Northeast Ohio
MEDICAL UNIVERSITY

Board of Trustees

June 9, 2016

Resolution 2016-30

Affordability and Efficiency Review and Report

WHEREAS, Ohio House Bill 64, Section 369.550, requires each institution of higher education's Board of Trustees to complete an efficiency review based on the Ohio Task Force on Affordability and Efficiency's recommendations by July 1, 2016, and to submit their findings and implementation plans to the Chancellor of the Ohio Department of Higher Education within 30 days, or by August 1, 2016; and

WHEREAS, the Northeast Ohio Medical University as defined by its mission educates only graduate level and professional students and is not accredited to offer undergraduate courses; and

WHEREAS, the Northeast Ohio Medical University models collaboration as evidenced by its interprofessional courses shared across the colleges and its Public Health graduate program administered via a consortium with regional universities; and

WHEREAS, the Northeast Ohio Medical University has successfully partnered with other public and private universities, colleges and teaching hospitals for over 40 years to assure the efficient delivery of high quality educational programs to our students; and

WHEREAS, the Northeast Ohio Medical University has completed the Affordability and Efficiency Review; **NOW THEREFORE**

BE IT RESOLVED, that the Northeast Ohio Medical University Board of Trustees hereby approved the NEOMED Efficiency and Value Report as presented.

Action Approved

Date of Action June 9, 2016

For the Board of Trustees

Richard W. Lewis, Secretary

Ohio | Department of Higher Education

John R. Kasich, Governor
John Carey, Chancellor

Affordability & Efficiency

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.

Northeast Ohio Medical University (NEOMED)

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.

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.

NEOMED currently does not have a dedicated centralized purchasing function. However, NEOMED does follow competitive bidding requirements and takes advantage of state contracts. NEOMED has altered the *Purchasing and Selling University Property* Policy to implement this recommendation of requiring all internal departments to utilize a centralized system for purchasing goods and services and must utilize preferred suppliers.

Projected implementation would occur during fiscal year 2017, starting with the largest opportunities for savings. This implementation may include a joint venture with other institutions. The *Purchasing and Selling University Property Policy* is incorporated by reference into this Report, in compliance with the Ohio Task Force on Affordability & Efficiency

In addition to mandating the use of preferred purchase contracts the University proposes to alter the following parameters within the Purchasing and Selling University Property Policy approved in March of 2005, to achieve the following:

- Increase threshold for competitive bidding for Goods from $ 25,000 to $50,000.
- Maintain the threshold for competitive bidding for Services at $50,000
- Maintain the threshold for competitive bidding for Construction Contracts at $200,000
- Increase the threshold for Capitalization from $2,500 to $5,000
- Increase the threshold of Board of Trustees approval from $250,000 to $500,000

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	No, but plan to	NEOMED entered into a five-year contract on July 1, 2015, but will join the joint state contract when the current contract expires.
Computer hardware	Yes	NEOMED currently uses the IUC contract negotiated by The Ohio State University.
Travel services	No, but plan to	Similar to a comprehensive purchasing system, NEOMED currently does not use a centralized travel service. NEOMED plans to incorporate a Travel & Entertainment component into the centralized purchasing function.
Outbound shipping	Yes	NEOMED does utilize a contract through E & I, a group purchasing organization used by thousands of companies throughout the United States.
Scientific supplies & equipment	Yes	NEOMED uses both IUC and E & I contracts for scientific supplies and small equipment.
Office supplies & equipment	Yes	NEOMED uses the IUC contract with *OfficeMax* for office supplies and equipment.

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:

An assessment of noncore assets was performed and it was determined that there were no opportunities to sell or lease these assets.

- Over the past five years, NEOMED has entered into extensive Public-Private-Partnerships (PPP) to leverage and optimize the universities assets in the range of $150,000,000.
- Contiguous parcels of real estate have recently been acquired for the purpose of land-banking for future needs. Many of the parcels have been purchased through an affiliated entity for consolidation with other parcels for sale at a later date during the next five years to promote economic development in the area.
- Other unique characteristics of NEOMED pertaining to the parking lots and conference services-dining programs do not allow for the sale or outsourcing of these auxiliaries.

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:

Coordination With Other State Universities to Implement a Common ERP (Software System) in the Cloud

NEOMED is actively working with several state universities to investigate this collaboration on a common ERP system and the development of an external service center.

