



OFFICE OF THE CHANCELLOR

Dear Appropriations and Education Committee Chairs,

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

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

The **Northeast's** progress against the significant actions outlined in July is noted below:

1. Detailed plan for phased-in curriculum development, review, and implementation developed.
 - Status – on track. The side letters with APSCUF to the interim curriculum committee have been signed, and work, as outlined in the plan, is beginning.
2. Plan for the curriculum implementation impacts on supporting systems such as information technology, registration, financial aid, etc.
 - Status – in process. Based on the phased-in curriculum plan and the current technology environments across the three universities, the Northeast determined the most cost-effective path forward is to leverage the new systemwide contract for the Student Information System. This reduces implementation costs and reduces the impact on faculty, staff and students by converting to a new platform with additional functionality. The new contract is currently being finalized and sets the stage for all universities to have a foundation for course sharing. The Northeast will be in the first phase of universities implementing the new technology, with the full implementation scheduled for 2023. They are currently in the process of developing the 2022-23 interim processes and the detailed implementation plan for 2023.
3. Middle States submission of Complex Substantive Change Request.
 - Status – completed. This request was submitted September 16th, with receipt subsequently acknowledged by Middle States. The universities will have ongoing conversations through the March 2022 anticipated approval date.
4. Organization charts at the division level.
 - Status – in process. Leadership communicated to employees the new cabinet, process, and timeline to create the new universities' structure. Additional communications are planned over the next quarter. Academic organization charts were distributed to faculty for feedback and finalized, including assignment of faculty to their departments.



5. Marketing and Branding strategy development.
 - o Status – in process. The research to create the new university name is underway, including engagement of stakeholders for input.

In addition, the integrating university has been communicating with its key stakeholders, engaging them via multiple channels to provide updates and solicit feedback. The team is focused on ways to create a consistent and enhanced student experience as they design the integrated university.

The significant activities planned for the next quarter include:

1. Academic – Establish the Interim Curriculum Committee and begin receiving, reviewing and aligning the academic programs as specified by our phased academic array approach.
2. Communications – Solicit feedback from key stakeholders and determine an integrated university name. Begin updating marketing collateral and recruitment materials for the integrated university.
3. Finance and Administration – Develop enhanced budgeting and financial processes and finalize contract synthesis to achieve financial benefit.
4. Technology – Begin transition planning conversations with core Student Information System vendor for software migration plans. Establish initial plans and alternative operating models for academic year 2022–2023 within existing applications.
5. Governance – Fully develop the management organizational chart, including departments and positions to properly support the integrated university.

The work we have achieved to date has been significant, and I want to thank the faculty and staff who have made it possible. While it is rewarding to redesign public higher education in Pennsylvania on this scale, it has also been challenging. University presidents and I are incredibly appreciative of their work and contributions. We are also appreciative of your consideration of and attention to these plans. The partnership we have developed has made this redesign possible, and I look forward to continuing our collective work as we build a better future for Pennsylvania students and our commonwealth.

Thank You,



Dan Greenstein
Chancellor

Act 50 Requirement	Appendix	First Quarterly Transmittal	Timing for continued data transmissions
(1) An overview of the financial position of the respective universities at the time of plan approval and the time of the report.	Appendix V: Financial Sustainability Analysis	<ul style="list-style-type: none"> • No updates 	<ul style="list-style-type: none"> • Updated annually (Quarter 2) Audited financial statements available in November annually
(2) The operating budget and total budget for each university at the time of plan approval and at the time of the report.	Appendix V: Financial Sustainability Analysis	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated annually (October)
(3) The estimated amount of expenditures needed to support plan implementation at the time of plan approval and the cumulative amount of expenditures made to support plan implementation at the time of the report.	Appendix X: Implementation Costs	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated quarterly
(4) The applicable organizational charts at the time of plan approval and at the time of the report.	Appendix T: Organizational Charts	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated based on organizational implementations
(5) Full-time enrollments at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updates (normally available in October and March)
(6) Graduation outcomes at the time of plan approval and at the item of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	<ul style="list-style-type: none"> • No updates 	<ul style="list-style-type: none"> • Updated annually (April)
(7) The cost of tuition, room and board and fees at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated annually (October)
(8) The average cost of attendance at the time of plan approval and at the time of the report.	Appendix O: Act 50 Reporting on Student Metrics and Analysis	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated annually (October)
(9) The number of faculty and non-faculty employees at the time of plan approval and at the time of the report.	Appendix P: Act 50 Reporting on Faculty Appendix Q: Act 50 Reporting on Staff	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated quarterly
(10) The number of faculty and non-faculty employees by location at the time of plan approval and at the time of the report.	Appendix P: Act 50 Reporting on Faculty Appendix Q: Act 50 Reporting on Staff	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated quarterly

