



2016 Efficiency Reporting Guidance

In the early part of 2015, Gov. John R. Kasich created the Ohio Task Force on Affordability and Efficiency to make recommendations to Ohio's institutions of higher education based on three simultaneous principles 1) to be more efficient both in expense management and revenue generation 2) while offering an education of equal or higher quality and 3) decreasing costs to students and their families. The Task Force met several times during the course of 2015. In October the Task Force issued a report with ten recommendations to advise institutions on efficiency and academic practices which will improve both the quality of education and lower costs for students.

Furthermore, House Bill 64 (Section 369.550) requires each institution's board of trustees to complete an efficiency review, based on the Task Force's recommendations, by July 1, 2016, and submit their findings and implementation plans to the chancellor within 30 days, or by August 1, 2016. For additional information on each category and recommendation, please review the [Action Steps to Reduce College Costs report](#), issued by the Ohio Task Force on Affordability and Efficiency.

This document is intended to provide guidance for institutions' reports to the chancellor, based on the legislation – please modify and add additional detail as necessary. **The institutional efficiency review and the implementation plans captured by this template will serve as the data for 2016 Efficiency Advisory Committee Report. These reports are due August 1, 2016.** In 2017 and moving forward, ODHE will issue a survey to the institutions, based on the Task Force Report, as a status update to the implementation plans and will serve as the Efficiency Advisory Committee report.

Campuses will want to review the template to familiarize themselves with the format and content before beginning. The template is structured into four sections:

- **Section 1: Efficiencies** – The first section captures practices likely to yield significant savings for institutions that can then be passed on to students. This includes Procurement, Administrative and Operational, and Energy.
- **Section 2: Academic Practices** – This section covers areas such as textbooks, time to degree incentives, and academic course and program reviews. While improvements to academic processes and policies may not convey immediate cost savings, there will likely be tangible benefits that improve the quality of education for students.
- **Section 3: Policy Reforms** – This section captures additional policy reforms recommended by the Task Force.
- **Section 4: Cost Savings, Redeployment of Savings & Tangible Benefits to Students** – The last section will ask institutions to provide, if applicable, cost savings to the institution in actual dollars saved for each of the recommendations. Furthermore, the institution must advise if the institutional savings has been redeployed as a cost savings to students or offered a benefit to the quality of education for students.

Any questions can be directed to Sara Molski, Assistant Policy Director at the Ohio Department of Higher Education, at 614-728-8335 or by email at smolski@highered.ohio.gov.

Section I: Efficiency Practices

Procurement

Recommendation 3A | Campus contracts: Each institution must require that its employees use existing contracts for purchasing goods and services, starting with the areas with the largest opportunities for savings.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Miami University, as recommended in the Task Force report, has amended its procurement policy to require that all university departments prioritize goods and services available through contracts negotiated by the Inter-University Council - Procurement Group (IUC-PG).

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

Recommendation 3B | Collaborative contracts: Ohio’s colleges and universities must pursue new and/or strengthened joint purchasing agreements in the following categories:

- Copier/printer services
- Computer hardware
- Travel services
- Outbound shipping
- Scientific Supplies and Equipment
- Office Supplies and Equipment

Contract Type	Is the institution participating in joint contracts? [yes, no, plan to]	Include additional explanation here if needed. If the institution chooses not to participate, please explain why.
Copier/printer services	Yes	Miami has adopted the vendor agreement for copier and printer services selected by the IUC. The IUC-PG intends to use the University of Akron agreement as the statewide model agreement. The new contract is effective 7/1/16.
Computer hardware	Yes	Miami continues to employ the STS PC standards and the model contract negotiated by The Ohio State University. Miami’s IT Services division is evaluating how to further refine the STS standards for administrative computer purchases and will fully participate in the IUC-PG’s exploration of similar standards for monitors, keyboards, mice, cabling, etc.
Travel services	Plan to	Miami University has entered into a contract with a travel provider and will supply

		travel information from the provider to the IUC for the purpose of negotiating lower costs for frequent destinations or for volume providers of travel related services.
Outbound shipping	Yes	Miami intends to adopt the IUC-PG's UPS outbound contract for letters and small packages and already uses the E&I Fed Ex contract as recommended by the IUC-PG. Miami will also fully participate in the inbound freight RFP being developed by the IUC-PG.
Scientific supplies & equipment	Plan to	Miami is participating in the current data-gathering process for scientific equipment and supplies and intends to adopt the statewide agreement(s) once a vendor or vendors have been selected.
Office supplies & equipment	Yes	Miami currently employs the IUC-PG office supply contract and will fully participate with the IUC-PG in development of office product standards with the potential for further reducing the cost of certain office products.

Template

Assets and Operations

Recommendation 4 | Assets and Operations

4A Asset review: Each institution must conduct an assessment of its noncore assets to determine their market value if sold, leased or otherwise repurposed. Where opportunities exist, colleges and universities must consider coordinating these efforts with other Ohio institutions to reap larger benefits of scale.

