

BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056 (513) 529-6225 MAIN (513) 529-3911 FAX WWW.MIAMIOH.EDU

Miami University Board of Trustees
Board Retreat
Renaissance Columbus Downtown Hotel
50 North Third Street
Columbus, Ohio
10:00 a.m. Thursday, September 28, 2023
8:00 a.m. Friday, September 29, 2023

Thursday, September 28, 2023

The Secretary to the Board of Trustees confirms that as specified in the Regulations of the Board of Trustees of Miami University, in compliance with Section 121.22 of the Ohio Revised Code, due notice was given prior to holding this meeting of the Board of Trustees.

The meeting was called to order at 10:00 a.m. with Chair Mary Schell presiding. Roll was called with a majority of Trustees present, constituting a quorum. In addition to the Trustees, members of the President's Executive Cabinet attending for all or part of the meeting were President Greg Crawford; Provost Liz Mullenix; Senior Vice Presidents Jayne Brownell and David Creamer; Vice Presidents Cristina Alcalde, Brad Bundy, Ande Durojaiye, Sue McDowell, Jessica Rivinius, David Seidl, Amy Shoemaker, Brent Shock, and Randi Thomas; Director of Athletics David Sayler; Associate Vice President for Equity and Equal Opportunity Kenya Ash; Director of Executive Communications Ashlea Jones; Executive Assistant to the President Dawn Tsirelis; and Ted Pickerill, Chief of Staff, and Secretary to the Board of Trustees.

Roll call of Trustees:

Present: Steve Anderson Beth McNellie

Biff Bowman (National Trustee)

Ryan Burgess

Sandra D. Collins

John Pascoe

Rod Robinson

Mary Schell

Deborah Feldman Mark Sullivan (National Trustee)

Zachary Haines

Absent: National Trustees Dinesh Paliwal and Jeff Pegues, and Student Trustees Jack

Fazio and Nick McNeil

Comments from the Public

There were no requests from the public to address the Board of Trustees.

Public Business Session

Approval of Prior Meeting Minutes

Trustee Feldman moved, Trustee Pascoe seconded, and by voice vote, the minutes of the prior meeting of the Board of Trustees were unanimously approved, with all voting in favor and none opposed.

Consent Calendar

Resolutions on the Consent Calendar, included:

- <u>Campus Naming</u>
- Emerita and Emeriti
- Conferral of Degrees
- Allocation of Unrestricted Funds

Trustee Haines moved, Trustee Anderson seconded, and by voice vote the items on the Consent Calendar were unanimously approved, with all voting in favor and none opposed.

Resolutions

Remote Attendance by Trustees

Secretary to the Board of Trustees Ted Pickerill spoke in support of the resolution which conforms to ORC 3345.82, and allows remote attendance by Trustees at Special and Emergency meetings of the Board. Trustee Haines then moved, Trustee Burgess seconded, and by voice vote the resolution was unanimously approved, with all voting in favor and none opposed.

Transcript Release Policy

Vice President for Enrollment Management and Student Success Brent Shock spoke in support of the resolution explaining the policy and that ORC 3345.27 requires each Ohio public university to formally consider and adopt a resolution regarding the practice of withholding an academic transcript by no later than December 1, 2023. Trustee Burgess then moved, Trustee McNellie seconded, and by voice vote the resolution was unanimously approved, with all voting in favor and none opposed.

Chair's Comments

Appointment of the Nominating Committee

According to the Board of Trustees Regulations, the Chair of the Board is directed to appoint a nominating committee at the September Board meeting for the purpose of nominating a slate of officers for the next year's Board. The nominating committee is charged with presenting their recommendations to the Board at the December meeting. At the December meeting, the Board will vote on the nominations, and the new officers will take office on January first.

Chair Schell announced that this year's nominating committee will include Trustee Robinson, Trustee Feldman and Trustee Bowman, with Trustee Collins as an alternate. Trustee Robinson will serve as Chair, and the committee's recommendations are to be presented to the Board at the December meeting.

Review of the Board Regulations

Chair Schell stated it is good practice to periodically review an organization's regulations, and it has been nearly four years - a period marked by significant and dynamic change - since the last review of the Board Regulations. So, she asked Trustee McNellie to conduct a review and to report back to the Board at the February meeting with any proposed changes or adjustments.

Executive Session

Trustee Haines moved, Trustee Pascoe seconded, and by unanimous roll call vote, with nine voting in favor and none opposed, the Board convened to Executive Session to consult with counsel, review pending litigation, for matters required to be kept confidential - trade secrets, for preparations for negotiations with public employees, and for the purchase or sale of property – real estate; as provided by the Open Meetings Act, Ohio Revised Code Section 121.22.

Return to Public Session

Other Business

Annual Ethics Training

Susan Willeke from the Office of the Ohio Ethics Commission led an annual ethics training session for the Board of Trustees and the others present.

Executive Session

Trustee Pascoe moved, Trustee Burgess seconded, and by unanimous roll call vote, with nine voting in favor and none opposed, the Board convened to Executive Session to consult with counsel, for matters required to be kept confidential - trade secrets, for preparations for negotiations with public employees, and for the purchase or sale of property – real estate; as provided by the Open Meetings Act, Ohio Revised Code Section 121.22.

Return to Public Session

Other Business

Resolutions

Ratification of Senate Committee Suspensions

Vice President and General Counsel Amy Shoemaker spoke in support of the resolution which ratifies the actions taken by Provost Mullenix as reflected in the Provost's August 11, 2023 communications, and further ratifies the suspension of continued activities of the Faculty Welfare Committee, Benefits Committee, and the All-Faculty Committee for the Evaluation of Administrators during the pendency of the negotiations, or until such time as the Board deems appropriate in its discretion. Trustee Anderson then moved, Trustee Pascoe seconded, and by

voice vote the resolution was unanimously approved, with all voting in favor and none opposed.

Adjournment of Meeting

With no other business to come before the Board, Trustee Pascoe moved, Trustee McNellie seconded, and by unanimous voice vote, with all voting in favor and none opposed, the Board adjourned at 4:00 p.m.

Friday, September 29, 2023

The Secretary to the Board of Trustees confirms that as specified in the Regulations of the Board of Trustees of Miami University, in compliance with Section 121.22 of the Ohio Revised Code, due notice was given prior to holding this meeting of the Board of Trustees.

The meeting was called to order at 8:00 a.m. with Chair Mary Schell presiding. Roll was called with a majority of Trustees present, constituting a quorum. In addition to the Trustees, members of the President's Executive Cabinet attending for all or part of the meeting were President Greg Crawford; Provost Liz Mullenix; Senior Vice Presidents Jayne Brownell and David Creamer; Vice Presidents Amy Shoemaker, and Brent Shock; and Ted Pickerill, Chief of Staff, and Secretary to the Board of Trustees.

Roll call of Trustees:

Present: Steve Anderson Beth McNellie

Biff Bowman (National Trustee)

Ryan Burgess

Sandra D. Collins

John Pascoe

Rod Robinson

Mary Schell

Deborah Feldman Mark Sullivan (National Trustee)

Zachary Haines

Absent: National Trustees Dinesh Paliwal and Jeff Pegues, and Student Trustees Jack

Fazio and Nick McNeil

Comments from the Public

There were no requests from the public to address the Board of Trustees.

Public Business Session

Executive Session

Trustee Pascoe moved, Trustee Burgess seconded, and by unanimous roll call vote, with nine voting in favor and none opposed, the Board convened to Executive Session to consult with counsel, for matters required to be kept confidential - trade secrets, for preparations for negotiations with public employees, for the purchase or sale of property – real estate, and personnel matters – the evaluation and compensation of public employees; as provided by the Open Meetings Act, Ohio Revised Code Section 121.22.

Return to Public Session

Other Business

Compensation of President Gregory Crawford

A resolution was proposed to increase the Academic Year (AY) 2024 salary for President Gregory Crawford by \$4,000, to \$555,665 (retroactive to July 1, 2023); and, to award an annual bonus payment of \$75,000 to President Gregory Crawford, payable per the employment agreement and terms of the Special Qualified Retirement Plan (SQRP).

Compensation of Dr. Renate Crawford

A resolution was proposed to increase the Academic Year (AY) 2023 salary for University Ambassador, Dr. Renate Crawford by 2% to \$54,100 (retroactive to July 1, 2023).

It was proposed that the resolutions be considered in a single vote; hearing no objections Trustee Robinson moved, Trustee Haines seconded and by unanimous voice vote, with all voting in favor and none opposed, the two resolutions were approved.

Adjournment of Meeting

With no other business to come before the Board, Trustee Haines then moved, Trustee Pascoe seconded, and by unanimous voice vote, with all voting in favor and none opposed, the Board, adjourned at 3:00 p.m.

Written Reports

- Update from Student Trustee Fazio
- Update from Student Trustee McNeil
- Campus Safety Report
- Occupancy Report
- OIDI Newsletter
- Senate Update
- University Dashboards
- Internal Audit Report
- FY2023 Financial Highlights
- FY2023 Operating Results

T. O. Pickerill II

Secretary to the Board of Trustees

(513) 529-6225 MAIN (513) 529-3911 FAX WWW.MIAMIOH.EDU

BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056

T. O. Pickerill II Secretary to the Board of Trustees September 28, 2023 Consent Calendar

RESOLUTION R2024-01

BE IT RESOLVED: that the Board of Trustees hereby approves the following naming recommendations of the Committee for Naming Campus Facilities:

Brower Resource Center

Located in the Clinical Health Sciences and Wellness facility

Barbara and Lancer Weinrich Endoscopy Lab

Located in the Clinical Health Sciences and Wellness facility

Monitor Control Room in Memory of Edna Lucielle Harding Sherck '32

Located in the Clinical Health Sciences and Wellness facility



T. O. Pickerill II
Secretary to the Board of Trustees

BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056 (513) 529-6225 MAIN (513) 529-3911 FAX WWW.MIAMIOH.EDU

September 28, 2023 Consent Calendar

RESOLUTION R2024-02

BE IT RESOLVED, that the Board of Trustees hereby approves the following for the rank of Dean Emerita effective on the formal date of retirement:

Cathy Bishop-Clark

Dean and Professor, Miami Regionals

BE IT RESOLVED, that the Board of Trustees hereby approves the following for the rank of Professor Emerita effective on the formal date of retirement:

Noriko Reider

German, Russian, Asian & Middle Eastern Languages and Cultures

BE IT FURTHER RESOLVED, that the Board of Trustees hereby approves the following for the rank of Professor Emeritus effective on the formal date of retirement:

Luis Actis
Microbiology

Mark Cybulski

Chemistry

BE IT FURTHER RESOLVED, that the Board of Trustees hereby approves the following for the rank of Administrator Emerita effective on the formal date of retirement:

Barbara Caudill

Regional Dean's Office - Hamilton

Denise Ison

Associate Director of OEEO

Theresa Murphy

Director of Employment

Roxanne Storer

Senior University Data Modeler

Diana Byrd

Executive Manager of Retail Sales and Market Merchandising

Amy Hoffman

Associate Director for Selection & Academic Initiatives

BE IT FURTHER RESOLVED, that the Board of Trustees hereby approves the following for the rank of Administrator Emeritus effective on the formal date of retirement:

Thomas Clark

Network Installation Specialist

Mark Fisher Physics

Ron Stevens Art



BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056 (513) 529-6225 MAIN (513) 529-3911 FAX WWW.MIAMIOH.EDU

Approved by the Board of Trustees September 28, 2023

T. O. Pickerill II

Secretary to the Board of Trustees

September 28, 2022 Consent Calendar

RESOLUTION R2024-03

BE IT RESOLVED: that the Board of Trustees hereby approves the conferring of all appropriate degrees, honors, and distinctions, as recommended by the Faculty Assembly, for all Commencement exercises scheduled during the 2023-2024 academic year, and during Summer 2024.



T. O. Pickerill II

Secretary to the Board of Trustees

BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056 (513) 529-625 MAIN (513) 529-3911 FAX WWW.MIAMIOH.EDU

September 28, 2023 Consent Calendar

RESOLUTION R2024-04

BE IT RESOLVED, by the Board of Trustees that the below stated funds be allocated from unrestricted contributions to the Miami University Fund for the period July 1, 2022 to June 30, 2023:

University Division/Office	<u>Amount</u>
University Advancement Office of the President	\$283,375 \$150,000
Total	\$433,375



T. O. Pickerill II

Secretary to the Board of Trustees

BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056 (513) 529-6225 MAIN (513) 529-3911 FAX WWW.MIAMIOH.EDU

Other Business September 28, 2023

RESOLUTION R2024-05

WHEREAS, in accordance with ORC 3345.82, a trustee may attend a meeting called in accordance with Ohio Administrative Code 3339-1-02, by means of virtual or electronic communications, provided:

That at least one-third of the trustees attending the meeting shall be present in person at the place where the meeting is conducted;

That all votes taken at the meeting are taken by roll call vote; and

That a trustee who intends to attend a meeting via means of electronic communication notified the chairperson of that intent not less than forty-eight hours before the meeting, except in the case of a declared emergency.

THEREFORE, BE IT RESOLVED, that the Board of Trustees hereby adopts following Attendance by Trustees at Emergency and Special Meetings by Means of Electronic Communications policy:

Purpose of Policy

This policy shall permit members of the Miami University Board of Trustees to attend any special or emergency meeting only, called in accordance with Ohio Administrative Code 3339-1-02, by means of virtual or electronic communications. This policy shall not apply to regular meetings of the Board of Trustees.

Policy

- A. In accordance with ORC 3345.82, a trustee may attend a special or emergency meeting of the Board of Trustees, via electronic communication, provided:
- 1. That at least one-third of the trustees attending the meeting shall be present in person at the place where the meeting is conducted;
 - 2. That all votes taken at the meeting are taken by roll call vote; and
- 3. That a trustee who intends to attend a meeting via means of electronic communication notified the chairperson of that intent not less than forty-eight hours before the meeting, except in the case of a declared emergency.
- B. A trustee who attends a special or emergency meeting via means of electronic communication is considered to be present at the meeting, is counted for purposes of establishing a quorum, and may vote at the meeting.
- C. For regular meetings of the Board of Trustees, those trustees not present in person shall be considered absent, and may not participate in the meeting.



T. O. Pickerill II Secretary to the Board of Trustees BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056 (513) 529-6225 MAIN (513) 529-3911 FAX WWW. MIAMIOH. FDIJ

Other Business September 28, 2023

RESOLUTION R2024-06

WHEREAS, Section 3345.27 of the Ohio Revised Code requires each institution to formally consider and adopt a resolution regarding the practice of withholding an academic transcript by December 1, 2023, and to submit the adopted resolution to the chancellor of higher education; and

WHEREAS, Miami University releases all academic transcripts intended for employers in accordance with ORC 3345.27(B); and

WHEREAS, Miami University strongly believes that assisting students in maintaining enrollment in the institution is the best way to meet the State's post-secondary education attainment and workforce goals; and

WHEREAS, Miami University provides a no-cost financial literacy curriculum to all students, as well as additional financial counseling and the proactive application of microgrants to assist students with outstanding financial balances in an effort to maintain enrollment; and

WHEREAS, Miami University releases academic transcripts to students who owe less than \$500; and

WHEREAS, Section 131.02 of the Ohio Revised Code requires institutions of higher education to turn over delinquent student accounts to the Ohio Attorney General for collection, resulting in increased fees to the student; and

WHEREAS, Miami University has adopted a practice of releasing academic transcripts to all students who owe more than \$500, following a discussion for purposes of providing financial counseling, regardless of any outcome towards payment made or resulting payment balance;

NOW, THEREFORE, BE IT RESOLVED, the Board of Trustees of Miami University authorizes the continued use of a temporary transcript hold to provide for a financial counseling discussion with the indebted student that outlines payment options, to further diminish the associated costs of collections of past-due balances, to promote the State's post-secondary education attainment and workforce goals, and to assist students with education attainment at Miami University or any institution of higher education; and

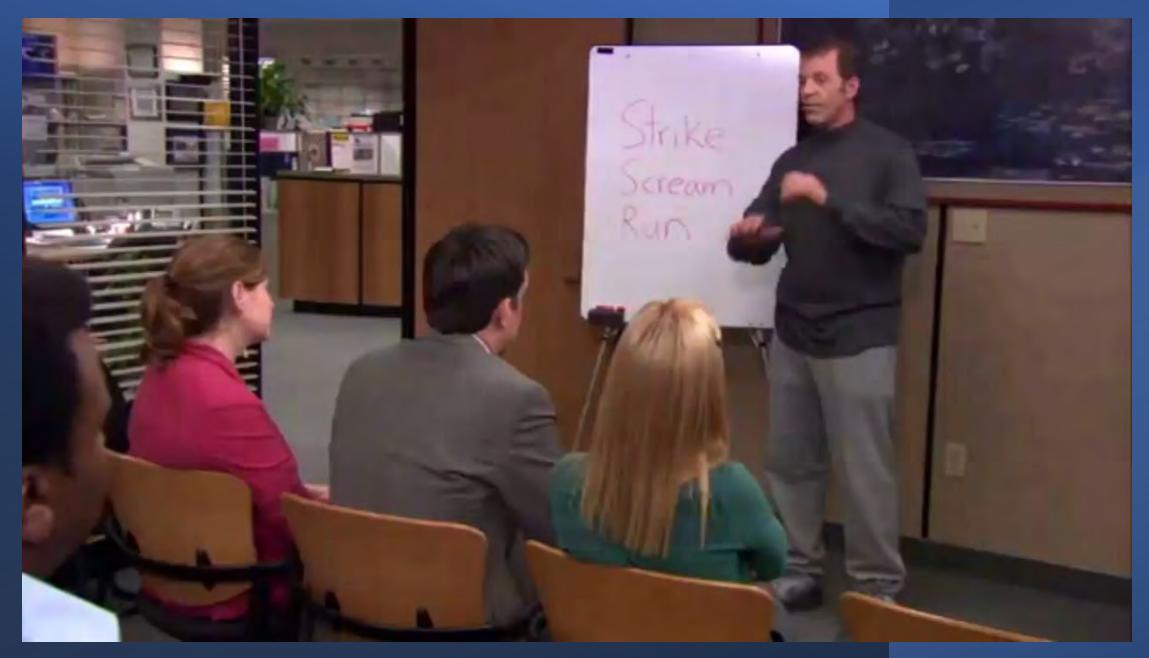
BE IT FURTHER RESOLVED, Miami is now and will continue to release academic transcripts after the counseling has occurred, regardless of the outcome to the University; and

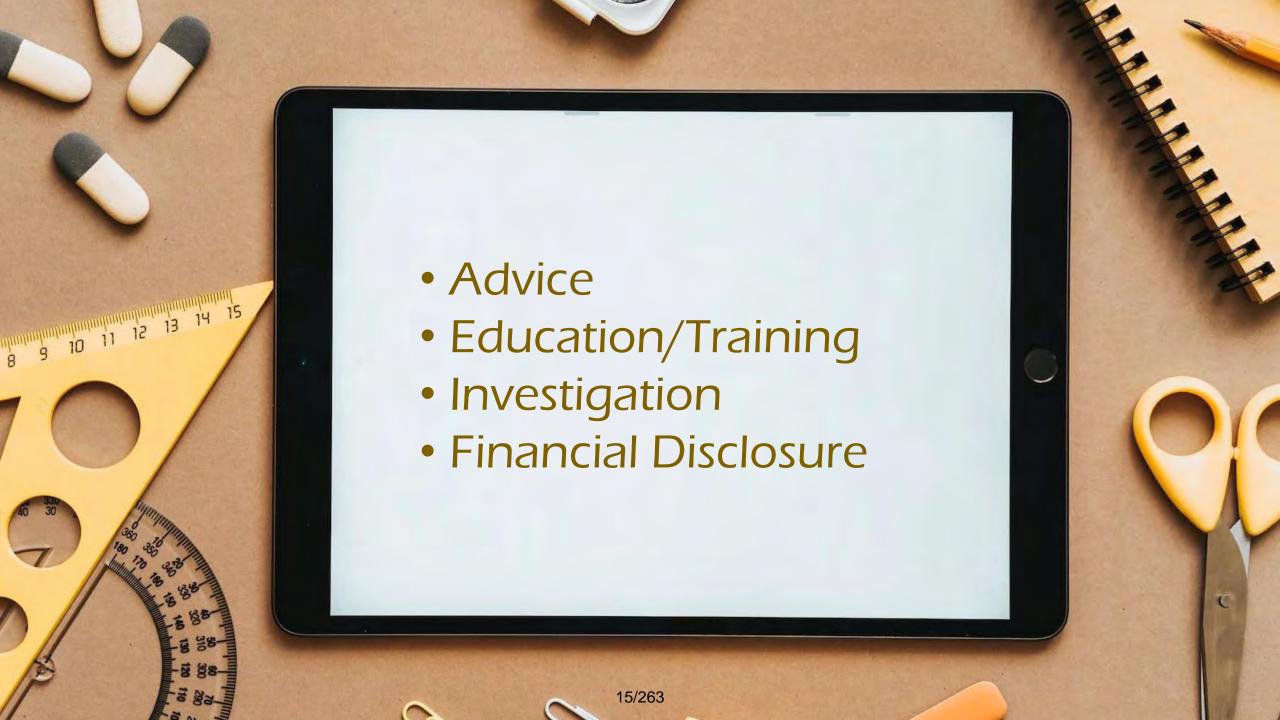
BE IT FURTHER RESOLVED, that Miami University will continue to release all transcripts to employers, as required by Section 3345.27(B) of the Ohio Revised Code.