(11) Each impact to faculty and non-faculty employee staffing, including, but not limited to, separations, reductions in force, reclassifications of job responsibilities or roles or reassignments to other universities within the system. The notification under this paragraph shall include an estimated financial impact for the current and subsequent two fiscal years.	Appendix P: Act 50 Reporting on Faculty Appendix Q: Act 50 Reporting on Staff	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Updated annually (July)
(12) The faculty-to-student ratio and the faculty and non-faculty employee-to-student ratio at the time of plan approval and at the time of the report.	Appendix P: Act 50 Reporting on Faculty	<ul style="list-style-type: none"> • No updates 	<ul style="list-style-type: none"> • Updated annually (January)
(13) A list of academic programs that have been terminated or consolidated and an explanation of the reasons for termination or consolidation.	Appendix L: Act 50 Reporting on Academic Programs	<ul style="list-style-type: none"> • Updated. 	<ul style="list-style-type: none"> • Quarterly updates based on activity
(14) A list of new academic programs that have been approved and an explanation of the need for the programs.	Appendix L: Act 50 Reporting on Academic Programs	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Quarterly updates based on activity
(15) The number of academic programs by location at the time of plan approval and at the time of the report.	Appendix L: Act 50 Reporting on Academic Programs	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Quarterly updates based on activity
(16) A list of property that is for sale or has been sold and the value of the proceeds from the sale.	Appendix J: Act 50 Reporting on Property for Sale	<ul style="list-style-type: none"> • Updated 	<ul style="list-style-type: none"> • Quarterly updates based on activity
(17) A list of administrative service consolidations and the value of savings resulting from the consolidations.	Appendix V: Financial Sustainability Analysis	<ul style="list-style-type: none"> • No updates 	<ul style="list-style-type: none"> • Quarterly updates based on activity
(18) A list of outlining concerns related to the implementation of the plan on the community and affiliated organizations.	Appendix R: Act 50 Reporting on Affiliated Entities' and Communities' Concerns	<ul style="list-style-type: none"> • No updates 	<ul style="list-style-type: none"> • Quarterly report on affiliated and community organizations concerns and mitigations
(19) Any other information as requested by the chairpersons enumerated under this subsection.	N/A		

