$4 in capital renewal costs.
 - FY 2016/17 funding is \$16 million; historically funded as high as \$18 million.
- **Commonwealth Capital Funds**—From FY 2000/01 to FY 2008/09 the Commonwealth provided the State System \$65 million annually for capital projects. In FY 2009/10, capital funding was increased to \$130 million per year; it returned to \$65 million in FY 2011/12 and currently remains at that level. These funds are spent largely on renovation or replacement of existing buildings. Because universities have not been able to adequately fund life-cycle maintenance from operating funds, the capital funds have been essential to limiting deferred maintenance backlog growth.

**Educational and General facilities house the instructional, academic support, and administrative functions; and exclude housing, dining, student unions, and recreation centers.*

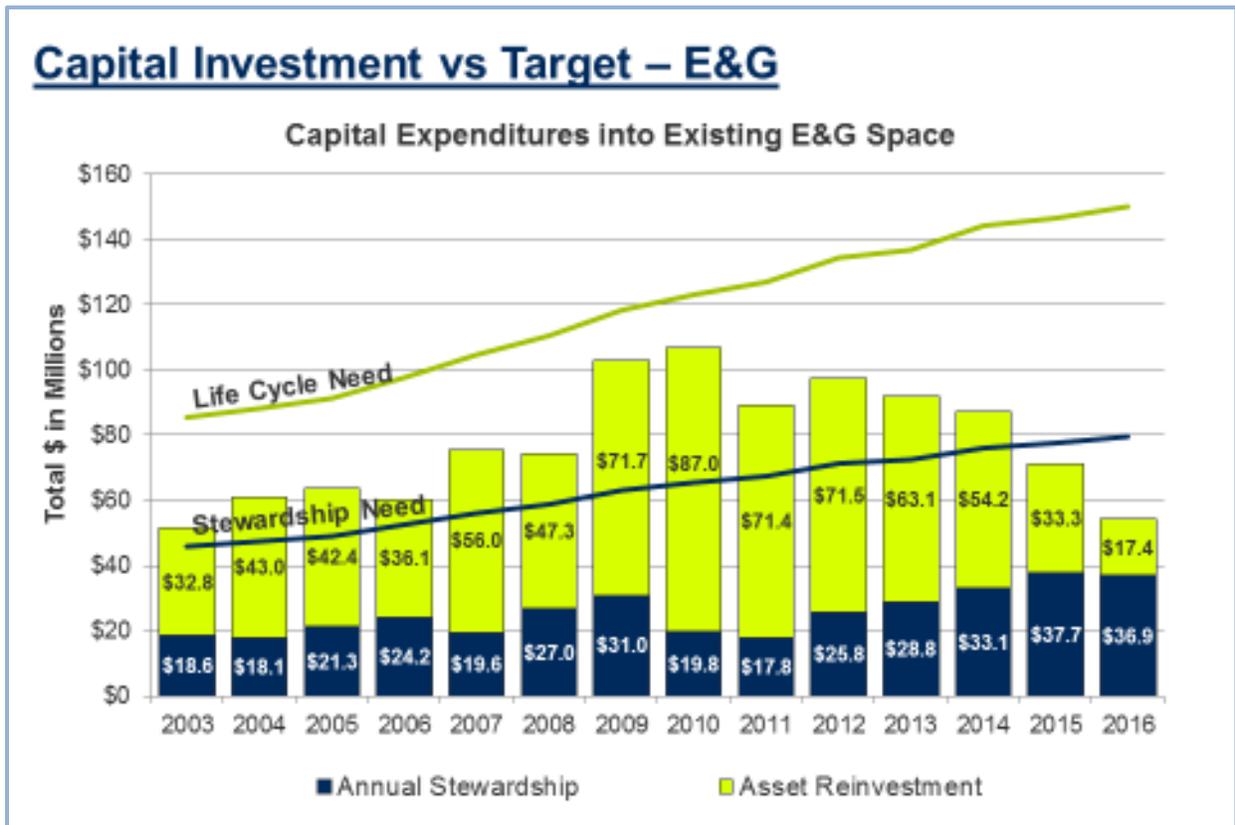
Pennsylvania's State System of Higher Education Educational and General (E&G)* Facilities Highlights

Funding Requirements for E&G Buildings and Infrastructure

According to Sightlines, a national firm that specializes in the benchmarking of higher education facilities, the State System is not investing adequately in its facilities.

National standards suggest the State System invest at least \$150 million annually in its E&G buildings to prevent further degradation of the facilities. This amount includes a blend of “annual stewardship” (university operating budgets and Key’93 funds or equivalent for recurring maintenance and repair) and “asset reinvestment” (capital funds to address building life cycle renewal and replacement requirements).

