



IV. FISCAL POSITIONING AND INFRASTRUCTURE

GOAL 1: BUILD A STRONG FINANCIAL FOUNDATION.

OUTCOME: Capital Funding Increase in the Annual Operating Budget

NOVEMBER 2019

The FY20 operating budget includes a 2% increase in capital funding.

MAY 2019

The FY19 operating budget includes a 2% increase in capital funding.

NOVEMBER 2018

The FY19 operating budget includes a 2% increase in capital funding.

MAY 2018

For the combined UToledo and UTMC budgets, the percentage increase from FY17 to FY18 in capital funding from the annual operating budget is 37% (\$5,500,000 to \$7,059,507).

The FY19 operating budget will include a 2% increase in capital funding.

OCTOBER 2017

For the combined UToledo and UTMC budgets, the percentage increase from FY17 to FY18 in capital funding from the annual operating budget is 37% (\$5,500,000 to \$7,059,507).

OUTCOME: Net Income Margin and Investment Capital of UTMC

NOVEMBER 2019

FY19 demonstrated a margin of -2.7%. \$1 million was reserved for FY20 capital.

MAY 2019

The University of Toledo Medical Center (UTMC) has identified several areas of focus — including primary care, behavioral health, consultative services and orthopaedics — and is committed to expanding its behavioral health services (most recently through the opening of the inpatient detoxification unit) and will continue to evaluate key service lines, including primary care, orthopaedics, heart and vascular care, oncology, stroke and trauma.

In order for UTMC to invest in capital and adapt services to meet the needs of the community, UTMC will evaluate initiatives to remove significant indirect costs from the health system and continue to reduce overhead to allow for capital generation that advances the medical center's clinical mission.

Revenue growth opportunities include the expansion of primary care/family practice with the buildout of the Glendale Medical East building, with occupancy expected in the fourth quarter of FY19; expansion of the adult inpatient detoxification unit, which was completed in April 2018; and an assessment of the feasibility of developing an inpatient, long-term, acute-care hospital program.

Additional revenue growth opportunities include the ongoing growth of the medical oncology program through faculty recruitment and implementation of multiple clinical-research trials; and growing the behavioral health program by expanding adult inpatient detoxification services. Recently, a market assessment was completed regarding the feasibility of developing adult, inpatient psychiatric services and adolescent substance-abuse services.

Following a feasibility study, UTMC has successfully launched a bariatric surgery program.

UTMC continues to consolidate ambulatory care (ongoing).

NOVEMBER 2018

The University of Toledo Medical Center (UTMC) has identified several areas of focus — including primary care, behavioral health, consultative services and orthopaedics — and is committed to expanding its behavioral health services (most recently through the opening of the inpatient detoxification unit) and will continue to evaluate key service lines, including primary care, orthopaedics, heart and vascular, oncology, stroke and trauma.

For UTMC to invest in capital and adapt services to meet the needs of the community, UTMC will evaluate initiatives to remove significant indirect costs from the health system and continue to reduce overhead to allow for capital generation that advances the medical center's clinical mission.

Revenue growth opportunities include the expansion of primary care/family practice with the buildout of the Glendale Medical East building, the expansion of the adult inpatient detoxification, and an assessment of the feasibility of developing an inpatient, long-term, acute-care hospital program.

Additional revenue growth opportunities include the growth of the medical oncology program through faculty recruitment and the implementation of multiple, clinical research trials, which is ongoing. A market assessment also is underway related to the feasibility of developing adolescent substance-abuse services and adult, inpatient psychiatric services.

Following a feasibility study, UTMC has successfully launched a bariatric surgery program.

UTMC continues to consolidate ambulatory care (ongoing).

MAY 2018

UTMC will expand service lines, while continuing to focus on key service areas. UTMC is committed to expanding its behavioral health services, most recently through the opening of an inpatient detox unit; and will continue to evaluate key service lines — including primary care, orthopaedics, heart and vascular, oncology, stroke, and trauma.

OCTOBER 2017

Expanding service lines, while continuing to focus on key service areas.

OUTCOME: Colleges Meeting Their Agreed-Upon Contribution Goals

NOVEMBER 2019

The Office of the Provost continues to work with college deans to meet their agreed upon contribution goals. The Office of Finance and Administration continues to provide support for this outcome by providing data, developing agreed upon metrics and updating the deans' dashboards.

MAY 2019

The Office of the Provost continues to work with deans to assess their agreed-upon contribution goals. The Office of Finance and Administration continues to provide support for this outcome by providing data, developing agreed-upon metrics and updating the deans' dashboards.

NOVEMBER 2018

The Office of the Provost is working with college deans to meet their agreed-upon contribution goals. The Office of Finance and Administration continues to provide support for this outcome by providing data, developing agreed-upon metrics and updating the deans' dashboards.

MAY 2018

The Office of Finance and Administration continues to provide support for this outcome by providing data, developing agreed-upon metrics and updating the deans' dashboards. College deans are able to access contribution margin data from FY13 through FY17 and are reviewing and analyzing the data to determine their agreed upon contribution goals.