Please provide an overview of the process used for the institution's asset review and the key outcomes below or on additional pages:

Since 2009 Miami University has aggressively pursued assessments of its non-core assets to determine their market value if sold, leased or otherwise repurposed. The following is a summary of the transactions that have already been completed:

Public Radio Station - Leased the broadcast rights to Cincinnati Public Radio in 2010, saving \$600,000 in annual operating costs.

Software Company redLantern - In 2010, redLantern was sold for a gross sales price of \$3,000,000.

On-campus Banking - Total value of the 2012 contract to the University is \$1.2 million over seven years. The new arrangement also made deposits of funds collected by university departments easier and faster with fewer administrative resources required to accomplish these deposits.

Beverage "Pouring Rights" - The 10-year contract negotiated in 2014 with an area Pepsi distributor has an estimated value of \$8.5 million over the life of the agreement.

Health Services - The 2015 sponsorship agreement provides \$10 million to the University over 12 years along with improved sports medicine services for Miami's intercollegiate athletes and students participating in intramural and club sports.

Sponsorship Agreements for Intercollegiate Athletics - Miami utilizes IMG to negotiate affinity partnerships for Intercollegiate Athletics which provides an annual value for the University's athletic programs of \$700,000.

In addition to the assessment of non-core assets that was previously completed by the University, the University undertook an updated assessment of the remaining non-core assets as recommended in the Ohio Task Force report. The process identified those properties directly adjacent and contiguous with the Oxford Campus. Assets in this category are of strategic importance because of growth or new uses for the land. As an example, three residential homes situated on property contiguous with the main campus were removed in recent years to provide space for new residence halls. The following assets have been evaluated for the possibility of being sold, leased or otherwise repurposed:

Airport - The receipt of capital improvement grants from the FAA precludes any immediate sale of the airport site and limits lease opportunities as well, but future opportunities will continue to be evaluated. Miami is also evaluating how it can more efficiently provide air travel that currently occurs through a university-owned plane. Despite FAA limitations for development on the surrounding land, the University has leased the property for agricultural cash crops to generate some revenue and reduce on-going maintenance costs.

Elm Street Facility - This building is being vacated due to high maintenance and operating costs. The University is currently evaluating whether to pursue offers for sale or an exchange of the property.

Miscellaneous Residential Properties not Adjacent to the Oxford Campus - The University is currently evaluating whether to pursue a sale or exchange of \$1 million of residential properties in Oxford not adjacent to the Oxford Campus.

Ox College - In 2001 the University entered into a long-term lease agreement for the former Ox College residence hall with a local community foundation. This agreement enabled Miami to avoid the cost of operating and maintaining the building. The site also includes vacant land that is near the Elm Street building that may increase the attractiveness of the Elm Street building to developers should the University choose to pursue such a transaction. Further analysis is needed to determine the feasibility of selling or

exchanging some of this site.

Parking Facilities - The University engaged a consultant to evaluate the operation of its parking facilities and to determine the feasibility of leasing or selling the facilities to a private operator. The consultant's conclusion was that selling or leasing these parking facilities is not financially viable.

4B Operations review: Each institution must conduct an assessment of non-academic operations that might be run more efficiently by a regional cooperative, private operator or other entity. These opportunities must then be evaluated to determine whether collaboration across institutions would increase efficiencies, improve service or otherwise add value.

Please provide an overview of the process used for the institution's operations review and the key outcomes below or on additional pages:

The University completed an assessment of non-academic operations to determine if they can be operated more efficiently by a regional cooperative, private operator, or other entity. A summary of the results from these reviews follows:

Dining - Improving the performance of the University's dining and residence hall operations was identified as a university priority in 2008. In an effort to achieve further improvement in the dining program, an RFP for management services was issued in late 2014 but the selected vendor was unsuccessful in assuming these responsibilities and is no longer under contract. An updated assessment of the dining operation was completed in 2014 and serves as the blueprint for making further and ongoing improvements in the dining.

Housing - As noted above, the need for improvement in the residence hall facilities and operations was identified in 2008 as an institutional priority. In 2011, the University issued an RFP for a potential P3 housing partnership before undertaking the construction of new residential housing for freshman and sophomore students. The proposal-evaluation committee determined that a P3 partner would not offer a viable alternative to university-constructed housing for freshmen and sophomores. While Miami continues to own and operate housing for freshmen and sophomore students on the Oxford campus, it has generally relinquished upper class and graduate student housing to operators in the Oxford area and thereby avoided the need for a formal P3 agreement that would shift financial risk to the University.

Student Health Center and Student Health Insurance - In 2013, Miami University contracted the management of its student health center with a local hospital provider, resulting in annual savings of about \$450,000. The University also annually evaluates its student health insurance policy and continues to find that its hard waiver policy leads to annual savings for those students needing to purchase health insurance. The annual evaluation also verified that more affordable student health insurance opportunities are not available through the Federal Exchange.

Child Care - Child care is already contracted with private operators.