The Ohio Ethics Law 101

Susan Willeke Training & Communications Manager





The Ohio Ethics Law

- Conflicts of Interest
- Gifts
- Public Contracts
- Sales to Public Agencies
- Nepotism
- Post-Employment





ORC 102.03(D)

- Self
- Family
- Business Associate



Private Employment/ **Outside Business Interests**

Advisory Opinions:
• 96-004

- 89-006





OHIO ETHICS COMMISSION

8 East Long Street, Suite 1200 Columbus, Ohio 43215-2940 Telephone: (614) 466-7090 Fax: (614) 466-8368

> Advisory Opinion Number 96-004 November 15, 1996

bus by the Commission:

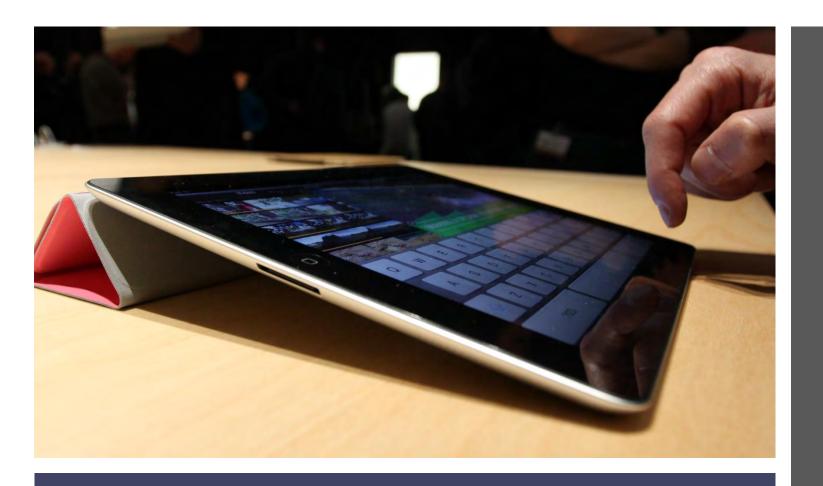
- (1) The Ohio Ethics Law and related statutes do not prohibit public officials and employees from engaging in private outside employment or business activities provided that no conflict of interest exists between the private interests and public duties of the public official or employee and there is no misuse of the public office or employment of the official or employee, as described below;
- (2) Divisions (D) and (E) of Section 102.03 of the Revised Code prohibits a public official or employee from engaging in private outside employment or business activity with parties that are interested in matters before, regulated by, or doing or seeking to do business with his own public agency <u>unless</u> it is determined by his public employer that he is able to withdraw, as a public official or employee, from consideration of matters that affect the interests of the party with which he desires to engage in private outside employment or business activity;

Advisory Opinion 96 – 004

Use of Public Position, Time & Equipment

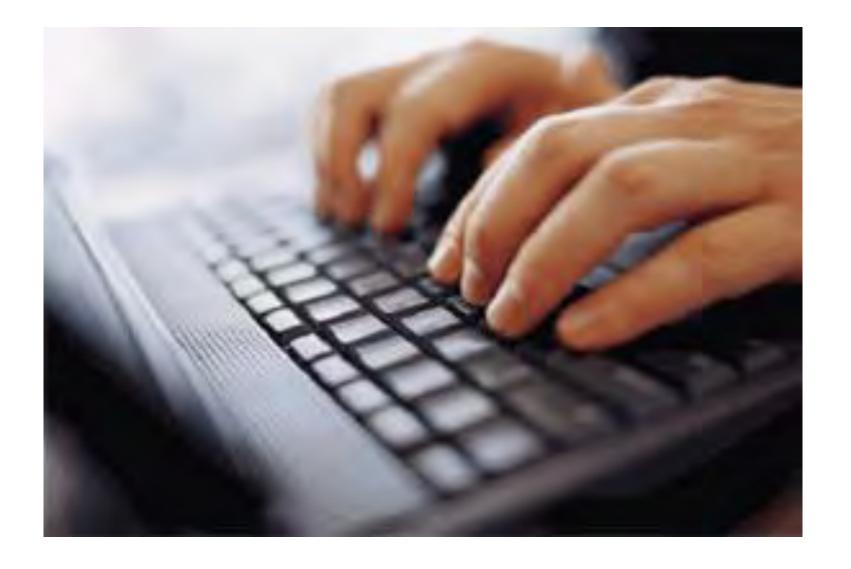
A city building inspector, who is also an adjunct professor at a public college, conducts a city building inspection on a construction project at the college.





Public college official uses college email address to email hundreds of people recommending his son's invention.

Public college employee solicits a job from a vendor whose project he manages for the college.



Recusal:

- Voting
- Discussing
- Reviewing
- Recommending
- Inspecting
- Investigating







Can a state employee teach at a college or a university that receives grant money from the state agency he or she serves?

Possible, BUT...

Advisory Opinion 89 – 006 Not if definite & direct interest in the grant

Can't profit from grant awarded by you/board/commission served on

Can't use public position to get the job

Can't accept job from a university w/ grant application if recusal impossible

Can't use public position to obtain agency grant for university

Can't use position to get something of value for university from agency

Can't use public position to get something of value from the university

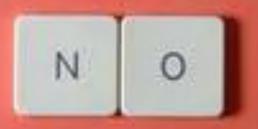
Can a student serving on the board of trustees also serve on the student government body?

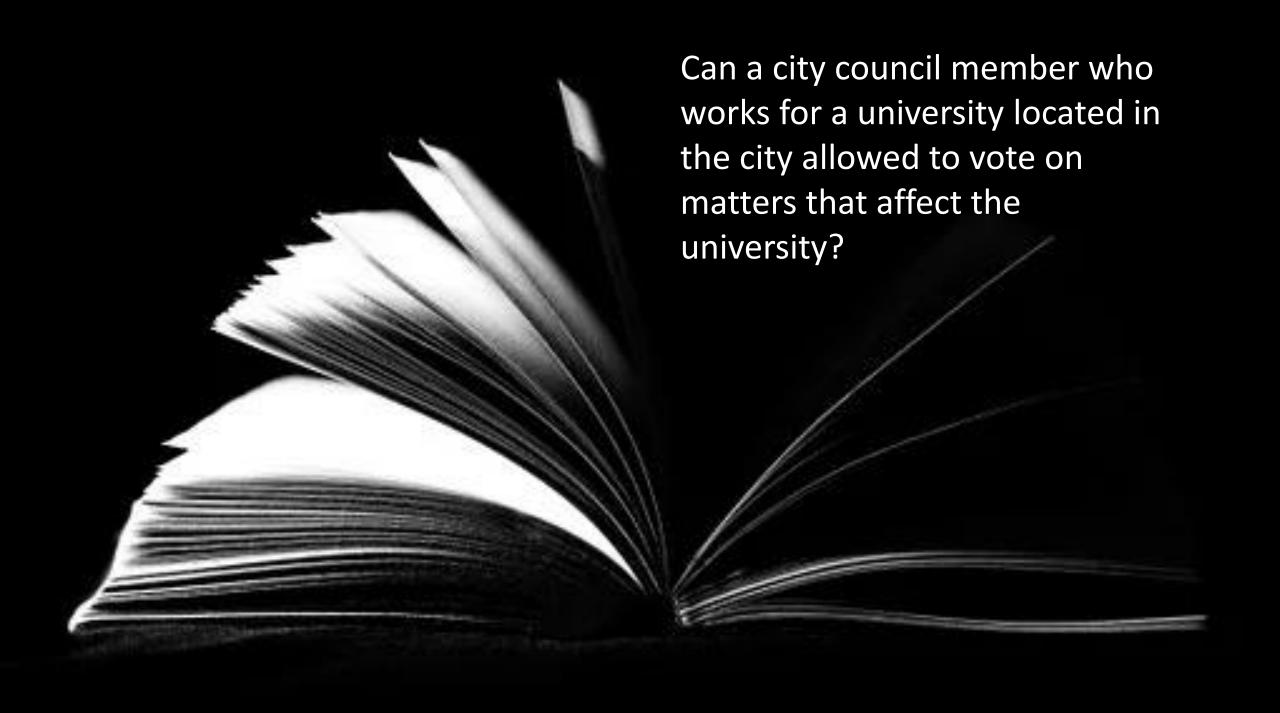


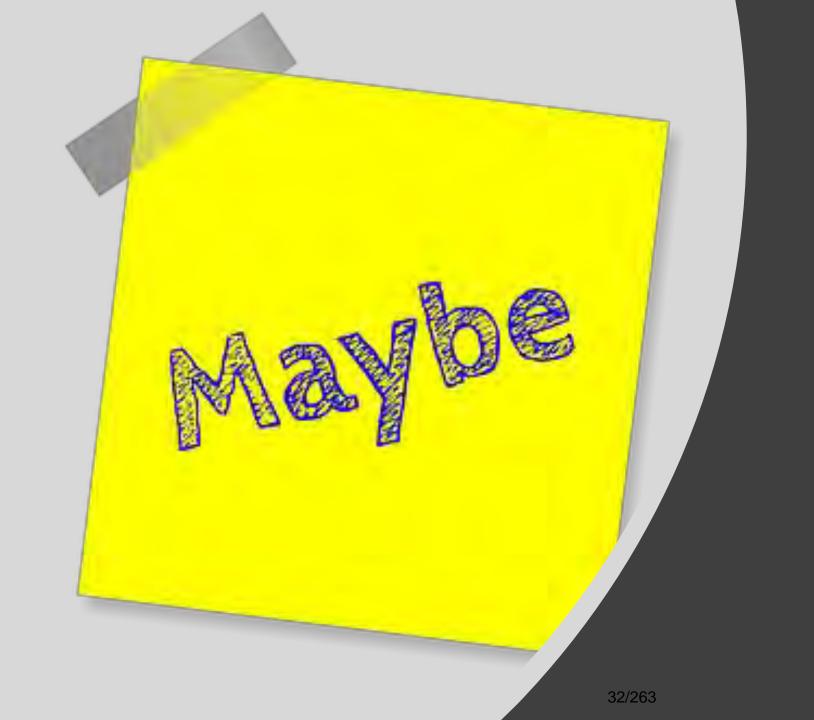




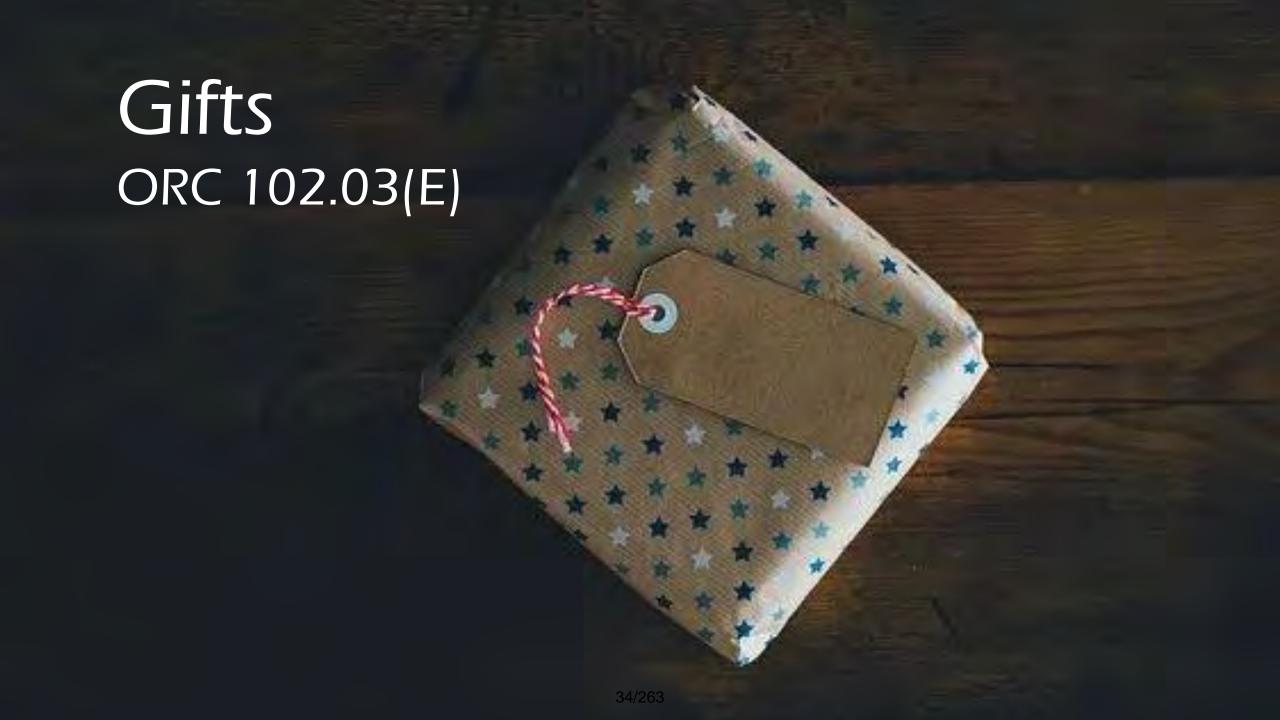
Is it okay for a college fiscal officer to use her college job title and the college logo to advertise her private accounting business?















Improper Source

- Doing business
- Seeking to do business
- Regulated
- Interests in matters









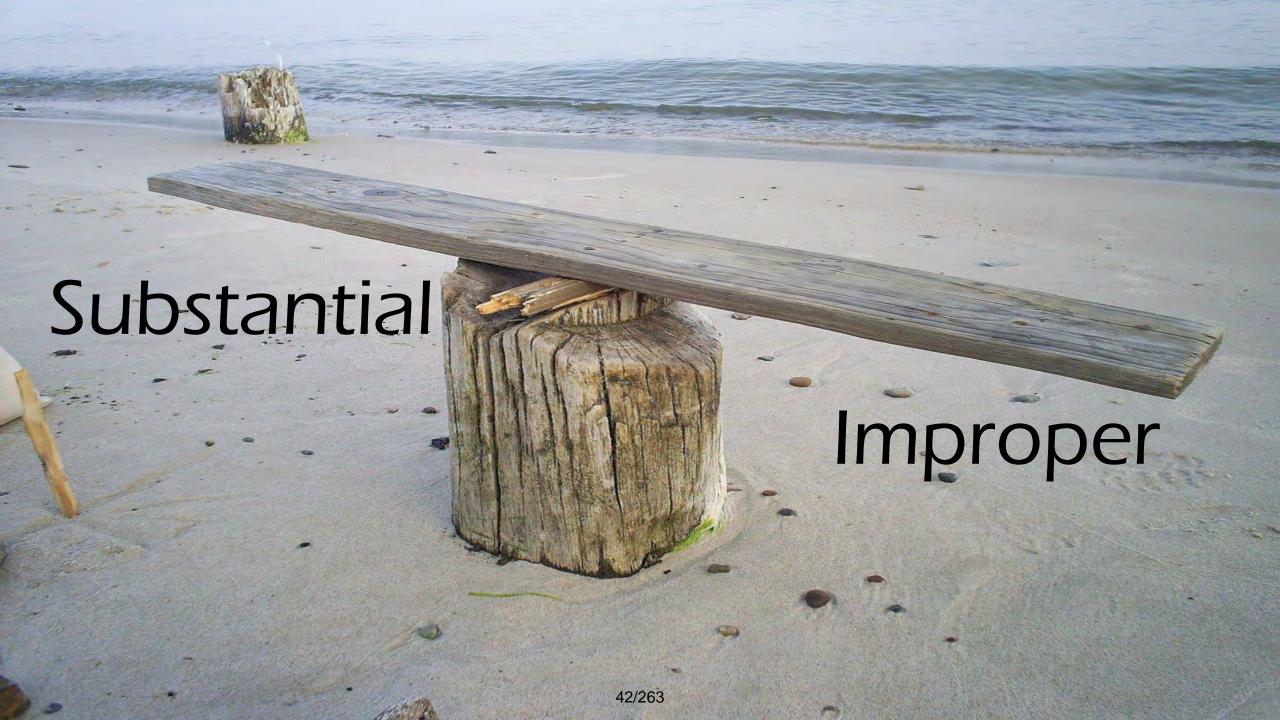




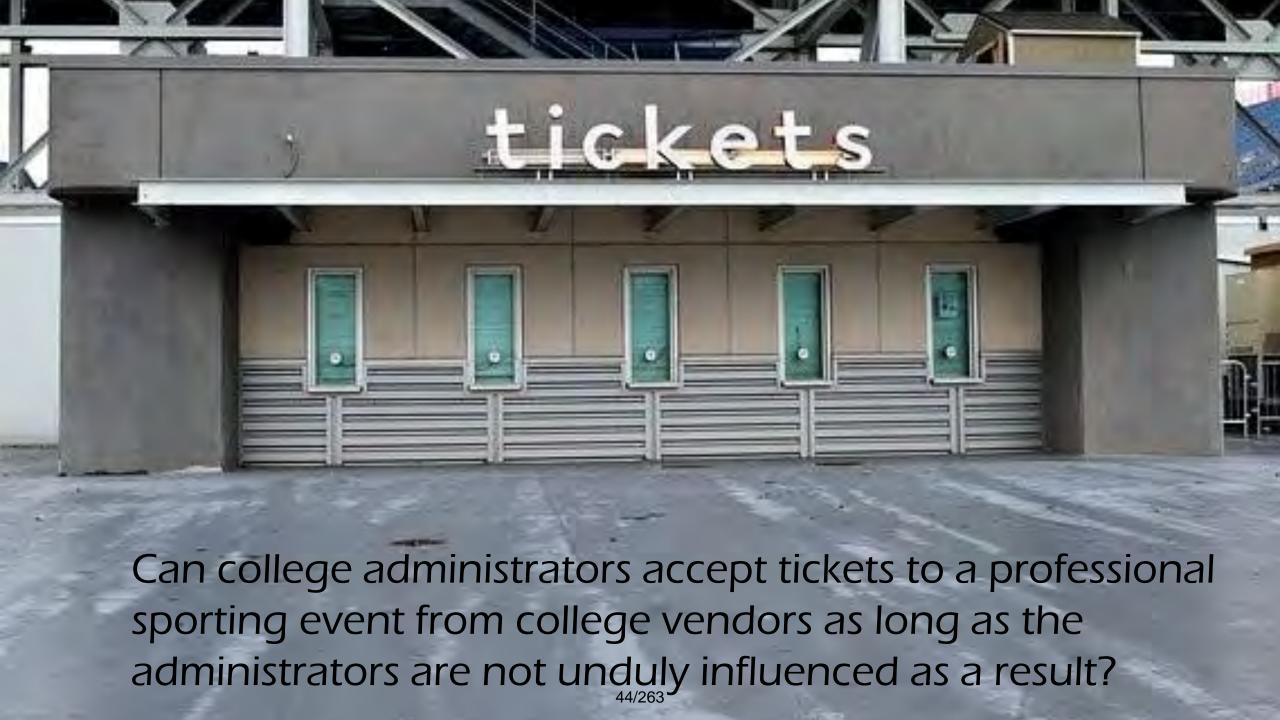
Nominal – "De Minimus"