OCTOBER 2017

The Office of Finance and Administration is providing support for this outcome by developing agreed-upon metrics and updating the deans' dashboards. The FY17 contribution margins were recently completed and are available for review on the deans' dashboards

OUTCOME: Key Leverage Ratios, as Measured by Annual Moody's Ratios

NOVEMBER 2019

For FY19, the financial leverage ratio is Aa and the debt affordability ratio is A, both in line with the 2022 target. Information for FY19 is not available until November.

MAY 2019

The financial leverage ratio is Aa and the debt affordability ratio is A, both in line with the 2022 target.

NOVEMBER 2018

For FY17, the Financial Leverage Ratio is Aa and the Debt Affordability Ratio is A, both in line with the 2022 target. (Note that the 2018 ratios are not available until 2019.)

Overall, for 2017, Moody's has assigned The University of Toledo a rating of A1 with a stable outlook.

MAY 2018

For FY18, the financial leverage ratio is Aa and the debt affordability ratio is A, both in line with the 2022 target.

Moody's and S&P have reaffirmed UT's credit rating.

OCTOBER 2017

For FY17, the key leverage ratios would yield an Aa rating.

GOAL 2: ENSURE ADAPTABILITY, SUSTAINABILITY AND FISCAL HEALTH FOR ACADEMIC PROGRAMS.

OUTCOME: Number of Programs Meeting Their Instructional Efficiency Goals (Student-To-Faculty Ratios, Cost Per Credit Hour, Number of Organized Class Sections Per Faculty FTE), Based on National Peer Data

NOVEMBER 2019

The Committee on Institutional Planning and Effectiveness (CIEP) in the Office of the Provost has established a baseline of 62.8% of academic programs meeting their instructional efficiency goals for the 2016-17 academic year based on national peer data; and a target goal was established for 80% of academic programs to meet their instructional efficiency goals by 2022.

The Committee on Institutional Planning and Effectiveness reported that 69.8% of academic programs met their instructional efficiency goals during the 2017-18 academic year, based on national peer data; an increase of 7% from the previous year.

For the 2018-19 academic year, we are working with the results of national peer data from the Delaware Cost Study project, which is a national initiative with approximately 700 colleges and universities participating that focuses on instructional costs and productivity with national benchmarks for peer institutions, including variations in costs by academic discipline. Data and results for the 2018-19 academic year have been provided in July 2019, following the release of this year's national peer data report from the Delaware Cost Study; however, three major changes are occurring during this reporting cycle. First, the Delaware Cost Study provided data that combined both R1 and R2 programs, and is being corrected to provide just R2 program data. Second, faculty CIP codes (classification of instructional programs) have been revised for academic program comparison. Third, each data element is being revisited to ensure data integrity going forward.

It should be noted that there is still ongoing discussion regarding the identification of UToledo's peer institutions as it relates to comparable academic disciplines and programs.

MAY 2019

The Committee on Institutional Effectiveness and Planning (CIEP) in the Office of the Provost has established a baseline of 62.8% of academic programs meeting their instructional efficiency goals for the 2016-2017 academic year, based on national peer data. A target was established for 80% of academic programs to meet their instructional efficiency goals by 2022.

CIEP reported that 69.8% of academic programs met their instructional efficiency goals during the 2017-18 academic year, based on national peer data; this is an increase of 7% from the previous year.

For the 2018-19 academic year, we are waiting for the release of national peer data from the Delaware Cost Study project, which is a national initiative with approximately 700 colleges and universities participating. It focuses on instructional costs and productivity with national benchmarks for peer institutions, including variations in costs by academic discipline. Data and results for the 2018-19 academic year will be available in July 2019, following the release of this year's national peer data report from the Delaware Cost Study.

It should be noted that there is ongoing discussion regarding the identification of UToledo's peer institutions as it relates to comparable academic disciplines and programs.

NOVEMBER 2018

The Committee on Institutional Effectiveness and Planning (CIEP) in the Office of the Provost has established a baseline of 62.8% of academic programs meeting their instructional efficiency goals for the 2016-17 academic year, based on national peer data; and a target goal was established for 80% of academic programs to meet their instructional efficiency goals by 2022.

CIEP reports that 69.8% of academic programs met their instructional efficiency goals during the 2017-18 academic year, based on national peer data; this is an increase of 7% from the previous year.

MAY 2018

Colleges and academic departments were provided with baseline data to include in their annual reporting process, beginning in the spring of 2018.

Colleges are currently working with the Office of the Provost to assess the baseline data and determine their goals in alignment with the University's strategic plan.

OCTOBER 2017

The Office of the Provost has established a Committee on Institutional Planning and Effectiveness (CIEP) to collect, analyze, monitor and track data in order to make data-driven decisions and align resource allocation with institutional priorities.

GOAL 3: INCREASE REVENUE AND OPERATING EFFICIENCIES.

OUTCOME: UToledo Enrollment

NOVEMBER 2019

UToledo enrolled the best academically prepared class of first-year students in school history in fall semester 2018, with an average ACT score of 23.03 and average GPA of 3.48.

Total enrollment for fall 2019 is 19,782, which includes 15,568 undergraduate students and 4,214 graduate and professional students. Fall 2018 enrollment was 20,304, and included 16,065 undergraduate students and 4,239 graduate and professional students.

