



OFFICE OF THE CHANCELLOR

Dear Appropriations and Education Committee Chairs,

Attached you will find the quarterly report on our integrating universities' 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 **West'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 – completed. The West has re-planned its milestones for information technology and supporting systems (see the attached milestone report). The West plans to move into a single instance of a current Student Information System phasing in the new technology beginning in January 2022.
3. Middle States submission of Complex Substantive Change Request.
  - Status – completed. The change request was submitted on September 16<sup>th</sup>, 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 – completed. Leadership communicated to employees the organization charts, process, and timeline to create the new integrated university's structure. Academic organization charts were distributed to faculty for feedback and finalized including assignment of faculty to their departments.
5. Marketing and Branding strategy development.
  - Status – completed. The new university name will be announced in October, which will begin the marketing and recruitment work.



In addition, the integrated 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 to align the Graduate and General Education programs for July 1, 2022 and facilitate the election of new department chairs.
2. Communications – Formally launch the integrated brand in October and provide the opportunity for stakeholder engagement/feedback on the new colors and logos. This action will be followed by the broader incorporation of the new brand within marketing and recruitment activities.
3. Finance and Administration – Develop new budgeting and financial processes and plans to merge purchasing processes and procedures to achieve financial benefit.
4. Technology – Development, testing, and final preparations for launching the first phase of the SIS and transitioning to a single CRM in January of 2022.
5. Governance – Begin transition planning for the new council of trustees.
6. Online – Finalize detailed plans and begin to onboard the team for the standup of the Global Online division.

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

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

<b>(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.</b>	Appendix P: Act 50 Reporting on Faculty Appendix Q: Act 50 Reporting on Staff	<ul style="list-style-type: none"> <li>• Updated</li> </ul>	<ul style="list-style-type: none"> <li>• Updated annually (July)</li> </ul>
<b>(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.</b>	Appendix P: Act 50 Reporting on Faculty	<ul style="list-style-type: none"> <li>• No updates</li> </ul>	<ul style="list-style-type: none"> <li>• Updated annually (January)</li> </ul>
<b>(13) A list of academic programs that have been terminated or consolidated and an explanation of the reasons for termination or consolidation.</b>	Appendix L: Act 50 Reporting on Academic Programs	<ul style="list-style-type: none"> <li>• Updated.</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly updates based on activity</li> </ul>
<b>(14) A list of new academic programs that have been approved and an explanation of the need for the programs.</b>	Appendix L: Act 50 Reporting on Academic Programs	<ul style="list-style-type: none"> <li>• Updated</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly updates based on activity</li> </ul>
<b>(15) The number of academic programs by location at the time of plan approval and at the time of the report.</b>	Appendix L: Act 50 Reporting on Academic Programs	<ul style="list-style-type: none"> <li>• Updated</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly updates based on activity</li> </ul>
<b>(16) A list of property that is for sale or has been sold and the value of the proceeds from the sale.</b>	Appendix J: Act 50 Reporting on Property for Sale	<ul style="list-style-type: none"> <li>• Updated</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly updates based on activity</li> </ul>
<b>(17) A list of administrative service consolidations and the value of savings resulting from the consolidations.</b>	Appendix V: Financial Sustainability Analysis	<ul style="list-style-type: none"> <li>• No updates</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly updates based on activity</li> </ul>
<b>(18) A list of outlining concerns related to the implementation of the plan on the community and affiliated organizations.</b>	Appendix R: Act 50 Reporting on Affiliated Entities' and Communities' Concerns	<ul style="list-style-type: none"> <li>• No updates</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly report on affiliated and community organizations concerns and mitigations</li> </ul>
<b>(19) Any other information as requested by the chairpersons enumerated under this subsection.</b>	N/A		