Creation of an External Independent Service Center

NEOMED is investigating the creation of an independent Higher Education **Service Center** to provide for the delivery of basic, core administrative and academic operations to several member public and private universities and colleges.

This separate, standalone entity will provide the opportunity to centralize common core business operations under a uniform structure. Consolidating these central services will generate economies of scale and provide a platform for reengineering the processes for each institution.

Streamlining Restructuring of internal services could encompass areas of technology, financial operations, human relations, student services, legal services and other operational functions.

A major component of this proposal involves converting the financial operations for all member universities, public and private, under a single cloud-based provider thru the independent service center.

Youngstown State University
University of Akron
Cleveland State Unviersity
INDEPENDENT HIGHER EDUCATION SERVICE CENTER
Kent State University
Northeast Ohio Medical University
Stark State College
Bowling Green University

Proposed Potential Structure

The service center will be a private entity created by a coalition of public universities from northeast Ohio
Those State universities that are considered primary candidates for membership include but are not limited to the University of Akron, Cleveland State University, Kent State University, the Northeast Ohio Medical University, Stark State Community College and Youngstown State University. Other public and private universities may also elect to join in the collaboration.

An additional goal could be to expand this collaborative effort to include the participation of other public and private universities and colleges, to achieve even greater economies of scale and efficiencies.

Current Conditions

The time to pursue this solution in Ohio is overdue. Other state systems including Wisconsin, New York, Maryland, Pennsylvania and Georgia have all taken advantage of shared service collaborations. The financial challenges to higher education are accelerating the demand for a bold, shared service model.

Rational for this proposal

It is incumbent on all institutions in higher education to contribute to finding new pathways to reduce costs while increasing efficiencies. It is important **to create ways to develop new approaches and establish best practices.**
Under this coalition, processes could **be reengineered and a new business model** could be developed that **will achieve real cost reductions and** enhanced value far beyond what could be achieved by working alone.
A **complete** detailed **package** is not being submitted as part of this whitepaper **because** it is **hoped the elements throughout the process** can be developed **by engaging** the **finance, technology, faculty and operations** personnel **in redesigning and discovering the best practices and models that have been implemented at other universities in Ohio and throughout the country by building a leaner operating model at reduced cost.**
This reengineering **will not be easy. Change never is.** But this different approach is being proposed in the hope that we can finally achieve the benefits from a "shared services" initiative that we have not been able to attain.
It is anticipated that it will **take years to reposition** the service models working under this joint external service center.

Transforming our operations

The proposed structure offers the best chance to succeed and will allow other institutions, both state and small privates, to join the effort. **Others could share both in the effort of building, reaping the benefits and identifying additional ways to accomplish efficiency and cost savings through** Best **practices.**

Basic Services

The center will initially focus on delivery of common operational **or** "*back-of-the-**house services***". What specific services will be aligned thru this center will be determined by the representatives of the partner universities. The transition could begin in the next 90 days but the full implementation will take 5 to 10 years.

The initial base list of services could include the following:

- Requisition, purchasing & contracting,
- Benefits, payroll, time & attendance, tax management,
- General ledger, chart of accounts & accounting systems,
- Basic legal services,
- Technology systems such as programming, security, help desk, off-site data storage, disaster recovery & continuation of business capabilities,
- Travel & expenses,
- Account payable & customer billing, collections,
- Fixed assets & capital/risk management insurance,
- Data management, reporting and compliance, and
- Textbook programs.

A list of potential secondary services may include the following:

- Health care insurance administration,
- Workers Compensation administration,
- Unemployment compensation claims,
- Background checks & verification,
- Labor relations,
- VISA & International programs,
- Financial aid, and
- Workforce development & staffing services

Other potential strategic functions could include the following:

- Template for Strategic Planning/Planning & Performance Management,
- Treasury Management,
- Business Analysis,
- Quality Assurance & Business Planning, and
- Academic & Emerging Technologies

In March, The Ohio State University announced that it will be moving to a cloud-based financial management system. Ohio State selected Workday as its new financial management system. Workday was selected after a comprehensive, competitive process, which included a year-long review of systems.

Geoff Chatas, CFO and Senior Vice President for Business and Finance commented, Ohio State was not simply choosing a new technology solution, but focused on "*putting more business insights in the hands of our analysts and leaders so that we can be more agile in how we use financial data to inform decisions.*"

This focus is on real-time, actionable data to enhance access and affordability while reducing costs to students.

This recent decision by Ohio State may provide an opportunity for the coalition and the creation of the independent service center to develop a parallel comprehensive solution that greatly enhances the proposal.