IT Help Desk - IT Services has completed a review of its help desk and found that Miami's cost per contact is lower than industry providers. Miami is working with other public colleges and universities in Ohio to identify other collaborations and approaches that would further lower the cost of providing this service at Miami or improve the service available to students and employees. Such initiatives include expanding the knowledge base offered and to increase client self-service capabilities. The additional savings from these strategies are not able to be estimated at this time. In addition to possible help desk collaborations, Miami is working with Wright State University on a collaboration involving video-captioning services.

Janitorial Services, Landscaping and Facility Maintenance - An assessment of the facility operations was performed by an independent operator earlier this year. The independent operator reviewed staffing levels, operating costs, and level of services provided on Miami's campus compared to national averages and best-in-class. Specifically, the report compared data on full time equivalent per gross square foot (FTE/GSF), cost per square foot (\$/GSF), and APPA standards for quality of service. Their report suggests that unless significant improvements and efficiencies can be achieved for the custodial operations within the next 12 months, such services should be contracted with a private operator. The annual savings opportunity is projected to be about \$1.6 million. Similar opportunities were

not found to exist for facilities maintenance or the grounds operations.

Real Estate Management - Because Miami's real estate holdings are largely rural, it is not financially practical to place them under the oversight of a real estate management company.

Print Center - The print center, due to a need to repurpose this space for expanded lab space in Hughes Hall, is being closed. Services will be provided through print shops in the Oxford or nearby communities. The annual operating savings is estimated to be \$200,000.

4C Affinity partnerships and sponsorships: Institutions must, on determining assets and operations that are to be retained, evaluate opportunities or affinity relationships and sponsorships that can support students, faculty and staff. Colleges and universities can use these types of partnerships to generate new resources by identifying "win-win" opportunities with private entities that are interested in connecting with students, faculty, staff, alumni or other members of their communities.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

These opportunities were assessed as part of the review of non core assets and operations.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

Please identify partnerships and sponsorships in effect for FY2016:

Partnerships/Sponsorships	Description
Public Radio Station	Leased the broadcast rights to Cincinnati Public Radio in 2010, saving \$600,000 in annual operating costs.
Software Company redLantern	In 2010, redLantern was sold for a gross sales price of \$3,000,000.
On-campus Banking	Total value of the 2012 contract to the University is \$1.2 million over seven years. The new arrangement also made deposits of funds collected by university departments easier and faster with fewer administrative resources required to accomplish these deposits.
Beverage "Pouring Rights"	The 10-year contract negotiated in 2014 with an area Pepsi distributor has an estimated value of \$8.5 million over the life of the agreement.
Health Services	The 2015 sponsorship agreement provides \$10 million to the University over 12 years along with improved sports medicine services for Miami's intercollegiate athletes and students participating in intramural and club sports.
Sponsorship Agreements for Intercollegiate Athletics	Miami utilizes IMG to negotiate affinity partnerships for Intercollegiate Athletics which provides an annual value for the University's athletic programs of \$700,000.

Administrative

Recommendation 5 | Administrative cost reforms

5A Cost diagnostic: Each institution must produce a diagnostic to identify its cost drivers, along with priority areas that offer the best opportunities for efficiencies. This diagnostic must identify, over at least a 10-year period:

- Key drivers of costs and revenue by administrative function and academic program;
- Distribution of employee costs — both among types of compensation and among units;
- Revenue sources connected to cost increases — whether students are paying for these through tuition and fees, or whether they are externally funded;
- Span of control for managers across the institution — how many employees managers typically oversee, by the manager's function; and
- Priority steps that would reduce overhead while maintaining quality — which recommendations would have the most benefit?

Has the institution produced a cost diagnostic? If yes, please provide an overview of the process used and the key outcomes.

A 10-year cost diagnostic was completed for Miami University as recommended in the Governor's Task Force report. This review included an analysis of spending by functional category and by object of expense. The diagnostic confirmed that the many efforts by Miami University over the past eight years have been effective in slowing the annual rate of growth in spending. Spending per student, net of student financial aid, actually declined from its peak in 2008, and the increase in actual spending over the entire ten-year period rose at a rate slower than the annual growth in the consumer price index.

While the cost trends observed over the last decade are generally quite favorable, this review did identify a small number of areas where costs have grown faster than the overall trend at Miami. Most of these areas align with the strategic priorities of the University during this period. It also is possible that opportunities for increased productivity or improved efficiency may exist in areas that grew slower than the average rate of growth. For all administrative functions and cost centers, a deeper analysis could potentially identify opportunities for improvement. For this reason, the University intends to implement a program review process for assessing nonacademic functions and programs on a regular cycle. Through these reviews, the effectiveness and sufficiency of these activities can be properly assessed and improved.

Please provide details on the result of the assessment. What are the cost drivers, based on the categories above? Please discuss the institution's priority areas that offer the best opportunities for recommendation.

Cost Diagnostic Spend Categories that are Outliers Oxford Educational and General Operations

VP Enrollment and Student Success (8.2%) - Increased spending on enrollment management has been a major factor in the growth in the number and quality of students enrolling at Miami.