Integration Pillars	Quarter 3 - 2021 (July, Aug, Sep)	Quarter 4 - 2021 (Oct, Nov, Dec)	West Region Integration
<b>Student Experience</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Developed brand identity in preparation for launch</li> <li><input checked="" type="checkbox"/> Initiated review of admissions/enrollment communications/material</li> <li><input checked="" type="checkbox"/> Inventoried &amp; consolidated Marketing vendor contracts</li> <li><input checked="" type="checkbox"/> Initiated collaboration of marketing teams and review of marketing / recruiting strategy, plans, and calendars (including social media)</li> <li><input checked="" type="checkbox"/> Determined Athletics diversity demographics</li> <li><input checked="" type="checkbox"/> Established method for determining athletics student fee budget allocation</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ongoing development of marketing / recruiting strategy, plans, and calendar including social media (ongoing from Q3 '21)</li> <li><input type="checkbox"/> Ongoing alignment of marketing team and strategies for integrated university (ongoing from Q3 '21)</li> <li><input type="checkbox"/> Execute strategic marketing plan (orig. Q3 '21)</li> <li><input type="checkbox"/> Formal launch of integrated university branding</li> </ul>	
<b>Academics</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Inventoried existing recognitions and rankings for online programs</li> <li><input checked="" type="checkbox"/> Created organization structure for Online personnel support (orig. Q2 '21)</li> <li><input checked="" type="checkbox"/> Recommended academic structure – colleges &amp; departments (orig. Q2 '21)</li> <li><input checked="" type="checkbox"/> Communicated academic structure and faculty placements</li> <li><input checked="" type="checkbox"/> Selected integrated university provost - additional leadership to follow</li> <li><input checked="" type="checkbox"/> MSCHE Teachout Plan and Agreement form completed and submitted</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Develop plans to satisfy / support service needs for online (orig. Q3 '21)</li> <li><input type="checkbox"/> Business model for partner relationships (orig. Q3 '21)</li> <li><input type="checkbox"/> Determine marketing and communications plan – online</li> <li><input type="checkbox"/> Curriculum phase-in plan for synthesized graduate programs in fall 2022 and undergraduate programs in fall 2023 developed, approved, and communicated</li> </ul>	
<b>Institutional Accreditation</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Submitted MSCHE Complex Substantive Change (CSC) Form for accreditation review</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review and respond to MSCHE 's legal requests for additional information, if needed</li> <li><input type="checkbox"/> Provide additional information to peer evaluators based on requests, if needed</li> </ul>	
<b>Regional SIS &amp; Enrollment</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Enabled existing CRM systems to support integrated university applications for Fall 2022</li> <li><input checked="" type="checkbox"/> Completed Regional SIS contracts, system design and initial configuration</li> <li><input checked="" type="checkbox"/> Decision made on Summer 2022 financial aid processing in Regional SIS</li> <li><input checked="" type="checkbox"/> Coordinated with Department of Education (ED) on Financial Aid requirements and OPEID changes at integrated university</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Integrated recruitment strategy for the integrated university (orig. Q3 '21)</li> <li><input type="checkbox"/> Implement technology to support the processing of student FAFSA data</li> <li><input type="checkbox"/> Determine pricing model for integrated university – by campus and program (orig. Q3 '21)</li> </ul>	
<b>Finance and Infrastructure</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Began initial functional design of financial operating systems and processes for post-integration budgeting, consolidation, and reporting activities within a new SAP business center that supports the initial and mid-year CPP submission</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Evolve financial and enrollment projections</li> <li><input type="checkbox"/> Develop and implement a singular budget methodology and planning process for the integrated university</li> <li><input type="checkbox"/> Assess vendor contracts for potential savings opportunities for the integrated University (orig. Q2 '21)</li> <li><input type="checkbox"/> Merge purchasing processes and procedures (orig. Q2 '21)</li> </ul>	
<b>Human Resources</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Defined and communicated high-level integrated university organizational structure</li> <li><input checked="" type="checkbox"/> Drafted and communicated initial staff departmental assignments</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Determine recommended organizational structure (orig. Q2 '22)</li> <li><input type="checkbox"/> Align and communicate staff departmental assignments</li> <li><input type="checkbox"/> Initiate development of detailed job descriptions and roles and responsibilities and finalization of staff assignments</li> </ul>	