This effort could be achieved thru a single contract with Workday or another cloud-based system.

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.

NEOMED works closely with a number of partners to create "win-win" opportunities to support students, faculty, and staff. Opportunities are evaluated within collegiate and university units, as appropriate, to determine value added outcomes.

- Kent State University (KSU) Office of Global Education: assist with study abroad and visiting scientist programs
- KSU Department of Biomedical Sciences: placement of graduate students within NEOMED research
- Akron General Hospital and NEOMED College of Pharmacy – shared pharmacy faculty, personnel, and educational programming
- Summa Health System and NEOMED College of Pharmacy- shared pharmacy faculty, personnel, and educational programming
- Cleveland State University (CSU) and NEOMED – Partnership for Urban Health program
- The University of Akron and NEOMED College of Pharmacy- dual Doctor of Pharmacy and MBA degree
- Mercy Health System and NEOMED – Education for Service scholarships for students
- Medical Mutual of Ohio and NEOMED – Education for Service scholarships for students

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
KSU Office of Global Education	Provides services to support NEOMED students' international study abroad and the visiting scientist exchange program.
KSU Biomedical Sciences Department	Collaborate across universities to host KSU graduate students on the NEOMED campus aligned to research focus areas.
Cleveland Clinic Akron General Hospital	Co-funded pharmacists serve as core faculty within the college of pharmacy. Also, coordinate residency education for pharmacists.
Summa Health System	Co-funded pharmacists serve as core faculty within the college of pharmacy. Also, coordinate residency education for pharmacists.
Cleveland State University	The CSU-NEOMED Partnership for Urban Health provides a pathway for students to enter medical school with the intention to enter practice in underserved urban areas.
University of Akron	Pharmacy students may simultaneously complete the UA MBA program thus shortening time to degree for this dual degree option
Mercy Health System	Education for Service scholarships are provided to students who will work in Mercy Health organizations upon graduation
Medical Mutual of Ohio	Education for Service scholarships are provided to students who will work in underserved areas upon graduation

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.

No, the institution has not completed the analysis that is due by December 2016.

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.

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.

Strategic Plan (September 2016)

NEOMED is currently undertaking the preparation and revision of a Strategic Plan, which is scheduled to be presented to the Board of Trustees at their September 2016 meeting. The specific scope and focus of this plan will be determined over the next several months.

The RPK Group Analysis

Currently the university has contracted with the RPK Group to conduct a workforce analysis that will also:

- preserve resources and streamline operations, while maximizing output and maintaining the high standards of quality service to support student success; and
- increase efficiency, value and sustainability across the institution through the optimization of the organizational structure and staffing levels, reallocating resources, and evaluating vacant positions.

Scope of Work

- Review and evaluate organizational and management structure, determining alternate structures that will reduce the burden on faculty, staff and students;
- Analyze staffing levels to determine how they compare with industry standards;
- Evaluate deployment of human resources to ensure maximum output;

- Review positions, and services to identify any duplication of effort and services, areas of inadequate delegation of responsibilities, and the existence or potential for a "silo" organizational structure;
- Ascertain possible areas of shared service and outsourcing arrangements; and
- Determine how to drive efficiency, value and sustainability across the institution through the optimization of the organizational structure and staffing levels.

LEAN Initiative

NEOMED is actively engaged in the implementation of a LEAN Initiative to develop a process that would bring about rapid, planned, controlled, and measured step-change improvements to the performance of the institution by focusing on a value & return on investment, elimination of waste and continuous incremental improvement.

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 Department of Higher Education has determined that NEOMED would not be included in the calculation of the Productivity Measure.

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

Yes, NEOMED is actively pursuing a LEAN Initiative to evaluate and reengineer the institution's processes.

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. In process. See Independent Service Center Concept
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.
(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.
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.

NEOMED does not currently have a disaster recovery data center site; nor do we have the budget to deploy one. Our existing capabilities are limited to co-location of enterprise data and backup services in the telecommunications room. This location is on the Rootstown campus; below ground, environmentally controlled, tied to a separate power generator. The existing disaster recovery data center solution does not meet best practice, is not the most optimal solution, and does put our University operations at risk in the event of a significant disaster event. The shortcomings have been identified along with systematic recovery time projections; this information is outlined in the IT disaster recovery plan (Updated 2016)

NEOMED does not have any plans to transition our primary data center to any other location. We believe that this recommendation is out of step with the evolution and general strategic direction that most Universities and business models are migrating to. Most enterprise operations are evaluating and moving toward cloud computing to reduce the cost associated with electronically processing, managing, storing, and backing up enterprise data. The cloud model, long term, should provide the greatest impact to reducing cost, increased efficiency, and should provide the University with the highest strategic value.