The temporary increases in capital funding in recent years helped minimize the impact of underfunding the annual stewardship. However, in FY 2014/15 and FY 2015/16 the combined investment in both annual stewardship and asset reinvestment fell short of the combined annual life cycle and stewardship need by more than \$75 million each year. Continued facility investment at this level will result in significant increases to the State System’s E&G deferred maintenance backlog, which is currently estimated at \$1.7 billion.



*Educational and General facilities house the instructional, academic support, and administrative functions; and exclude housing, dining, student unions, and recreation centers.

Appendix B-19
Pennsylvania's State System of Higher Education
Energy Cost Savings

Estimated Cost Avoided Through State System's Energy Conservation Effort Since 2005/06								
Fiscal Year	Million Square Feet	mmBTU	Total Energy Cost for Fiscal Year	\$/mmBTU	Energy Utilization Index (EUI)	Annual EUI Reduction	Cumulative EUI Reduction	Cost Avoided
2005/06	26.45	3,796,335	\$43,720,415	11.52	145,749	4.9%	10.9%	\$5,460,000
2006/07	26.56	3,810,074	\$45,411,400	11.92	143,446	1.6%	12.4%	6,400,000
2007/08	26.72	3,648,264	\$46,053,980	12.62	136,517	4.8%	16.6%	9,160,000
2008/09	26.55	3,510,905	\$47,424,753	13.51	132,234	3.1%	19.2%	11,270,000
2009/10	27.40	3,213,945	\$41,807,009	13.01	117,288	14.1%	28.3%	16,530,000
2010/11	29.68	3,503,409	\$43,636,255	12.46	118,026	10.7%	27.9%	16,870,000
2011/12	30.63	3,255,255	\$40,873,698	12.56	106,261	9.4%	35.1%	22,080,000
2012/13	31.30	3,459,765	\$41,950,885	12.13	110,527	-4.0%	32.5%	20,170,000
2013/14	32.36	3,742,193	\$42,333,481	11.31	115,631	-4.6%	29.3%	17,580,000
2014/15	32.75	3,520,811	\$39,495,798	11.22	107,513	7.0%	34.3%	20,630,000
2015/16	31.96	3,286,025	\$35,988,733	10.95	102,819	4.4%	37.2%	21,300,000
Total								\$167,450,000

EUI (Energy Utilization Index) = Btu/sq-ft

Avoided cost = (EUI_{current} - EUI_{base year}) (MSF_{current}) (\$/mmBTU_{current})

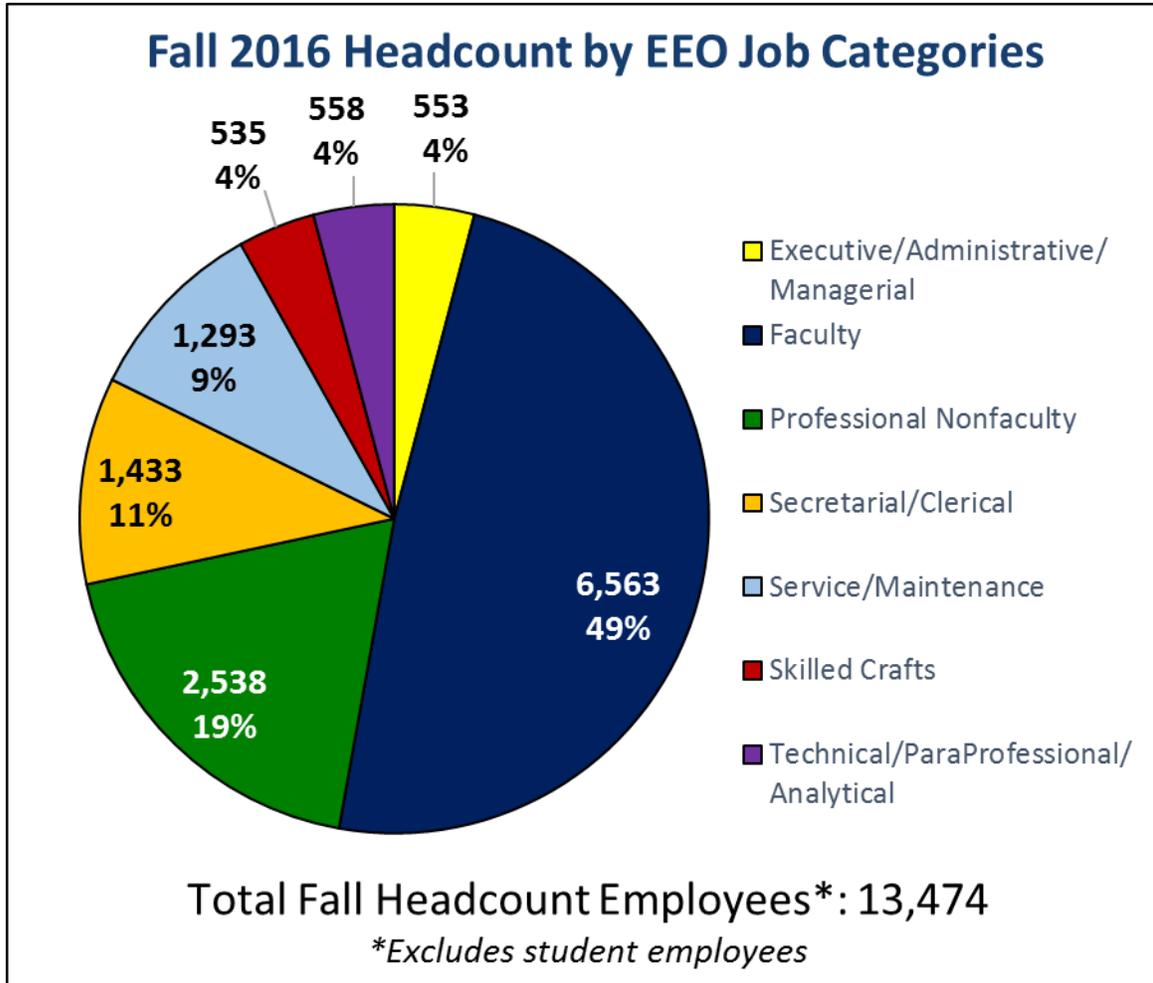
The base-line year for calculations is 2002/03