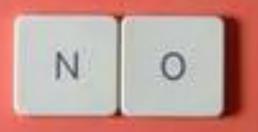


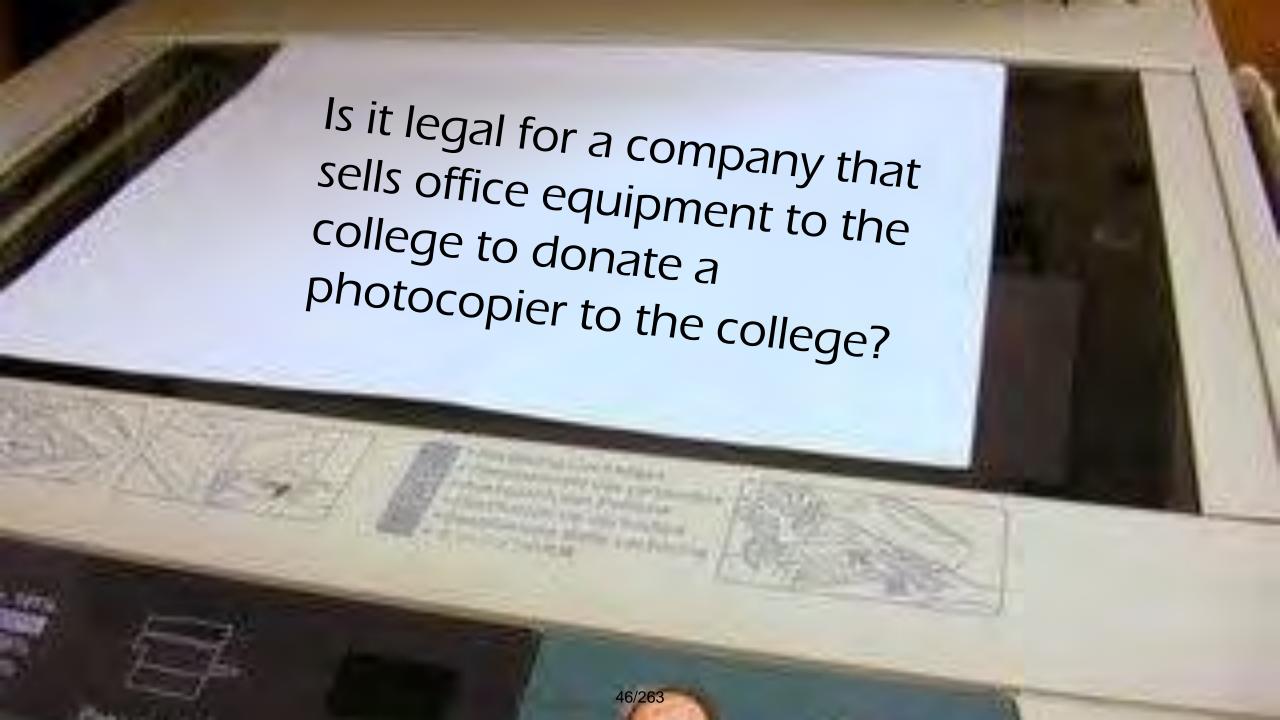














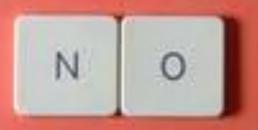
Can an instructor accept a free textbook from a vendor to review it, even if the instructor keeps the textbook, but decides not to order it for use in the classroom?

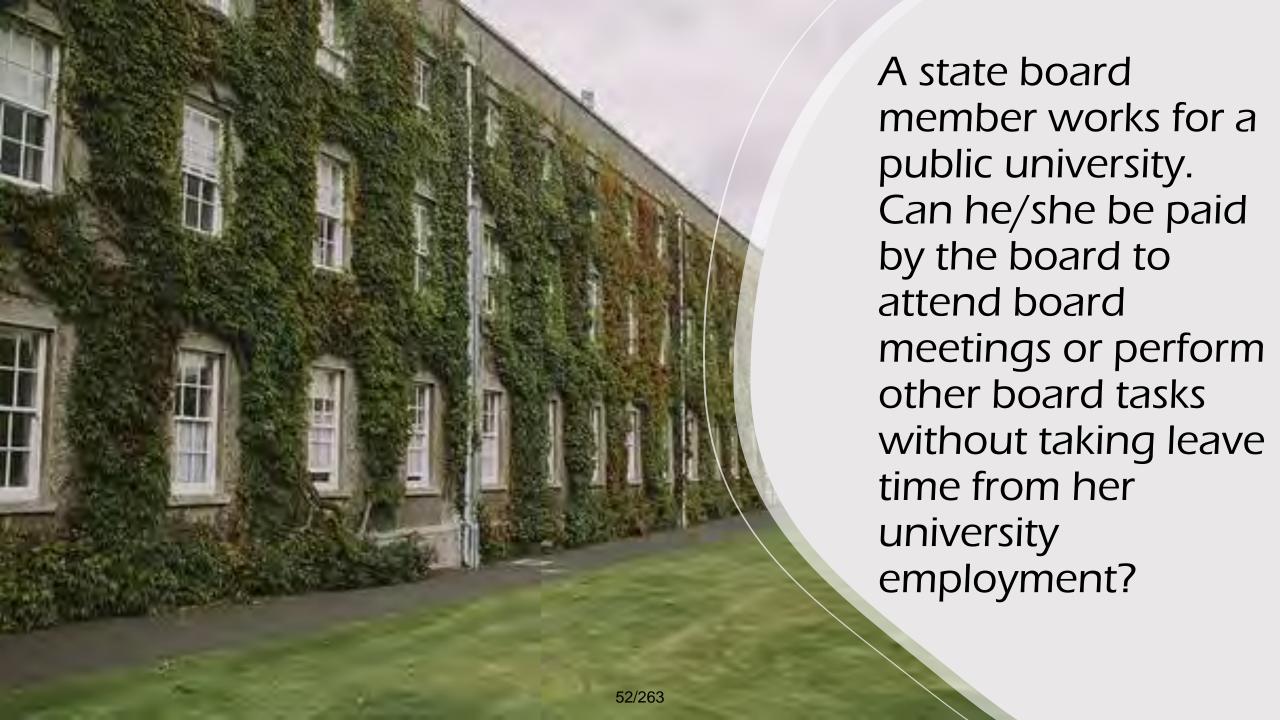


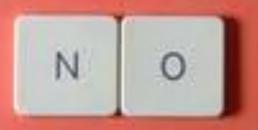


Can a public college employee accept tickets to the Memorial Tournament from a private student loan lender?



















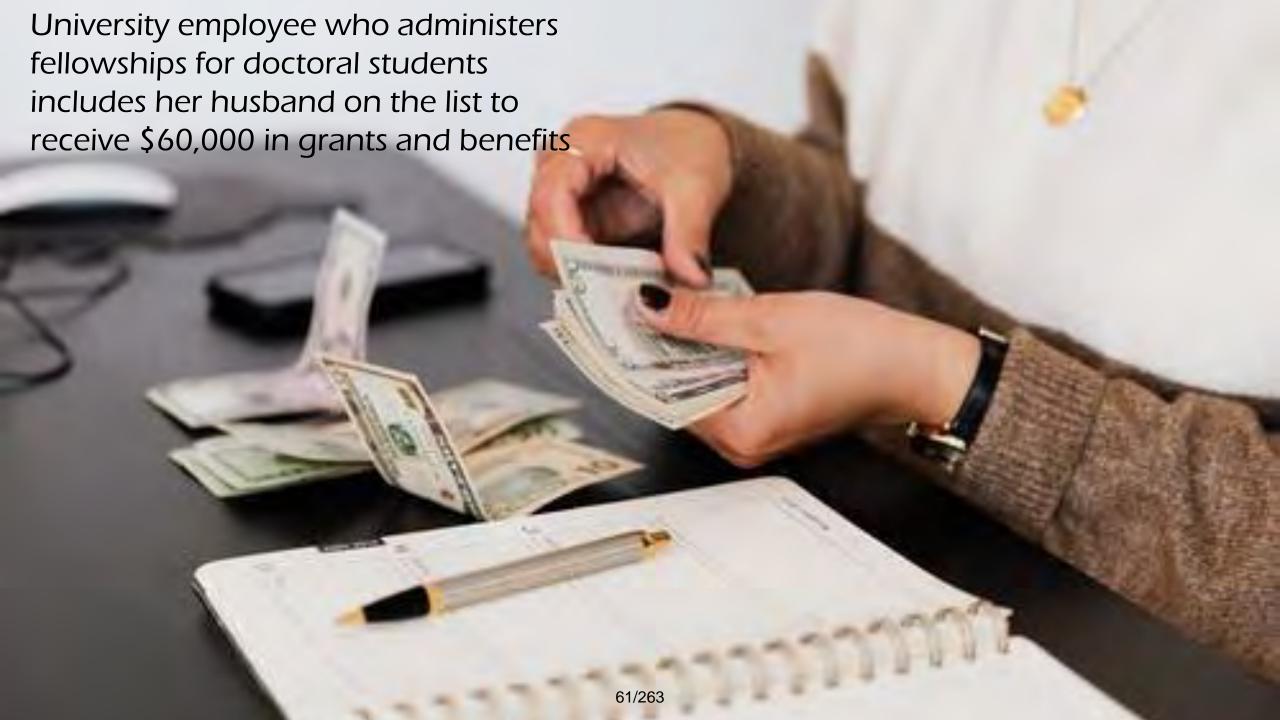
Prohibits Securing a Public Contract for:

- Self
- Family Member
- Business Associate





College employee secures a catering contract for a family member for a ribbon-cutting ceremony on campus









Prohibits Securing a Public Contract for:

- Self
- Family Member
- Business Associate



Grant Money = Public Contract!





Cannot sell goods or services to your own public agency!





Can relatives of university employees and officials pursue public contracts with the universities where their family members serve?



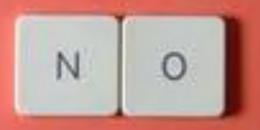


A college administrator recommends a construction contract for the company her husband owns stating she can remain objective during the decisionmaking process.



Can a college employee who has a business in his/her private life sell HVAC services to the college if there is no written contract and its on an "as needed" basis?









My Son's Office



Family?

- Spouse
- Sibling
- Parent/step-parent
- Child/step-child
- Grandparent
- Grandchild





Post-Employment orc 102.03(A)



Post-Employment Restrictions:

- One year
- Representation
- Personal participation



Post-Employment Restrictions



OHIO ETHICS COMMI William Green B 30 West Spring Sti Columbus, Ohio 432 Telephone: (614) 40

Fax: (614) 40

www.ethics.o

POST-EMPLOYMENT RESTRICTIONS: Ethics Commission Information Sheet # 5

troduction

hio Ethics Law and related statutes are thio Revised Code (R.C.) Chapter 102. ons 2921.42 and 2921.43. These laws prohibit public officials and employees using their official positions for their nal benefit or the benefit of their family or business associates.

thics Law applies to all people who officials and employees for public n Ohio. "Public agencies" include state tts, boards, and commissions, counties, ages, townships, school districts, public and universities, public libraries, port s, and all other public entities.

hio Ethics Commission was created to r, interpret, and assist in the int of the Ethics Law for all officials in except members and employees of the Accomply, and indicate officers and

For more guidance on that issu Information Sheet # 6. Except where oth noted, these restrictions apply to an officia during, and for one year after he leaves, his position. They also apply whether the offi taking a new position with a private corpo a non-profit organization, or another agency.

III. Summary of the Law

The Ohio Ethics Law and related s prohibit an official from:

- Profiting from a contract of his agency, if he authorized the contrawas part of a committee, board, or authority that authorized the contra-
- Representing any person, befor public agency, on matters in wh personally participated during his service; and







Approved by the Board of Trustees September 28, 2023

T. O. Pickerill II

Secretary to the Board of Trustees

BOARD OF TRUSTEES ROUDEBUSH HALL ROOM 212 OXFORD, OHIO 45056 (513) 529-6225 MAIN (513) 529-3911 FAX

Other Business September 28, 2023

RESOLUTION R2024-07

WHEREAS, the Board of Trustees established the University Senate as "the primary University governance body where students, faculty, staff, and administrators debate University issues and reach conclusions on the policies and actions to be taken by the institution. It is the legislative body of the University in matters involving educational programs, requirements, and standards; faculty welfare; and student conduct. The Board of Trustees delegates to the Senate primary responsibility for curriculum, programs, and course offerings and advisory responsibility on all matters related to Miami University."

WHEREAS, the FAM/AAUP-AFT is now the exclusive representative for the Tenured, Tenure-Track and TCPL Faculty and the Librarians regarding their wages, hours and other terms and conditions of employment;

WHEREAS, the University has commenced initial contract negotiations with FAM/AAUP-AFT, which is the exclusive representatives for the Miami Tenured, Tenure-Track and TCPL faculty as well as the exclusive representatives for the university Librarians;

WHEREAS, the Board of Trustees affirms the commitment of the University to bargain with FAM/AAUP-AFT in good faith in accordance with its legal obligations under ORC 4117.08;

WHEREAS, the Regulations of the Board of Trustees, Art. IX, and the Enabling Act of the University Senate reflect the powers of the Board of the Trustees and its right to consider, approve, modify, or reject actions taken by the University Senate or Faculty Assembly;

WHEREAS, on August 11, 2023, the Provost communicated the adjusted status of certain University Senate Committees pending negotiations; and

WHEREAS, the Provost further communicated the suspension of the activities of the Faculty Welfare Committee, Benefits Committee, and the All-Faculty Committee for the Evaluation of Administrators;

THEREFORE, BE IT RESOLVED: that the Board of Trustees hereby ratifies the actions taken by the Provost as reflected in her August 11, 2023 communications, and further ratifies the suspension of continued activities of the Faculty Welfare Committee, Benefits Committee, and the All-Faculty Committee for the Evaluation of Administrators during the pendency of the negotiations, or until such time as it deems appropriate in its discretion.

BE IT FURTHER RESOLVED, this action in no way impacts the executed Memorandum of Understanding of the Continuation of Certain Committee Activities effective September 12, 2023, as negotiated between the University and FAM/AAUP-AFT.



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Approved by the Board of Trustees September 29, 2023

T. O. Pickerill II

Secretary to the Board of Trustees

Other Business September 29, 2023

RESOLUTION R2024-08

BE IT RESOLVED; that the Board of Trustees hereby approves an Academic Year 2023-2024 salary of \$555,665 for President Gregory Crawford, retroactive to July 1, 2023.

BE IT FURTHER RESOLVED; that the Board hereby also approves an annual bonus payment of \$75,000 to President Gregory Crawford, payable per the employment agreement and terms of the Special Qualified Retirement Plan (SQRP).



Approved by the Board of Trustees September 29, 2023

T. O. Pickerill II

Secretary to the Board of Trustees

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Other Business September 29, 2023

RESOLUTION R2024-09

BE IT RESOLVED, that the Board of Trustees hereby approves an Academic Year 2023 - 2024 salary of \$54,100 for University Ambassador Dr. Renate Crawford, retroactive to July 1, 2023.

Hello,

I would like to begin my written report for this meeting by expressing my gratitude for having been able to introduce Nick McNeil, the newest student trustee to so many trustees, administrators, and students during the course of the meeting. As we move forward into a new academic year, I could not be more excited to have a new partner. I have complete faith in his ability to take on this unique challenge and make this opportunity his own. I am excited to help guide him through the first part of his term, as he develops his skills and knowledge related to Miami University, and begins to see and prioritize the issues facing the student body. I am thrilled to be able to work with such a passionate and committed member of the Miami community, and I cannot wait to provide an update on our progress in December.

We have already begun the hard work of the semester, working with stakeholders from all over campus to continue the relationships we have fostered over the last several years. We have begun regular meetings with the leadership of the Associated Student Government, as well as with the Provost's office. We are currently in the process of beginning the search for the next student trustee with our partners in Student Body President and Vice-President Nyah and Jules. We have also had the opportunity to connect with a number of administrators on topics such as mental health, student conduct, safety and wellness, and more, and were able to welcome the new Dean of Students, Bashaun Smith.

I have also begun serving as a member of the Mental Health Implementation Task Force, led by Dr. Steve Large, Associate Vice President for Health and Wellness. As I shared in June, the mental health of the student body is and will continue to be a major priority of the student trustees. The task force is beginning to prioritize and implement the 56 recommendations included in the Mental Health Task Force Report discussed in June. I am both grateful for this opportunity to continue fostering growth in this area, and excited to see how we can continue to build support for students in this area. We have also begun connecting with the student organization Miami Hope, a group focused on suicide provention on campus, and we are excited to see how we may support them in their future efforts.

I was also excited to be able to present the product of the research I conducted as an Undergraduate Summer Scholar throughout this summer at the Undergraduate Research Forum just a few weeks ago. I was blown away by the scale and importance of research being conducted by undergraduate students at Miami. It was a good reminder of the gratitude that I have for attending a university that is so committed to providing these unique opportunities to students.

I am looking forward to the work and excitement of the semester, and with love and honor I conclude my report.

Hello,

My name is Nick McNeil, and I am the newly appointed student trustee. I am excited to work with the board, university administration, and students throughout the academic year. I am grateful to have the opportunity to work alongside them. I have already had the opportunity to meet some members of the board and administration, though I look forward to seeing everyone in person at the next board meeting in December.

I am a junior student pursuing a Bachelor of Arts in political science and journalism. Public service has always been a focus for me, and I plan on continuing this long-held dedication into a future career, whether it is through government or the media. I have had numerous opportunities to prepare for this role on campus through the Government Relations Network, Office of ASPIRE, and College Republicans. I am excited to continue growing in my ability to listen to the student body and reflect their values and ideas.

I hope to bring a student perspective to the board, especially in the areas of student success and financial wellness. My own decision to attend Miami University was impacted by financial considerations, so I know how impactful financial wellness is. I am grateful that I had this opportunity, along with support from my family. I hope that I can be a part of expanding students' access to information about their own financial options.

During my time as a student trustee, I hope to encourage easy access to information regarding things like tuition and financial assistance, making it as visible as possible. Miami currently has excellent examples of policy, such as the Tuition Promise, and I am excited to see how we continue to support students in this area. I want to be as effective as possible at providing this information easily to students and look forward to learning how to do that efficiently.

I am extremely enthusiastic about beginning my term as a student trustee and I look forward to working with the board in the future.

With Love and Honor, I conclude my first report.

Campus Safety 2022-2023

Division of Student Life | Board of Trustees Report

September 2023

Campus safety at Miami University can be measured in several ways. Information provided by the Miami University Police Department in the form of the <u>Annual Security and Fire Safety Report</u> provides crime statistics for the previous three years and is the most comprehensive report regarding incidents reported to law enforcement or other responsible employees on campus. Statistics in the report are divided by campus and organized under the crime statistics tab.