Integration Pillars	Quarter 3 - 2021 (July, Aug, Sep)	Quarter 4 - 2021 (Oct, Nov, Dec)	Northeast Region Integration
Student Experience	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Inventoried and began alignment of Student Services across campuses including counseling, orientation, military & veteran affairs, etc. <input checked="" type="checkbox"/> Developed a common timeline and editorial calendar (orig. Q1- 2021) 	<ul style="list-style-type: none"> <input type="checkbox"/> Introduce future students to the integrated university (orig. Q3-2021) <input type="checkbox"/> Initiate the design of the integrated university's student facing activities 	
Academics	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Created plan for phased curriculum <input checked="" type="checkbox"/> Completed negotiations with APSCUF / Faculty <input checked="" type="checkbox"/> Began process to establish interim curriculum committee and approval process <input checked="" type="checkbox"/> Communicated academic structure and faculty placements 	<ul style="list-style-type: none"> <input type="checkbox"/> Establish an integrated academic catalog (orig. Q3-2021) <input type="checkbox"/> Establish approach for academic curriculum synthesis and student cross walks (orig. Q3-2021) <input type="checkbox"/> Interim curriculum committee creates process for curriculum review <input type="checkbox"/> Begin academic program development across campuses to enable academic phase-in approach <input type="checkbox"/> Establish guidelines for curriculum development within new departments 	
Institutional Accreditation	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Submitted MSCHE Complex Substantive Change (CSC) Form for accreditation review 	<ul style="list-style-type: none"> <input type="checkbox"/> Review and respond to MSCHE 's legal requests for additional information, if needed <input type="checkbox"/> Provide additional information to peer evaluators based on requests, if needed 	
Enrollment	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Affirmed plan to utilize individual institutions' financial aid leveraging strategies for awarding aid in Fall 2022 <input checked="" type="checkbox"/> Developed and refine talking points for recruiters and tour guides to ensure consistency and accuracy of messaging <input checked="" type="checkbox"/> Worked with Department of Education (ED) to understand timeline and requirements for integrated institution <input checked="" type="checkbox"/> Established interim operating plans for recruitment, admissions and financial aid before July 1, 2022 effective date 	<ul style="list-style-type: none"> <input type="checkbox"/> Develop common admissions applications, standards, and communications (orig. Q2 2021) <input type="checkbox"/> Determine financial aid leveraging strategy for awarding aid in Fall 2023 (orig. Q3-2021) <input type="checkbox"/> Students can complete Free Application for Federal Student Aid (FAFSA) for upcoming year eligibility (orig. Q3 2022) <input type="checkbox"/> Review aid applications and package & process aid for Fall 2022 returning students (orig. Q2-2022) <input type="checkbox"/> Begin planning integrated recruitment strategy for the integrated university (orig. Q3- 2021) <input type="checkbox"/> Align with Dept. of Education (ED) and PA Higher Education Assistance Agency (PHEAA) requirements for transition (orig. Q3- 2021) <input type="checkbox"/> Determine impact of integration to contracts/affiliation agreements related to dual enrollment (orig. Q3- 2021) 	
Finance and Infrastructure	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Developed financial and enrollment projections for the integrated university <input checked="" type="checkbox"/> Reviewed vendor contracts for consolidation and savings <input checked="" type="checkbox"/> Determined impact of integration to contracts/affiliation agreements related to marketing & communications 	<ul style="list-style-type: none"> <input type="checkbox"/> Develop and implement common procedures to all accounting functions within the integrated university <input type="checkbox"/> Develop and implement a singular budgeting process 	
Human Resources	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Developed integrated Human Resources (HR) structure into one singular NE HR team (serving the three universities) 	<ul style="list-style-type: none"> <input type="checkbox"/> Establish integrated university organizational structure 	

October 1, 2021 updates to Appendix V: Financial Sustainability Analysis

The tables below reflect the Act 50 financial sustainability analysis reporting requirements as of September 30, 2021.

- Operating budget and total budget for each university

UNRESTRICTED BUDGET (EDUCATIONAL AND GENERAL AND AUXILIARY)