Audit Fees (6.3%)- Audit contracts are awarded by the Auditor of State, but a cost reduction may be possible at the next contract renewal.

Marketing and Communications (5.9%) - Increased spending on marketing has contributed to the growth in number and quality of students enrolling at Miami.

Travel and Hosting (5.13%) - Increased spending on travel is consistent with university priorities such as increased international opportunities for students, national student recruitment, and fundraising growth.

Investment Fees (4.4%) - The growth is reasonable given the growth in the amount invested by the University and the Foundation.

Advancement (3.4%) - There also has been growth in donor contributions.

Debt (3.10%) - No new E&G debt has been issued since 2007. E&G debt will continue to be closely scrutinized going forward.

Student Employment (2.29%) - This is a strategic priority for the University as increased student employment opportunities assist students in meeting their financial obligations, aiding retention, and gaining professional experiences that benefit them in their preparation for future professional opportunities.

General Counsel (2.0%) - This is the result of increased regulation and litigation.

Human Resources (1.7%) - This is partially due to increased regulation and also to a greater emphasis on employee programs (such as wellness) that have helped to slow the growth in employee benefit costs. Accenture also identified HR as an operation where the current level of spending is below best practice.

Cost Diagnostic Spend Categories that are Outliers Oxford Auxiliary Operations

Aviation Services (11.7%) - Increase is due to rise in the cost of maintaining the university plane and the related services. Along with the airport, this cost center will continue to be evaluated.

Debt (11.21%) - This is the result of the residential and dining facility renewal program mentioned earlier.

Graduate Assistants (8.86%) - This is due to increased utilization of graduate students in Recreational Center operations and ICA. This cost aligns with the university's educational priorities.

Goggin Ice Center (7.3%) - This is a result of the increased cost of operating a new and much larger ice arena.

Financial Aid (1.94%) - This is due to growth in tuition which impacts scholarship costs for Intercollegiate Athletics.

Intercollegiate Athletics (2.3%) - Intercollegiate Athletics, especially when combined with the growth in related facility costs, continues to increase its cost at a faster rate than most university operations. This growth, even though consistent with other similar athletic programs, is disproportionately large when compared to the restrained growth in most academic programs and should be evaluated, definitely slowed, and possibly reduced.

Transportation Services (2.2%) - Growth is exclusively due to cost increases for bus transportation used by students and staff.

If the institution has not produced a cost diagnostic, is there a plan to? If yes, what is the implementation plan? If the institution has not completed a cost diagnostic and does not plan to do so, please provide the rationale.

5B Productivity measure: The Department of Higher Education developed a common measurement of administrative productivity that can be adopted across Ohio's public colleges and universities. While the measure should be consistent, each institution should have latitude to develop its own standards for the proper level of productivity in its units. This will allow, for instance, for appropriate differences between productivity in high-volume environments vs. high-touch ones.

What steps has the institution taken to improve the productivity measure score or what are the institution's plans to improve the score?

The Ohio Department of Higher Education has provided its productivity measure for Miami University, and the University will use these ratios as part of its approach to monitoring its progress towards improved efficiency and affordability for its students. The measure included revenues from resident students, but total costs for all students regardless of residency.

Has the institution implemented or considered utilizing Lean Six Sigma methodology as a tool to evaluate the institution's processes?

Miami University began its Lean journey in 2009. Over that period of time Miami employees have completed 864 projects valued at \$42,276,409 in Cost Avoidance, Cost Reduction and new Revenue. In FY 2016 Miami completed 327 of those projects at a value of

\$12,781,358 in Cost Avoidance, Cost Reduction and new Revenue. Over 2500 employees have been introduced to Lean and 140 are currently in the Lean Certification Program with 44 employees having become Certified Senior Lean Leaders. This process takes 24-30 months and includes over 100 hours of specialized formal training, involvement in 5 Lean Projects and Lean leader of three, plus the presentation of a significant project to the Miami Lean Review Board. Miami has developed a Lean Structure, Lean Database with Dashboard Reporting and standardized processes for Lean project management. Only one full time and one part time employee are dedicated to Lean. All of the other employees have other non-related Lean responsibilities. At one time or another every Division of the university have had employees engaged in projects.

5C Organizational structure: Each institution should, as part or as a consequence of its cost diagnostic, review its organizational structure in line with best practices to identify opportunities to streamline and reduce costs. The institutional reviews also should consider shared business services — among units or between institutions, when appropriate — for fiscal services, human resources and information technology.

Has the institution reviewed its organizational structure? If yes, please provide an overview of the process used and the key outcomes.

Over the past eight years, Miami University has made considerable effort to improve its efficiency and productivity in providing administrative services. One measure of this effort is the student-to-staff ratio, which improved by 36% during the last eight years.