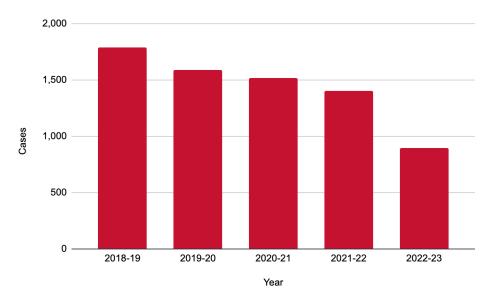
As is required of all institutions that participate in federal financial assistance programs, Miami provides statistics in several categories of crimes, including criminal offenses, hate crimes, VAWA offenses (Violence Against Women Act), and arrests and referrals for disciplinary actions in specified categories.

Student Conduct Data 2022-23

Student conduct cases are another metric for gauging campus safety. Though not all student conduct cases rise to the level of a crime, these incidents often contribute to campus climate and students' perceptions of campus safety.

Consistent with national trends in student conduct, Miami conduct cases have been in a steady decline since pre-pandemic numbers. In 2018-19, there were 1,793 conduct cases. In 2019-20 and 2020-21 (COVID years), case numbers dropped to 1,586 and 1,515, respectively. In 2021-22, numbers dropped again to 1,403. In 2022-23, conduct cases declined an additional 36% to 895, representing a 50% decrease from pre-pandemic numbers. While it is unclear what accounts for this decline, student risk-taking behaviors post-pandemic may play a part in this trend.

Student Conduct Cases Over Five Years



A conduct case can carry multiple charges (e.g., a student may be charged with both Alcohol Violations and False Identification). Of the 895 cases last year, there were 1,075 charges. Of the 1,075 charges, students were found "responsible" 693 times (64%). This represents a 39% decrease in violations from 2021-22 (1,131), which is fairly consistent with the 36% decrease in the number of cases during the same period.

Organizational investigations remained fairly consistent over last year, while sexual misconduct investigations resulting from formal complaints declined significantly (from 18 in 2021-22 to 7 in 2022-23). The number of reports of all forms of sexual misconduct (including sexual harassment, dating and domestic violence, stalking, and sexual assault) submitted to our Title IX Coordinator for Students also decreased by 30% last year, but we still received 191 reports. As has always been true, few students opt to go through a formal conduct process but instead request accommodations and support. It is unclear why formal reporting of sexual misconduct was down last year since it is unlikely the number of actual incidents changed drastically during the same time period. We continue to encourage reporting and ensure that students know the resources available to them, along with offering robust prevention and education efforts.

Resolutions

The majority of cases (80%) are resolved with an administrative hearing, made up of one hearing officer. Community Standards Boards are a three-person panel. For the categories below that have more cases than hearings, more than one student was assigned a case number in our system relating to the same incident/hearing.

Student Cases Processed By Resolution Type	2022-23
Administrative Hearing	717
Community Standards Board	7 (4 hearings)
Sexual Misconduct Hearing	18 (9 hearings) *
Informal Resolution (alcohol)	7
Good Samaritan w/ Administrator	52
Record Keeping	69
Withdrawal Action Pending	4
Written Warning	19
TOTAL	893 **

^{*} Two (2) of the nine hearings involved cases that were fully investigated in 2021-22. Therefore, they are not represented in the 2022-23 Sexual Misconduct Investigations number, above.

^{**} In addition, two (2) student cases were resolved through Adaptable Resolution with the Dean of Students Office, bringing the total number of student conduct cases processed to 895, as noted above.

Violation and Sanction Breakdown

Prohibited Conduct	Charges Brought 2022-23	Violations 2022-23 (Responsible findings)	Violations 2021-22 (Responsible findings)
Abuse of Technology	1	1	1
Alcohol Violations	502	326	493
Complicity	46	43	115
Damage and/or Theft of Property	92	54	69
Discrimination/Harassment	0	0	0
Dishonesty	0	0	15
Disorderly Conduct	61	35	68
Drug Violations	46	27	51
Endangering Health or Safety	32	17	22
Failure to Comply	54	23	16
False Identification	80	76	122
Hazing	2	2	2
Non-Title IX Sexual Misconduct	2	0	1
Retaliation	3	0	0
Title IX Sexual Misconduct	9	5	1
Trespass or Unauthorized Use of Facilities	7	7	13
Unauthorized Use of University Access Device	2	0	0
Violation of Law	33	19	56
Violation of Sanctions	5	3	1
Violation of University Policy	94	52	82
Weapons	4	3	3
TOTAL	1,075	693	1,131

Sanctions of Note (2022-23)

•	Alcohol Alternatives:	231	Drug CAEP*:	17
•	Alcohol Assessment:	22	 Disciplinary Probation: 	427
•	Alcohol CAEP*:	22	Suspension:	15
•	Drug Assessment:	6	Dismissal:	0

^{*}CAEP: Chemical Abuse Education Program

Adjudication Timeline

The decline in conduct caseloads in 2022-2023 has afforded the Office of Community Standards the opportunity to improve our timely resolution of student conduct cases. Across all conduct cases (from the more basic to the most complex), on average, cases were resolved from incident to adjudication in just over three weeks. This represents a 13% improvement over the prior year.

MIAMI UNIVERSITY CAMPUS SERVICES

Campus Services Center

2023-2024 Occupancy Report # 2 (End of Week 2)

9/8/2023

Building Name	Standard Capacity	Residents	Occupancy %	Vacancies	Doubles Sold as Singles
Anderson	217	206	95%	11	0
Bishop	94	90	96%	3	1
Brandon	144	139	97%	5	0
Clawson	120	117	98%	2	1
Collins	145	136	94%	6	3
Dennison	271	260	96%	8	3
Dodds	196	190	97%	4	2
Dorsey	212	179	84%	24	9
Elliott	35	34	97%	1	0
Emerson	337	308	91%	23	6
Etheridge	237	224	95%	10	3
Flower	266	241	91%	23	2
Hahne	366	340	93%	21	5
Hamilton	180	174	97%	4	2
Havighurst	332	310	93%	22	0
Hepburn	267	245	93%	16	6
•	267	245	92%	10	В
Heritage Commons	72	C 4	000/	0	
Blanchard House	72 72	64	89%	8	0
Fisher		71	99%	1	0
Logan	70	67	96%	3	0
Pines Lodge	72	68	94%	4	0
Reid	72	70	97%	2	0
Tallawanda	72	66	92%	6	0
Hillcrest	268	221	82%	42	5
MacCracken	176	167	95%	7	2
Maplestreet Station	90	89	99%	1	0
Marcum	348	331	95%	14	3
McBride	138	134	97%	4	0
McFarland	143	125	87%	14	4
McKee (Offline)	0	0	0%	0	0
Miami Inn	99	93	94%	5	1
Minnich	255	243	95%	7	5
Morris	363	310	85%	48	5
Ogden (Offline for Renovation)	0	0	0%	0	0
Peabody	153	99	65%	48	6
Porter	181	175	97%	5	1
Richard	212	203	96%	6	3
Scott	253	242	96%	9	2
Stanton	203	182	90%	16	5
Stoddard	45	43	96%	2	0
Stonebridge	262	214	82%	38	10
Symmes	197	190	96%	7	0
Tappan	293	267	91%	21	5
Thomson	204	141	69%	55	8
Wells (Offline)	0	0	0%	0	0
Withrow	281	272	97%		4
Young (Beechwoods)	266	272	90%	5 19	8
Tourig (Deecitwoods)	8279	7579	JU/0	13	O

Grand Totals	8279	7579	92%	580	120
One Year Ago	8380	7961	95%	414	5



The Miami Pulse

Connecting, Assessing, and Moving Forward our Inclusive Community

Office of Institutional Diversity and Inclusion Newsletter

September 2023 Edition

Land Acknowledgement

Miami University is located within the traditional homelands of the Myaamia and Shawnee people, who along with other indigenous groups ceded these lands to the United States in the first Treaty of Greenville in 1795. The Miami people, whose name our university carries, were forcibly removed from these homelands in 1846.

In 1972, a relationship between Miami University and the Miami Tribe of Oklahoma began and evolved into a reciprocal partnership, including the creation of the Myaamia Center at Miami University in 2001. The work of the Myaamia Center serves the Miami Tribe community and is dedicated to the revitalization of Miami language and culture and to restoring that knowledge to the Myaamia people.

Miami University and the Miami Tribe are proud of this work and of the more than 140 Myaamia students who have attended Miami since 1991 through the Myaamia Heritage Award Program.

Letter from the Vice President for Institutional Diversity and Inclusion

Greetings Miamians,



We hope everyone has had an opportunity to enjoy some rest this summer. We are excited about the possibilities the new academic year brings, and to once again have the energy of new and returning Miami community members on our campuses as the semester gets underway.

Whether you are a new or returning Miami community member, we invite you to use NameCoach to record and share your name pronunciation, refer to our Religious
Observances and Inclusive Scheduling Calendar to plan events, and include the Land
Acknowledgement video in your events. We also invite you to participate in our awardwinning DEI in Leadership online certificate, to learn new or strengthen existing inclusive practices and earn a certificate as we continue to move forward in building a more inclusive Miami for all.

As we enter Latinx/Hispanic Heritage Month, we hope you'll take a moment to read about and participate in the many events planned at Miami, including a week of events and performances by Latin Grammy® Award Winning Flautist Artist-in-Residence Nestor Torres, and the UniDiversity Festival Uptown on September 22.

Looking ahead to October, we are especially excited about collaborating with Kent State University and Ohio University for our joint conference: Reimagining the Academy: Building Communities for Access and Transformational Change, on October 18-19 at Kent State. It is free to all Miami faculty, staff, and students.

In this newsletter, you can read about the exciting teaching and research topics Dr. Elena Albarrán engages in through the Departments of Global and Intercultural Studies and History; learn about Senior Director of Marketing and Communications Christian Ponce and his team's efforts and plans in multicultural marketing; catch up with Chatrice Barnes ('17) and her many accomplishments and plans, and hear from Student Body President Nyah Smith and Vice President Jules Jefferson.

As always, we welcome your feedback and suggestions and invite you to reach out to OIDI staff.

Love and Honor,
M. Cristina Alcalde, Ph.D. (she/her/hers)
Vice President for Institutional Diversity and Inclusion
Professor, Global and Intercultural Studies
vpDiversity@MiamiOH.edu

Heritage Month Updates

Working in close collaboration with faculty, staff, and student partners, the Office of Institutional Diversity and Inclusion provides opportunities for the Miami community to continue our learning and engage in meaningful programming that recognizes, examines, and values historical legacies of a diverse array of identities. Heritage Month programming supports Miami's inclusive excellence and DEI mission and connects to, among other areas, DEI Task Force Recommendation, Pillar 2: Cultural Consciousness, which encourages the Miami University community to enhance our awareness, knowledge, and skills to enrich and renew our intercultural competence.

The Office of Institutional Diversity and Inclusion will organize programming, and collaborate, coordinate, and support events across campuses through a coordinated calendar for each month; promotion of events; and, when available, limited funding support for proposed events with appeal

MU Libraries is partnering with OIDI to feature online resources, including films, books and articles, and class offerings, during each Heritage Month. We invite you to explore these and other educational resources and links on each webpage. We will be adding resources as they become available.

To learn more about this quarter's heritage months please visit our Heritage Month webpage:

- September: Hispanic/Latinx Heritage Month
- o October: LGBTQIA+ History Month; Disability Identity and Culture Month

<u>For upcoming events, visit our University Events calendar page.</u>

<u>History Month Events Submissions:</u>

across campuses.

Now accepting <u>Submissions</u> for History Month events and programming for Spring semester. Working in close collaboration with faculty, staff, and student partners, the Office of Institutional Diversity and Inclusion provides opportunities for the Miami community to continue our learning and engage in meaningful programming that recognizes, examines, and values historical legacies of a diverse array of identities. Heritage Month programming supports Miami's inclusive excellence and DEI mission and connects to, among other areas, <u>DEI Task Force Pillar 2: Cultural Consciousness</u>, which encourages the Miami University community to enhance our awareness, knowledge, and skills to enrich and renew our intercultural competence. <u>Submit</u> your proposal considering <u>priority deadlines</u> for each proposed history and heritage month celebrations.

Affinity Groups

Asian/Asian American Faculty Staff Association President: April Robles, Director of Operations and Communications

The mission of the Asian/Asian American Faculty Staff Association is to bring together Asian and Asian American faculty and staff, and serve as a supportive community for Asian and Asian American employees and students. The Asian/Asian American Faculty Staff Association is currently building traction with the community and is seeking to provide opportunities for individuals to connect in a more casual atmosphere and then use that leverage to continue the growth and momentum of the group. If you are looking to make an impact and be a leader, this is the group for faculty and staff to join! If it is a personal passion and something they want to do to become more connected to the campus community, you are encouraged to reach out to April Robles to connect.

Association of Black Faculty and Staff President: Seth Seward, Assistant Director, Alumni Relations

The Association of Black Faculty and Staff stands for diversity, equality, solidarity, and change for campus at large, students, and the Oxford community. As an organization, they will engage and participate in any efforts that are meant to educate and provide clarity of ideas of ending racism and discrimination. The Association of Black Faculty and Staff serves as a safe place for African American or black individuals to come together and meet. This is accomplished through general body meetings and social events. If something arises on campus that impacts the community, they gather together to discuss and hash out solutions in a safe space. The group also works to serve as a support system and network for students, staff, and faculty. While there are no current community events planned, anyone interested in becoming a member is encouraged to complete the membership formstack to connect.

Association of Latinx Faculty and Staff

President: José Amador, Associate Professor, Global and Intercultural Studies (Latin American, Latino/a, and Caribbean Studies)

The primary goal of the Association of Latinx Faculty and Staff primary is to support and raise awareness about the Latinx faculty and staff. They aim to build networks between departments and units, faculty and students, and Miami university and the community at large. The group also strives to raise the visibility of the Latin American Studies Program and the nearby Latinx community. Additionally, to keep everyone informed about everything Latinx-related, which is done through a weekly "bulletin" with news and events.

This organization has been formed by employees of Miami University (Hamilton, Middletown, and Oxford campuses) to foster Latinx, Latin American and Caribbean, and Ibero, Luso-American representation, improve work conditions, and enrich the social and cultural environment for all Miami faculty, staff, and students. Individuals interested in connecting can reach out to José Amador.

Classified Personnel Advisory Committee President: Angela Coffey Brown, Administrative Assistant, Enrollment Management and Student Success

The Classified Personnel Advisory Committee is established for the purpose of advising the President, Vice Presidents, and Human Resources on matters of interest and concern to classified staff members in the context of the whole university community. The group accomplishes this by bringing issues/concerns/proposals to administration for input and/or action, serving (individual members) on university committees, and providing feedback/input on matters brought to the committee for review. Additionally, the Classified Personnel Advisory Committee is established to provide an institutional venue or forum in which matters of interest or concern to classified staff members can be discussed, considered, and/or moved forward through appropriate channels. Anyone interested in connecting with or joining the committee can contact Angela Coffey Brown or reach out to the CPAC email.

International Faculty and Staff Association President: Jacqueline Rioja Velarde, Associate Director of the Global Initiatives' CAWC

The goal of the International Faculty and Staff Association at Miami is to support and connect international faculty and staff while helping each other thrive in their specific roles on campus. This is accomplished through connecting with colleagues from diverse cultural, ethnic, racial, linguistic, and educational backgrounds, and broadening perspectives, welcoming diversity, and experiencing inclusion at Miami. The group also seeks to listen, understand, and identify the needs of international faculty/staff, address the concerns and needs of the university, provide relevant resources as needed, and help international faculty/staff. The main goal of the group is to support one another in professional development at the university.

Interested individuals can reach out to IFSAM's president Jacqueline Rioja Velarde, communications chair Ebru Dirsel-Duffield, or to the IFSA email.

Queer and Trans Faculty and Staff Association President: Emily Cluen, Access Coordinator, Miller Center for Student Disability Services

The goal of the Queer and Trans Faculty and Staff Association is to create space for the LGBTQIA community on campus and advocate for queer and trans individuals needs. The group is currently working on establishing and maintaining a larger group to allow for more capacity moving forward. For more details or to join our listserv, email QTFSA@MiamiOH.edu. The group is looking to host more events moving forward to connect with more folks on campus and provide more networking opportunities. Interested individuals can email the group's email address to connect.

Unclassified Personnel Advisory Committee President: Sarah Persinger, Associate Director FBS Technology Operations & Support

The Unclassified Personnel Advisory Committee was created in 1983 to advise the University Administration (specifically the president and vice presidents) on matters of interest and concern to unclassified personnel. Committee members are selected to reflect a balance of gender, race/ethnicity, campus, division, level in the organization, responsibilities, years of university service, and any other characteristics that help to achieve a balance of knowledge, experience, viewpoints, interests and talents. The group's most recent endeavor was focussing on wellness and bringing back access and funding to wellness areas on campus. Individuals interested in joining are encouraged to attend the monthly virtual meetings, which take place on the second Tuesday of each month. Interested individuals can also connect with Sarah Persinger for more information.

For More Information

To learn more about these affinity groups or to join a group, check out the main affinity groups web page for more information on upcoming events, future meetings, and ways to connect.

Diversity, Equity, and Inclusion Campus Spotlight

Miami Spotlight:

Chatrice Barnes

Virginia Tech Director for Faculty Diversity and Community

Engagement

Miami University, Class of 2017

The Faculty Women of Color in the Academy (FWCA) conference is a national conference hosted annually by the Virginia Tech (VT) Office for Inclusion and Diversity. According to their <u>conference website</u>, FWCA is designed to be a "unique educational and professional

FWCA is designed to be a "unique educational and professional opportunity for Indigenous and Women of Color in higher education to network, engage, and learn with colleagues from around the country." In a recent interview with FWCA National Conference Director, Miami alumna Chatrice Barnes discussed her role with the organization and production of FWCA as the Director for Faculty Diversity and Community Engagement for the

Office of Inclusion and Diversity at Virginia Tech.

Chatrice Barnes is a proud 2017 alumna of the Master of Science in Student Affairs in Higher Education program. During her time at Miami, Barnes focused her study on student development

theory from an intersectional lens and fell in love with the space of higher education and student

involvement. After graduation, Barnes found herself at Virginia Tech, where she initially served as the Assistant Director for Student Organizations and Leadership Development in Student Engagement and Campus Life. While Barnes greatly enjoyed this role, she felt the impact of being a Black administrator at a predominately white institution (PWI) as she was the only professional woman of color employed in the almost 50-person department. Her own experiences, coupled with the experiences of her students in a small college town in Appalachia, and the experiences of other colleagues in similarly isolating positions, pushed Barnes to make a concerted effort to connect more with other diverse individuals on campus and around the community.

Barnes elaborated by noting that when she first arrived at Virginia Tech, she began to get plugged into the university and was able to build community through the connections she established through the welcoming efforts of her colleagues. As Barnes began to connect with other new professionals and colleagues, it became clear that the people she connected with were a key part of making her experience at VT meaningful. The ability to build and maintain meaningful connections and relationships has been the cornerstone of Barnes' career from the beginning. She explained how this has become a driving force for her path forward: "I alwayswant to be in a position where I can pay it forward. I want to be able to connect with people in meaningful ways, just as I have had people connect with and mentor me, and I want to be able to pay it forward and connect with the next generation of people that are coming up in higher education." As Barnes transitioned into her current office during the COVID-19 pandemic, she was tasked with implementing new community-building initiatives for other underrepresented faculty and staff. Barnes explained, "This was a stretch and required me to adapt, becoming more flexible and creative as I, like many others, navigated what it meant to build community during the height of the pandemic in 2020. This became an opportunity for me to expand my own network. Overall, the community-building that took place during the pandemic was something that took a lot of grit and resilience to accomplish. But in the words of Beyoncé, 'sometimes we have to turn lemons into lemonade'. We were able to learn a lot about what we can do virtually and as chaotic as

that time was, it really opened our eyes to new opportunities for engagement."