## 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)

	FY 2020-21			FY 2021-22			FY 2022-23	FY 2023-24	FY 2024-25	FY 2025-26
	CA	CL	ED	CA	CL	ED	Integrated University	Integrated University	Integrated University	Integrated University
<b>Revenues</b>										
Tuition	\$60,179,054	\$33,482,062	\$36,636,311	\$57,018,881	\$29,673,712	\$35,087,422	\$128,382,675	\$137,650,329	\$147,703,335	\$159,457,403
Fees	14,468,223	11,496,465	10,303,418	15,360,258	11,617,289	10,094,634	36,571,106	36,899,144	37,266,520	37,637,569
State Appropriation	34,181,375	26,512,315	28,576,510	33,410,388	26,237,620	27,424,855	88,814,318	90,590,604	92,402,415	94,250,463
Auxiliary Sales	2,533,988	6,622,070	3,331,024	13,319,840	11,985,235	12,032,080	36,682,238	37,049,061	37,419,552	37,793,747
All Other Revenue	13,638,092	17,067,582	3,856,031	15,051,876	13,989,647	24,784,089	32,171,431	39,122,095	18,572,760	18,572,760
<b>Total Revenues</b>	<b>\$125,000,732</b>	<b>\$95,180,494</b>	<b>\$82,703,294</b>	<b>\$134,161,241</b>	<b>\$93,503,503</b>	<b>\$109,423,080</b>	<b>\$322,621,768</b>	<b>\$341,311,233</b>	<b>\$333,364,582</b>	<b>\$347,711,942</b>
<b>Expenditures</b>										
Compensation Summary:										
Salaries and Wages	\$56,487,609	\$42,299,142	\$46,656,688	\$55,389,620	\$40,809,468	\$44,351,567	\$144,274,947	\$147,016,941	\$149,545,661	\$152,165,003
Benefits	25,145,264	20,477,501	22,589,382	24,678,068	20,047,959	21,857,322	68,988,023	69,607,807	70,259,448	71,312,496
Subtotal, Compensation	\$81,632,873	\$62,776,643	\$69,246,070	\$80,067,688	\$60,857,427	\$66,208,889	\$213,262,970	\$216,624,748	\$219,805,109	\$223,477,499
Student Financial Aid	7,872,605	6,128,828	3,397,074	7,867,605	6,079,730	4,932,056	19,693,486	19,693,486	19,693,486	19,693,486
Other Services and Supplies	24,730,053	25,738,843	20,629,229	34,329,529	29,628,164	27,619,191	95,197,719	99,455,664	104,330,577	109,601,531
Subtotal, Services and Supplies	\$32,602,658	\$31,867,671	\$24,026,303	\$42,197,134	\$35,707,894	\$32,551,247	\$114,891,205	\$119,149,150	\$124,024,063	\$129,295,017
Capital Expenditures and Debt Principal Payments	6,787,439	4,578,924	6,137,408	8,628,339	4,794,116	5,214,215	18,260,903	16,586,922	17,726,183	17,653,004