Estimated Cost Avoided Through State System's Energy Procurement Efforts			
Fiscal Year	Electricity	Natural Gas	Total
2005/06	\$0	\$3,248,000	\$3,248,000
2006/07	0	1,424,000	1,424,000
2007/08	0	1,990,000	1,990,000
2008/09	0	1,144,000	1,144,000
2009/10	1,771,000	1,127,000	2,898,000
2010/11	6,273,000	162,000	6,435,000
2011/12	1,199,000	257,000	1,456,000
2012/13	1,850,000	601,000	2,451,000
2013/14	5,868,000	1,246,000	7,114,000
2014/15	1,869,000	318,000	2,187,000
2015/16	12,116,000	631,000	12,747,000
Total	\$30,946,000	\$12,148,000	\$43,094,000

Avoided cost estimate based on difference from procured energy cost and published rate from the local distribution company for the estimated energy needs over the life of the contract period. Savings listed are for the term of the contract period; many contracts are for multiple years.

Appendix B-20

Pennsylvania's State System of Higher Education
Employee Demographics



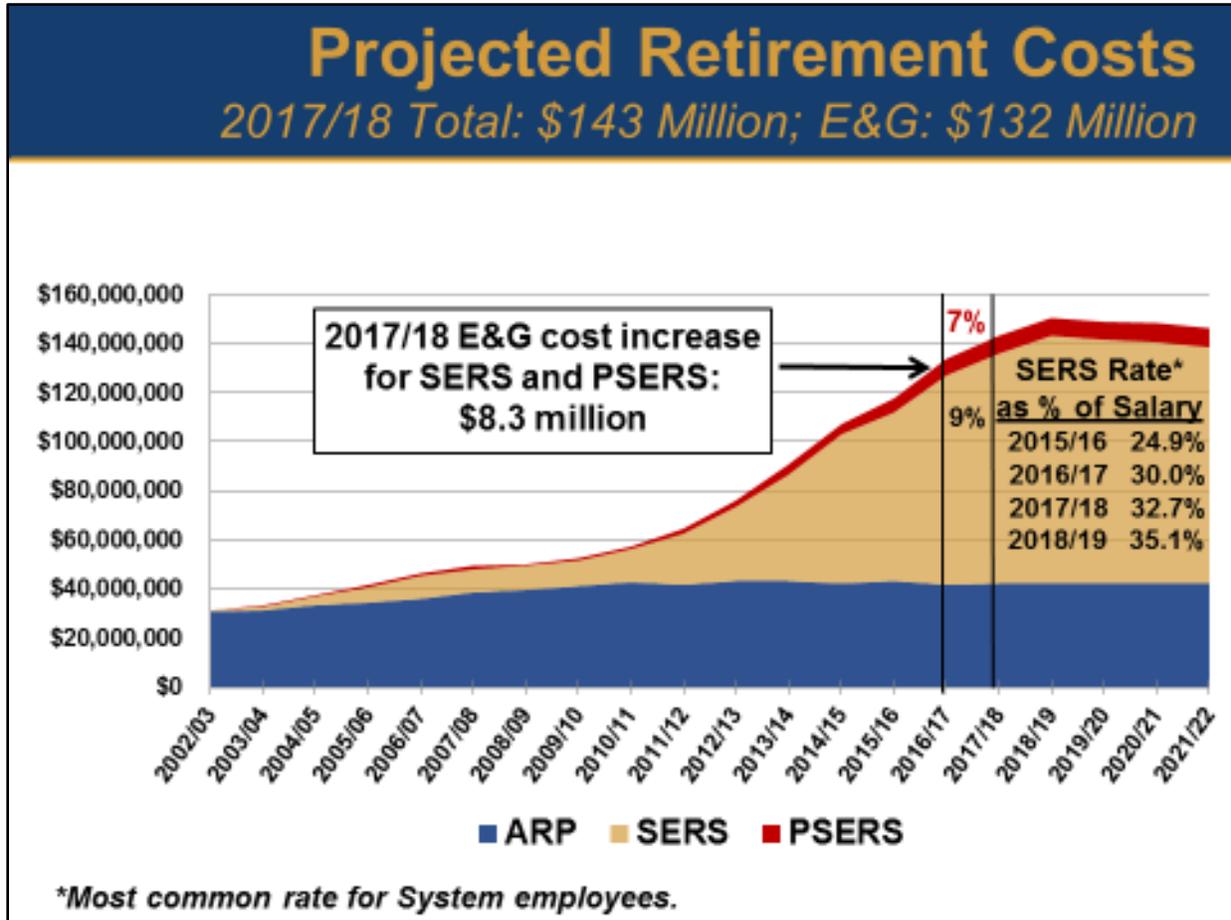
Pennsylvania's State System of Higher Education Retirements by Fiscal Year												
	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17 YTD**
APSCUF (Faculty)	53	165	99	121	107	250	112	204	112	190	132	86
AFSCME	58	240	77	94	98	154	104	115	101	213	176	62
All Others*	32	62	50	49	88	92	65	75	69	85	86	61
Total	143	467	226	264	293	496	281	394	282	488	394	209