The College of Nursing experienced a 10% increase in enrollment with the largest cohort of students pursuing a bachelor's degree in nursing. UToledo added faculty in order to accept more students into the program and launched a new competency-based education RN to BSN program, which is the first of its kind among Ohio institutions. This new online program provides the flexibility for working nurses to advance their careers through self-paced learning that's personalized, accessible and convenient.

The College of Medicine and Life Sciences grew its graduate programs and recruited a highly qualified class of M.D. students with more than 5,400 applicants for 175 spots. The new class of medical students had an average MCAT score that places it in the top 20% nationally.

MAY 2019

UToledo enrolled the best academically prepared class of first-year students in school history in fall 2018, with an average ACT score of 23.02 and an average GPA of 3.45.

Total enrollment for fall 2018 was 20,304, compared to 20,579 in fall 2017. The fall 2018 enrollment includes 16,065 undergraduate students and 4,239 graduate and professional students. The fall 2017 enrollment included 16,194 undergraduate and 4,385 graduate students.

The University experienced a significant increase in doctoral students enrollment, and the College of Law experienced a nearly 10% increase in student enrollment this year.

Direct from High School (DHS) enrollment increased by 1.7% in fall 2018 compared to last year.

Enrollment of transfer readmits increased by 21% compared to last year (transfer readmits are former UToledo students who dropped out for at least one semester and returned to UToledo after earning credit at another institution).

College Credit Plus enrollment increased by 7.9%.

During the 2018-19 academic year, UToledo implemented the second year of Winter Intersession courses, including online courses, which helped students make progress in their programs while increasing enrollment.

Initiatives are underway to enhance and expand existing and new transfer pathways, including implementation of the state of Ohio's Transfer Assurance Guides, UToledo's Rocket Express partnership with Owens Community College, as well as collaborations with other area community colleges.

UToledo is exploring the possibility of a new 2+2 program with Owens Community College in nursing and a 2+2 program with Northwest State Community College in the area of criminal justice.

In fall 2018, Ohio Department of Higher Education Chancellor John Carey sent a letter of appreciation to UToledo for the 50 or more faculty members who served on statewide faculty panels and committees related to the development of transfer guidelines, including Ohio Guaranteed Transfer Pathways. Many UToledo faculty continue to serve on one or more statewide panels or committees as the transfer guidelines work continues.

The Office of the Provost is an active participant in the state's Northwest Region Higher Education Compact that was launched in March 2018. Compact members meet regularly with representatives from UToledo, Bowling Green State University, Owens Community College, Northwest State Community College, Terra State Community College and Rhodes State College.

For 2019, the region is the recipient of a second Regional Transfer Grant from the Ohio Department of Higher Education, which will be used to fund information sharing workshops at community colleges in the region. This Ohio Articulation and Transfer Network Regional Consortium grant, runs from January through June 2019. As a component of this program, UToledo personnel have given presentations at all regional community colleges (Owens, Northwest, Terra and Rhodes) during spring 2019.

In spring 2019, a University-wide campaign was launched with the goal of registering 90% of current undergraduate students by May 1 for fall 2019 semester. As a result of this initiative, 86% of current undergraduate students registered for fall 2019 before summer break, an increase from 74% at the same time last year. In addition, several colleges exceeded the 90% target, and all colleges improved significantly compared to last year.

The Office of the Provost and the Council of Deans are working with Enrollment Management to review and revise the schedule of University preview and experience days in 2019-20 for students and their families to ensure high value experiences for those considering applying to and attending UToledo. The Vice President for Enrollment Management met with the Council of Deans in May 2019 to discuss the revised plan for 2019-20.

The Enrollment Management Division implemented a number of changes in spring 2019 to expand outreach to new and continuing students through phone calls, emails and meetings with students and families to assist with the financial aid application process and other financial issues.

Enrollment Operations instituted staffing changes to meet the demand of peak application times in November and December, which significantly improved turnaround times.

A strategic plan has been developed for international admissions, with a focus on high schools in primary countries where most of our international students originate. This will enable targeted high school visits and building relationships in these key areas, with a clear plan for growth in each of these countries.

Enrollment Management is working with four community colleges in Ontario, Canada, with the goal of creating transfer agreements. During fall 2018, direct from high school (DHS) students increased within 11 of the 18 primary counties identified in Ohio and southeast Michigan when compared to fall 2017.

Digital messages are being updated for online programs through a partnership with Madhouse, a Toledo marketing firm, with University College leading this effort for improved online recruitment.

A need was identified for additional staffing for transfer student admissions during peak times. Enrollment Operations now has a temporary employee dedicated specifically to transfer operations.

Adult, transfer, online and military admissions web pages were redesigned during fall 2018.

Revisions and improvements to recruitment materials are ongoing each time a print piece is developed or updated.

Rocket Solution Central expanded training and professional development related to customer service and developed a Rocket Solution Central Standards of Service document to foster a shared vision and accountability for superior customer service.

Enrollment Management increased educational outreach to both internal and external constituents through presentations at area high schools, First-Year Experience classes, FAFSA completion workshops, orientations, admissions events and other venues.

Enrollment Management increased UToledo's social media presence through Twitter.