<b>Total Expenditures</b>	<b>\$121,022,970</b>	<b>\$99,223,238</b>	<b>\$99,409,781</b>	<b>\$130,893,161</b>	<b>\$101,359,437</b>	<b>\$103,974,351</b>	<b>\$346,415,078</b>	<b>\$352,360,820</b>	<b>\$361,555,355</b>	<b>\$370,425,520</b>
<b>Revenues Less Expenditures</b>	<b>\$3,977,762</b>	<b>(\$4,042,744)</b>	<b>(\$16,706,487)</b>	<b>\$3,268,080</b>	<b>(\$7,855,934)</b>	<b>\$5,448,729</b>	<b>(\$23,793,310)</b>	<b>(\$11,049,587)</b>	<b>(\$28,190,772)</b>	<b>(\$22,713,578)</b>
Transfers to Plant Fund	141,009	(2,004,830)	(7,768,698)	0	(244,763)	0	190,000	190,000	190,000	190,000
<b>Revenues Less Expenditures and Transfers</b>	<b>\$3,836,753</b>	<b>(\$2,037,914)</b>	<b>(\$8,937,789)</b>	<b>\$3,268,080</b>	<b>(\$7,611,171)</b>	<b>\$5,448,729</b>	<b>(\$23,983,310)</b>	<b>(\$11,239,587)</b>	<b>(\$28,380,772)</b>	<b>(\$22,903,578)</b>
<b>Supplemental Resources/Adjustments</b>										
Planned Use of Reserves for One-Time Needs/Strategic Initiatives	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Use of One-Time COVID Funds (revenue recognition adjustment)	\$6,306,291	\$4,624,749	\$2,941,148	(\$6,306,291)	(\$4,624,749)	(\$2,941,148)	\$0	\$0	\$0	\$0
<b>Revenues and Use of Supplemental Resources/Adjustments Less Expenditures &amp; Transfers</b>	<b>\$10,143,044</b>	<b>\$2,586,835</b>	<b>(\$5,996,641)</b>	<b>(\$3,038,211)</b>	<b>(\$12,235,920)</b>	<b>\$2,507,581</b>	<b>(\$23,983,310)</b>	<b>(\$11,239,587)</b>	<b>(\$28,380,772)</b>	<b>(\$22,903,578)</b>
<b>Annualized FTE Enrollment</b>										
Undergraduate	4,299.00	3,177.23	2,843.17	4,034.00	2,815.37	2,692.43	9,343.44	9,458.42	9,575.05	9,695.04
Graduate	1,842.00	608.65	1,010.79	1,784.00	528.95	927.31	3,590.01	3,753.28	3,932.39	4,127.69
<b>Total Annualized FTE Enrollment</b>	<b>6,141.00</b>	<b>3,783.88</b>	<b>3,853.96</b>	<b>5,818.00</b>	<b>3,344.32</b>	<b>3,619.74</b>	<b>12,933.45</b>	<b>13,211.70</b>	<b>13,507.44</b>	<b>13,822.73</b>
<b>FTE of Budgeted Unrestricted Employees, Net of Turnover</b>										
Faculty	282.91	228.77	261.65	265.00	199.44	227.63	686.04	686.00	686.00	686.00
Nonfaculty	359.56	298.98	272.97	342.15	290.00	252.41	876.56	859.45	843.45	825.45
<b>Total FTE of Budgeted Employees</b>	<b>642.47</b>	<b>527.75</b>	<b>534.62</b>	<b>607.15</b>	<b>489.44</b>	<b>480.04</b>	<b>1,562.60</b>	<b>1,545.45</b>	<b>1,529.45</b>	<b>1,511.45</b>