One experience that was positive during the pandemic was the FWCA conference. A large part of Barnes' role as the Director for Faculty Diversity and Community Engagement consists of overseeing the development and execution of the FWCA national conference. Barnes had attended and volunteered for the conference during her time as a student affairs professional. In her Associate Director role with the Office for Inclusion and Diversity she joined the FWCA core leadership team. This was during the time of the pandemic when everything was forced to shift online and the team was uncertain of what that would mean in terms of engagement and community-building, which is a hallmark of FWCA. Barnes explained that the goals of FWCA are "to create a space where womxn of color in higher education spaces can come and gather to uplift one another; learn, grow, and network with other people who have had similar experiences. The primary audience of the conference is womxn of color, many of whom are the only people in their departments or divisions who look like them; they often serve as the backbone of their families, and tend to contribute a lot of unseen and unpaid labor in the academy and within their communities. We are talking about a group of people who are typically pushed to the margins of society. So during the pandemic, we really wanted to start using the FWCA national conference as a platform to prioritize care and ensure that these womxn at the conference knew that while they were with us, they would be cared for."

When FWCA began, it was founded in Illinois by Dr. Menah Pratt as a way to build a supportive network of academic women of color as they as they sought after professional development and advancement. When Barnes first attended FWCA, the conference had a reach primarily into the South and Mid-Atlantic regions, but she recalls the opportunity the pandemic presented: "Duringthe pandemic our team was able to increase our outreach efforts in order to expand it to become a truly national conference. And because we had to be fully virtual this meant that more womxn could join us from anywhere in the country without the logistical hassles and barriers that travel can cause. We saw record numbers of first-time attendees during this time." As a national conference, the Faculty Women of Color in the Academy National Conference still strives to prioritize inclusivity and community. Barnes made an important note that "All womxn are welcome to attend the FWCA national conference! The more the merrier! We are always looking to expand and are excited to continue introducing new womxn into the conference."

Much of Barnes' work in her current role deals with developing the conference details, be it reimagining conference components and structures, outreach to new and ongoing sponsors, connecting folks to resources and each other, and continuing to explore how to best service the audience: "I take a close look at who is attending, how we are engaging with them, and in what ways they in turn engage with us. This leads to new innovations around how we connect, like through our social media for example. Our social media features what we call 'academic sister shout outs' where we recognize the accomplishments and celebrate the successes that womxn are having throughout the year. So often, research has shown that minoritized faculty and staff do not feel recognized in their jobs. While we can't solve everything today, we can make positive contributions as we strive to address real issues for marginalized people in higher education."

The FWCA national conference has continued to grow so much that it has outgrown the space of its host institution of Virginia Tech, and is now being hosted in Washington, D.C. As the conference continues to grow, Barnes admits that her favorite part still remains the community that is found in the space. "The best part for me is having womxn stop me during the conference and say how included, prioritized, and supported they feel. As we grow and continue to become

larger, that's the real challenge: to maintain the same intimacy and the same ability to create community and connections. Each year, we are always striving to do better, learn more, and create a more inclusive and supportive environment for our audience. This is a great challenge to have!"

One key aspect of maintaining the growth of the FWCA national conference has been through sustainable partnerships and sponsors. Since last year, conference organizers refocused their sponsorship opportunities to address the increased size and scope of FWCA as well as to increase opportunities for access to more women of color. Miami University is one of the sponsors for FWCA, along with Barnes' undergraduate alma mater, The University of Tennessee at Chattanooga. "Having both of my alma maters support this conference has been such an incredible feeling. I felt very supported during my time as a student at UTC and Miami, and the fact that these institutions are intentionally supporting women and people of color, and continue to be committed to DEI in these and other ways, especially with everything going on in society, is surreal and inspiring."

As the FWCA Planning Committee continues to plan for the 2024 conference, there are a variety of opportunities for people to engage. It is not too late for you, your office, or division to become a conference sponsor. You can submit a proposal to present, nominate a woman of color for an achievement award, or simply attend the 2024 FWCA National conference next April. Chatrice invites any interested parties to attend the conference and visit their website or follow their social media for more information. To become a part of the academic sisterhood and connect with engagement opportunities, email FWCA@vt.edu for more information.

Interview conducted by: Abbie Proeschel (she/her), Communications and Events Coordinator, Office of Institutional Diversity and Inclusion

Faculty Spotlight:
Elena Jackson Albarrán, Ph.D.
Associate Professor
Department of Global and Intercultural Studies: Latin
American, Latino/a and Caribbean Studies Program
Department of History

Since the beginning of the semester coincides with Hispanic/Latinx Heritage Month, we are featuring a faculty member whose work contributes to the understanding of Latin American and Latinx identities. The start of a new semester serves as a time of reflection and anticipation for faculty and students as they begin a new slate of classes. This is a time of experience of the start of the start



students as they begin a new slate of classes. This is a time of exploration and discovery as new subjects are introduced and familiar topics are revisited with refreshed perspectives. Within this space of excited anticipation, Associate Professor Dr. Elena Jackson Albarrán flourishes as another semester of teaching and scholarship begins.

Elena Jackson Albarrán is an Associate Professor with a dual appointment in the Department of Global and Intercultural Studies (GIC) and the Department of History. She is a core faculty member in the Latin American, Latino/a, and Caribbean Studies Program housed in GIC, as part of a faculty team that endearingly calls itself the Junta Democrática de LAS. Dr. Albarrán has been teaching at Miami since 2008, and she currently teaches courses in modern Latin American history, comparative histories of childhood (Latin American, world, and Cold War), Latin American revolutions, popular culture (hybridity and commodification), history of Mexico, and visual culture. Dr. Albarrán is a member of the Association of Latinx Faculty and Staff (ALFAS) as an ally and appreciates the interdisciplinary collaborations that the group fosters across campus.

Dr. Albarrán's scholarship centers on the cultural history of twentieth-century Mexico and the history of childhood. Currently, Dr. Albarrán is in the final stages of copyediting her latest book and is eagerly anticipating its publication. "The book is called Good Neighbor Empires: Children and Cultural Capital in the Americas. I've been working on this a long time and am very excited for it to be in the end stages of publication. In this book, I explore hemispheric power dynamics and children as historical agents and symbols, particularly as they were represented in the good neighbor politics at the time and in the ways that they became metaphors for development narratives." Dr. Albarrán's scholarship serves as an expansion of her work in the classroom, taking a deeper dive into topics that she explores with her students and brings to life in her classes.

As a dual-appointed professor in the Department of History and the Department of Global and Intercultural Studies, Dr. Albarrán strives to ensure her work and her teaching is interdisciplinary in an effort to highlight the significance of the intersections of her departments. Dr. Albarrán noted, "I feel like the subject matters I am given to teach are really fundamental in allowing and promoting not just an appreciation but a sensitivity to the different realities that depart from the mainstream official history of the U.S. To be able to offer different perspectives within the Miami curriculum is an opportunity that I relish and I am appreciative of the chance to dive deeper into these topics with students." She went on to explain that "Global and Intercultural Studies as a department serves as a paragon of representation of all different forms of embodied diversity among the faculty which has come together as an incredibly collaborative group of folks. Almost everybody in the department is a faculty of color,

important role to model to students." For Dr. Albarrán and her students, these courses are a chance for academic and personal exploration and discovery.

This semester, Dr. Albarrán is teaching her class Revolutions and Social Movements, which examines Latin American history in the long Cold War, along with its connections to U.S. history. Within this class, Dr. Albarrán and her students explore and examine how "the United States is inextricably tied to Latin American history, for better or worse, and as a result, the U.S. cannot be fully understood as a political or social entity without examining the historical context of these relationships." Through these conversations about Latin American history and thorough examination of the ties between Latin America and the U.S., many of Dr. Albarrán's students have been able to make connections with their own identities and personal histories. "I had a student whose grandparents were Nahuatl speakers, which was the language spoken in parts of Mexico when the Spanish arrived there and not many still speak the language. Her grandparents were monolingual, and her parents were bilingual in Spanish and Nahuatl. My student was then bilingual in Spanish and English. Within just three generations, there is this incredible transcultural family history that tells a lot about the history of Mexico and the history of migration. To be able to teach a class on things like the history of Mexico and to see just how much students connect and resonate with those topics is amazing because I have the chance to connect these students with history in ways that dive deeper into their own histories and identities."

Dr. Albarrán went further noting the significance of being able to have this opportunity and space of exploration with her students. "It means a lot to me to be able to play a role in helping these students connect with their personal histories and then tie those stories to a larger global context. It gives me a greater sense of purpose in a way, and I think it overall is a really productive learning environment for students to participate in." The chance to connect students with their past to better inform their present and future is an invaluable experience that Dr. Albarrán is able to facilitate with her students. The discoveries and self-exploration that occurs in Dr. Albarrán's courses, like many other history courses within her department, provide conversations for students to better identify with their past to inform their futures. By showcasing and connecting students with their histories, she paves the way for students to better understand the context of their own identities as individuals and as global citizens as they begin to construct their own pathways into future careers and post-graduate journeys.

These histories and conversations within programs like the Department of Global and Intercultural Studies and the Department of History are what these programs are founded on, providing critical depth for Miami students as they navigate and explore their academic and personal educational and identity journeys. We encourage students to connect with either department if they are interested in further exploring the topics and courses Dr. Albarrán and other faculty members offer.

To learn more about Dr. Albarrán's research and classes, the Latin American Studies Program, and the departments, please visit the <u>Department of Global and Intercultural Studies website</u> or the <u>Department of History's website</u>.

the <u>Department of History's website</u>.

Links to LAS capstone projects carried out by Dr. Albarrán's students:

<u>Latin America(n)</u> at Miami U: Stories of Transmigration and Belonging in the Midwest (follow regional links at the top to read the personal stories of Miami faculty, staff and students of Latin American heritage)

Child and Nation in Latin America

Interview Conducted by: Abbie Proeschel (she/her), Communications and Events Coordinator, Office of Institutional Diversity and Inclusion

Staff Spotlight: Christian Ponce, CDMP Senior Director of Marketing and Communications University Communications and Marketing

As social landscapes are constantly changing and evolving, the significance of multicultural marketing continues to remain relevant within higher education. Multicultural marketing is the practice of marketing to one or more audiences of different ethnicities, identities, and cultures within a brand's overarching audience. As the need for comprehensive representation becomes increasingly important with changing national



demographics, it is important to ensure that marketing and communications materials demonstrate environments and spaces that reflect the general population.n higher education, as in other spaces, students will gravitate to where they feel represented and valued. It is within the navigation of this complex challenge that Christian Ponce's role as Senior Director of Marketing and Communications is situated.

Christian Ponce has been working in marketing for over twenty-three years. At the start of his career, Ponce worked in advertising for ten years before transitioning into higher education. As Senior Director of Marketing and Communications, Ponce drives marketing strategy and brand value at Miami University. This includes the oversight of three teams: Creative Services, Digital

Marketing, and Web Marketing. The Creative Services team, which is one of the largest teams within University Communications and Marketing, is responsible for the creative output of Miami in terms of graphic design, multimedia design, digital and print advertisements, interior designs, and environmental graphics. The Digital Marketing team is responsible for paid digital advertising and social media channels. The Web Marketing team is responsible for the website and digital platforms for the university. The directors from these three teams work with Ponce to create a cohesive multicultural marketing approach for Miami University at large.

Ponce's background and experiences have afforded him a unique relationship and perspective on the significance of multicultural marketing. Ponce explained, "I'm very proud of who I am as a person. I was born and raised in Honduras, Central America, but I've been in the United States for the past 28 years. Growing up as a Latin American man, I bring a different perspective and worldview, and I have a different frame of reference than someone who grew up in this country, or even another country, as I come from global sales." Ponce has dedicated his entire career to multicultural marketing, specifically examining representation within marketing spaces and audiences. Ponce explained that within current social contexts, multicultural marketing efforts are and continue to be an integral part of any marketing strategy: "In 2000, multicultural marketing was mostly referred to as Hispanic marketing, but even before then, it was a bit of a buzzword. It has always held a large significance for me, both on a personal and professional level. Diversity, equity, and inclusion (DEI) are close to my heart because I am a man of color and I am an immigrant, so for me it is important, but I think it is also important for the brands and for professionals to adhere to these standards as well."

Ponce went on to explain that as the demographic makeup within the United States continues to evolve and expand, multicultural marketing continues to become mainstream within marketing strategies. Ponce described the shifting dynamics of social demographics by noting, "The face of the U.S. is changing before our eyes. The demographics are changing, making inclusion in marketing not only the right thing to do, but I think the smart thing to do as well. I think reaching out to and connecting with multicultural population segments, whether it be race, ethnicity, sexual identity, or gender, better representation is the smart thing to do because that is the direction that the country is moving in as well, from a multicultural standpoint." Ponce elaborated on this, stating that "by the year, 2060 one-fourth of Americans will be Latino. This has marketers continuing to explore best practices and changing strategies in order to better engage."

For Ponce and his team, these practices continue to include intentional partnerships and collaborations in order to implement effective strategies around DEI, integrating them into daily work and ongoing campaigns. This includes conducting campaigns around addressing cultural and language barriers and working to create content to address these gaps. Ponce also works with his team through continued education, noting the importance of furthering and continued research and understanding of multicultural marketing strategies and practices as social and cultural dynamics continue to grow and evolve over time. In addition to these departmental efforts, Ponce takes this strategy a step further, serving as the UCM Officer in the Divisional Leadership Council with the Office of Institutional Diversity and Inclusion. He also has previously established a multicultural marketing consulting group with UCM, partnering with various stakeholders across campus to work to address and identify areas in which UCM can work to better serve underrepresented populations.

In 2023, Ponce's team received an award of distinction for their multicultural marketing campaign in the <u>Communicator Awards</u>. Additionally, Ponce and his team won a Silver Award in the <u>Circle of Excellence Awards by CASE</u> for their brand campaign. These awards of high distinction demonstrate the depth and reach of the work Ponce and his team put into multicultural marketing and the intentionality behind making Miami's brand what it is today. As Ponce and his team continue to implement these practices, Ponce is excited to explore what the future of multicultural marketing looks like at Miami. When asked about the direction he sees Miami and UCM taking, Ponce explained that, "I want to say without a shadow of a doubt that Miami has the best multicultural marketing programming in the country. That's what I see in the next few years, which I know is a tall order, but we must aim high. I want UCM to continue to be an award-winning marketing and communications department and to become a case study of how to do marketing well in regard to attracting, representing, and retaining underserved communities. That's what I would like to see in the future."

To follow along with Ponce and his team as they strive for excellence and continue to build Miami's multicultural marketing areas, follow Miami University on <u>Instagram</u>, <u>Twitter</u>, or <u>LinkedIn</u>. For more information on how multicultural marketing is utilized and integrated at Miami, visit <u>UCM's website</u>.

Interview Conducted by: Abbie Proeschel (she/her), Communications and Events Coordinator, Office of Institutional Diversity and Inclusion

Student Spotlight: Nyah Smith Student Body President, Class of 2024

Jules Jefferson Student Body Vice President, Class of 2024

In the spring of 2023, Nyah Smith and Jules
Jefferson were elected as Student Body President
and Vice President for the class of 2024. This
election was a historic moment for the Miami
University community, as Smith and Jefferson are



the first all-Black ticket elected Student Body President and Vice-President. In a recent interview with our staff, Smith and Jefferson discussed their experiences through the election process and their goals for the academic year.

Nyah Smith, Student Body President, Class of 2024, is currently majoring in Social Work and Public Health. Smith's passion for working with women and children began early in her life, at the age of 14, when her family became a foster family. This moment introduced Smith to the field of social work, which she has held a strong passion for since. Upon her arrival in Miami, Smith decided to pursue the addition of a Public Health major, with aspirations to work in the field of health equity and birth equity post-graduation. When asked about her post-graduation plans, Smith explained, "I'm very passionate about women and children. I have completed two internships in the past two summers that have allowed me to work with survivors of sex and human trafficking, which is a topic I was and am passionate about. More specifically, I am looking at health and birth equity in relation to the disproportionate rates of maternal mortality that Black women experience." Smith plans to continue to pursue these passions and interests upon graduation with hopes of working in a birth equity clinic or similar environment.

Jules Jefferson, Student Body Vice President, Class of 2024, is currently majoring in Biochemistry and Nutrition with co-majors in Environmental Science and Premedical Studies. When Jefferson first arrived at Miami, she was pursuing a biochemistry degree. Through research and different experiences, her interests have led her to her desire to become a physician-scientist. Post-graduation, she will begin pursuing an M.D. and Ph.D. in order to examine "how environmental pollutants affect your respiratory health and examine the health disparities that are connected to that. My research at Miami has really shaped that opportunity for exploration, which is what led to environmental science and pre-medical studies as comajors." Her nutrition major is of personal interest to her, allowing her to share the gained knowledge with her family and take them on a health journey as a collective. Jefferson plans to continue to pursue her research upon graduation, as the topic is something that she holds to be a long-term goal.

When Smith and Jefferson began their election, they established their campaign with the intention to continue the leadership and community work they were already involved in through the outlet of the Associated Student Government (ASG), which would allow them broader student and campus reach for planned initiatives. Smith and Jefferson ran under the slogan "Building the Table," based on the quote from Tamlyn Tomita "When you have more than you need, build a longer table, not a higher fence." This was a quote Smith had come across in her work and the two felt it a fitting sentiment that encapsulated their platform goals, the primary of which being, "to ensure students feel prepared and equipped to have a seat at the table." Smith and Jefferson's platform consists of three pillars, each with two supporting initiatives to outline the goals they would like to achieve during their tenure in office. These three pillars are: Student Empowerment, Unity, and Sustainability/Infrastructure. These pillars can be broken down into the following initiatives:

• Student Empowerment:

- Mental Health Screenings:
- This initiative has been modeled with student-athletes and Smith and Jefferson are working to bring the effort to the student body at large. This would consist of renting space in the Armstrong Student Center and working with the Student Counseling Service to arrange a free walk-in session. These sessions would serve as a preventative measure where students could identify key struggles and work to connect with the appropriate resources for their needs.
- Career Clothing Closet:
- The clothing closet is an initiative that Miami University alumni have been wanting to establish for years, but it has not yet come to fruition. Smith and Jefferson are working with alumni to provide free career clothing and resources for students on campus, and they are currently figuring out a location to house the closet. This resource is being modeled after the Center for Student Diversity and Inclusion's open-door closet, along with the Hamilton campus career clothing closet. The goal of this initiative is to provide students with the resources they need to succeed and be dressed for success in interviews as they prepare for internships and life after graduation.

- Unity:
 - Open-Forums:
 - During their tenure in ASG, Smith and Jefferson will be working to establish open forums to provide better transparency for students, faculty, staff, and administrators about the current projects, progress, and undertakings of ASG as a whole. These forums are planned to be hosted at the beginning of the semester and will allow individuals to meet the ASG cabinet and have a better understanding of the advocacy work taking place through ASG.
 - Campus-Wide Day of Service:
 - This initiative will be in collaboration with the Oxford community and across campus to establish the tradition of a day of service across campus. With service being a unifying act that can bring individuals together as a community, Smith and Jefferson hope to establish the day of service as a unifying act on campus that will bring individuals together both in service and in the community.
- Sustainability/Infrastructure:
 - Sustainability within Student Organizations:
 - Ouring their tenure in ASG, Smith and Jefferson will be working to source green funding for student organizations which will be provided under the agreement that any organization can apply for the funding so long as they are utilizing it to expand their current sustainability measures. This measure is designed to encourage sustainable measures in student organizations and will work with student organizations to incorporate sustainability into their mission statements.
 - Parking Ticket Initiative:
 - This initiative is designed to address the financial barrier many students face when they receive a parking ticket. By the start of the spring semester, students are given the option to pay the \$75 fine outright or to complete four hours of community service. This can create a large financial barrier for students, which is why Smith and Jefferson are working to create more service opportunities on and off campus to aid in providing avenues of alternative payment for students. This measure also ties back to the desire to build community on campus and these service opportunities would provide community-building opportunities for students.