Rocket Solution Central developed a rapid response process to alert appropriate offices and administrators as soon as a student financial problem is identified.

Efforts are underway to identify and correct inaccurate, inconsistent and unclear messaging related to ongoing changes in admission policies, academic programs, scholarship programs, tuition, print and digital communication, etc.

The Office of Student Financial Aid revised all 2018-19 forms used by students and parents to ensure consistent use of terminology, eliminate redundancy and simplify instructions. In addition, a regular review of internal and external messaging has been incorporated into the Office of Student Financial Aid's academic year planning process.

The Office of Student Financial Aid and Rocket Solution Central continue to streamline financial aid and admissions application processing by leveraging technology and reducing manual processes.

NOVEMBER 2018

UToledo enrolled the best academically prepared class of first year students in school history in fall 2018, with an average ACT score of 23.02 and an average GPA of 3.45.

Total enrollment for fall 2018 is 20,304, compared to 20,579 students enrolled in fall 2017. The fall 2018 enrollment includes 16,065 undergraduate students and 4,239 graduate and professional students. The fall 2017 enrollment included 16,194 undergraduates and 4,385 graduate students.

The University experienced a significant increase in doctoral students' enrollment, and the UToledo College of Law experienced a nearly 10% increase in student enrollment this year.

The freshman class is 1.5% larger in fall 2018 than the entering class in fall 2017, with 3,269 new students enrolled.

This is the sixth consecutive year with an increase in the number of students who returned to campus for their second years.

Direct from High School (DHS) enrollment increased by 1.7% in fall 2018 compared to last year.

Enrollment of transfer readmits increased by 21% compared to last year. (Transfer readmits are former UToledo students who dropped out for at least one semester and returned to UToledo after earning credit at another institution).

College Credit Plus enrollment increased by 7.9%.

During the 2018-19 academic year, UToledo will implement the second year of Winter Intersession courses, including online courses, which will help students make progress in their programs and increase enrollment at the University.

Summer session courses will be expanded to help students make progress in their programs and increase enrollment for summer semester 2018.

Initiatives are underway to enhance and expand existing and new transfer pathways, including implementation of the state of Ohio's Transfer Assurance Guides and UToledo's Rocket Express partnership with Owens Community College, as well as collaborations with other community colleges in the region.

UT is exploring the possibility of a new 2+2 program in nursing with Owens Community College and a 2+2 program with Northwest State Community College in the area of criminal justice.

In fall 2018, Ohio Department of Higher Education Chancellor John Carey sent a letter of appreciation to UToledo for the 50 or more UToledo faculty who served on statewide faculty panels and committees related to the development of transfer guidelines, including Ohio Guaranteed Transfer Pathways. Many UToledo faculty continue to serve on one or more statewide panels or committees as the transfer guidelines work continues.

MAY 2018

Overall enrollment for fall 2017 was down 0.3%, primarily because new student enrollment was lower than expected at the undergraduate and graduate levels.

The Interim Vice President for Enrollment Management is in the process of analyzing the factors that contributed to a lower-than-expected yield among admitted undergraduate students.

Stronger student retention increased spring enrollment; with an improved undergraduate fall-to-spring semester retention rate of 90.6% for the 2017-18 academic year compared to 89.3% for 2016-17 and 89.1% for the 2015-16 academic year.

Plans to increase enrollment going forward include implementation of the strategic enrollment plan and an increase in personalization and customization of recruitment from Direct from High School (DHS) students; enhanced messaging to school counselors and parents; enhanced marketing to targeted geographic areas; timely notification of graduate funding offers; and timely and effective financial aid awards.

New email campaigns have been rolled out for all undergraduate student populations.

Enhancements have been made to the campus visit program and initial feedback from the first round of campus visits by students and their families has been positive.

Fall 2018 confirmations for Direct from High School (DHS) admitted students are up compared to last year.

International students admitted for fall 2018 are up 25% over the same time last year.

Piloted the offering of winter intersession courses offered in 2017-18 and reviewing results to improve and increase the number of courses offered next year.

Summer session courses to be expanded to increase student enrollment in the summer of 2018.

College Credit Plus enrollment has increased for summer 2018 courses.

Initiatives are underway to enhance and expand existing and new transfer pathways, including implementation of the state of Ohio's Transfer Assurance Guides, 2+2 programs, UToledo's Rocket Express partnership with Owens Community College, as well as collaborations with other community colleges in the region.

OCTOBER 2017

Overall enrollment for fall 2017 was down 0.3%, primarily because new student enrollment was lower than expected at the graduate and undergraduate levels.

The Interim Vice President for Enrollment Management is in the process of analyzing the factors that contributed to a lower-than-expected yield among admitted undergraduate students.

Plans to increase enrollment going forward include implementation of the strategic enrollment plan and an increase in personalization and customization of recruitment of Direct from High School (DHS) students; enhanced messaging to school counselors and parents; enhanced marketing to targeted geographic areas; timely notification of graduate funding offers; and timely and effective financial aid awards.

Initiatives underway to enhance and expand existing and new transfer pathways, including TAGS, 2+2 programs and Rocket Express with Owens Community College, as well as other regional community colleges.

The interim president of Owens Community College met with advisors, success coaches and academic leaders in fall 2017 to discuss ways to enhance the Rocket Express partnership with UToledo.