## 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

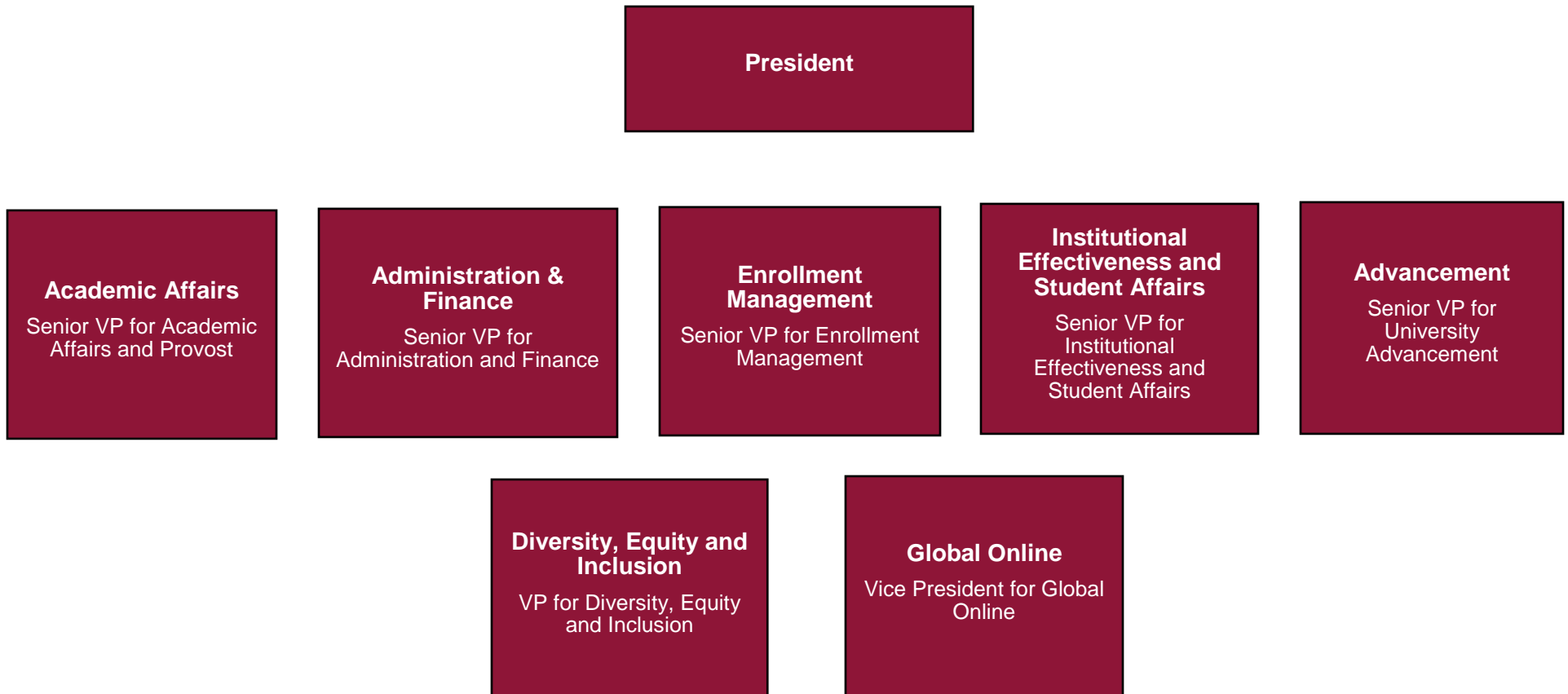
Integration Budget and Cumulative Expenditures FY 2021/22 First Quarter Report West Integration									
	Budget by Fiscal Year						Less		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	Total Budget	Cumulative Expenditures	Remaining Budget
Consulting/Personnel	\$202,000	\$732,600	\$87,500	\$87,500	\$0	\$0	\$1,109,600	(\$64,661)	\$1,044,939
IT – SIS	1,066,545	2,273,628	174,375	0	0	0	3,514,548	(1,301,986)	2,212,562
IT – Software	527,000	420,000	0	0	0	0	947,000	(121,244)	825,756
IT – Technology Upgrades	0	75,000	0	0	0	0	75,000	0	75,000
Middle States	120,000	0	0	0	0	0	120,000	0	120,000
Academic	0	2,000,000	2,000,000	2,000,000	0	0	6,000,000	(110,000)	5,890,000
Faculty	0	2,309,844	0	0	0	0	2,309,844	0	2,309,844
<b>Average</b>	<b>\$1,915,545</b>	<b>\$7,811,072</b>	<b>\$2,261,875</b>	<b>\$2,087,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$14,075,992</b>	<b>(\$1,597,891)</b>	<b>\$12,478,101</b>

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
<b>Average</b>	<b>\$4,248,662</b>	<b>\$18,319,972</b>	<b>\$2,995,015</b>	<b>\$2,818,640</b>	<b>\$603,640</b>	<b>\$603,640</b>	<b>\$29,589,569</b>	<b>(\$4,358,801)</b>	<b>\$25,230,768</b>

## October 1, 2021 updates to Appendix T: Organizational Charts

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

- Organizational charts – Western Senior Cabinet





## 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
California	4,341	2,171	6,512
Clarion	2,631	1,291	3,922
Edinboro	3,113	930	4,043
<b>Total</b>	<b>10,085</b>	<b>4,392</b>	<b>14,477</b>