From a strategic direction standpoint, cloud computing/solutions are the direction that we have been and are currently in the process of moving toward. The LMS (AIMS) has been a cloud hosted solution for 9 years. We are in process of moving our email to a full cloud 365 solution (completed by Aug. 2016).

Future Plans:

- We are reviewing cloud services for our ERP systems (along with a collaborative venture with many other Universities).
- Our next generation storage solution will be cloud based.
- Next generation backup solution, in all likelihood, will be cloud based.
- We will look to extend computing in the cloud for mission critical server/applications to ensure redundancy and high availability.

This is the strategic direction that the NEOMED IT department is pursuing.

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. No
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. The University has created a Space Committee that will be focused on this matter.

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? None

Project	Collaborative Partnership(s)	Explanation

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.

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.
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.

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.
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.
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.
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.
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. NEOMED's academic programs are housed within the College of Medicine, the College of Pharmacy and the College of Graduate Studies at the graduate professional level. The University's programs are predominantly combined within the fall and spring semesters. The summer semesters typically involve the placement of students within healthcare environments for clinical rotations. In order to improve efficient use of our facilities, the University has had dialogue with potential partners such as Stark State University to offer use of our facilities during late afternoon, evening hours and weekends to fellow universities. Additionally, NEOMED developed and now permanently houses on its Rootstown campus the Biomed STEM Academy for high schoolers. Non-credit bearing program activities regularly conducted by NEOMED include: Med Camp, HPAC Programs, and the Pathways to Pharmacy Program.
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.

NEOMED has established agreements via Northeast Ohio Council on Higher Education (NOCHE) to connect students to academic programs at NEOMED. In addition, a signed agreement with Stark State Community College provides an articulation process to streamline the time to degree for students entering the College of Pharmacy. Additional early assurance programs are under evaluation for consideration.

The Health Professions Affinity Community (HPAC) is a program to encourage middle school and high school students from diverse backgrounds to pursue careers in the health professions. Students explore ways to apply their academic knowledge to real-world practice. It provides groups of students with opportunities to enact projects to address issues plaguing their communities.

The College of Medicine in conjunction with several university partners offers pre-medical to MD (Doctor of Medicine Degree) pathways. These interinstitutional pathways offer pre-medical students early provisional admission to the College of Medicine either at the high school, baccalaureate, or post-baccalaureate levels. Students who successfully complete the pre-medical phase at the partnering university matriculate to NEOMED for the MD degree. All of the pathways offer provisional admissions with students being held to academic and professional standards that must be met during the pre-medical stage to qualify for admission to the MD at NEOMED. Those partnerships cluster into three general pathways to include:

Accelerated 2+4 B.S./M.D. Degree Pathway: Students apply to the program during their senior year of high school and, upon admission, enjoy the benefits of having a reserved seat in the College of Medicine when they begin their college program at either Kent State University, the University of Akron, or Youngstown State University. Students complete the B.S. degree in 2-3 years and then matriculate to NEOMED for the MD.

4+4 Baccalaureate/M.D. Degree Pathway: Baccalaureate students apply to the program during their second year of college at either Cleveland State University or Hiram College. Once admitted as rising juniors, students complete their baccalaureate degree and then matriculate to NEOMED.

2+4 Post-Baccalaureate/M.D. Degree Pathway: This pathway is designed for prospective students who have previously earned a baccalaureate degree, but who lack the coursework or qualifications needed to gain direct entry to medical school. Students complete the post-baccalaureate phase at Cleveland State within a two-year time frame prior to matriculating to the MD at NEOMED.

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)?

Details are provided in the descriptions above.

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.

NEOMED's professional programs within the Colleges of Medicine and Pharmacy align their curricula to national accreditation standards. This includes the identification of learning outcomes, goals, and objectives that are linked to courses and student activities. In some cases, it requires mastery of competencies before moving forward in the curriculum. In other areas, there are assessments and evaluation conducted at designated intervals to document achievement of learning outcomes. As such, NEOMED is able to demonstrate compliance with learning outcomes and assessment standards through regular and rigid re-accreditation reviews.

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.

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.

