Summary: Progress on 2016-17 Goals

President’s Report to the Board of Trustees
May 5, 2017
President’s Annual Goals

• 7 goals set at the start of fiscal year by BOT and President
• Opportunity for Assessment and Reflection
• Objective - Update on Progress
1. Expand Access and Affordability Initiatives

- Focus: total cost of a degree, student borrowing, and success of need-based students
Access and Affordability Pilot Programs

- Pathway to Success Summer Start (PaSSS)
  - PaSS for World Campus
- Financial Literacy Center
- Digital Learning Initiative
- Education at Work (EAW)
- Advising Enhancements (Starfish)
- Student Transition Experiences Program (STEP)
- Raise.me Micro-scholarship Program
- ALEKS Initiative
Pathway to Success Summer Start (PaSSS)

- An intensive program to help students graduate on time using summer courses and guaranteed employment.
- Initial assessment results suggest gains in: retention, math proficiency, GPAs, and credit accumulation; Assessment will continue once spring 2017 grades are submitted.

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td># of students</td>
<td>135</td>
<td>274</td>
<td>375</td>
<td>1,000</td>
</tr>
<tr>
<td># of participating campuses</td>
<td>7</td>
<td>9</td>
<td>12</td>
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World Campus PaSS

• Focused on first time college/online students who are first generation, adult learners or have high financial need.

• Target Launch: Fall ‘17 for 30 students; second cohort in spring ‘18.

• Program highlights include:
  – non-credit courses that address study skills, technology, financial literacy, career planning and student engagement
  – personalized student mentoring and faculty/staff coaching
  – $1,500 scholarship for each of the two semesters
Penn State Financial Literacy Center

• Provides students with access to financial security information and tools.
• Unifies existing programming.
• [https://financialliteracy.psu.edu/](https://financialliteracy.psu.edu/)
• Website is a portal to make appointments and request advice.
• Director Daad Rizk received the Institute for Financial Literacy’s 2017 Educator of the Year Award.
• Currently seeking an endowment for Center.
Digital Learning Initiative

- Uses online/video classes and resources to help students make academic progress and provides supplementary materials for classes with high repeat rates.

- Increases sharing of entrance-to-major and upper level/major courses among campuses.

- Reduces number of under-enrolled courses/sections.

- Develops a sustainable model to expand courses.

- Fall ’17 courses include: MATH 34: The Mathematics of Money and STAT 200: Elementary Statistics.

- Collaboration among Office of the Vice President for the Commonwealth Campuses, Eberly College of Science and World Campus.
Education at Work (EAW)

- A non-profit organization that helps college students graduate with less debt through industry partnerships.
- The partners provide wages and tuition assistance to students while developing workplace skills.
- Working with EAW and an interested corporate partner to establish this initiative at Penn State (UP).
Advising Enhancements

• Rolled out in May 2016, Starfish is a new suite of academic and early progress reporting tools.
• Designed to facilitate communication among academic advisors, instructors and students.
• Through Starfish, in fall ‘16, 60,000 unique students received an early alert about their performance in classes; and 6,000 advising appointments were scheduled.
Student Transitional Experiences Program (STEP)

- Summer program for juniors transitioning to UP from a Commonwealth Campus.
- Previously STEP was limited to students in Smeal, Engineering and HHD, but now it includes all colleges.
- Students take two courses during summer session II, partner with a student mentor, receive a $1,500 Provost Award, and participate in STEP Connect Workshop Series.
### Raise.me Micro-Scholarship Program

- Students earn tuition $$ through academic and co-curricular requirements to max $4,000/year for 4 years.
- Office of Undergraduate Education provides wraparound programming for participants.

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<th>2014</th>
<th>2015-16</th>
<th>2016-17</th>
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<tbody>
<tr>
<td>Urban Schools (Phila./Pitt.)</td>
<td>5</td>
<td>5</td>
<td>16</td>
</tr>
<tr>
<td>Rural Schools</td>
<td>6</td>
<td></td>
<td>8</td>
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- This year's program includes every PA high school student in the free/reduced lunch program.
## Raise.me Micro-Scholarship Outcomes