Revenues	FY 2020-21			FY 2021-22			FY 2022-23	FY 2023-24	FY 2024-25	FY 2025-26
	BL	LO	MA	BL	LO	MA	Integrated University	Integrated University	Integrated University	Integrated University
Tuition	\$71,931,324	\$27,398,010	\$12,813,137	\$69,421,894	\$25,785,228	\$12,338,059	\$111,416,320	\$113,655,788	\$115,940,269	\$118,270,669
Fees	15,917,162	6,680,569	2,782,374	23,823,478	7,812,549	2,917,404	35,606,481	36,130,617	36,675,049	37,228,726
State Appropriation	38,405,845	25,746,354	18,074,506	39,050,145	24,266,719	17,199,122	82,126,305	83,768,831	85,444,207	87,153,092
Auxiliary Sales	19,675,435	3,071,636	5,210,996	29,146,284	9,137,994	9,793,340	53,306,046	53,839,106	54,377,497	54,921,272
All Other Revenue	16,182,320	7,746,730	4,268,767	15,021,145	9,242,315	5,837,320	10,806,796	10,218,041	9,629,286	9,629,286
Total Revenues	\$162,112,086	\$70,643,299	\$43,149,780	\$176,462,946	\$76,244,805	\$48,085,245	\$293,261,948	\$297,612,383	\$302,066,308	\$307,203,044
Expenditures										
Compensation Summary:										
Salaries and Wages	\$76,984,828	\$38,323,126	\$21,488,767	\$73,171,644	\$35,816,826	\$20,633,311	\$128,988,448	\$134,107,492	\$136,737,259	\$139,428,053
Benefits	37,954,656	19,214,141	10,047,206	37,194,343	18,435,755	10,435,013	67,983,787	70,576,503	71,981,477	73,858,494
Subtotal, Compensation	\$114,939,484	\$57,537,267	\$31,535,973	\$110,365,987	\$54,252,581	\$31,068,324	\$196,972,235	\$204,683,995	\$208,718,736	\$213,286,547
Student Financial Aid	5,928,041	3,758,268	4,257,932	7,261,421	4,788,307	4,817,000	17,443,075	17,610,784	17,780,170	17,951,250
Other Services and Supplies	34,013,780	12,100,603	12,652,778	42,579,298	13,431,053	14,407,772	69,767,255	69,133,754	68,526,637	68,074,891
Subtotal, Services and Supplies	\$39,941,821	\$15,858,871	\$16,910,710	\$49,840,719	\$18,219,360	\$19,224,772	\$87,210,330	\$86,744,538	\$86,306,807	\$86,026,141
Capital Expenditures and Debt Principal Payments	6,825,721	3,360,623	3,600,330	8,267,236	3,437,371	3,736,403	15,202,914	15,142,693	12,265,320	12,557,599
Total Expenditures	\$161,707,026	\$76,756,761	\$52,047,013	\$168,473,942	\$75,909,312	\$54,029,499	\$299,385,479	\$306,571,226	\$307,290,863	\$311,870,287
Revenues Less Expenditures	\$405,060	(\$6,113,462)	(\$8,897,233)	\$7,989,004	\$335,493	(\$6,944,254)	(\$6,123,531)	(\$8,958,843)	(\$5,224,554)	(\$4,667,243)
Transfers to Plant Fund	4,782,978	165,622	320,291	1,886,437	42,857	66,771	5,339,243	4,359,692	4,359,692	4,359,692
Revenues Less Expenditures and Transfers	(\$4,377,918)	(\$6,279,084)	(\$9,217,524)	\$6,102,567	\$292,636	(\$6,011,025)	(\$11,462,774)	(\$13,318,535)	(\$9,584,246)	(\$9,026,935)
Supplemental Resources/Adjustments										
Planned Use of Reserves for One-Time Needs/Strategic Initiatives	\$2,120,845	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Use of One-Time COVID Funds (revenue recognition adjustment)	\$8,877,060	\$4,000,000	\$0	(\$8,877,060)	(\$4,000,000)	\$0	\$0	\$0	\$0	\$0
Revenues and Use of Supplemental Resources/Adjustments Less Expenditures & Transfers	\$6,619,987	(\$2,279,084)	(\$9,217,524)	(\$2,774,493)	(\$3,707,364)	(\$6,011,025)	(\$11,462,774)	(\$13,318,535)	(\$9,584,246)	(\$9,026,935)
Annualized FTE Enrollment										
Undergraduate	7,225.74	2,440.38	1,584.63	6,927.63	2,255.66	1,525.59	11,003.14	11,113.17	11,224.30	11,336.55
Graduate	608.96	512.81	4.76	605.28	506.00	5.02	1,133.57	1,144.91	1,156.35	1,167.92
Total Annualized FTE Enrollment	7,834.70	2,953.19	1,589.39	7,532.91	2,761.66	1,530.61	12,136.71	12,258.08	12,380.66	12,504.46
FTE of Budgeted Unrestricted Employees, Net of Turnover										
Faculty	404.84	200.29	110.67	391.38	179.00	98.55	604.88	604.88	604.88	604.88
Nonfaculty	522.33	263.80	168.20	480.98	251.35	158.85	883.33	883.33	883.33	883.33
Total FTE of Budgeted Employees	927.17	464.09	278.87	872.36	430.35	257.40	1,488.21	1,488.21	1,488.21	1,488.21

October 1, 2021 updates to Appendix X: Implementation Costs

The table below reflects the Act 50 reporting requirements related to estimated and cumulative expenditures as of September 30, 2021.