*Includes nonrepresented employees and represented employees in the APSCUF - Coaches, SCUPA, OPEIU, SPFPA, PSSU and PDA unions.

**Year to Date (YTD) data is as of 2/10/17

Appendix B-21

**Pennsylvania's State System of Higher Education
Impact of Projected Employer Retirement Contribution Rates**



Note: Since the enactment of Act 120-2010, the System's additional retirement costs will be approaching \$85 million by fiscal year 2017/18 (the year in which the SERS employer contribution rates originally were expected to peak).

Enrollment in Retirement Plans	
SERS*	42%
PSERS*	8%
Alternative Retirement Plans (ARP)**	50%

*Defined benefit plans

**Defined contribution plans

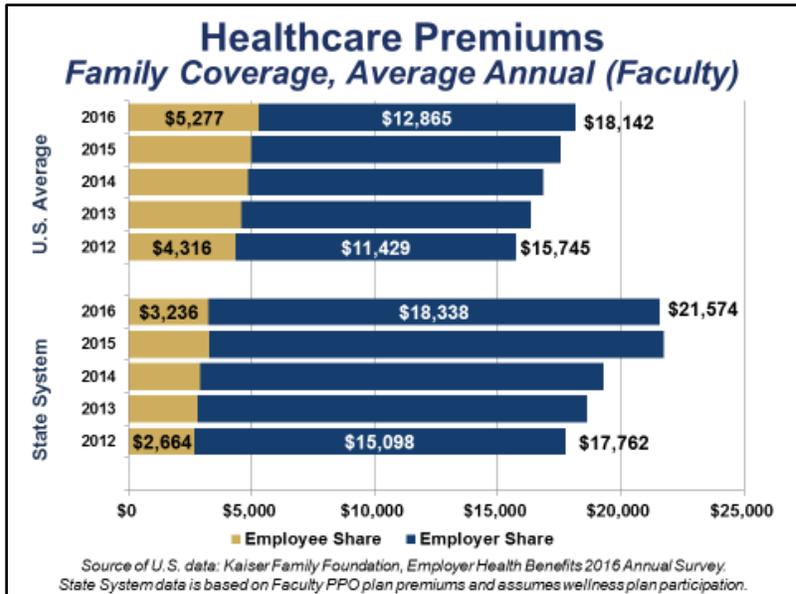
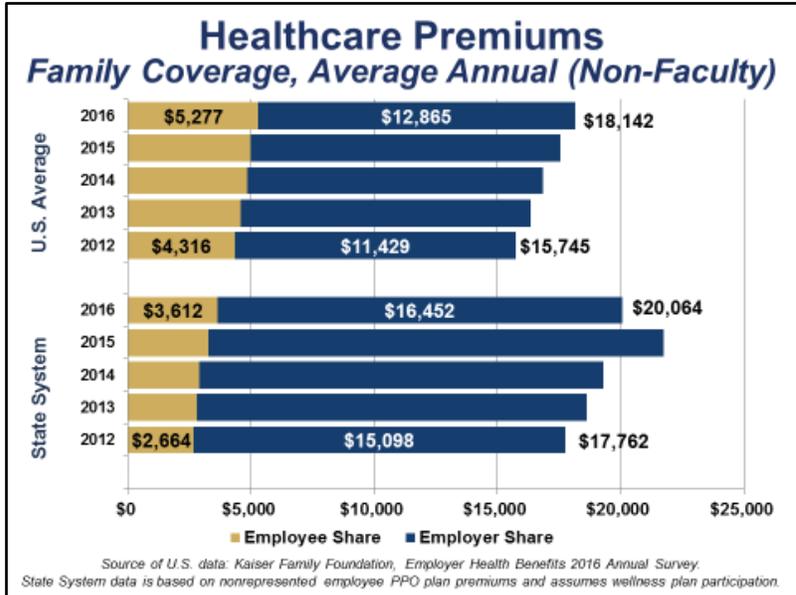
Appendix B-22