<table>
<thead>
<tr>
<th>Cohort</th>
<th>Applied</th>
<th>Offered</th>
<th>Accepted</th>
<th>First Generation</th>
<th>Financial Need</th>
<th>Ave. Award Per Student Per Semester</th>
</tr>
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<tbody>
<tr>
<td>2015-16</td>
<td>77</td>
<td>55</td>
<td>37</td>
<td>42</td>
<td>$1,053</td>
<td></td>
</tr>
<tr>
<td>2016-17</td>
<td>214</td>
<td>135</td>
<td>121</td>
<td>71</td>
<td>$1,060</td>
<td></td>
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<table>
<thead>
<tr>
<th>Cohort</th>
<th>Asian American</th>
<th>African American</th>
<th>Hispanic/Latino</th>
<th>White</th>
<th>Other/Did not Report</th>
</tr>
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<tbody>
<tr>
<td>2015-16</td>
<td>40%</td>
<td>24%</td>
<td>13%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>2016-17</td>
<td>33%</td>
<td>18%</td>
<td>12%</td>
<td>17%</td>
<td>20%</td>
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Assessment and Learning in Knowledge (ALEKS)

- Allows for adaptive math placement and provides modules to strengthen math skills.
- One third of students in calculus sequence used the online modules; 90% placed into a course higher than original placement level.
- Refined to increase online prep time, resulting in a 94% success rate for students who re-test, and eliminated most 5- and 6-credit courses that were stumbling blocks for students.
- Working to expand courses and offer to multiple campuses.
- Helps adult learners relearn/refresh math skills.
2. Continue Cost Cutting and Efficiency Measures

- Voluntary Retirement Plan Savings: $12-16M from 587 faculty and staff retirements.
- New initiatives in energy ($1.5M savings) and strategic procurement ($3.5M savings).
- Cost savings/budget reductions in ‘16-’17: $19.8M includes restructuring post-retirement health care liability, capping/reducing subsidy to World Campus and Outreach, administrative overhead, and other tactical savings.
- Anticipated savings in ‘17-’18: $27M includes health care savings, released debt service, administrative overhead, general funds subsidy reductions for Campus Rec and UHS, World Campus subsidy reductions, and HR Transformation.
Increased Revenue Initiatives Being Explored

• Creation of new Professional Masters programs.
• Provide multiple seamless points of access through World Campus.
• Cultivate lifelong learning through refresher courses and a subscription to professional content modules.
• Program investments/targeted advertising to increase enrollment at Commonwealth Campuses.
• New residence halls at Abington and Brandywine have increased enrollments.
• Monetize IP.
Total Office of Tech Management Revenues

Fees, royalties, equity liquidation (yellow) and patent expense reimbursements (blue)

NOTE: 1989-1995 Revenue = $1,429,916
3. Expand Invent Penn State and Economic Development/Career Success Initiatives

- Assess outcomes of initial 7 Launchboxes/Innovation Hubs.
- Opened 6 new Launchboxes in 2016.
- Assess outcome of 4 planning grants; award 2 additional planning grants in 2017.
- Measure growth in startup licenses, companies in acceleration mode, new corporate partners, IP Fair participation, investor interactions and more.
Example: Morgan Advanced Materials

• Partnering with Penn State to establish R&D facility at Innovation Park
• First U.S.-based center of excellence
• First global industrial partnership formed through Invent Penn State
• Will drive global developments in the field of carbon research
Invent Penn State Outcomes: Year Two

• 400+ industry research contracts
• 5,000 Penn State researchers involved
• 91 patents issued/51 licenses & options executed
• 48 Startups formed with support for 1000s of entrepreneurs
• 90 student internships
• $900,000 invested and 50+ community partnerships
Example: Penn State New Kensington

• Awarded one of the first SEED grants

• Worked with New Kensington mayor to build an entrepreneurial center and co-working space downtown.

• The county and Penn State have raised $800,000+ for the project.

• Led to establishment of new arts center, loft apartments, small business association, 14 new businesses, downtown revitalization.
Venture & IP Conference (Oct. 6-7, 2016)

• 585 Conference Attendees
• 95 Capital Seeking Ventures
• 69 Venture Capitalists
Two Years of Accelerated Entrepreneurship & Innovation

- 230 students in Entrepreneurship and Innovation minor
- $2M invested in emerging PSU technologies
- 40 technology projects funded
- 29 EdTech student startups formed
4. Prepare to Launch Philanthropic Campaign

• Conducted 22 Case Statement Sessions with donors (14 Barron/8 Jones); completed case statement for *A Greater Penn State for 21st Century Excellence*

• Our strategy:

  **Open Doors** – Transform the financial equation for students

  **Create Transformative Experiences** – We must do much more than deliver content.

  **Impact the World** – Focus on the most compelling issues of our time.
Preparation and Progress

• Strategic Hires: Rich Bundy, VP for Development and Alumni Relations plus personnel to address campaign needs.
• $30M gift created the Donald P. Bellisario College of Communications.
• 50 presidential one-on-one visits to donors.
• 53 development events with nearly 6,000 donors/friends.
• 120+ formal speeches to university stakeholders.
• Delivered *A Greater Penn State* speech at Duquesne Club; sharing widely with printed/electronic copies.
A Greater Penn State

Time Elapsed: 16.7% (as of April 30, 2017)

Open Doors – Goal: $500M
Current Progress: $112.5M (23%)

Create Transformative Experiences – Goal: $225M
Current Progress: $55.6M (25%)

Impact the World – Goal: $475M
Current Progress: $102.5M (22%)

TOTAL FUNDRAISING PROGRESS – Goal: $1.6B
Current Progress: $315.3M (20%)
5. Address Major Issues of Campus and Public Concern

• Promote diversity and inclusion with All In Initiative.
• Taking unprecedented action to curb sexual assault, hazing and excessive drinking.
• $7.7M National Institutes of Health grant creates first national center for child maltreatment studies at Penn State.
• Title IX Office making progress on 18 task force recommendations.
Initiatives in 2016-17

Five main areas

• Service & Support
• Education
• Recruitment & Training
• Dialogue
• Awareness
Service & Support…Examples

- New dining options to meet the standards of Halal and Kashrut for observant Muslim and Jewish faith students.
- OPP is analyzing disability access in sports venues.
- Law Minority Mentor Program enters second year.
- Military Appreciation Week
- Hired Col. Eugene McFeely as University’s first senior director for Veterans Affairs and Services.
Education...Examples

- First Amendment Panel Discussion
- Faculty Senate’s Joint Diversity Awareness Task Force recommended enhancements to diversity related courses.
- New Student Orientation We Are Project
- First All In Conference attracted 400 people from 20 PSU campuses.
Recruitment and Training...Examples

- Partnering with Student Minority Advisory Recruitment Team.
- Hired Sara Oliver-Carter as Senior Director of Talent, Diversity and Inclusion.
- Equity Action Resource Team has 100+ volunteers available for search committees.
- Daylong training for PSU police on “enhancing relations in a diverse community” at UP, New Kensington and Schuylkill.
- Mentoring program for newly hired diverse employees.
Dialogue...Examples

• Inclusive Language Campaign for RAs.
• Facilitated Dialogues. President’s Council and the Student Leadership Roundtable held the first All In dialogue.
• Outreach and Online Education planning quarterly internal diversity and inclusion events.
• Commonwealth Campuses are hosting discussions and faculty/staff retreats.
Awareness...Examples

• Inaugural All In Award given to one faculty member and one student.
• All In videos have been featured at athletic events and on social media.
• World Campus is promoting All In events on its digital calendar.
• CCSG launching PA Patch Works to celebrate diversity and inclusion.
• All In Capstone will be a permanent tribute.
6. Create a strategic framework for future of online learning and the World Campus

• Transforming Education Task Force met with 25+ groups of stakeholders and is preparing report.
• The vision extends what it means to be One Penn State in 2025.
• By leveraging digital assets, Penn State can be more integrated, flexible and responsive in support of access, student learning, engagement and success.
Guiding Principles for Strategic Framework

- Supporting student mobility in accessing education with multiple entry points.
- Establishing curricular paths for individualization while reducing complexity of academic choices.
- Pursuing efficient scalability using innovative technologies.
- Addressing affordability as a key element of the curricular design and delivery.
7. Strategic Plan Implementation

- Based on five Thematic Priorities
  - Transforming Education
  - Enhancing Health
  - Stewarding Our Planet’s Resources
  - Advancing the Arts and Humanities
  - Driving Digital Innovation
Progress

- Committees actively overseeing implementation.
- Developing specific goals and initiatives.
- Forums held at Commonwealth Campuses to share ideas and receive feedback.
- Looking to leverage philanthropy and direct investment to fund new initiatives.
Recap of Goals

1. Expand access and affordability initiative.
2. Continue cost cutting and efficiency measures.
3. Expand Invent Penn State and economic development and career success initiatives.
4. Prepare to launch philanthropic campaign.
5. Address major issues of campus and public concern.
6. Create a strategic framework for the future of online learning and the World Campus.
7. Implement the strategic plan.
Thank you