As part of the overall organizational review, a comparison of Miami's organizational structure was made to Ohio's other four-corner schools and to five other public universities with similar enrollment and missions. Additionally, a span-of-control review similar to the method employed by the Ohio Auditor of State was completed for the major divisions of the University. These recent analyses confirmed the earlier analysis by the Strategic Priorities Task Force, the Strategic Assessment of Support Services (SASS) committee, and the review by Accenture for the SASS committee that the University's organizational structure is as efficient or more efficient than other similar universities. However, a small number of opportunities for possible improvement follow:

- 1.) One of the shortcomings identified with the University's organizational design during the earlier reviews is the disproportionate amount of time devoted by staff to transactional processing to the detriment of more strategic activities. The improvement in the student-to-staff ratio since these earlier studies is evidence of the significant progress that has been made towards a more productive organization, but there remain opportunities for further reductions in transactional tasks. Several Lean projects have identified opportunities where software application improvements would lead to reduced transactional work. To date, insufficient application support from IT services has prevented such improvements from being implemented. It is recommended that software application improvements become an increased focus for IT Services.
- 2.) Both the Strategic Priorities committee and the Accenture study performed for the SASS committee noted that the numbers of academic departments and programs at Miami are generally larger than at similarly sized universities. Progress has been made in these areas since the report, but there may be additional opportunities for an improved academic organizational structure that aligns with the university's academic goals and priorities. It may be beneficial to engage the university community in a broad discussion of the potential benefits of more flexible and possibly more efficient department and program structures. Such changes may better position Miami University to adjust to the rapid expansion of knowledge in a technology driven, global society and to the rapid development of new or interdisciplinary fields in response to such a society. These changes may also better convey to students and grantors the possibilities offered through the University's departments and programs.
- 3.) The implementation of the University's "one-stop" student support center successfully responded to one of the major opportunities identified in the SASS committee report. While service to students has been greatly improved through this new service delivery model, the recent span-of-control review suggests there may be some opportunities to restructure the traditional offices that comprise the new

Enrollment Management division. Specifically, the Registrar's Office was identified as an outlier in the current span-of-control review. 4.) Another area of improvement identified by the 2011 SASS committee was the design of the IT organization. Again, much improvement has been made in the IT organizational structure since 2011, but the current review continues to identify the span of control for IT services as being smaller than higher performing IT organizations. Further opportunities may still exist and should be evaluated.

If the institution has not reviewed the organizational structure, is there a plan to? If yes, what is the implementation plan? If the institution not completed a review and does not plan to do so, please provide the rationale.

5D Health-care costs: Like other employers, colleges and universities have experienced rapid growth in health-care costs. To drive down costs and take advantage of economies of scale, the Department of Higher Education has convened a working group to identify opportunities to collaborate. While no information on healthcare costs is required in this year's survey, please feel free to share ideas that the institution believes may be helpful for the working group to consider.

(Optional) Has the institution identified any healthcare reforms that the working group should consider? Please describe.

1. Centers of Excellence and Bundled Pricing
2. Pharmacy Steering Committee comprised of resources from Ohio Pharmacy Schools
3. Complete health plan/tpa market assessment by region
4. State and/or regional contracting/purchasing of healthcare services
5. Identify/select provider of auditing services for medical and pharmacy plans/contracts

(Optional) Has the institution achieved any expected annual cost savings through health-care efficiencies? Please explain how cost savings were estimated.

5E Data centers: Institutions must develop a plan to move their primary or disaster recovery data centers to the State of Ohio Computer Center (SOCC).

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Miami participated with the Inter-University Council (IUC) in the development of best-fit criteria for the deployment of disaster recovery services and other data center operations. Miami will continue its participation with the IUC in evaluating these criteria and their use in determining which services should be deployed to the State of Ohio Computer Center (SOCC) once the appropriate investments have been made to prepare that center for these services. Miami currently utilizes Wright State University for its disaster recovery services but intends to contract with the SOCC for these services once additional universities can be accommodated at the SOCC or with another state-wide shared data center should hosting in one location be found to be a substantial risk.

Miami is also pursuing increased use of the Ohio Supercomputing Center (OSC) and the SOCC for research computing as well. This includes high performance computing strategies involving the OSC such as "condo computing" now offered at the SOCC as an affordable solution to providing increased research computing capacity. These enhanced research computing capabilities won't reduce the cost of existing services but will help to avoid future costs.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

5F Space utilization: Each Ohio institution must study the utilization of its campus and employ a system that encourages optimization of physical spaces.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Yes, see below.

Please provide details on the results of the assessment below or on additional pages:

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

Miami had undertaken the study of its space utilization prior to the Ohio Task Force recommendation. While opportunities for greater efficiency appear to exist, the work to date has identified the need for more comprehensive review. In anticipation of this comprehensive review, Miami's Division of Enrollment Management and Student Success Office and the University Registrar, in consultation with the Provost's Office, have begun to examine course and classroom data to: (1) broadly understand how we currently schedule and utilize instructional and meeting spaces across campus, and (2) identify additional potential multi-use spaces that could be used more comprehensively. Further, preliminary work is being done to better consolidate and centralize how classroom and meeting spaces on campus are scheduled with the goal of using one scheduling system. Finally, the University Registrar is making improvements to the capacity to readily identify courses by schedule type and delivery mode, which is information that typically informs the type of instructional space required.