Both Smith and Jefferson emphasized the importance of creating sustainable practices and partnerships, along with providing the campus community with transparency throughout their time in office as they navigate these initiatives.

Throughout their campaign and during their tenure in office, Smith and Jefferson have and continue to strive to be their authentic selves within their positions. When asked what it felt like to be the first all-Black ticket elected Student Body President and Vice-President, Jefferson noted the roller coaster of emotions that came with the knowledge, stating, "It's such a blessing to be the first, but at the same time it is very scary because you're treading into waters that are unknown, and in doing so you are setting the template for that can be done next." One example of this was through Smith and Jefferson's choice to maintain their natural hair during their campaign. Both noted that there had been people inquiring about whether or not they would or should straighten their hair, but both chose to maintain their natural hair the entire election to demonstrate their authentic selves and set the expectation that other Black women can do the same.

Smith noted that the support from the Black community at Miami was incredibly special and that throughout their campaign, the knowledge of being the first all-Black student body elect ticket was not made known to them until closer to the end. Smith stated, "When we first ran, we didn't know until almost the time of voting that we were the first. We really set out to intentionally be our authentic selves from the start because we wanted to run an authentic campaign. We are clear that Miami is a predominantly white institution (PWI) and so we wanted to make sure that in every space we were in, we were being true to ourselves and what we stand for. I'm just really so proud of what we were able to accomplish with our campaign." As their time in office continues, Smith and Jefferson encourage individuals to connect with their ASG representatives, explaining that there are a variety of places and instances where having a larger picture of student experiences can be incredibly helpful to ASG as a whole. Smith and Jefferson both maintained the significance of the advocacy measures that are being taken by ASG cabinet and encouraged students to remain true to themselves as they grow and challenge themselves during their time at Miami. To learn more about ASG and Nyah and Jules' time in office, follow their Instagram platforms for additional information.

Interview Conducted by: Abbie Proeschel (she/her), Communications and Events Coordinator, Office of Institutional Diversity and Inclusion

Submission for DEI Spotlight

Do you know a student, faculty member, or staff member who is doing standout diversity, equity, and inclusion (DEI) work? We are looking to highlight individuals on campus who are doing (DEI) work and making an impact on campus or in the community at large. Our goal is to highlight DEI works around campus and showcase the incredible work our community is undertaking. Submit your suggestions for our next edition's spotlight!

101/263

Research Insights

We welcome your submissions and invite individuals to share publications that from the past year to be highlighted in this section. To submit a recent publication, <u>please visit our website and complete our submission form</u>.

Campus Announcements and Upcoming Events

Diversity, Equity, and Inclusion in Leadership Certificate

We encourage Divisions, Colleges, departments, and teams to join our online Diversity, Equity, and Inclusion course on how to be an active ally, inclusive leader, and effective mediator. Extend your individual experiences and collective knowledge with research-based tools and strategies to thrive as an advocate for a more diverse, equitable, and inclusive world.

The DEI in Leadership Certificate utilizes five foundational modules: (1) Bias, Stereotypes, and Microaggressions, (2) Race and Anti-Racism, (3) LGBTQ+ Identities, (4) Ableism and Inclusion, and 5) Allyship and Advocacy. This online certificate is free for Miami employees and graduate students.

Current registrants have until December 15th to complete their certificate modules. For more information, please visit <u>DEI in Leadership Certificate</u>.

Redhawk Equity Leadership Series (RELS)

Join our online cultural competency certificate for undergraduate and graduate students. We invite all students to sign up to be a part of the first cohort of students to complete the training starting September 2023. The Redhawk Equity Leadership Series (RELS) encompasses multiple thematic electives and a set of core competencies workshops including Inclusive Leadership, Allyship, Intersectionality and Professional Preparation: From Introspection to Inclusive Action. Enroll today by signing up through the <u>Registration Form</u>.

Artist-in-Residence: Nestor Torres

Miami University presents Nestor Torres, Latin Grammy® Award Winning Flautist, as this year's Latinx Artist-in-Residence. Torres has shaped the music industry for over four decades as a classically trained flutist. His work encompasses a wide breadth of music, 19 albums including various peacebuilding efforts internationally.

Join us for a week-long series of events sponsored by Office of Institutional Diversity and Inclusion, Department of English, Department of Global and

NESTOR TORRES:
ARTIST-IN-RESIDENCE

A WEEK-LONG SERIES OF EVENTS

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Intercultural Studies, Grayson Kirk Endowment Fund, Latin American, Latino/a, and Caribbean Studies, Center for Career Exploration and Success, Center for Diversity, Equity, and Inclusion, Center for American and World Cultures, Department of Music, Performing Arts Series, Association of Latinx Faculty and Staff, Sigma Lambda Gamma National Sorority Inc., Latiné Student Alliance.

For a full schedule of events, visit the Office of Institutional Diversity and Inclusion.

NameCoach Access

NameCoach, a tool that helps provide pronunciation information for student, faculty, and staff names, is now available for Miami users in Canvas and online!

As colleagues, educators, friends, and learners, interpersonal communication is key for everyone at Miami. Respect and inclusion are key to ensuring an inclusive and welcoming environment, and that includes correctly pronouncing our fellow Miamians' names. Having the tools to correctly pronounce each of our names helps promote an inclusive environment for folks of all socio-cultural identities, and NameCoach is going to help us do that.

With NameCoach, anyone at Miami can record a pronunciation for their name and share it with the community. We have integrated it directly with Canvas so that instructors can see the pronunciations of their students' names

pronunciations of their students' names.

There are two ways to record your name with NameCoach:

- Record your name in Canvas
- Record your name directly in NameCoach for your email signature, social media accounts, or professional biography

Please note: To have a pronunciation show up in Canvas, you have to record in Canvas. The direct NameCoach recording will not cross-pollinate. 102/263

Capacity Building

Reimagining the Academy: Building Communities for Access and Transformational Change

Miami University, Kent State University, and Ohio University have joined forces to form a collaborative conference: Reimagining the Academy: Building Communities for Access and Transformational Change. Previously, each university held an annual conference on topics related to diversity, equity and inclusion. This new alliance will allow the universities to come together for one conference that will share expertise and leverage their strengths.

Reimagining the Academy will take place October 18-19, 2023 in the Kent Student Center. Virtual engagement opportunities will also be available.

Registration will be free to faculty, staff and students at each of the collaborating institutions. Keynote speaker and Miami alum, Carol Anderson, Ph.D., will speak on October 19th. Dr. Anderson is a professor of African American Studies at Emory University and is the author of several bestselling books including The Second: Race and Guns in a Fatally Unequal America (2020), One Person, No Vote: How Voter Suppression Is Destroying Our Democracy (2018) and the critically-acclaimed #1 bestseller White Rage (2016).

Those interested in joining the conference listserv to receive up-to-date information regarding announcements, registration, important dates and more should visit www.kent.edu/reimagining. Additional questions can be sent to arconference@kent.edu

We look forward to having you join us for this very enriching conference. Thank you!

Sincerely,
Cristina Alcalde, Ph.D.
Vice President for Institutional Diversity and Inclusion
Miami University

Amoaba Gooden, Ph.D. Vice President for Diversity, Equity and Inclusion Professor of Africana Studies

Kent State University
Salome Nnoromele, Ph.D.
Interim Vice President of Diversity and Inclusion
Ohio University

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Current registrants have until June 15th to complete their certificate modules. For more information, please visit <u>DEI in Leadership Certificate</u>.

Religious Observances and Inclusive Scheduling

As we enter the fall season, the Office of Institutional Diversity and Inclusion (OIDI) encourages all Miami community members to consult the full list of <u>Religious Observances and Inclusive Scheduling</u> dates on our website. Below we highlight a few key religious holidays and observances, including a description of the holiday, best practices, and customary greetings to support our active investment in fostering an inclusive campus community. Please note that these are not all of the holidays that are taking place, nor is this a fully inclusive list.

September 15-17* - Rosh Hashanah (Judaism)

- Description: Rosh Hashanah is the Jewish New Year. It is the first of the Jewish High Holy Days that occur in the late summer/early fall. Rosh Hashanah begins a ten-day period of penitence culminating in Yom Kippur. The holiday is a two day observance and celebration that includes synagogue services and festive meals.
- Best Practices: When providing food at functions, please consider Kosher food accommodations. We also recommend avoiding scheduling deadlines or activities on these dates since work is prohibited during Rosh Hashanah.
- Customary Greetings: "Happy Rosh Hashanah" or "Chag Sameach" (Khahg sa-MAY-ach) or "Shana Tova" (ShaNAH ToVAH).

September 24-25* - Yom Kippur (Judaism)

- Description: Yom Kippur is the holiest day of Judaism. Primarily centered on atonement and repentance, the day's observances consist of full fasting and ascetic behavior accompanied by intensive prayer and confessions.
- Best Practices: Please consider the practice of fasting when scheduling any events, "lunch
 meetings," or scheduling lengthy presentations. Not all will fast or take time off, but they may
 still observe in various ways. We also recommend avoiding scheduling deadlines or activities
 on these dates since work is prohibited during the holiday.
- Customary Greetings: "Tzom Kal" (TZome Kal) or "G'mar Chatima Tovah" (gih-MAR chahtee-MAH toe-VAH)

Note: "*" denotes holidays that start sundown the day before. Please note that individual practices may vary.

We also encourage the use of our <u>Religious Observances and Inclusive Scheduling</u> calendar to provide guidance and help avoid scheduling important events, activities, and deadlines on holidays observed by members of the Miami community. Should you or a member of your team have any questions or concerns on how to best utilize this information or on appropriate accommodations, please contact the <u>Office of Institutional Diversity and Inclusion</u> or the <u>Office of Equity and Equal Opportunity</u>.

Call for Submissions

If you have any campus updates or relevant information that you would like to have included in the next edition, please complete the <u>newsletter submission form</u>.

To: Miami University Board of Trustees

From: Tracy Haynes, Senate Executive Committee Co-Chair

Date: September 18, 2023

University Senate Report:

- 1. It was reported to the Board of Trustees in June that Senate would work over the summer to fill vacancies on all Senate Committees. I am pleased to report that all vacancies have been filled on all senate committees and councils. The senate committees and councils are working with the exception of the Faculty Welfare and Benefits Committee as they are paused during the contract negotiations and the Council on Diversity and Inclusion which Senate has placed "on hold" as its charges are reviewed and refined to be distinct but complementary to that of the Office of Institutional Diversity and Inclusion.
- 2. The Ohio Faculty Council (OFC) which consist of Senate leaders from the 14, four-year Ohio universities and colleges, had its first meeting of the academic year on August 18. At this meeting, Dr. Linda Rouillard from the University of Toledo began her tenure as chair of OFC, replacing Laura Luehrmann from Wright State University. OFC discussed the status of SB 117 and HB 151. SB 117, which was initially written to create the Solomon P, Chase Center for Civics, Culture, and Society at The Ohio State University and the Institute of American Constitutional Thought and Leadership at the University of Toledo but now includes creating similar centers at Miami University, University of Cincinnati, and Cleveland State University. SB117 has passed the Senate and is now in House Committee. HB 117, Revised Code to Enact Ohio Education Enhancement Act, is currently in House Committee. Plans were also discussed for the joint meeting of the OFC and Ohio Faculty Senate (which form the Faculty Congress when meeting jointly) in Columbus on September 22. The theme for this meeting is "Building Connections: Mental Health, Collaboration, and Well-Being in Ohio Higher Education".
- 3. Senate began the academic year with the Annual Fall Senate Retreat on August 23 held at the Hamilton Campus in the Wilks Conference Center. As reported in June, the retreat is an optional meeting of the Senate and provides an opportunity for informal conversations about current topics pertinent to Miami. Prior to the beginning of the retreat, new Senators were educated on common senate practices, communication methods, and Robert's rules regarding parliamentary procedure. During the retreat, all senators discussed best practices for communicating with constituents and participating during a Senate meeting and the purpose and procedures during executive sessions of Senate. For the remainder of the retreat senators divided into small groups and attended two of following sessions: (1) *How to protect Academic Freedom by updating the Academic Freedom Policy?* led by Senator Rodney Coates; (2) *What are good teaching practices surrounding AI?* led by Heidi Mckee, Professor, Professional Writing, English Department; (3) *How is the University meeting the requirements of HB 117?* led by Liz Mullenix, Provost and Executive Vice President for Academic Affairs; (4) *How can the Council of Undergraduate Curriculum and Senate work more efficiently during the*

Curriculum Approval Process? led by myself as former liaison for the CUC; (5) How can we use/change/grow the existing framework and purposes of senate working sessions this year? led by Senator Tom Poetter; (6) How can the Senate Council of Diversity and Inclusion best work with the Office of Institutional Diversity and Inclusion? led by Tekeia Howard, Director, DEI Programming. Notes were taken during each session and reported to the whole group. The discussions were very productive and Senate Executive Committee plans to continue discussion of these topics as the year progresses and create/update policies and/or change Senate practices if appropriate.

- 4. Senate had its first formal meeting of the academic year on September 11. During this meeting, Carolyn Haynes, Senior Associate Provost for Strategic Initiatives presented a policy for the Establishment of Centers and Institutes. The guidelines for establishing centers and institutes have been posted on the Office of Research website for a number of years but these are not easily located. The new policy aligns with the current practice and Higher Learning Commission accreditation expectations. This policy will be voted on by Senate at our next meeting on September 25. The following special reports were also heard: (1) BaShaun Smith, Associate Vice President and Dean of Students, provided a special report to introduce himself to Senate and explain the resources available to students and faculty through his office as well as a reminder and duty to report under Title IX (2) Brent Shock, Vice President of Enrollment Management and Student Success and Bethany Perkins, Assistant Vice President and Director of Admissions, presented the enrollment data for the Class of 2027 along with updated plans designed to increase admissions in light of the increasing competition for students each year; and (3) Tim Melley, Director of the Humanities Center and Liz Mullenix, Provost and Executive Vice President, presented an update of the newly formed Humanities Futures Committee and initiatives being developed to overcome the challenges of low enrolled majors in the departments in this discipline.
- 5. On behalf of Senate and Senate Executive Committee, I thank you for the opportunity to provide a report of our work. I look forward to personally meeting all of you a the next meeting.

Board of Trustees - Fall Semester Dashboards

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Home Page

Oxford Undergraduate

Oxford Campus Undergraduate Leading Part 1

Oxford Campus
Undergraduate
Leading Part 2

Oxford Campus Undergraduate Leading Part 3

Oxford Campus Undergraduate Lagging Part 1

Oxford Campus Undergraduate Lagging Part 2

Student Success & Career Services

Graduate & Research

Oxford Campus
Graduate Leading

Oxford Campus Graduate Lagging Part 1

Oxford Campus Graduate Lagging Part 2

Research Activity
Part 1

Research Activity
Part 2

Oxford Faculty

Oxford Campus
Faculty Resources
Part 1

Oxford Campus
Faculty Resources
Part 2

Oxford Campus Faculty Resources Part 3

Oxford Campus Faculty Resources Part 4

Oxford Campus Faculty Resources Part 5

Regional Campuses

Regional Campus Leading

Regional Campus Lagging Part 1

Regional Campus Lagging Part 2

Regional Campus Faculty Resources Part 1

Regional Campuses Faculty Resources Part 2

Regional Campuses Faculty Resources Part 3

USO Comparisons

Ohio Public University Comparisons Part 1

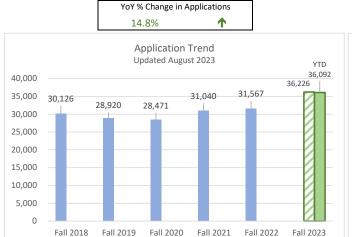
Ohio Public University Comparisons Part 2

Ohio Public University Comparisons Part 3

> Fall vs Spring Comparison Part 1

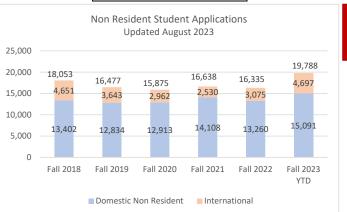
Fall vs Spring Comparison Part 2

Leading Indicators Oxford Campus Fall Class Recruitment First Time Students



YoY % Change in Non Res Apps
21.1%

Return to Home Page



The application trend is the earliest indicator of whether the University will meet its net instructional revenue (NIR) goal. Except for the Fall impacted by COVID, the University's application pool has been increasing.

YoY % Change in Admitted

Non-Resident applications are important for meeting the University's NIR goal. International applications have been trending down, while domestic non-resident applications had been increasing but declined for fall 2022.

Admitted Student Trend

Updated August 2023

24,683

26,571

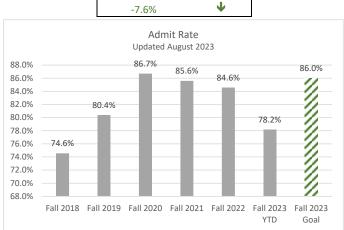
Fall 2021

28,317

Fall 2023 YTD

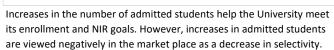
26,699

Fall 2022



YoY Change in Admitted
6.1%

23,247



Fall 2019 Fall 2020

The admit rate is another indicator of selectivity. An increase in admit rates suggest less selectivity and can have long term negative consequences for the University's brand.

Fall 2018

30,000

25,000

20,000

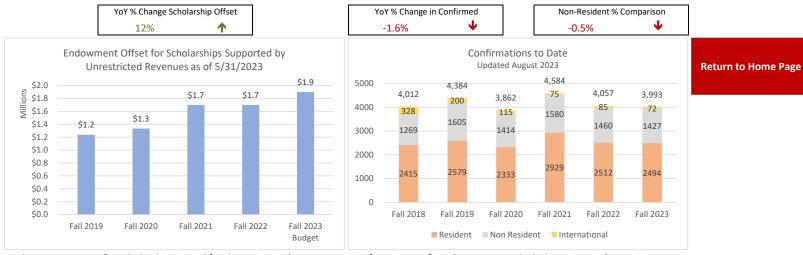
15,000

10,000

5,000

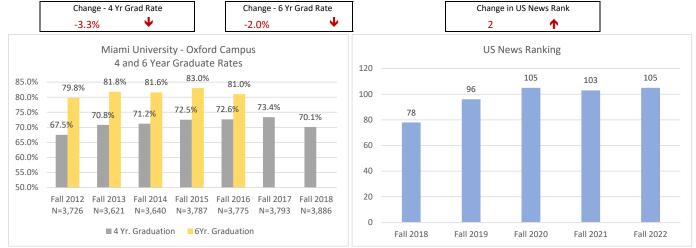
22,459

Leading Indicators Oxford Campus Fall Class Recruitment First Time Students



Endowment support for scholarships is vital for the University's recruitment and NIR goals. While there has been some growth in endowed scholarships, it has not kept pace with the increase in scholarships awarded to the incoming class.

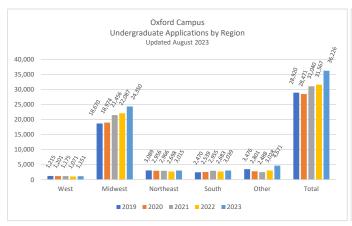
Confirmations reflect the extent to which the University's recruitment efforts have been successful. Success in non-resident recruitment is especially important for meeting the University's NIR goals.

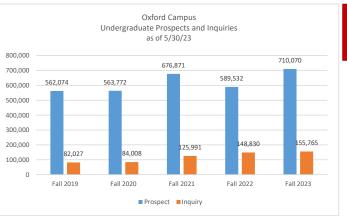


Graduation rates are an indication of the University's quality and a key measure of student success. A rising graduation rate also tends to be accompanied by an increase in selectivity and growing NIR.