**Pennsylvania's State System of Higher Education
Healthcare Premiums**

The State System operated two different healthcare programs in 2016. Combined, the plans covered about two-thirds of all System employees; the Pennsylvania Employee Benefit Trust Fund (PEBTF) covered the remainder of those eligible to receive healthcare coverage.

The State System health plan that covered nonrepresented employees and members of two of its smaller union groups was redesigned at the beginning of 2016, incorporating features that included higher member cost-sharing for certain medical services, along with an increased employee premium contribution. The State System saved more than \$2,000 for each employee enrolled in family coverage last year because of these plan modifications. It also made significant progress in moving toward better alignment with healthcare program costs of other organizations in the higher education sector nationally, as well as with overall U.S. averages, as illustrated in the top chart on the right.

The other health plan operated by the System, specific only to faculty and coaches, remained consistent in both plan design and costs for 2016, as compared to 2015, as illustrated in the bottom chart. As a result of the recently completed negotiations with the union representing these employee groups, this plan also has been modified to include changes in both member cost-sharing and employee premium contributions that will produce cost savings for the State System going forward that will approximate those realized from the changes that were made to the health plan for nonrepresented employees and the other union groups.



Appendix B-23

Pennsylvania's State System of Higher Education Dixon University Center Actual Annualized FTE Employees and Current Year Budget System-wide Offices Located in Harrisburg and Philadelphia

	Actual 2014/15 FTE	Actual 2015/16 FTE	Estimated* 2016/17 FTE	2016/17 Budget
Office of the Chancellor (1/2 of 1%)	40.31	40.59	37.25	\$10,022,403
Shared Services (a)	76.57	76.40	81.64	21,610,485
Other (b)	35.00	33.64	34.14	10,061,560
Total	151.88	150.63	153.03	\$41,694,448

**As of January 18, 2017*

(a) When cost effective, the System's universities and the Office of the Chancellor participate in shared service centers rather than managing individual offices across the System to perform similar functions. Currently, there are shared services for functions such as: payroll, benefits administration, labor relations, legal services, construction support, and administrative information systems.

(b) Includes site support functions, externally funded restricted grant activity, academic programming support for the eleven universities that offer academic programs at the Dixon University Center, positions supported by Board-allocated resources, and other miscellaneous positions funded from alternative sources.

Additional Detail for "Other" Positions:	2014/15	2015/16	2016/17
Site Support Functions	13.40	14.86	14.61
Academic Programs at Dixon University Center **	5.31	5.31	5.31
Restricted Activity (funded externally)	2.02	2.25	3.54
Office of Internal Audit and Risk Assessment	7.00	7.00	6.90
Other	7.27	4.22	3.78
Total	35.00	33.64	34.14

***Academic programs are offered at the Dixon University Center by the following System universities: Bloomsburg, Indiana, Lock Haven, Millersville, and Shippensburg. In addition, Elizabethtown College, Evangelical Seminary, Immaculata University, Lebanon Valley College, Rochester Institute of Technology, and University of Texas – Arlington offer programs there.*

Note: In 2016/17, 3.34 employees (included in Shared Services) provide operational support at the State System @ Center City, Philadelphia location for academic programs for Bloomsburg, Cheyney, East Stroudsburg, Millersville, and West Chester Universities.

Appendix B-24

Pennsylvania's State System of Higher Education Programs and Services for Military Members and Veterans

State System universities offer a wide range of programs and services for military members, veterans, and their families. Their efforts continue to receive national recognition. Victory Media, publisher of *G.I. Jobs* magazine, this year named 13 of the universities "Military Friendly® Schools," a designation awarded annually to colleges, universities, and trade schools in recognition of their efforts to ensure the academic success of military service members, veterans, and spouses. Several of the universities have qualified for this select honor roll for multiple years in a row.



Additionally, *Military Advanced Education & Transition* magazine's 2017 Guide to Top Colleges and Universities, which compares schools based on their military culture, financial assistance, flexibility, and on-campus and online support provided to students serving in the military, includes six State System universities.



All 14 universities provide military veterans with preference in course scheduling. The universities also offer in-state tuition rates to qualified veterans and their dependents regardless of state residency status under the Veterans Access, Choice, and Accountability Act.