Energy

Energy Efficiencies seek to refine sustainable methods utilized by institutions to procure and use energy (resulting in more efficient use of energy), including, but not limited to lighting systems, heating & cooling systems, electricity, natural gas, and utility monitoring.

What energy efficiency projects has the institution implemented or enhanced within fiscal year 2016?

Since the passage of Ohio HB 251, Miami University engaged in a number of energy efficiency initiatives. Using FY2008 as a baseline, Miami University energy efficiency initiatives resulted in a 28% decrease in energy consumption per gross square foot by FY2015 and a 34% decrease by FY2016. Without these energy efficiency strategies, Miami University's annual energy costs would have been \$2.7 million higher in FY2016 compared to FY2008.

Project	Collaborative Partnership(s)	Explanation
Simultaneous Heating & Cooling Expansion		The project impacted four research buildings (Hughes Hall, Pearson Hall, Engineering Building, and Benton Hall). Each building has significant process cooling systems that previously rejected heat to the atmosphere. This project captures the rejected heat and efficiently uses it for process heating loads thereby improving efficiency, reducing cost, and reducing carbon footprint.
North Quad Residence Hall Renovations		Specific energy reduction strategies were intentionally integrated into this comprehensive renovation project. The project renovated four large residence halls (Flower, Hahne, Hepburn, and Brandon). Prior to the renovations, two of the four residence halls had central cooling. The goal is to reduce energy costs by 20% in all residence halls impacted by this project even with the addition of central cooling and increased electrical loads. Reduction of water consumption is also included in the expectation. The project was successfully completed and on track to exceed the 20% reduction expectations.
North Quad Dining Hall Renovation		Specific energy reduction strategies were intentionally integrated into this comprehensive renovation project. The project renovated a dedicated dining facility (Martin Hall) that prepares and serves food to an area of campus with nearly 1,200 beds. The goal is to reduce energy costs by 20% in this dining facility. As the project has just been completed, data is not yet available on performance.
Shideler Hall Renovation		Specific energy reduction strategies were intentionally integrated into this comprehensive renovation project. The project renovated an existing 60K GSF building and constructed a 30K GSF addition. The energy goal was to maintain the same energy consumption for the space even with the significant addition. As with the other renovation projects, many different strategies were employed to accomplish this goal, but include sophisticated fume hood heat recovery and control, LED lighting inside and outside the building, occupancy sensors for lighting and HVAC control, thermal envelop improvements, and various other mechanical system improvements.
LED Lighting Upgrade Project		The project systematically replaced over 1200 2'X2' fluorescent u-tube fixtures with LED retrofits in 14 buildings. Nearly 50 hi-bay metal halide fixtures were replaced with LED in two separate facilities. Auditorium lighting was replaced with LED in Benton Hall.
North Chiller Plant Variable Frequency Drive Upgrade		A constant speed 1000-ton electric centrifugal chiller was converted to variable speed.

Section II: Academic Practices

Recommendation 6 | Textbook Affordability

6A Negotiate cost: Professional negotiators must be assigned to help faculty obtain the best deals for students on textbooks and instructional materials, starting with high-volume, high-cost courses. Faculty must consider both cost and quality in the selection of course materials.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Miami is reviewing proposals for a provider of online textbook and course materials and expects to select the University's partner in the coming weeks. The shift from the University's traditional bookstore approach to providing these materials through an online provider recognizes that online services can offer students access to textbooks and materials, as conveniently as campus stores, while lowering the cost to students by 15-25%. The transition to the new service will be completed by fall 2017.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

6B Standardize materials: Institutions must encourage departments to choose common materials, including digital elements, for courses that serve a large enrollment of students.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

An Open Educational Resources Committee was appointed by Miami's Provost to develop recommendations for greater standardization of course materials for gateway courses and high-impact courses. Thus far, the Committee has met with various university groups and conducted surveying of the university community; created a website geared primarily to librarians, which includes discipline-related resources; joined the Open Textbook Network, a community of educational institutions that promote student success and affordability through the use of open textbooks; and developed a preliminary set of recommendations for how to move the initiative forward, which are currently under consideration by the Dean of the Libraries and Provost.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

6C Develop digital capabilities: Institutions must be part of a consortium to develop digital tools and materials, including open educational resources, that provide students with high-quality, low-cost materials.

Please explain your efforts to develop digital tools and materials.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

The Open Educational Resources Committee was also charged with studying options for greater use of digital course materials and coordinating with statewide groups on how to share these materials across Ohio's public colleges and universities. Recommendations are still in preparation and the final report is not yet available.

Recommendation 7 | Time to Degree

7A Education campaign: Each institution must develop a coordinated campaign to educate its full-time undergraduates about the course loads needed to graduate on time (two years for most associate degrees and four years for most bachelor's degrees).