- Integration budget and cumulative expenditures

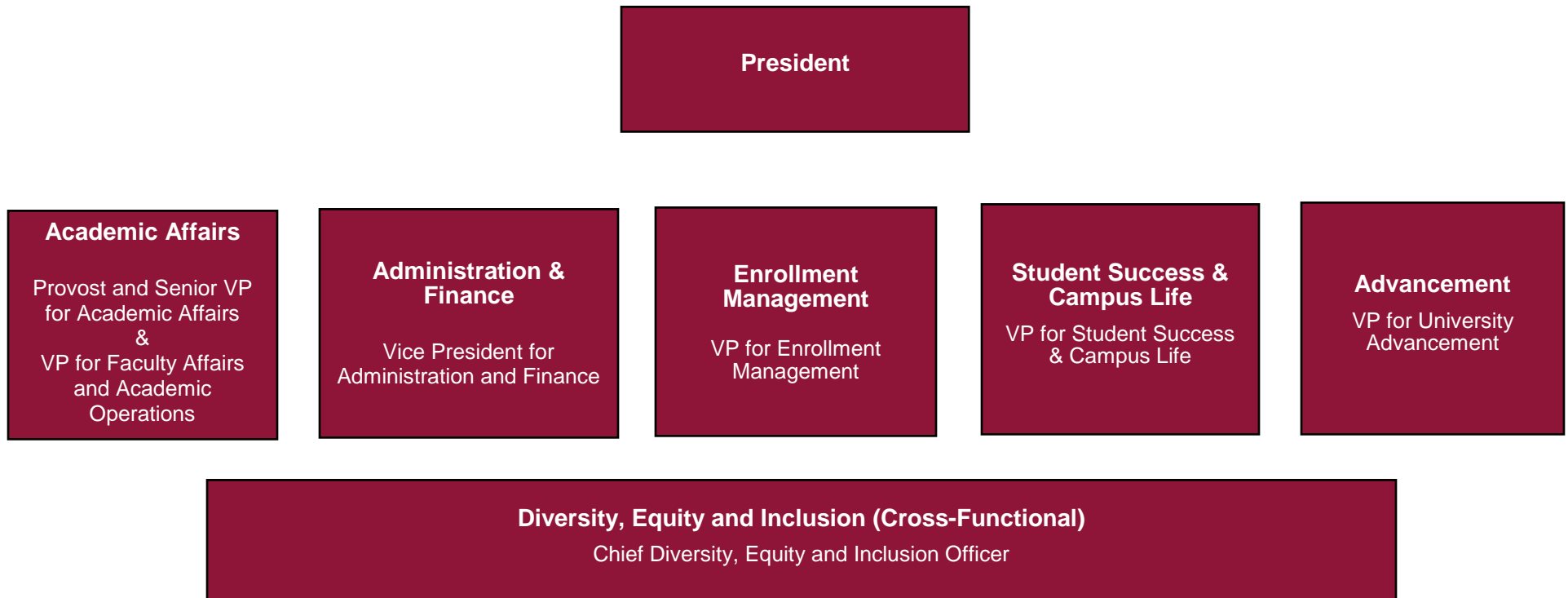
Integration Budget and Cumulative Expenditures FY 2021/22 First Quarter Report Northeast Integration									
	Budget by Fiscal Year						Less		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	Total Budget	Cumulative Expenditures	Remaining Budget
Consulting/Personnel	\$584,588	\$326,600	\$87,500	\$87,500	\$0	\$0	\$1,086,188	(\$350,284)	\$735,904
IT – SIS	330,000	700,000	0	0	0	0	1,030,000	(323,393)	706,607
IT – Software	44,704	968,816	42,000	40,000	0	0	1,095,520	(14,917)	1,080,603
IT – Technology Upgrades	0	603,640	603,640	603,640	603,640	603,640	3,018,200	0	3,018,200
Middle States	112,825	0	0	0	0	0	112,825	0	112,825
Faculty	0	2,309,844	0	0	0	0	2,309,844	0	2,309,844
Average	\$1,072,117	\$4,908,900	\$733,140	\$731,140	\$603,640	\$603,640	\$8,652,577	(\$688,594)	\$7,963,983

Integration Budget and Cumulative Expenditures FY 2021/22 First Quarter Report Whole Integration									
	Budget by Fiscal Year						Less		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	Total Budget	Cumulative Expenditures	Remaining Budget
Northeast Integration	\$1,072,117	\$4,908,900	\$733,140	\$731,140	\$603,640	\$603,640	\$8,652,577	(\$688,594)	\$7,963,983
West Integration	1,915,545	7,811,072	2,261,875	2,087,500	0	0	14,075,992	(1,597,891)	12,478,101
Both Integrations	1,261,000	5,600,000	0	0	0	0	6,861,000	(2,072,316)	4,788,684
Average	\$4,248,662	\$18,319,972	\$2,995,015	\$2,818,640	\$603,640	\$603,640	\$29,589,569	(\$4,358,801)	\$25,230,768

October 1, 2021 updates to Appendix T: Organizational Charts

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

- Organizational charts



October 1, 2021 updates to Appendix O: Act 50 Reporting on Student Metrics and Analysis

The information below reflects Act 50 reporting requirements related to enrollment projections, graduation outcomes, cost of tuition, room and board, and cost of attendance as of October 1, 2021.