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

Course/Program	Partnering Institution	Explanation

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.

NEOMED offers financial literacy as a standard part of our students' education. Financial literacy offerings are provided to students in the following ways.

In partnership between the Financial Aid Office and NEOMED faculty, financial stewardship topics are part of students' curricular coursework. The following activities are regularly included in the curriculum:

- The Financial Aid Office offers a plenary session at the start of professional school for students who have the willingness and interest to engage in a budget strategy workshop.
- The Financial Aid Office partners with faculty offering senior capstone-like courses to offer a session on financial stewardship and planning. There is also current and ongoing conversation with College of Pharmacy faculty regarding the desire/need for a financial planning elective that purposefully targets second and third year pharmacy students, which would include general financial stewardship and planning content, but also advice and best practices on how to better manage student loan indebtedness.

NEOMED's Financial Aid staff routinely engage students in the following programs offerings and activities:

- Contracts with PGPresents, an independent student loan consulting company with expertise in student financial aid. This contractor provides education debt management help for student loan borrowers. The agency specializes in assisting medical and pharmacy school graduates to develop repayment strategies as they transition to residency programs. The contractor conducts the federally mandated Title IV financial aid exit interview process and is paid for additional time on campus (1-2 days) to be available for one-on-one consulting appointments.
- Offering one-on-one NEOMED counselling sessions to all students, including guidance on options as they progress through the curriculum.
- Maintenance of mandatory in person entrance and exit financial aid counseling to students.
- Communications to students encouraging them to return unneeded student loan funds. An estimated $300,000 of excess loans has been returned since initiating this process (which reinforces frugal use of financial aid funds and the lessening of student loan debt).
- Ensuring that students understand they have 120 days to return loan funds for principal to be credited and interest to be forgiven on the returned portion by publicizing the 120 day date to students.
- Requiring in-person appointments for students wishing to borrow additional loan funds during the academic year.
- Maintenance of an independent financial literacy curriculum. Students are encouraged to examine each step based on where they are within the curriculum.
- At the conclusion of professional school, students participate in a mandatory financial planning seminar. In this session, students learn about different insurances needed (personally and professionally), planning and saving for retirement, investing, personal banking, credit, home financing options and whether it's best to rent versus own.

The following initiatives are being planned for the next fiscal year:

- Sending indebtedness letters to students, highlighting current NSLDS outstanding indebtedness and what a sample repayment may be under the standard 10 year plan. Also, offering to guide and encourage students to evaluate their indebtedness using calculators on studentloans.gov to explore other qualifying programs.
- Communicating with students who borrow maximum allowances, encouraging them to evaluate their budgets to determine if the total borrowing is necessary and asking them to re-evaluate their budgets and encourage them to send the funds back if they are unneeded.

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?

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 indicates "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 *Put NA if no savings	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)
Efficiency Practices			
3A: Campus Contracts	NA	NA	NA
3B: Collaborative contracts	NA	NA	NA
4A: Asset Review	NA	NA	NA
4B: Operations Review	NA	NA	NA
4C: Affinity partnerships and sponsorships	NA	NA	NA
5A: Cost diagnostic	NA	NA	NA
5B: Productivity measure	NA	NA	NA
5C: Organizational Structure	NA	NA	NA
5D: Health-care costs	NA	NA	NA
5E: Data Centers	NA	NA	NA
5F: Space utilization	NA	NA	NA
Energy projects	NA	NA	NA
Academic Practices and Policies			
6A: Negotiate cost on textbook affordability	NA	NA	NA
6B: Standardize materials	NA	NA	NA
6C: Develop digital capabilities	NA	NA	NA
7A: Education Campaign	NA	NA	NA
7B: Graduation Incentive	NA	NA	NA
7C: Standardize credits for degrees	NA	NA	NA
7D: Data-driven advising	NA	NA	NA
7E: Summer programs	NA	NA	NA
7F: Pathway agreements	NA	NA	NA
7G: Competency-based education	NA	NA	NA
8: Duplicative courses and programs	NA	NA	NA
Low-enrollment programs:	NA	NA	NA

10: Financial advising:	NA	NA	NA
Total Expected Annual Cost Savings:	NA	NA	NA

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)	NA	NA
Student financial aid	NA	NA
Student success services, particularly with regard to completion and time to degree	NA	NA
Investments in tools related to affordability and efficiency	NA	NA
Improvements to high-demand/high-value student programs	NA	NA
Add other categories as needed	NA	NA