- 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
California	\$7,716	\$478	\$2,914	\$6,822	\$9,208	\$6,822	\$3,422	\$3,900	\$3,594	\$21,352	\$24,216	\$21,524
Clarion	\$7,716	\$478	\$2,979	\$7,570	\$10,870	\$7,570	\$3,600	\$4,340	\$4,340	\$22,343	\$26,383	\$23,083
Edinboro	\$7,716	\$478	\$2,349	\$6,660	\$10,000	\$6,660	\$1,640	\$3,460	\$3,260	\$18,843	\$24,003	\$20,463
<b>Average</b>	<b>\$7,716</b>	<b>\$478</b>	<b>\$2,747</b>	<b>\$7,017</b>	<b>\$10,026</b>	<b>\$7,017</b>	<b>\$2,887</b>	<b>\$3,900</b>	<b>\$3,731</b>	<b>\$20,846</b>	<b>\$24,867</b>	<b>\$21,690</b>

## 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
California	\$11,108	\$10,416	\$3,594	\$10,794	\$5,002	\$6,634	\$5,002	\$1,000	\$27,526	\$22,336	\$27,904
Clarion	\$11,223	\$12,930	\$7,040	\$12,930	\$3,400	\$4,810	\$3,400	\$1,240	\$28,793	\$24,313	\$28,793
Edinboro	\$10,543	\$11,660	\$9,000	\$11,660	\$3,450	\$4,100	\$3,450	\$1,400	\$27,053	\$25,043	\$27,053
<b>Average</b>	<b>\$10,958</b>	<b>\$11,669</b>	<b>\$6,545</b>	<b>\$11,795</b>	<b>\$3,951</b>	<b>\$5,181</b>	<b>\$3,951</b>	<b>\$1,213</b>	<b>\$27,791</b>	<b>\$23,897</b>	<b>\$27,917</b>

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
California	\$15,726	\$10,416	\$3,594	\$10,794	\$5,340	\$7,272	\$5,340	\$1,000	\$32,482	\$27,592	\$32,860
Clarion	\$16,102	\$12,930	\$7,040	\$12,930	\$3,640	\$4,810	\$3,640	\$1,240	\$33,912	\$29,192	\$33,912
Edinboro	\$15,062	\$11,660	\$9,000	\$11,660	\$3,450	\$4,100	\$3,450	\$1,400	\$31,572	\$29,562	\$31,572
<b>Average</b>	<b>\$15,630</b>	<b>\$11,669</b>	<b>\$6,545</b>	<b>\$11,795</b>	<b>\$4,143</b>	<b>\$5,394</b>	<b>\$4,143</b>	<b>\$1,213</b>	<b>\$32,655</b>	<b>\$28,782</b>	<b>\$32,781</b>

**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
California	\$11,108	\$10,416	\$3,594	\$10,794	\$5,002	\$6,634	\$5,034	\$1,000	\$27,526	\$22,336	\$27,936
Clarion	\$11,223	\$12,930	\$7,040	\$12,930	\$3,400	\$4,810	\$3,400	\$1,240	\$28,793	\$24,313	\$28,793
Edinboro	\$10,543	\$11,660	\$9,000	\$11,660	\$3,450	\$4,100	\$3,450	\$1,400	\$27,053	\$25,043	\$27,053
<b>Average</b>	<b>\$10,958</b>	<b>\$11,669</b>	<b>\$6,545</b>	<b>\$11,795</b>	<b>\$3,951</b>	<b>\$5,181</b>	<b>\$3,961</b>	<b>\$1,213</b>	<b>\$27,791</b>	<b>\$23,897</b>	<b>\$27,927</b>

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
California	\$15,726	\$10,416	\$3,594	\$10,794	\$5,372	\$7,272	\$5,372	\$1,000	\$32,514	\$27,592	\$32,892
Clarion	\$16,102	\$12,930	\$7,040	\$12,930	\$3,640	\$4,810	\$3,640	\$1,240	\$33,912	\$29,192	\$33,912
Edinboro	\$15,062	\$11,660	\$9,000	\$11,660	\$3,450	\$4,100	\$3,450	\$1,400	\$31,572	\$29,562	\$31,572
<b>Average</b>	<b>\$15,630</b>	<b>\$11,669</b>	<b>\$6,545</b>	<b>\$11,795</b>	<b>\$4,154</b>	<b>\$5,394</b>	<b>\$4,154</b>	<b>\$1,213</b>	<b>\$32,666</b>	<b>\$28,782</b>	<b>\$32,792</b>