UToledo leadership met with the leadership of Lorain County Community College in fall 2017 to discuss possible future partnerships.

Winter Intersession courses will be piloted this academic year to provide students with additional opportunities to progress toward their degrees, as well as increase UToledo enrollment.

Summer courses will be expanded in summer 2018 to increase UToledo enrollment and to provide students with additional opportunities to progress toward their degrees.

OUTCOME: Annual Net Revenue Increase

NOVEMBER 2019

From the audited financial statements, total revenue (includes Academic Affiliation revenue) increased by 4.2% between FY18 and FY19 (\$716.8 million versus \$746.7 million).

MAY 2019

Net revenue increased by 2.3% between FY16 and FY18 (\$700.9 million vs. \$716.8 million). (Note: 2016 net revenue excludes \$40 million from the Academic Affiliation Agreement with ProMedica.)

Net revenue for FY19 will be established at the end of the current fiscal year, June 30, 2019.

NOVEMBER 2018

Net revenue increased by 2.3% between FY16 and FY18 (\$700.9 million vs. \$716.8 million).

The initial 2016 baseline metric of \$753.7 million is not consistent with 2016 net revenue (net revenue of student institutional aid). The correct number is \$700.9 million.

MAY 2018

Data will be available at close of fiscal year 2018.

Between FY17 and FY19, adjusting the Direct from High School Merit Scholarship matrix for the incoming class has provided movement toward a targeted annual reduction of total discounts by 2%.

OCTOBER 2017

Between FY17 and FY19, adjusting the Direct from High School Merit Scholarship matrix for the incoming class has provided movement toward a targeted annual reduction of total discounts by 2%.

Net revenue is expected to increase by 4% between FY17 and FY18 (\$700.9 million vs. \$728.1 million).

(Note: FY17 net revenue excludes \$40 million from the Affiliation Agreement.)

OUTCOME: Percentage Share of the State Share of Instruction (SSI) Funding Pool

NOVEMBER 2019

Preliminary estimates indicate that UToledo's FY20 State Share of Instruction (SSI) stayed constant at 6.99%, which is within 0.5% of FY16 market share (7.8% compared to 6.8%).

The Office of Finance and Administration provides support for this outcome by modeling market share trends and reviewing the Office of Institutional Research's data submissions to the Ohio Department of Higher Education.

MAY 2019

Final allocations indicate that UToledo's FY19 State Share of Instruction (SSI) is 6.99%, which is within 0.5% of FY16 market share (7.8%, compared to 6.8%).

The Office of Finance and Administration provides support for this outcome by modeling market share trends and reviewing the Office of Institutional Research's data submissions to the Ohio Department of Higher Education.

NOVEMBER 2018

Preliminary estimates indicate that UToledo's FY19 State Share of Instruction (SSI) is 7.1%, which is within 0.5% of FY16 market share (7.8% compared to 6.8%).

MAY 2018

For FY18, UToledo's percentage share of SSI is estimated to be 7.2%.

Preliminary estimates indicate that UToledo's FY19 SSI share is on track to be within 0.5% of FY16 market share.

OCTOBER 2017

For FY18, UToledo's percentage share of SSI is estimated to be 7.2%.

OUTCOME: Revenue From Commercialization of Research and Technology Transfer

NOVEMBER 2019

Total income from technology transfer for FY19 is \$1.27 million.

Technology transfer for FY2013-2017 includes (per \$10 million research expenditures): invention disclosures 12.3; licenses 2.4; license income \$326.546; reimbursement rate 48%; and startups formed 0.35.

MAY 2019

Data for FY19 will be available after June 30, 2019.

The Office of Technology Transfer assists investigators with the patenting and commercialization of technologies developed from University research. Associates guide inventors through the patenting and commercialization process, provide opportunities to interact with industry, gather and report feedback from companies, notify investigators of industry-sponsored funding, and directly contribute to the translation of faculty research through licensing. A number of lectures, presentations and talks with faculty on both campuses have taken place to educate them regarding the technology transfer process.

Dr. Vijay Goel, Distinguished University Professor and director of the UToledo Engineering Center for Orthopaedic Research Excellence, was presented with the 2018 Ohio Faculty Council Technology Commercialization Award by Ohio Department of Higher Education Chancellor John Carey in Columbus in October 2018. Dr. Goel was recognized for his accomplishments toward the development and commercialization of the Libra Pedicle Screw System, which is being used in a growing number of hospitals and spinal surgery centers.

NOVEMBER 2018

Total income from technology transfer for FY18 is \$2.05 million.

Technology transfer for FY2013-2017 includes (per \$10 million research expenditures): invention disclosures 12.3; licenses 2.2; license income \$128,629; reimbursement rate 56%; startups formed 0.40.

Dr. Vijay Goel, Distinguished University Professor and director of the UToledo Center for Orthopaedic Research Excellence, was awarded the 2018 Ohio Faculty Council Technology Commercialization Award by Ohio Department of Higher Education Chancellor John Carey in Columbus in October 2018. Dr. Goel was recognized for his accomplishments toward the development and commercialization of the Libra Pedicle Screw System, which is being used in a growing number of hospitals and spinal surgery centers.