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Students can leverage information about their requirements and degree paths in multiple ways: (1) A student can run a Degree Audit Report at any time, which alerts students as to which requirements have been met, are in progress, or still need to be met; (2) academic plans are developed in consultation with the academic advisor and in the UNV 101 course; (3) the General Bulletin includes requirements for each degree program and is available online; and (4) the EAB Student Success Collaborative provides information to each academic advisor when students are not making progress toward completing their primary major in a timely manner, allowing for more proactive advising and intervention. After completing a pilot in two of the six academic divisions at Miami, the EAB Student Success Collaborative will be launched university-wide in fall 2016.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

7B Graduation incentive: Institutions should consider establishing financial incentives to encourage full-time students to take at least 15 credits per semester.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Miami University has implemented the Miami Tuition Promise. Under the Miami Tuition Promise undergraduate students' tuition and fees are fixed over four years. Additionally, Miami University does not charge additional tuition for enrollment in more than 12 credit hours per semester. Miami freshmen take an average of 15.7 credit hours per term already, negating the need for a financial incentive.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

7C Standardize credits for degree: Institutions should streamline graduation requirements so that most bachelor's degree programs can be completed within 126 credit hours or less and an associate degree programs can be completed within 65 credit hours or less. Exceptions are allowed for accreditation requirements.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Miami had previously taken and is currently taking steps to increase college completion rates and reduce average time-to-degree. Miami's 2015 revision of its general education program reduced the credit-hour requirements for a degree. Over 60% of academic programs have developed and publicized pathways for completion in three years (<https://miamioh.edu/academics/three-year-pathways/index.html>). Finally, we are working to reduce the credit-hour requirement for graduation with a bachelor's degree by an additional four credit hours, to be implemented beginning fall 2017. It also should be noted that Miami's time to degree is the shortest for any public university in Ohio.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

7D Data-driven advising: Institutions should enhance academic advising services so that students benefit from both high-impact, personalized consultations and data systems that proactively identify risk factors that hinder student success.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

A new comprehensive academic advising plan has been developed and implemented beginning fall 2015. The plan includes consistent advising philosophy, required advising milestones, ongoing advisor training, annual recognition of advising excellence as well as clear outcomes. Additionally, Miami is implementing (Summer 2016) EAB's Student Success Collaborative software advising platform across all undergraduate academic programs to assist with identifying students most at-risk for not graduating on time. This technology provides information for advisors to intervene and provide preemptive support to students based on actionable and student-specific data. Advisors can use this software to track advising sessions, take and record notes, and identify students for advising interventions. This comprehensive advising plan includes annual assessment of advising efforts using multiple measures (national surveys, graduation/retention rates, advisor training completion rates, and internal surveys). The first annual assessment report was created in April 2016 with suggested steps for improvement to be implemented beginning fall 2016.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

7E Summer programs: Each campus must develop plans to evaluate utilization rates for summer session and consider opportunities to increase productive activity. In particular, institutions should consider adding summer-session options for high-demand classes and bottleneck courses that are required for degree completion.

Please provide details on the results of the assessment. In particular, please address whether the campus added summer session options for high-demand and bottleneck classes.

Miami's implementation of wait-listing beginning in fall 2016 will better enable unmet course demand to be met. Miami actively reviews high-demand courses for possible expansion in both summer and winter terms, along with discontinuation of low-enrollment courses. In addition, Miami reduced tuition for online courses taken during summer and winter terms.

Miami University has implemented a 20% discount of resident undergraduate tuition for online courses offered in the winter and summer terms.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

7F Pathway agreements: Ohio institutions should continue to develop agreements that create seamless pathways for students who begin their educations at community or technical colleges and complete them at universities.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Miami has taken significant steps to increase its partnerships and articulation agreements with two- and four-year institutions, including a new website and partnership database and online approval protocol.

Please provide details. In particular, how many articulation agreements does the institution have with other Ohio colleges and universities (either 2+2 or 3+1)?

Current articulation agreements are in place with Sinclair and Columbus State Community Colleges, and Miami continues to expand program guides to create more academic program connections (2+2) at each location. Miami is currently developing a new articulation agreement with Cincinnati State, and discussions are also being held with Tri-C & Lakeland Community Colleges. Partnership agreements and the quality of partnerships are reviewed annually by a university-level committee.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

7G Competency-based education: Institutions should consider developing or expanding programs that measure student success based on demonstrated competencies instead of through the amount of time students spend studying a subject.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

No.

If applicable, please provide additional details. In particular, how many students does the institution estimate the competency-based education programs will serve?

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

Miami University does not offer any competency-based degree programs at this time and has no immediate plans for development of such degree programs.

Recommendation 8 | Course and Program Evaluation

8 Duplicative Programs: Institutions should consider consolidating courses and/or programs that are duplicated at other colleges and universities in their geographic area.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

The IUC Provosts group has submitted reports regarding low enrollment courses and considerations for consolidating programs. University of Cincinnati, Ohio State University and Miami University are exploring opportunities for collaboration on offering foreign language classes. Miami and Ohio University (Classics Departments) are already engaged in a cooperative venture that puts Miami and OU students virtually in the same classroom (<http://miamioh.edu/cas/academics/departments/classics/>).