## 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
California	698	333	365
Clarion	599	240	359
Edinboro	523	265	258
<b>Integrations Result</b>	<b>1,820</b>	<b>838</b>	<b>982</b>

Employee Headcount as of 9/30/2021									
	AFSCME	Nonrepresented	SCUPA	SPFPA & POA	Coaches	Cheer Adviser	OPEIU	PSSU	Physicians
California	171	82	56	16	33		7		
Clarion	181	73	44	9	26		14	12	
Edinboro	123	65	30	9	22	1	5		3
<b>Integrations Result</b>	<b>475</b>	<b>220</b>	<b>130</b>	<b>34</b>	<b>81</b>	<b>1</b>	<b>26</b>	<b>12</b>	<b>3</b>

### 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)	
California	<b>Faculty</b>	407	323	-83	46	-129	1	-1	13
	Faculty (Permanent)	240	220	-26	3	-30	1		13
	Faculty (Temporary)	167	103	-57	43	-99		-1	
	<b>Nonfaculty</b>	385	348	-39	17	-50		-6	15
	<b>California Personnel</b>	792	671	-122	63	-179	1	-7	28
Clarion	<b>Faculty</b>	327	269	-60	34	-93		-1	18
	Faculty (Permanent)	185	166	-22		-22			18
	Faculty (Temporary)	142	103	-38	34	-71		-1	
	<b>Nonfaculty</b>	376	345	-29	19	-49	1		14
	<b>Clarion Personnel</b>	703	614	-89	53	-142	1	-1	32
Edinboro	<b>Faculty</b>	331	281	-51	15	-66			15
	Faculty (Permanent)	247	215	-38		-38			15
	Faculty (Temporary)	84	66	-13	15	-28			
	<b>Nonfaculty</b>	320	251	-70	19	-84	1	-6	17
	<b>Edinboro Personnel</b>	651	532	-121	34	-150	1	-6	32

## 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)
<b>California</b>	<b>Faculty</b>	\$ 1,642,348	\$ (6,683,381)	\$ 146,767	\$ (4,894,266)
	Faculty (Permanent)	\$ 430,902	\$ (4,395,830)	\$ 146,767	\$ (3,818,161)
	Faculty (Temporary)	\$ 1,211,446	\$ (2,287,552)		\$ (1,076,106)
	<b>Nonfaculty</b>	\$ 1,003,833	\$ (5,463,401)	\$ 89,236	\$ (4,370,332)
	<b>California Personnel</b>	<b>\$ 2,646,181</b>	<b>\$(12,146,782)</b>	<b>\$ 236,003</b>	<b>\$ (9,264,598)</b>
<b>Clarion</b>	<b>Faculty</b>	\$ 899,201	\$ (5,331,546)	\$ 187,396	\$ (4,244,949)
	Faculty (Permanent)		\$ (3,332,397)	\$ 187,396	\$ (3,145,001)
	Faculty (Temporary)	\$ 899,201	\$ (1,999,149)		\$ (1,099,948)
	<b>Nonfaculty</b>	\$ 1,496,922	\$ (4,102,866)	\$ 112,161	\$ (2,493,783)
	<b>Clarion Personnel</b>	<b>\$ 2,396,123</b>	<b>\$ (9,434,412)</b>	<b>\$ 299,557</b>	<b>\$ (6,738,731)</b>
<b>Edinboro</b>	<b>Faculty</b>	\$ 405,165	\$ (5,994,156)	\$ 153,471	\$ (5,435,520)
	Faculty (Permanent)		\$ (5,427,851)	\$ 153,471	\$ (5,274,379)
	Faculty (Temporary)	\$ 405,165	\$ (566,306)		\$ (161,141)
	<b>Nonfaculty</b>	\$ 1,524,414	\$ (7,878,320)	\$ 112,193	\$ (6,241,713)
	<b>Edinboro Personnel</b>	<b>\$ 1,929,579</b>	<b>\$ (13,872,476)</b>	<b>\$ 265,664</b>	<b>\$ (11,677,233)</b>

## 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
<b>Increase to Employee Complement</b> (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
<b>Reduction in Employee Complement</b> (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
<b>Reclassification of job responsibilities and role reassignments</b> (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.