- Total Full-Time and Part-Time Enrollment

University	Fall 2021		
	Full-Time	Part-Time	Total
Bloomsburg	6,684	1,061	7,745
Lock Haven	2,427	493	2,920
Mansfield	1,386	417	1,803
Total	10,497	1,971	12,468

- Cost of Tuition, Room and Board, and Fees

Minimum, Maximum and Most Common Price of Attendance
FY 2021-22

University	In-State Undergrad Tuition	In-State Tech Fee	In-State Mandatory Fees	Room			Board			TOTAL		
				Min	Max	Most Common	Min	Max	Most Common	Min	Max	Most Common
Bloomsburg	\$7,716	\$478	\$2,789	\$6,610	\$9,296	\$7,108	\$3,014	\$4,186	\$3,298	\$20,607	\$24,465	\$21,389
Lock Haven	\$7,716	\$478	\$2,684	\$6,540	\$9,380	\$6,540	\$2,300	\$4,556	\$3,828	\$19,718	\$24,814	\$21,246
Mansfield	\$7,716	\$478	\$2,488	\$6,660	\$11,400	\$8,750	\$3,586	\$4,072	\$3,668	\$20,868	\$26,154	\$23,100
Average	\$7,716	\$478	\$2,654	\$6,583	\$10,025	\$7,466	\$2,967	\$4,271	\$3,598	\$20,398	\$25,144	\$21,912

October 1, 2021 updates to Appendix O: Act 50 Reporting on Student Metrics and Analysis Continued

- Average Cost of Attendance

In-State Undergraduate, Dependent 2021-2022 Preliminary											
University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$10,983	\$10,718	\$4,258	\$9,408	\$3,210	\$3,310	\$3,210	\$1,200	\$26,111	\$22,751	\$24,801
Lock Haven	\$10,878	\$10,350	\$2,629	\$10,350	\$4,564	\$5,307	\$5,307	\$1,830	\$27,622	\$20,644	\$28,365
Mansfield	\$10,682	\$10,168	\$6,268	\$9,328	\$2,308	\$3,452	\$2,226	\$2,000	\$25,158	\$22,402	\$24,236
Average	\$10,848	\$10,412	\$4,385	\$9,695	\$3,361	\$4,023	\$3,581	\$1,677	\$26,297	\$21,932	\$25,801

Out-of-State Undergraduate, Dependent 2021-2022 Preliminary											
University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$22,807	\$10,718	\$4,258	\$9,244	\$3,330	\$3,430	\$3,330	\$1,200	\$38,055	\$34,575	\$36,745
Lock Haven	\$20,702	\$10,350	\$2,629	\$10,350	\$5,709	\$5,709	\$5,709	\$1,830	\$38,591	\$30,870	\$38,591
Mansfield	\$13,248	\$10,168	\$6,268	\$9,328	\$2,308	\$2,226	\$2,226	\$2,000	\$27,724	\$24,968	\$26,802
Average	\$18,919	\$10,412	\$4,385	\$9,641	\$3,782	\$3,788	\$3,755	\$1,677	\$34,790	\$30,138	\$34,046

October 1, 2021 updates to Appendix O: Act 50 Reporting on Student Metrics and Analysis Continued

In-State Undergraduate, Independent 2021-2022 Preliminary											
University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$10,958	\$10,718	\$4,258	\$9,408	\$3,310	\$3,310	\$3,210	\$1,200	\$26,111	\$22,751	\$24,801
Lock Haven	\$10,878	\$10,350	\$2,629	\$10,350	\$4,564	\$5,307	\$5,307	\$1,830	\$27,622	\$20,644	\$28,365
Mansfield	\$10,682	\$10,168	\$6,268	\$9,328	\$2,672	\$3,452	\$2,226	\$2,000	\$25,158	\$22,402	\$24,236
Average	\$10,839	\$10,412	\$4,385	\$9,695	\$3,515	\$4,023	\$3,581	\$1,677	\$26,297	\$21,932	\$25,801