Below are more examples of the individual programs and services State System universities provide to military members, veterans, their spouses, and dependents:

- **Bloomsburg University's** Office of Military and Veterans Resources provides former and current military students, their spouses, and their dependents assistance when seeking different forms of financial aid through their respective branch of service, including through the GI Bill, Federal Tuition Assistance, and the Educational Assistance Program. The university also provides a military specific academic adviser for other issues. Bloomsburg was awarded Silver Level status as a Military Friendly® school this year. The university ranked in the top 10 percent of colleges, universities, and trade schools in the country working to embrace military service members, veterans, and spouses as students and helping to ensure their success on campus. To help meet the needs of military students, the university also established a military students' lounge. The BU Student Veterans Association offers opportunities for social and educational activities and is involved in fundraisers to benefit organizations such as the Wounded Warrior Foundation and the American Red Cross.
- **California University of Pennsylvania's** dedicated Office of Military and Veterans Affairs provides resources for veterans, assists with benefits, and provides support for current and former service members and their eligible family members. In addition, service members around the world are enrolled in 100 percent online degree programs through Cal U Global Online, which offers a discounted tuition rate for active-duty military, veterans, and their eligible dependents. Cal U will host its fifth annual German Armed Forces Proficiency Badge testing in April; active-duty service members from

across the country will undergo rigorous competition to earn this sought-after award, one of the few foreign awards approved for U.S. service members.

- **Cheyney University** welcomes all veterans, eligible dependents, members of the National Guard and Reserves, and active duty personnel and is committed to ensuring that their educational and campus community goals are met. The Office of the Registrar provides information about GI Bill and other available educational benefits and is the office where veterans, eligible dependents, members of the National Guard, and selected reserves may apply for their benefits. Special programs and events are scheduled throughout the year by the Veterans Resource Center to honor and celebrate veterans.

- **Clarion University** offers sensitivity and awareness sessions for students, faculty, and staff. It also provides a student lounge for veterans, a veteran's certifying official, and veterans' clubs on both the main and Venango campuses. The university has contracted with the Butler VA to offer Telehealth counseling services to student veterans. The university's Department of Library Science is collaborating with the Library of Congress to conduct interviews for the Veterans History Project. The university also received the distinction as a best Military Spouse Friendly School for 2016.



- **East Stroudsburg University's** Student Veterans Center processes all veteran education benefits including Federal Tuition Assistance, the Educational Assistance Program, and GI Bill. A Veterans Task Force meets regularly to identify issues that student veterans are experiencing, and the center's website contains up-to-date information about how student veterans can apply for educational benefits and scholarships. The Veterans Center also hosts a series of weekly meetings for veterans on a variety of topics ranging from employment opportunities to healthcare.



- **Edinboro University** has been recognized among the top 15 percent of higher education institutions nationwide in service to veterans, earning *G.I. Jobs' Military Friendly®* designation in each of the last seven years. At the center of the university's support for veterans and military families is the EU Veterans Success Center, which is now in its fifth year. The center serves as a "one-stop" shop for assistance to veterans, active military, and military dependents, providing expert guidance for all GI Bill programs and other services. Also, Edinboro University and the Erie Veterans Affairs Medical Center have partnered to make VA Telehealth Services available to veterans through the university's Ghering Health Center.
- **Indiana University of Pennsylvania's** Military and Veterans Resource Center serves as a "one-stop" shop, providing a wide range of services for military, veterans, and military-affiliated students and family members. Student workers who are veterans or military-affiliated staff the center. More than 4,000 individuals have visited the MCRV since its opening, and staff members have helped more than 500 IUP students to use their GI Bill benefits. The center also coordinates special Veterans' Day events and campus-wide programming. IUP has an active Veterans Outreach Committee that meets regularly to improve university services to students who are veterans, a Veterans

Support Group, and a Student Veterans Organization. IUP has one of the largest Reserve Officers Training Corps (ROTC) in Pennsylvania, commissioning its 2,000th cadet in May 2015 and counting 12 generals among its ROTC graduates. The IUP ROTC program has earned the MacArthur Award, a national award given to the top programs in the country. IUP ROTC is also a three-time recipient of the Governor's Trophy, presented to the most outstanding military science program at a Pennsylvania college or university. IUP is a Yellow Ribbon university and is recognized routinely by military publications for excellence.