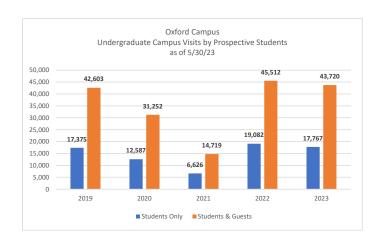
The US News and World Report's ranking of University's is an often used measure of quality by students, especially international students, and families as they consider where the student will go to college. An increasing ranking is normally a positive indicator NIR.

Leading Indicators Oxford Campus Fall Class Recruitment First Time Students



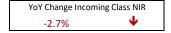


Return to Home Page

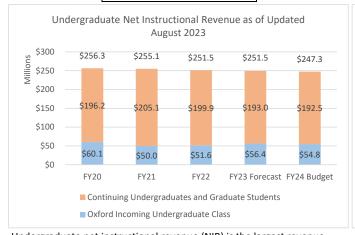


Lagging Indicators Oxford Campus Fall Class Recruitment First Time Students





Return to Home Page

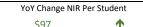




Undergraduate net instructional revenue (NIR) is the largest revenue source for the University. This category of revenue has been on the decline since FY2018. This is the most important indicator of financial stability for Miami.

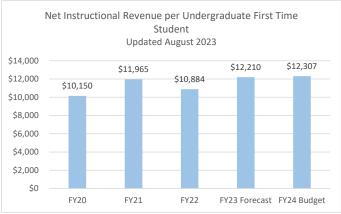
Revenue growth from the incoming class is the most significat predictor of future revenue. Revenue from the incoming class from fall 2022 increased for the first time following several years of decline.

YoY % Change in Cohort Aid





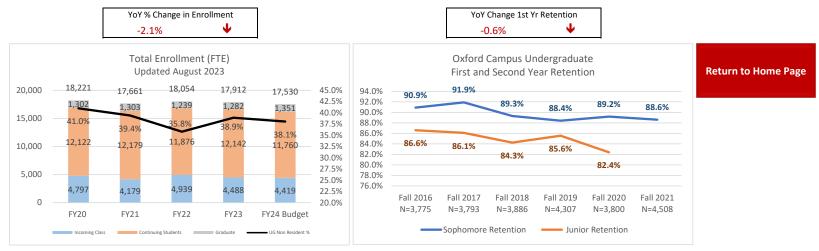




The NIR per undergraduate student reflects the combination of class size, discounting, and residency mix and the resulting resources available to the University. NIR per undergraduate student had been decreasing year over year until fall 2022.

Cohort aid is the amount of scholarships awarded to the incoming class. As this aid rises it reduces the NIR available to fund compensation and university operations. The annual amount of cohort had generally been rising year over year until fall 2022 which led to declining net instructional revenue from the incoming class.

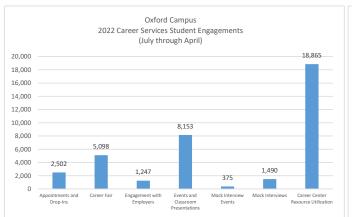
Lagging Indicators Oxford Campus Fall Class Recruitment First Time Students

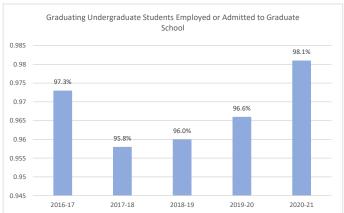


The NIR per undergraduate student reflects the combination of class size, discounting, and residency mix and the resulting resources available to the University. NIR per undergraduate student has been decreasing.

Retention measures student success and has an impact on tuition revenue. Decreases in retention will be followed by lower tuition revenue and lower graduation rates. After peaking for the Fall 2017 cohort, retention has declined but has remained around 89%.

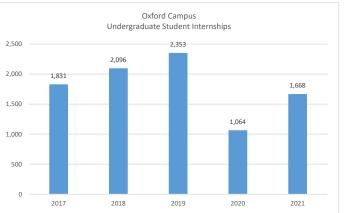
Lagging Indicators Oxford Campus Fall Class Recruitment Student Success and Career Services







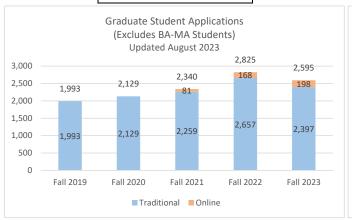


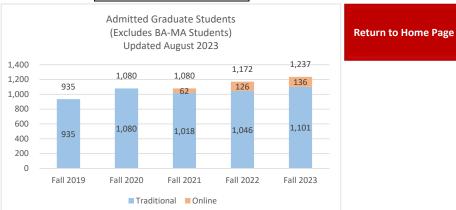


Source: Graduation survey response data joined with First Destination Survey (administered by NACE - the National Association of Colleges and Employers). These figures respresent the number of internships across a student's career. Many students have more than one.

Leading Indicators Graduate Students

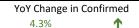
YoY Change in Admitted 5.5%

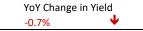


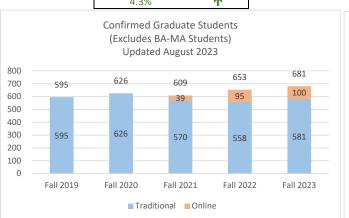


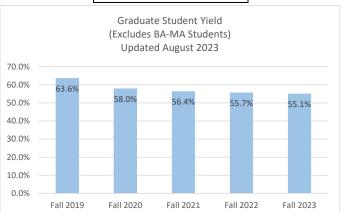
It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Applications reflect student demand for the program. With program offerings increasingly delivered on line the data are segmented between "traditional" and "online."

It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Graduate admssions are influenced by student demand, academic preparedness, and program size as determined by the academic department. As a result, the number of admitted students fluctuates more than undergraduate students.







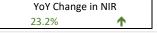


It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Confirmed students are those selecting Miami University for graduate study. The addition of new Boldly Creative graduate programs should result in increased confirmations.

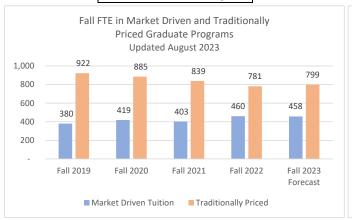
It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Yield is the percentage of admitted students confirming attendance at Miami University. Generally, increasing yield rates reflect alignment of student demand with program offerings.

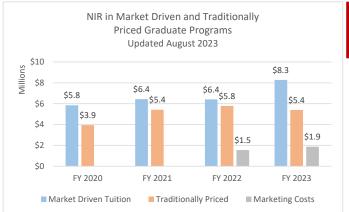
Lagging Indicators Graduate Students

YoY Change in Enrollment 1.2%



Return to Home Page

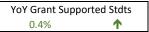


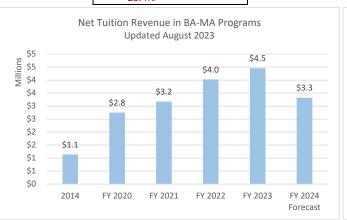


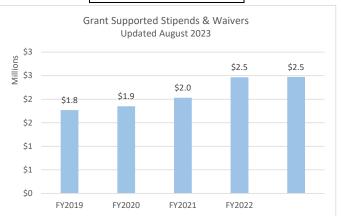
Miami University offers traditionally priced graduate programs that often Miami University offers traditionally priced graduate programs that often have a student stipend and fee waiver. Market programs are priced based on market analysis and do not include stipends or fee waivers. The mix in these programs is changing over time as more professional (market driven) programs are offered.

have a student stipend and fee waiver. Market programs are priced based on market analysis and do not include stipends or fee waivers. The shift to market driven programs is a revenue diversification and growth strategy.

YoY Change in BA-MA NTR -25.4%



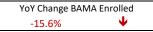


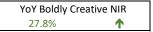


Miami University offers over 50 program pathways where undergraduate students can transition into a masters program as early as their third year. It is difficult to discern whether BAMA tuition revenue is "new" or merely retained revenue. Either outcome is preferable to foregone revenue.

Funding graduate stipends and fee waivers for students in traditionally priced programs reduces pressure on the tuition supported budget. Faculty in graduate programs have increased the level of grant support for graduate students.

Lagging Indicators Graduate Students





Return to Home Page





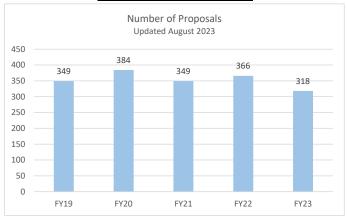
students can transition into a masters program as early as their third year. Students find these opportunities appealing and are increasingly pursuing the option.

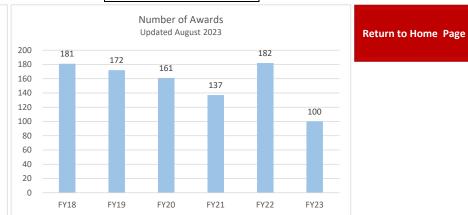
Miami University offers over 50 program pathways where undergraduate The Boldly Creative initiative has resulted in the creation of new, indemand programs. As program enrollments fill in, instructional revenue should increase.

Research Activity

YoY Change in Proposals
4.9%

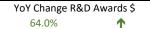


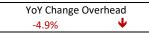




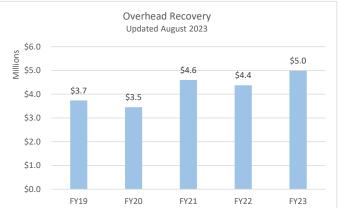
Increasing revenues from grants requires a consistent pipeline of grant proposal. However, the count of proposals doesn't capture the quality of the proposal. For instance, the number of proposals in FY21 and FY22 were below FY19, but research revenue increased in FY22.

Increasing revenues from grants requires a consistent pipeline of grant awards. However, the count of awards doesn't capture the quality of the proposal or the amount of. For instance, the number of awards in FY21 and FY22 were below FY19, but research revenue increased in FY22.









R&D Awards support the University's scholarly research activity. Increases in R&D awards help to diversify revenues and decrease pressure on the tuition supported budget. R&D awards have been increasing except for FY21 which was impacted by COVID.

Many grants allow for an administrative recovery. Increasing overhead recoveries help to take pressure of the tuition supported portion of the university's budget.

Research Activity



\$21.9

FY19

\$25

\$20

\$15

\$10

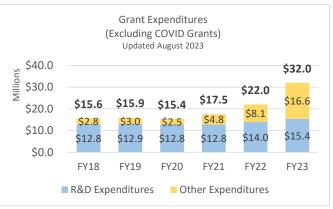
\$5

\$21.9

FY18







Return to Home Page

Grant revenue has been on an upward trend, with a substantial increase in FY22. The revenues increased despite a decline in proposals and awards suggesting higher quality proposals and better relationships with increase in FY22. Federal and state grants to offset the impacts of COVID grant making agencies.

FY20

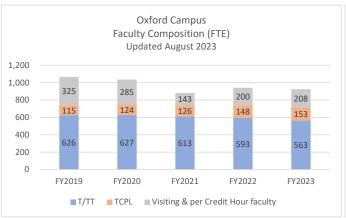
FY21

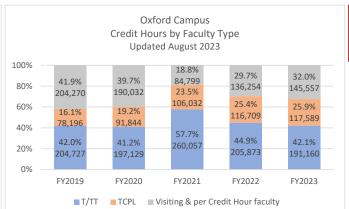
FY22

FY23

Grant expenditures reflect the amount of spending from grant revenues. The level of grant expenditures has been increasing, with a substantial are not reflected in the chart.

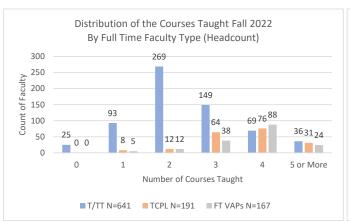
Oxford Campus
Alignment of Faculty Resources with Student Demand

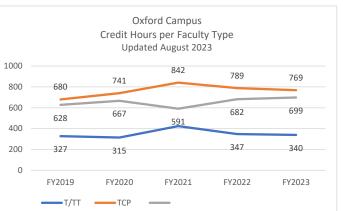




The number and mix of faculty determines the capacity of the university to deceiver in academic programs, and fulfill research and service objectives.

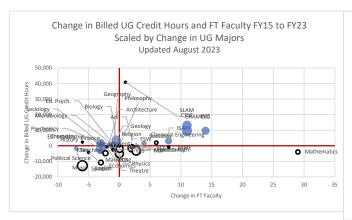
Credit hours instructed by faculty type are one measure of instructional load and the allocation of faculty resources. Instructional activity by VAPs & per credit hour faculty have decreased the last to fiscal years. The decrease has been offset by an increase in credit hours delivered by tenure-tenure track faculty.



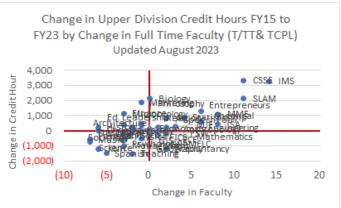


The number of course taught by faculty type generally illustrates instruction load. Instructional load for a tenure-tenure track faculty member is 3/2 or 3/3. Instructional load for a clinical faculty and full time visiting members is 4/4.

Oxford Campus Alignment of Faculty Resources with Student Demand



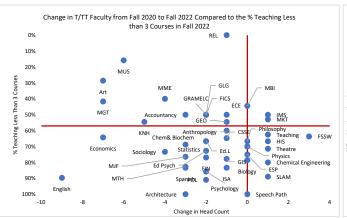
Faculty resources are aligned when the change in faculty matches the change in student demand (credit hours). Departments in the upper right quadrant increased faculty to meet increased credit hours. Departments in the lower left quadrant decreased faculty as credit hours decreased. The change in faculty did not match student demand the lower right quadrant (fewer credit hours, more faculty) and upper left quadrant (more credit hours, fewer faculty).

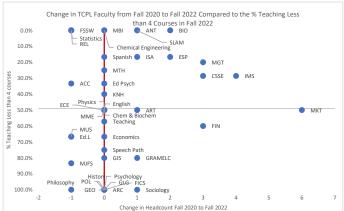


Student demand for programs is reflected by upper division credit hours taken to fulfill the requirements of majors. Departments in the upper right quadrant increased faculty to meet increased credit hours. Departments in the lower left quadrant decreased faculty as credit hours decreased. The change in faculty did not match student demand the lower right quadrant (fewer credit hours, more faculty) and upper left quadrant (more credit hours, fewer faculty)

Return to Home Page

Oxford Campus Alignment of Faculty Resources with Student Demand

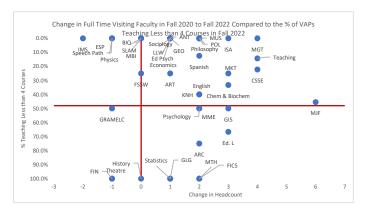




Return to Home Page

Generally, tenure-tenure track faculty teaching loads are 3/3 (3/2). Departments in the upper right quadrant had an increase in faculty and a lower than average percent of their faculty teaching less than 3 courses. Departments in the lower right quadrant had an increase in faculty and a higher than average percent of their faculty teaching less than 3 courses. Departments in the upper left quadrant had a decrease in faculty and a lower than average percent of their faculty teaching less than 3 courses. Departments in the lower left quadrant had a decrease in faculty and a higher than average percent of their faculty teaching less than 3 courses.

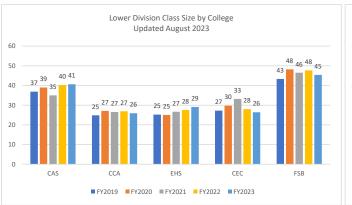
Generally, TCPL faculty teaching loads are 4/4. Departments in the upper right quadrant had an increase in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower right quadrant had an increase in faculty and a higher than average percent of their faculty teaching less than 4 courses. Departments in the upper left quadrant had a decrease in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower left quadrant had a decrease in faculty and a higher than average percent of their faculty teaching less than 4 courses.

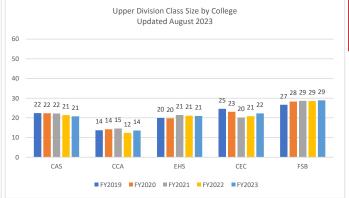


Generally, full-time visiting faculty teaching loads are 4/4. Departments in the upper right quadrant had an increase in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower right quadrant had an increase in faculty and a higher than average percent of their faculty teaching less than 4 courses. Departments in the upper left quadrant had a decrease in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower left quadrant had a decrease in faculty and a higher than average percent of their faculty teaching less than 4 courses.

Oxford Campus

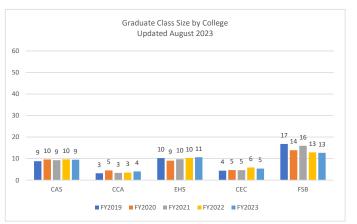
Alignment of Faculty Resources with Student Demand





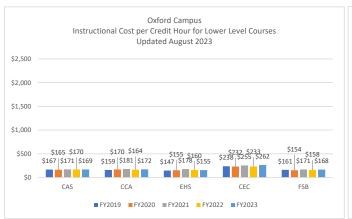
Section sizes are influenced by discipline and pedagogy. Generally, larger section sizes are associated with the efficient use of faculty and lower costs of instruction.

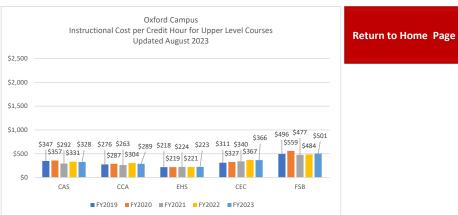
Section sizes are influenced by discipline and pedagogy. Generally, larger section sizes are associated with the efficient use of faculty and lower costs of instruction.

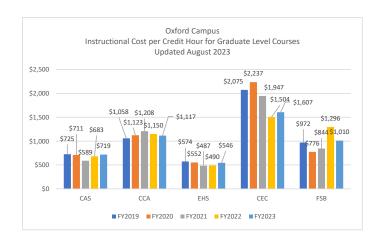


Section sizes are influenced by discipline and pedagogy. Generally, larger section sizes are associated with the efficient use of faculty and lower costs of instruction. Graduate instruction tends to be more expensive than undergraduate instruction due to section size and the use of tenure-tenure track faculty for instruction.

Oxford Campus
Alignment of Faculty Resources with Student Demand

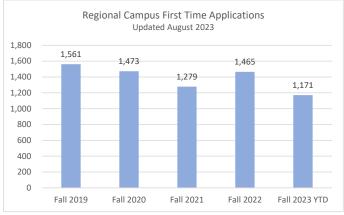


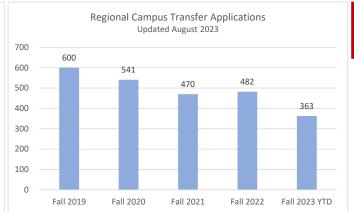




Leading Indicators Regional Campus Students

Return to Home Page

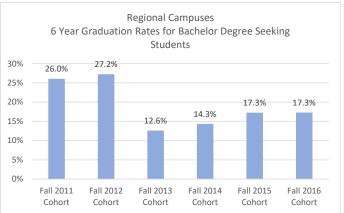




It is very early in the regional recruitment cycle to draw conclusions about this metric. The size of the application pool is the earliest indicator of whether the regional campuses will meet its NIR goals. First time applications increased in fall 2022 following a decline in Fall 2021 likely due to the tight labor market.

It is very early in the regional recruitment cycle to draw conclusions about this metric. Compared to the main camp, transfer students make up a larger portion of the regional campus incoming class. Transfer application have been trending down since fall 2019.





Regional campus graduate rates tend to be lower than main campus graduation rates due to the open access to admissions and the greater likelihood students will complete their degree at the main campus or another institution.



Regional campus graduate rates tend to be lower than main campus graduation rates due to the open access to admissions and the greater likelihood students will complete their degree at the main campus or another institution.

Lagging Indicators Regional Campus Students



downward trend.