Out-of-State Undergraduate, Independent 2021-2022 Preliminary											
University	Tuition & Fees	Room & Board, On-Campus	Room & Board, With Parents	Room & Board, Off-Campus	Other Expenses (Transp., Etc.), On-Campus	Other Expenses (Transp., Etc.), With Parents	Other Expenses (Transp., Etc.), Off-Campus	Books Supplies	Total COA, On-Campus	Total COA, With Parents	Total COA, Off-Campus
Bloomsburg	\$22,807	\$10,718	\$4,258	\$9,408	\$3,330	\$3,430	\$3,330	\$1,200	\$38,055	\$34,575	\$36,745
Lock Haven	\$20,702	\$10,350	\$2,629	\$10,350	\$5,709	\$5,709	\$5,709	\$1,830	\$38,591	\$30,870	\$38,591
Mansfield	\$13,248	\$10,168	\$6,268	\$9,328	\$2,308	\$3,452	\$2,226	\$2,000	\$27,724	\$24,968	\$26,802
Average	\$18,919	\$10,412	\$4,385	\$9,695	\$3,782	\$4,197	\$3,755	\$1,677	\$34,790	\$30,138	\$34,046

October 1, 2021 updates to Appendix P: Act 50 Reporting on Faculty; Appendix Q: Act 50 Reporting on Staff

The tables below reflect Act 50 reporting requirements related to staff as of September 30, 2021.

- Number of faculty and non-faculty employees by location

Employee Headcount as of 9/30/2021			
	Total Employee Headcount	Faculty	Total Nonfaculty
Bloomsburg	965	445	520
Lock Haven	454	198	256
Mansfield	294	126	168
Integrations Result	1,713	769	944

Employee Headcount as of 9/30/2021							
	AFSCME	Nonrepresented	SCUPA	SPFPA & POA	Coaches	Cheer Adviser	OPEIU
Bloomsburg	291	92	70	22	30	1	14
Lock Haven	144	48	27	7	30		
Mansfield	92	31	14	11	20		
Integrations Result	527	171	111	40	80	1	14

FOOTNOTES:

- Includes total employee headcount for all active employees (will include those on various types of leave without pay, etc.)
- Excludes employees classified as Volunteers, Contractors or Other, as well as student employees
- Includes all groups (Permanent/Temporary, Full Time/Part Time/Hourly)
- Total Nonfaculty figures are the sum of all non-APSCUF units: AFSCME, Nonrepresented, SCUPA, SPFPA & POA, Coaches, Cheer Advisors, OPEIU
- Current Employee Complement as of September 30, 2021 (will be subject to retro-activity)

October 1, 2021 updates to Appendix P: Act 50 Reporting on Faculty;

Appendix Q: Act 50 Reporting on Staff, Continued

The tables below reflect Act 50 reporting requirements related to staff as of July 30, 2021.

- Each impact to faculty and non-faculty employee staffing, including, but not limited to, separations, reductions in force, reclassifications of job responsibilities or roles or reassignments to other universities within the system. The notification under this paragraph shall include an estimated financial impact for the current and subsequent two fiscal years.

Faculty and non-Faculty Complement Impacts									
		July 1, 2020 Complement	July 1, 2021 Complement	Net Employment Actions	July 2020 - June 2021 Employment Actions				Total Promotions
					New Hires & Rehires	Separations & Retirements	Transfers (Receiving)	Transfers (Sending)	
Bloomsburg	Faculty	505	456	-53	74	-127			23
	Faculty (Permanent)	354	335	-22	10	-32			23
	Faculty (Temporary)	151	121	-31	64	-95			
	Nonfaculty	587	499	-90	9	-87	1	-13	30
	Bloomsburg Personnel	1,092	955	-143	83	-214	1	-13	53
Lock Haven	Faculty	223	204	-20	11	-33	2		9
	Faculty (Permanent)	186	173	-16		-17	1		9
	Faculty (Temporary)	37	31	-4	11	-16	1		
	Nonfaculty	288	259	-31	17	-42		-6	17
	Lock Haven Personnel	511	463	-51	28	-75	2	-6	26
Mansfield	Faculty	148	134	-15	9	-24			7
	Faculty (Permanent)	113	108	-6		-6			7
	Faculty (Temporary)	35	26	-9	9	-18			
	Nonfaculty	182	161	-22	10	-29	1	-4	7
	Mansfield Personnel	330	295	-37	19	-53	1	-4	14

October 1, 2021 updates to Appendix P: Act 50 Reporting on Faculty; Appendix Q: Act 50 Reporting on Staff Continued

The tables below reflect Act 50 reporting requirements related to staff as of July 30, 2021.