A UToledo alumnus who graduated in 2014 with a bachelor's degree in mechanical engineering technology and participated in UToledo's LaunchPad incubation program had his invention, called the Grypmat, included in Time magazine's "Best Inventions of 2018" issue.

MAY 2018

Total revenue from commercialization of research and technology transfer in FY17 is \$5.8 million.

Data for FY18 will be available at end of fiscal year.

Report on performance of other Ohio universities is not yet available.

OCTOBER 2017

Total income from technology transfer for FY17 is \$5.8 million. Reports on performance of other Ohio universities is not yet available.

OUTCOME: Revenue Generated or Cost Reduction/Avoidance From Technology Services and Products**NOVEMBER 2019**

Implementation of the new telecommunications system, Cisco VOIP (voice over internet protocol), approved by the Board of Trustees, has begun and will be completed during FY19 and FY20.

The University continues to move technology/key applications to the cloud to reduce cash costs of server replacements. Key applications consist of Banner modules, Microsoft Office, and Athena EMR (Electronic Medical Records). Microsoft Office 365 was recently moved to the cloud. Employee (faculty and staff) H drives were moved to the cloud during summer 2019, which adds storage capacity and reduces capital costs.

Negotiated substantial cost reduction for McKesson Electronic Medical Record (EMR) support.

Completed new agreement with Ellucian among five of Ohio's public universities for Banner version 9 renewal that includes a cost reduction. This agreement is already driving cost efficiencies. It is expected to drive \$4.2 million in cost savings for the five schools during the five-year term. A joint development team is being established with the other Inter-University Council (IUC) schools to drive improved functionality in Banner version 9 upgrades, and lower costs of the third party software products that function in the Banner ecosystem.

MAY 2019

Implementation of the new telecommunications system, Cisco VOIP (voice over internet protocol), approved by the Board of Trustees, has begun and will be completed over FY19 and FY20.

The University continues to move University technology/key applications to the cloud to reduce cash costs of server replacements. Key applications consist of Banner modules, Microsoft Office and Athena EMR (electronic medical records). Microsoft Office 365 was recently moved to the cloud. Employee (faculty and staff) H drives will be moved to the cloud during summer 2019, which will add storage capacity and reduce capital costs.

UToledo negotiated a substantial cost reduction for McKesson electronic medical record (EMR) support.

UToledo completed a new agreement with Ellucian among five of Ohio's public universities for Banner version 9 renewal that includes a cost reduction. This agreement is already driving cost efficiencies. It is expected to drive \$4.2 million in cost savings for the five schools during the five-year term. A joint development team is being established with the other Inter-University Council (IUC) schools to drive improved functionality in Banner version 9 upgrades and lower costs of third-party software products that function in the Banner ecosystem.

NOVEMBER 2018

Continue to move University technology/key applications to the cloud to reduce cash costs of server replacements. Key applications consist of Banner modules, Microsoft Office and Athena EMR (electronic medical records).

Microsoft Office 365 was recently moved to the cloud.

Plans are underway to move H drives of faculty and staff to the cloud during FY19 and FY20, which will add storage capacity and reduce capital costs.

Negotiated a substantial cost reduction for McKesson EMR support.

Completed a new agreement with Ellucian among Ohio's public universities for Banner version 9 renewal that includes a cost reduction. In progress to build a joint development team with other Ohio public universities to drive improved functionality in Banner version 9 upgrades and lower costs of the third-party software products that function in the Banner ecosystem.

MAY 2018

Continue to move University technology/key applications to cloud to reduce cash costs of server replacements. Key applications consist of Banner modules, Microsoft Office and Athena EMR (Electronic Medical Records).

Microsoft Office 365 was recently moved to cloud.

Negotiated substantial cost reduction for McKesson electronic medical record (EMR) support.

Completed new agreement with Ellucian among Ohio's public universities for Banner version 9 renewal that includes a cost reduction.

The project with Athena Health to develop and implement its new, cloud-based electronic medical records (EMR) is well underway, and the system will be implemented during FY19.

OCTOBER 2017

Going forward, the University is moving key applications to the cloud to reduce the cash costs of server replacements. Key applications consist of Banner modules, Microsoft Office and Athena EMR (Electronic Medical Records).

The project with Athena Health to develop and implement its new, cloud-based EMR is well under way, and the system will implement during FY19.

OUTCOME: Cost Savings From Operating Efficiencies

NOVEMBER 2019

FY19 cost savings from operational efficiencies are at 59.6% of the 2022 target of 10% of FY17 operational expenses.

MAY 2019

The FY18 cost savings from operational efficiencies were 54.5% of the 2022 target. (Note: The target is 10% of FY17 operational expenses.)

The FY19 cost savings from operational efficiencies will be calculated at the end of the current fiscal year on June 30, 2019.

NOVEMBER 2018

FY18 cost savings from operational efficiencies are at 54.5% of the 2022 target. (Note: Target is 10% of FY17 operational expenses.)

MAY 2018

Administrative dashboard reports that focus on trends in employee FTEs and departments' expenses are in development.

OCTOBER 2017

Dashboard reports that focus on trends in employee FTEs and departments' expenses are in development.