- Academic programs that have been terminated or consolidated

Degree Programs and Concentrations Put into Moratorium or Terminated (July 1, 2021 to September 30, 2021)			
University	Award	Program Name	Concentration
California	BS	Environmental Studies	Fisheries and Wildlife Biology
	BS	Biology	Nanotechnology
	BS	Chemistry	Nanofabrication Manufacturing Technology
	BS	Physics	Nanofabrication Manufacturing Technology
	MBA	Business Administration	Entrepreneurship
	BS	Sport Management	Wellness and Fitness
	MA	Social Sciences	<ul style="list-style-type: none"> <li>• Applied Criminology</li> <li>• Conflict Resolution</li> <li>• Arabic Society and Linguistics</li> </ul>
	BS	Business Administration	<ul style="list-style-type: none"> <li>• Accounting</li> <li>• Economics</li> <li>• Finance</li> <li>• Marketing</li> <li>• Business Management</li> <li>• Human Resource Management</li> </ul>
	MEd	Special Education	<ul style="list-style-type: none"> <li>• Pre K-8</li> <li>• K-8</li> <li>• 7-12</li> </ul>
	BSEd	PreK-4 & Special Education	
	BSEd	Biology	Secondary Education with Special Education
	BSEd	English	Secondary Education with Special Education
	BSEd	Mathematics	Secondary Education with Special Education
	BSEd	Social Studies	Secondary Education with Special Education



Clarion	MBA	Business Administration	<ul style="list-style-type: none"> <li>• Accounting</li> <li>• Finance</li> <li>• Health Care</li> </ul>
Edinboro	BS	Physics	Coop Engineering
	BS	Health and Wellness Studies	
	BS	Data Science	
	BS	Geographic Information Science	
	BS	Applied Computing	<ul style="list-style-type: none"> <li>• Web and Mobile Application Development</li> </ul>
	BA	Environmental Studies	
	BA	Anthropology	<ul style="list-style-type: none"> <li>• Forensic Anthropology</li> </ul>
	BSEd	Secondary Education	<ul style="list-style-type: none"> <li>• Physics</li> <li>• Physics /Special Education 7-12</li> </ul>

Note: Does not include minors and certificates. Academic programs were put into moratorium primarily due to lack of student demand as seen in low enrollments; programs may also have been running at a fiscal deficit, frequently but not always the result of small class sizes resulting from lack of student demand.

- Number of academic programs by location

Number of Degree Programs by Location October 1, 2021			
University	Undergraduate	Graduate	Total
California	67	28	95
Clarion	56	11	67
Edinboro	45	16	61

Note: Does not include concentrations, minors, and certificates

## October 1, 2021 updates to Appendix J: Act 50 Reporting on Property for Sale

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

- Property that is for sale or has been sold and the value of the proceeds from the sale.

Property for Sale	Estimated Value	Property Sold	Value of Sale Proceeds	Notes
Edinboro University Porreco Campus	\$2-\$3 million	N	\$3,207,106	Closing occurred on July 28, 2021
Clarion University 915 Corbett St. and 177 Greenville Ave., Clarion, PA		Y	\$77,500	Sale closed on July 20, 2021
Clarion University 957 Corbett St., Clarion, PA	\$56,350	N	Pending	Sales agreement executed and closing expected by mid-October 2021
Clarion University 963 Corbett St., Clarion, PA	\$70,000	N	Pending	Sales agreement executed and closing expected in October 2021
Clarion University 961 Corbett St., Clarion, PA	\$66,000	N	Pending	Sales agreement executed and closing expected in October 2021
Clarion University 959 Corbett St., Clarion, PA	\$56,650	N	Pending	Sales agreement executed and closing expected in October 2021