- Each impact to faculty and non-faculty employee staffing, including, but not limited to, separations, reductions in force, reclassifications of job responsibilities or roles or reassignments to other universities within the system. The notification under this paragraph shall include an estimated financial impact for the current and subsequent two fiscal years.

Faculty and non-Faculty Financial Impacts					
		Total Personnel Expenses (Increased Employees)	Total Personnel Expense (Employee Reduction)	Total Personnel Expense (Employee Promotions)	Net Personnel Expense (Change from Prior Year)
Bloomsburg	Faculty	\$2,660,673	\$(7,605,935)	\$220,750	\$(4,724,512)
	Faculty (Permanent)	\$1,069,664	\$(4,781,753)	\$220,750	\$(3,491,339)
	Faculty (Temporary)	\$1,591,010	\$(2,824,183)		\$(1,233,173)
	Nonfaculty	\$844,485	\$(8,284,055)	\$247,810	\$(7,191,760)
	Bloomsburg Personnel	\$3,505,158	\$(15,889,990)	\$468,560	\$(11,916,272)
Lock Haven	Faculty	\$660,112	\$(3,022,503)	\$101,445	\$(2,260,946)
	Faculty (Permanent)	\$100,649	\$(2,414,082)	\$101,445	\$(2,211,989)
	Faculty (Temporary)	\$559,464	\$(608,421)		\$(48,957)
	Nonfaculty	\$825,304	\$(4,125,499)	\$135,785	\$(3,164,410)
	Lock Haven Personnel	\$1,485,417	\$(7,148,002)	\$237,230	\$(5,425,355)
Mansfield	Faculty	\$206,137	\$(1,320,746)	\$69,631	\$(1,044,979)
	Faculty (Permanent)		\$(938,199)	\$69,631	\$(868,567)
	Faculty (Temporary)	\$206,137	\$(382,548)		\$(176,411)
	Nonfaculty	\$545,508	\$(2,934,522)	\$38,244	\$(2,350,770)
	Mansfield Personnel	\$751,645	\$(4,255,268)	\$107,875	\$(3,395,748)

October 1, 2021 updates to Appendix P: Act 50 Reporting on Faculty; Appendix Q: Act 50 Reporting on Staff Continued

Footnotes for Faculty and non-Faculty Complement and Financial Impact Tables

- Comparison of employee complement of July 1, 2021 to July 1, 2020
- Excludes employees classified as Others, Contractors, Volunteers, Student Employees and Hourly Employees
- Includes active employees across all funds, performs a basic calculation to provide the headcount difference between the comparison periods
- Isolates New Hires/Rehires and Separations/Retirements, as well as Campus Transfers (Sending & Receiving) as the main actions impacting the change in complement
- Identifies the reclassification of job responsibilities or role reassignments through faculty and staff promotion actions
- Final calculation for Net Personnel Expense (Change from Prior Year): Total Salaries & Benefits for Increase to Employee Complement – Total Salaries & Benefits for Reduction to Employee Complement + Total Salaries & Benefits for Employee Promotions

Calculation of the financial impact is based on the following salary and benefits rates:

Complement Change	Personnel Compensation	Benefit Rate
Increase to Employee Complement (New employees and receiving transfers)	Actual annual salaries of new personnel	50% of salary amount for permanent faculty and all nonfaculty 18% of salary amount for temporary faculty
Reduction in Employee Complement (Separations, Retirements and sending transfers)	Actual annual salaries of separated and retired personnel	50% of salary amount for permanent faculty and all nonfaculty 18% of salary amount for temporary faculty
Reclassification of job responsibilities and role reassignments (Faculty and staff promotions)	Rate of 10% of current salaries is assumed to be a result of the personnel promotion increase	26% of new salary amount to account for increase to retirement and FICA expenditures

October 1, 2021 updates to Appendix L: Act 50 Reporting on Academic Programs

The tables below reflect Act 50 reporting requirements related to academic programs as of September 30, 2021.

- Number of academic programs by location

Number of Degree Programs by Location October 1, 2021			
University	Undergraduate	Graduate	Total
Bloomsburg	57	21	78
Lock Haven	44	7	51
Mansfield	29	2	31

Note: Does not include concentrations, minors, and certificates.