GOAL 4: IMPROVE UTOLEDOS'S INFRASTRUCTURE.

OUTCOME: Completion of Projects and Initiatives Proposed for the First Five Years of the Multiple-Campus Master Plan

NOVEMBER 2019

The Office of Finance and Administration estimates that 25% of the projects and initiatives proposed for the first five years of the Multiple Campus Master Plan have been completed to date. This is up from the 21% reported in April 2019. We expect that by the end of FY20 we will complete an additional 2-4% of the projects and initiatives proposed for the first five years of the Multiple Campus Master Plan.

Since the previous update provided in April 2019, projects completed or on track to be completed by the end of FY20 include: Classroom renovations in Stranahan Hall, McMaster Hall and Snyder Memorial; Main Campus research lab renovations in Health and Human Services 1409 and 1412, North Engineering 1470E, Wolfe Hall 2200/2200A, 2209A, 2217D, 2223A/B and 3242A, Boman-Oddy Laboratories 0125E and Palmer Hall 1370; Health Science Campus research Lab renovations in Health Education Building 207/209, 210, 219-220 and Health Science Building 403/404; Paul Hotmer Soccer Field and Track and Field throwing events relocation; North Engineering lab/classroom renovations Phase 1; and Public Safety Building.

MAY 2019

The Office of Finance and Administration estimates that 21% of the projects and initiatives proposed for the first five years of the Multiple Campus Master Plan will be completed by the end of FY19. This is improved from the 20% reported for FY18.

With the combination of the remainder of FY19-FY20 state and local funds, we expect that by the end of FY20 we will have completed an additional 6-9% of the projects and initiatives proposed for the first five years of the Multiple Campus Master Plan.

FY18 projects completed include: Dining hall renovations (Ottawa East and Thompson Student Union); addition of Chick-fil-A in the Student Union; William S. Carlson Library renovations; minor renovations to Carter Hall for the start of the 2017-18 academic year; North Engineering boiler plant and chilled water plant upgrades; Main Campus chilled water plant upgrades; research lab renovations in the Block Health Sciences Building; Parks Tower renovations; relocation of Office of Finance and Administration departments (General Accounting, Accounts Payable, Payroll) from Scott Park to University Hall; relocation of Purchasing (Procurement) offices from Scott Park to the Ruppert Health Center; relocation of the Office of the Treasurer from Scott Park to Rocket Hall; Carlson Library bridge replacement; Health Education Building renovations; improved bicycle network connectivity with the completion of Bancroft Street and University Hills reconstruction; renovation of Student Involvement and Career Services offices; and expanded use of branded banners and exterior signage on campus.

Projects completed or on track to be completed by the end of FY19 include: overhead utilities relocated as the beginning of construction of Goddard Recreation Field; locker rooms and coaches' offices relocated as the first step in relocating soccer to Main Campus; renovation of the Center for Administrative Support (the former Child Care Center) to house Human Resources; and research lab renovations in rooms 207/209 and room 210 in the Health Education Building.

NOVEMBER 2018

The Office of Finance and Administration estimates that 20% of the projects and initiatives proposed for the first five years of the Multiple Campus Master Plan have been completed through the end of FY18. This is an increase from the 11% reported in May 2018.

With the combination of FY19 and FY20 state and new local funds, work will begin on an additional 5-10% of projects and initiatives proposed for the first five years of the Multiple Campus Master Plan.

FY18 completed projects include: dining hall renovations (Ottawa East and Thompson Student Union), addition of Chick-Fil-A in Student Union, Carlson Library renovations, minor renovations to Carter Hall for the start of the 2017-18 academic year, North Engineering boiler plant and chilled water plant upgrades, Main Campus chilled water plant upgrades, research lab renovations in the Block Health Sciences Building, Parks Tower renovations, relocation of the finance offices (General Accounting, Accounts Payable, Payroll) from Scott Park to University Hall, relocation of purchasing (procurement) offices from Scott Park to the Ruppert Health Center, relocation of the treasurer's office from Scott Park to Rocket Hall, Carlson Library bridge replacement, Health Education Building (HEB 100) renovations and HEB 110 renovations, improved bicycle network connectivity with the completion of Bancroft and University Hills reconstruction, renovation of the Student Involvement and Career Services offices, and expansion of branded banners and exterior signage on campus.

MAY 2018

The Office of Finance and Administration estimates that 15% of projects and initiatives proposed for the first five years of the Multiple Campus Master Plan have been completed, including the \$6 million renovation of Carlson Library.

Work completed includes: relocation of Purchasing Services from the Scott Park Campus to the Health Science Campus; relocation of the Department of Accounting from Scott Park to Rocket Hall; relocation of Accounts Payable/General Accounting/Payroll offices from Scott Park to Main Campus; renovation of research labs within the Block Health Sciences Building on Health Science Campus; light renovation and deferred maintenance in Carter Hall; renovation in Parks Tower (to be completed by August 2018); and updating of North Engineering's steam and chilled water plants.

The Office of Finance and Administration submitted the University's six-year capital plan to the state's Office of Budget and Management in fall 2017 for review and prepare for the University's two-year capital plan for the upcoming biennium in FY19 and FY20.