- **Kutztown University** provides a military-supportive atmosphere in a thriving campus environment. This supportive atmosphere starts with a committed and knowledgeable staff and a centrally located Veterans Services Center, a USO-style resource center that provides a place where students can study, relax, and meet other military-affiliated students. A single point-of-contact provides assistance and coordinates needed services for students and staff. To make the pursuit of academic goals more manageable, veteran's liaisons offer services such as veteran benefits guidance (i.e. GI Bill, TA, EAP), financial assistance, academic advising, career planning, counseling, and disability services. Military-related leadership and student-organization opportunities exist such as Army ROTC, an active Military Club @ KU, the Women Veterans Committee, and SALUTE Veterans National Honor Society. Graduating student-veterans receive Patriotic honor cords for their achievement. Faculty and staff participate in Veterans Green Zone sensitivity training and an advisory board consisting of administrators, faculty, staff, student-veterans, and local VA and veteran-related organizations meet regularly to improve university services. Additionally, KU awards credit for military training, CLEP and DAN TES, and participates in the MyCAA spouse program.
- **Lock Haven University's** veterans' advisory group meets monthly to coordinate university efforts in identifying and meeting the needs of student veterans as well as veterans in the community. The group coordinates Veterans' Appreciation Month activities celebrated in November, including an on-campus Community Veterans' Expo, a Veteran Pinning Ceremony, and LHU Army ROTC's Commemorative Run. In addition, LHU's Student Veterans' Organization serves as a liaison for student veterans, providing a variety of resources and special services, including personal and financial counseling. A student veterans' lounge is available for all military and veteran students.
- **Mansfield University** waives the application fee for all veterans. The Office of Military and Veterans Affairs offers counseling to enrolled veterans on benefits, career resources, and more. The MU chapter of Student Veterans of America (MUSVO) is open to all students, faculty, and staff who have served or are serving in the military. MUSVO has started a new program that pairs each incoming student veteran with a current student veteran as a mentor. The university dedicated its new Military Resource Center in November. The center has computers, study space, a television, refrigerator, and microwave for student veterans to use. Two scholarships have been established to provide recognition and financial assistance to veterans and active-duty personnel. Nine students who are veterans or are currently serving in the military were awarded scholarships for the current academic year.



- Millersville University** provides an organization and resources for veterans to receive academic support and assistance in attending and successfully graduating from college. Housed on campus at the Mercer House, the Veterans Resource Center and the Student Veterans Association welcome veterans to share their experiences and explore opportunities for leadership on campus and in the community. It also serves as a source of fellowship and support for families of soldiers who are currently deployed or preparing for deployment. A veterans' coordinator on staff handles paperwork for individuals applying for educational benefits from the Department of Veterans Affairs and ensures that veterans receive all of the benefits they are entitled to, including qualifying for the in-state tuition rate. Millersville coordinates with the VA's work-study program to ensure that the students staffing the VRC are also veterans, and a Veterans' Task Force meets regularly to assess changes in options or needs. Millersville was recognized for being among the 2017 Military Friendly® Employers and Schools and was honored with the Seven Seals Award by the Employer Support of the Guard and Reserve. Millersville participates in the Concurrent Admissions Program with the Army, Army Reserves, and Army National Guard. In addition, Millersville offers a two-part, four-year program in military science, ROTC.
- Shippensburg University** offers a variety of programs and assistance-based services for military service members, veterans, and their dependents. These services are centralized through the Veterans Service Office, whose mission is to help simplify the transition to continuing education. The Veterans Resource Center in the student union building is a relaxing place to study, relax, eat, and converse with like-minded students. Additional learning and outreach opportunities for student veterans include an active Student Veterans of America chapter and the Army ROTC Raider Battalion. The campus is an easy commute from Letterkenny Army Depot, U.S. Army War College in Carlisle, Navy Support Activity in Mechanicsburg, National Guard Training Center at Fort Indiantown Gap, and Army Medical Command installation at Fort Detrick.
- Slippery Rock University** sponsors a Student Veterans' Center, providing veterans, veteran-dependents, active duty personnel, reserve and National Guard members, and ROTC cadets a place to gather, share information, and relax. The center's location in the Smith Student Center Success Suite supports a synergy and integration between and among student veterans, the Student Government Association, and other student organizations. SRU is utilizing grant money from the U.S. Department of Veterans Affairs for an equine-assisted recreation program, which provides recreational therapy to veterans at the University's Storm Harbor Equestrian Center. Slippery Rock was the first university in the country to participate in the Veterans Administration's Telehealth system. The university annually promotes several "Salute to the Military" activities at which former, current, and future military personnel are recognized and receive free admission.
- West Chester University** offers scholarships for returning veterans and provides a variety of services through its Veterans Center and the Student Veterans Group, including a weekly support group. The Veterans Center regularly connects with West Chester VFW Post 106 for breakfast, support, and networking. Students are eligible to participate in the Army Reserve Officers' Training Corps (ROTC) program through a formal cross-enrollment agreement with the Widener University Department of Military Science and in the Air Force Reserve Officer Training Corps (AFROTC) through an



agreement with Saint Joseph's University. The Greg and Sandra Weisenstein Veterans Center at West Chester strives to create an intentional culture of understanding, acceptance, and success for veterans, active military, and those who support them. The Veteran Center facilitates communication among campus offices to provide a coordinated system of service to provide a meaningful transition from the military to college.