What courses/programs are currently being shared with other institutions?

Course/Program	Partnering Institution	Explanation
Classics	Ohio University	Virtual classroom

Institutions already provided a list of low-enrollment courses to ODHE by January 31. NOTE: this benchmark will be added to the 2017 Institution Efficiency Survey.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

Section III: Policy Reforms

Recommendation 10 | Policy Reforms

10A Financial advising: Ohio's colleges and universities should make financial literacy a standard part of students' education.

Has the institution implemented this recommendation? If yes, please provide an overview of the process used and the key outcomes.

Miami University is implementing a number of improvements in the financial advising it provides to students. A new website will allow students to view information about their personal loan debt. This improvement will enable students to access their loan debt history, total borrowing costs, and anticipated repayment amounts following graduation. The University is also developing a loan counseling protocols based on student borrowing patterns (i.e., low, medium, high risk). Both of these changes are scheduled to be implemented in summer 2016. A financial literacy program for students will also be deployed in fall 2016.

If the institution has not implemented this recommendation, is there a plan to implement? If yes, what is the implementation plan? If the institution has not implemented this recommendation and does not plan to do so, please provide the rationale.

10B Obstacles: The state Department of Higher Education and/or state legislature should seek to remove any obstacles in policy, rule or statute that inhibit the efficiencies envisioned in these recommendations.

What legislative obstacles or policy roadblocks, if any, inhibit efficiencies and affordability practices at the institution?

This recommendation is the responsibility of the Ohio Department of Higher Education and the Inter-University Council.

Section IV: Cost Savings, Redeployment of Savings & Tangible Benefits to Students

The following charts allow each institution to report this information. For the first chart, please provide, if applicable, any actual cost savings to the institution for fiscal year 2016 (or expected annual cost savings) for each of the recommendations from the Task Force. (Please note this does NOT include cost avoidance.) Then the institution should indicate “yes” or “no” to the savings being redeployed to lower costs for students in terms of tuition, room and board, and/or student financial aid. If there was no savings or the institutional savings was not redeployed, please indicate “yes” or “no” to the practice providing a tangible benefit to the quality of students’ education.

For the second chart, please provide more detail as to how cost savings were deployed, specifically in the following categories: reductions in cost of attendance, student financial aid, student services, investment in efficiency and affordability tools, and student program improvements. Please use the explanation field to provide further detail.

Please use the chart below to capture, if applicable, FY16 cost savings, or expected annual savings, to institutions in actual dollars:

Recommendation	If applicable, provide the actual FY16 cost savings, or expected annual cost savings to the institution <small>*Put NA if no savings</small>	Were the savings redeployed to reduce the cost of college for students? (Yes or No)	Or did the practice provide tangible benefits to the quality of students' education? (Yes or No)
<i>Efficiency Practices</i>			
3A: Campus Contracts	\$923,000	Yes	Yes
3B: Collaborative contracts	\$2,506	Yes	Yes
4A: Asset Review	\$764,204	Yes	Yes
4B: Operations Review			
4C: Affinity partnerships and sponsorships	\$1,721,429	Yes	Yes
5A: Cost diagnostic			
5B: Productivity measure	\$2,428,114	Yes	Yes
5C: Organizational Structure			
5D: Health-care costs			
5E: Data Centers			

5F: Space utilization			
Energy projects	\$393,087	Yes	Yes
Academic Practices and Policies			
6A: Negotiate cost on textbook affordability	Savings commence Fall 2017		
6B: Standardize materials			
6C: Develop digital capabilities			
7A: Education Campaign			
7B: Graduation Incentive			
7C: Standardize credits for degrees			
7D: Data-driven advising			
7E: Summer programs	\$439,646	Yes	Yes
7F: Pathway agreements			
7G: Competency-based education			
8: Duplicative courses and programs			
Low-enrollment programs:			
10: Financial advising:			
Total Expected Annual Cost Savings:	\$6,671,986		

Please utilize the chart below to show how the total actual cost savings listed above were redeployed to either (1) reduce the cost of college for students or (2) to provide tangible benefits for the quality of students' education:

Category	Amount Invested	Explanation
Reductions to the total cost of attendance (tuition, fees, room and board, books and materials, or related costs — such as technology)	\$439,646	20% tuition discount for resident undergraduates taking online courses in summer and winter terms.
Student financial aid	\$8,558,568	Increased investment in student financial aid to lower the cost of attendance.
Student success services, particularly with regard to completion and time to degree	\$355,000	Implemented Student Success Collaborative.

Investments in tools related to affordability and efficiency		
Improvements to high-demand/high-value student programs	\$1,390,248	Increased investment in additional tenure track/tenure eligible faculty.
Improvement in financial advising	\$46,551	Investment in website development and staff training to support newly implemented financial advising program.

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