OCTOBER 2017

The Office of Finance and Administration estimates that 10% of projects and initiatives proposed for the first five years of the Multiple-campus Master Plan have been completed.

Work completed includes: relocation of Purchasing Group from Scott Park to Health Science Campus (completed), relocation of Treasury Accounting from Scott Park to Rocket Hall (completed), and relocation of Accounts Payable/General Accounting/Payroll offices from Scott Park to Main Campus (to be completed by December 2017); renovation of research labs within the Block Health Sciences building on Health Science Campus (to be completed by December 2017); light

renovations and deferred maintenance in Carter Hall (completed summer 2017); renovations underway in Parks Tower (to be completed by August 2018); updating of North Engineering steam and chilled water plants (completed October 2017).

The Office of Finance and Administration will submit the university's six-year capital plan to the state's Office of Budget and Management by mid-November 2017 for review and to prepare for the university's two-year capital plan for the upcoming biennium FY 19 and FY20.

OUTCOME: State Funds Invested Annually Into Deferred Maintenance Projects

NOVEMBER 2019

On March 30, 2018, then-Ohio Gov. John Kasich signed House Bill 529, which provides funding for capital projects. UToledo is set to receive requested funds for FY19 and FY20 in the total amount of \$21.023 million.

Of the \$21.023 million received from the state for FY19 and FY20, more than 60% has been spent on deferred maintenance. The deferred maintenance projects include: underground steam/condensation infrastructure improvements (\$2 million); building envelope/weatherproofing (\$2 million); mechanical system improvements (\$2 million); electrical system enhancements (\$2 million); North Engineering lab/classroom renovations (\$2 million of \$3 million); classroom renovations (\$0.5 million of \$1.5 million); research laboratory renovations (\$0.2 million of \$1.5 million); building automation system upgrades (\$1.5 million of \$2 million); and Savage Arena pedestrian bridge replacement (\$0.75 million of \$1 million)

The total amount of state funds invested in deferred maintenance projects for FY19 and FY20 totals \$12.95 million (62% of \$21.023 million).

MAY 2019

On March 30, 2018, then-Ohio Gov. John Kasich signed House Bill 529, which provides funding for capital projects. UToledo is set to receive requested funds for FY19 and FY20 in the amount of \$21.023 million.

Of the \$21.023 million received from the state for FY19 and FY20, more than 60% has been spent on deferred maintenance. The deferred maintenance projects include: underground steam/condensation infrastructure improvements (\$2 million); building envelope/weatherproofing (\$2 million); mechanical system improvements (\$2 million); electrical system enhancements (\$2 million); North Engineering lab/classroom renovations (\$2 million of \$3 million); classroom renovations (\$0.5 million of \$1.5 million); research laboratory renovations (\$0.2 million of \$1.5 million); building automation system upgrades (\$1.5 million of \$2 million); and Savage Arena pedestrian bridge replacement (\$0.75 million of \$1 million).

The amount of state funds invested in deferred maintenance projects for FY19 and FY20 totals \$12.95 million (62% of \$21.023 million).

NOVEMBER 2018

On March 30, 2018, Ohio Gov. John Kasich signed House Bill 529, which provides funding for capital projects. UToledo is set to receive requested funds for FY19-20 in the amount of \$21.023 million.

Of the \$21.023 million received from the state for FY19-20, nearly half will be spent on deferred maintenance. The deferred maintenance projects include: underground steam/condensation infrastructure improvements (\$2 million); building

envelope/weatherproofing (\$2 million); mechanical system improvements (\$2 million); electrical system enhancements (\$2 million); North Engineering lab/classroom renovations (\$1 million of \$3 million); classroom renovations (\$.5 million of \$1.5 million); and research laboratory renovations (\$.5 million of \$1.5 million).

The total amount of state funds invested in deferred maintenance projects for FY19 and FY 20 totals \$10 million (48% of \$21.023 million).

MAY 2018

For FY17 and FY18, UToledo received \$21.6 million in state appropriations; approximately 50% has been, or will be, invested into deferred maintenance projects.

On March 30, 2018, Ohio Gov. John Kasich signed House Bill 529, which provides funding for capital projects. UToledo is set to receive requested funds for FY19 and FY20 in the amount of \$21.073 million.

OCTOBER 2017

For FY17 and FY18, UToledo received \$21.6 million in state appropriations. Approximately 50% has been, or will be, invested into deferred maintenance projects.

OUTCOME: Completion of the UToledo Technology Strategic Plan

NOVEMBER 2019

The current UToledo Technology Strategic Plan is 70% complete and will be presented in FY20. It will be fully implemented by FY22.

MAY 2019

The UToledo Technology Strategic Plan version 1.0 was completed, as well as a cybersecurity technology plan.

NOVEMBER 2018

The first documents defining the UToledo Technology Strategic Plan have been completed and are under review.

Approval was obtained from the Board of Trustees to replace the current telecomm system with new Cisco VOIP, which will be implemented during FY19 and FY20.

MAY 2018

The first documents defining the UToledo Technology Strategic Plan have been completed and are under review.

OCTOBER 2017

The first documents defining the UToledo Technology Strategic Plan have been completed and will be reviewed with leadership and governance groups in spring 2018.