Military Friendly® Schools (as designated by Victory Media, publisher of *G.I. Jobs* magazine): Bloomsburg, California, Clarion, East Stroudsburg, Edinboro, Indiana, Kutztown, Lock Haven, Mansfield, Millersville, Shippensburg, Slippery Rock and West Chester

Top Schools (as designated by KMI Media Group, publisher of *Military Advanced Education & Transition* magazine's 2017 Guide to Top Colleges and Universities): California, Clarion, Edinboro, Kutztown, Mansfield and West Chester

Appendix B-25

Pennsylvania's State System of Higher Education 2012–17 Performance Funding Program

The Performance Funding Program supports the strategic direction of Pennsylvania's State System of Higher Education. As the State System and the universities transform teaching and learning, secure resources, engage their communities and regions, and provide leadership for the future, the Performance Funding Program is designed to measure the outcomes of these efforts in the success of our students, comprehensive access to opportunity, and stewardship of our resources and the Commonwealth's communities and regions.

The Performance Funding Program was designed around specific principles:

- The program will be clear, understandable, and replicable.
- The primary focus will be on results (outputs rather than inputs or throughputs).
- There will be transparency and visibility of all data.
- University efforts to distinguish themselves on programs, students, locations, and delivery methods will be possible.
- The design will reduce inter-institutional competition and support collaboration.
- The program will align with System and university strategic directions and System policies, e.g., allocation formula.
- The program will align with national accountability efforts.

Performance Measures/Indicators

To achieve the principles within the three themes of success, access, and stewardship, each university is evaluated annually on 10 performance measures. The performance indicators are organized into three groups (see next page.) All of the universities are responsible for the four mandatory performance indicators. The universities selected their remaining six performance measures from a list of optional measures or proposed a maximum of two unique performance measures not listed. Proposed measures were derived from the university's strategic plan, having an element of risk as well as reward, an external comparative base to be measured against annually, and are capable of being quantified such that it can be determined if the university meets or does not meet the goal.

Performance Measurement

For all indicators, university performance is measured via progress toward institution-specific goals and against external comparisons or expectations. Whenever possible, external comparisons are based upon similar universities participating in national studies. Benchmark institutions have been developed based on, but not limited to, such factors as institutional size and complexity.

Performance Funding Pool

To maintain a reasonable performance funding pool that will continue to encourage performance, the performance funding pool is established annually as equal to 2.4 percent of the State System's total Educational and General fund revenue. The performance funding pool is funded completely from state appropriations.

Pennsylvania's State System of Higher Education Performance Funding Program

Mandatory Measures

Access Measures	Success Measures	Stewardship Measures
Closing the Access Gap for Low-Income and Underrepresented Minority, First-Time Freshmen Students	Closing the Achievement Gap for Low-Income and Underrepresented Minority, First-Time Freshmen Students	
Faculty Diversity	Degrees Conferred: Increase the number of degrees conferred	

Optional Measures

Access Measures	Success Measures	Stewardship Measures
Faculty Career Advancement	Student Persistence (3rd and 4th year)	Facilities Investment
Student Diversity	Student Learning Assessment – Value Added and Senior Scores	Support Expenditures as a Percent of Cost of Education
Closing the Access Gaps Low-Income and Underrepresented Minority Transfer Students	Increase in STEM and Health Profession Degree Recipients	Employee Productivity
	Closing the Achievement Gaps Low-Income and Underrepresented Minority Transfer Students	Private Support

University-Specific Measures Examples

Distance Education Enrollment	Second Year Persistence for Nonmajority Students	Enrollment of First-time Nonmajority Students
International Enrollment	High Impact Practices	Individual Donor Support
Study Abroad	Student Engagement	External Grant Support
Underrepresented Minority Transfers	Undergraduate Research	Reducing Carbon Emissions

Bloomsburg University of Pennsylvania
David L. Soltz, President

California University of Pennsylvania
Geraldine M. Jones, President

Cheyney University of Pennsylvania
Frank G. Pogue, Interim President

Clarion University of Pennsylvania
Karen M. Whitney, President

East Stroudsburg University of Pennsylvania
Marcia G. Welsh, President

Edinboro University of Pennsylvania
H. Fred Walker, President

Indiana University of Pennsylvania
Michael A. Driscoll, President

Kutztown University of Pennsylvania
Kenneth S. Hawkinson, President

Lock Haven University of Pennsylvania
Michael Fiorentino Jr., President

Mansfield University of Pennsylvania
Francis L. Hendricks, President

Millersville University of Pennsylvania
John M. Anderson, President

Shippensburg University of Pennsylvania
Barbara G. Lyman, Interim President

Slippery Rock University of Pennsylvania
Cheryl Joy Norton, President

West Chester University of Pennsylvania
Christopher M. Fiorentino, President

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