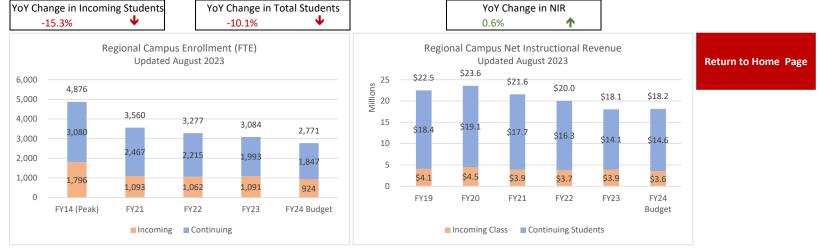
While volatile from year to year, regional retention rates have been on a The starting income for students that graduate from the regional campuses has been on an upward trend.

Return to Home Page

\$57,050

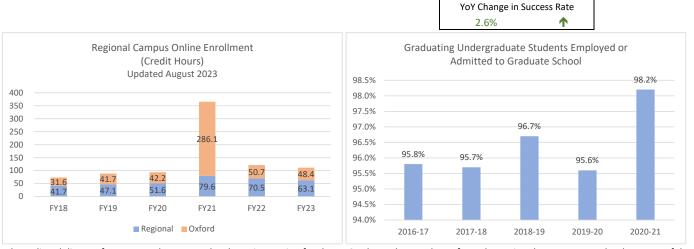
2020-21

Lagging Indicators Regional Campus Students



Regional campus enrollments have been on a downward trend since FY19 due to smaller incoming classes, and lower retention rates.

Instructional revenue has declined as enrollments decreased.



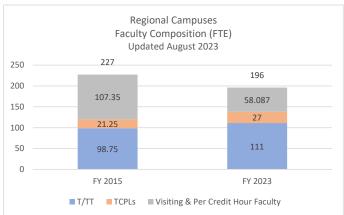
The online delivery of courses and programs has been increasing for the regionals. Online credit hours taken on the regional campuses have for students enrolled at the regional campuses and on the Oxford campus.

Students that graduate from the regional campuses tend to be successful finding employment.

Regional Campuses Aligntment of Faculty Resources and Student Demand

100%

40%



24%, 29,121 FY 2015 FY 2023 ■T/TT ■TCPL ■VAP & Per Credit Hour Faculty Credit hours instructed by faculty type are one measure of instructional load and the allocation of faculty resources. Instructional activity by VAPs & per credit hour faculty have decreased the last to fiscal years. The

decrease has been offset by an increase in credit hours delivered by

Regional Campuses

Credit Hours by Faculty Type

Updated August 2023

67%, 79,674

9%, 10,116

tenure-tenure track faculty.

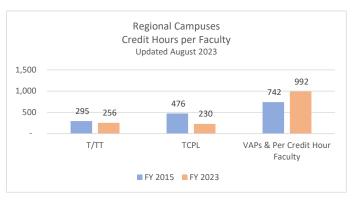
62%, 57,632

7%, 6,203

31%, 28,446

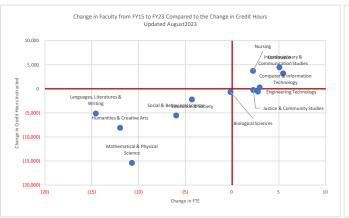
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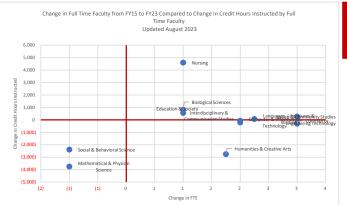
The number and mix of faculty determines the capacity of the university to deceiver in academic programs, and fulfill research and service objectives.



Credit hours instructed by faculty type are one measure of instructional load and the allocation of faculty resources. Instructional activity by VAPs & per credit hour faculty have decreased the last to fiscal years. The decrease has been offset by an increase in credit hours delivered by tenure-tenure track faculty.

Regional Campuses Aligntment of Faculty Resources and Student Demand

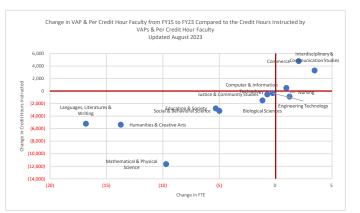




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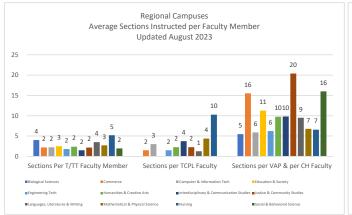
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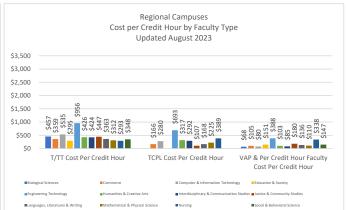
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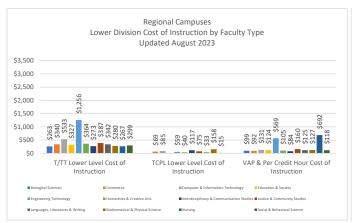
Regional Campuses
Aligntment of Faculty Resources and Student Demand

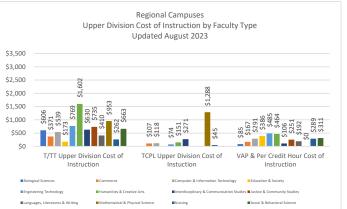




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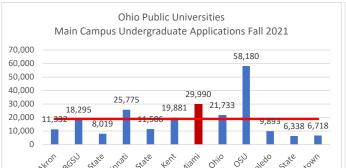
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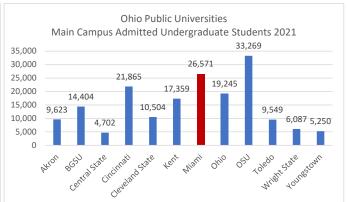




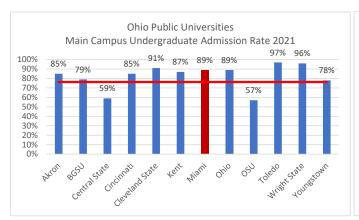
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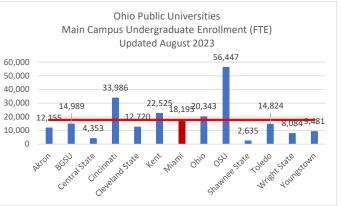
Ohio Public University Comparisons



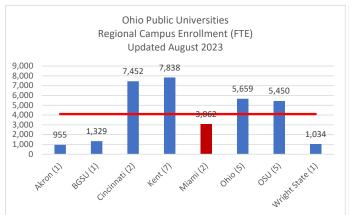


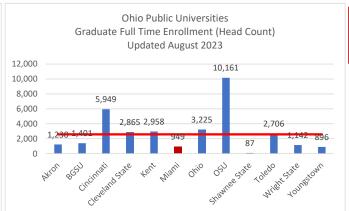
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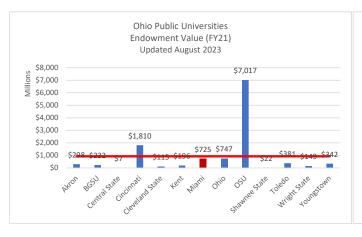


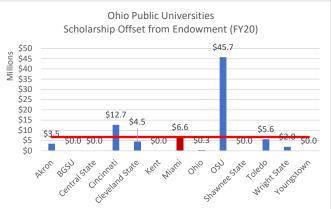
Ohio Public University Comparisons



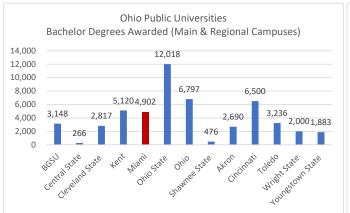


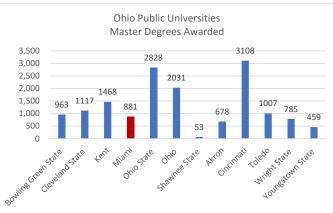




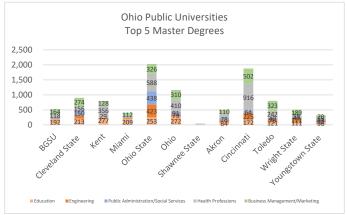


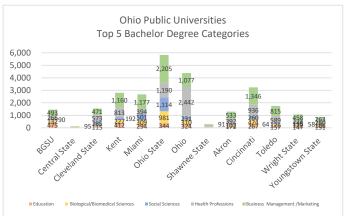
Ohio Public University Comparisons



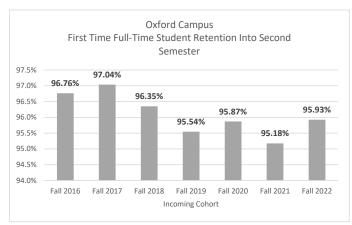


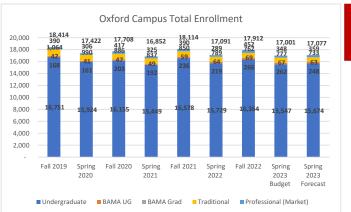
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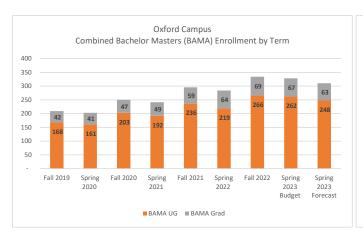


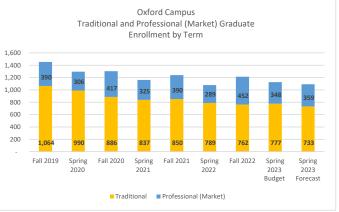
Fall vs Spring Comparison



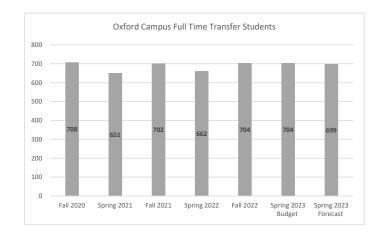


Return to Home Page





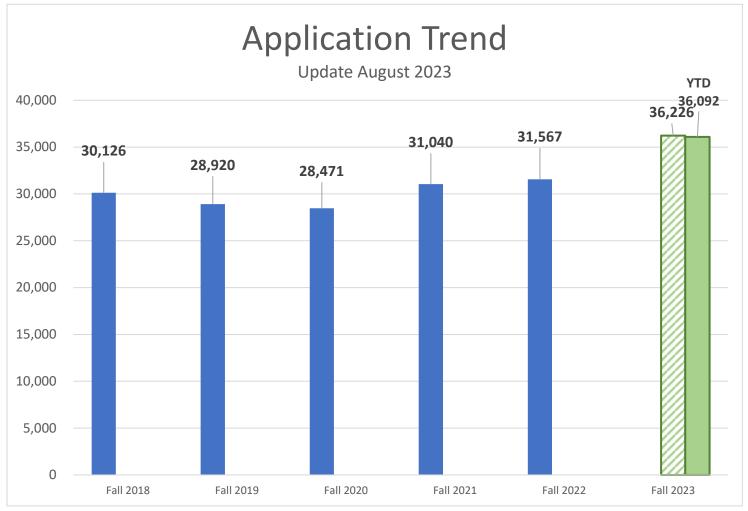
Fall vs Spring Comparison





Appendix

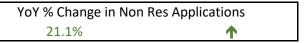


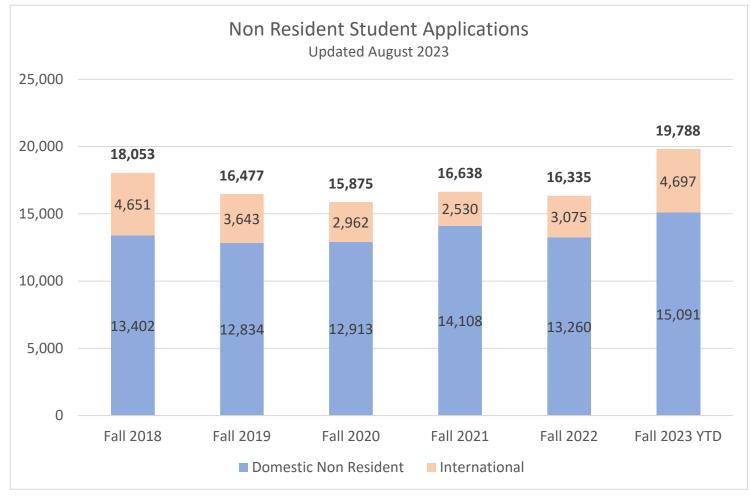


The application trend is the earliest indicator of whether the University will meet its net instructional revenue (NIR) goal. Except for the Fall impacted by COVID, the University's application pool has been increasing.

Return to Home Page

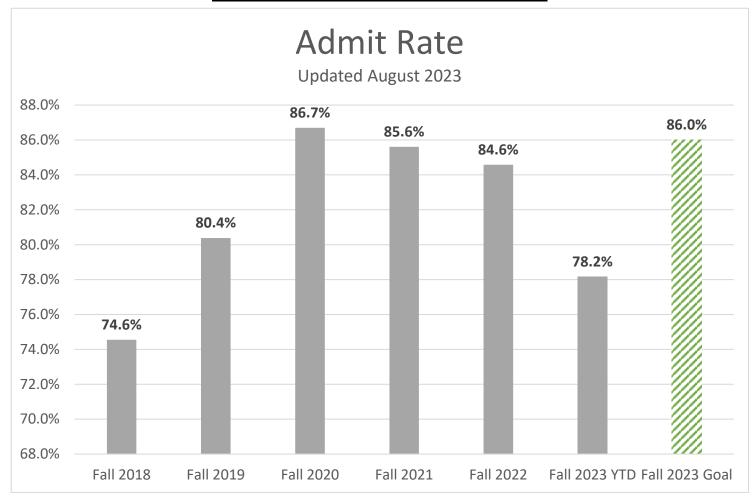
Oxford Campus Undergraduate Leading Part 1





Oxford Campus Undergraduate Leading Part 1

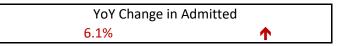
Non-Resident applications are important for meeting the University's NIR goal. International applications have been trending down, while domestic non-resident applications had been increasing but declined for fall 2022.

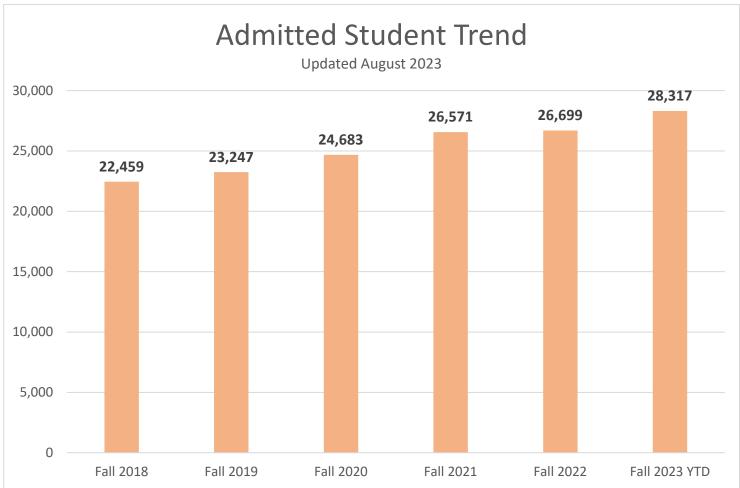


Return to Home Page

Oxford Campus Undergraduate Leading Part 1

The admit rate is another indicator of selectivity. An increase in admit rates suggest less selectivity and can have long term negative consequences for the University's brand.

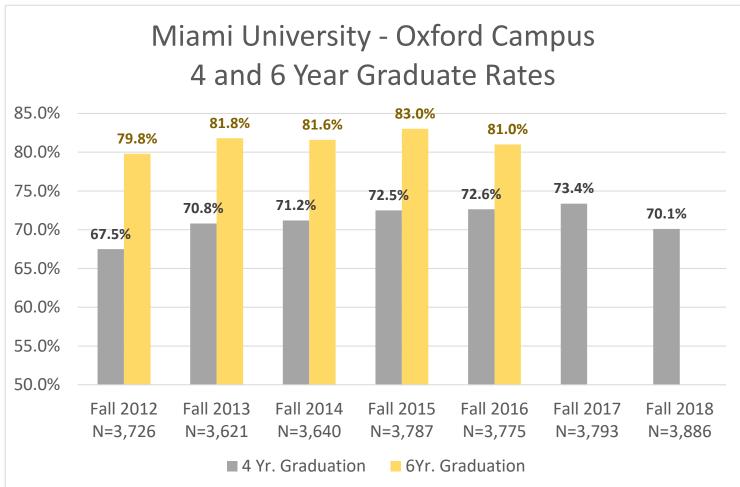




Oxford Campus Undergraduate Leading Part 1

Increases in the number of admitted students help the University meet its enrollment and NIR goals. However, increases in admitted students are viewed negatively in the market place as a decrease in selectivity.





Graduation rates are an indication of the University's quality and a key measure of student success. A rising graduation rate also tends to be accompanied by an increase in selectivity and growing NIR.

Return to Home Page

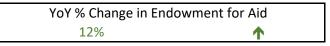
Oxford Campus Undergraduate Leading Part 2

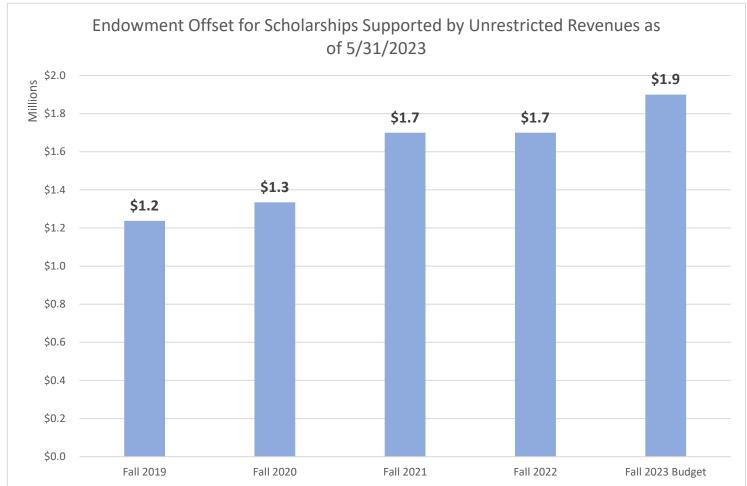




Oxford Campus Undergraduate Leading Part 2

The US News and World Report's ranking of University's is an often used measure of quality by students, especially international students, and families as they consider where the student will go to college. An increasing ranking is normally a positive indicator NIR.

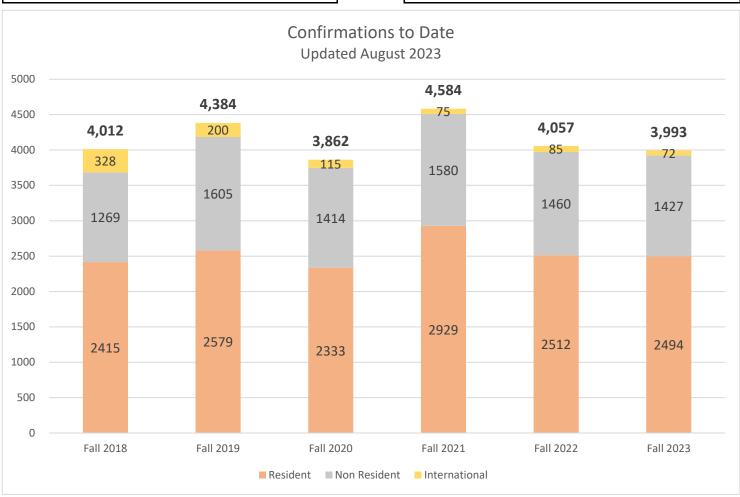




Oxford Campus Undergraduate Leading Part 2

Endowment support for scholarships is vital for the University's recruitment and NIR goals. While there has been some growth in endowed scholarships, it has not kept pace with the increase in scholarships awarded to the incoming class.

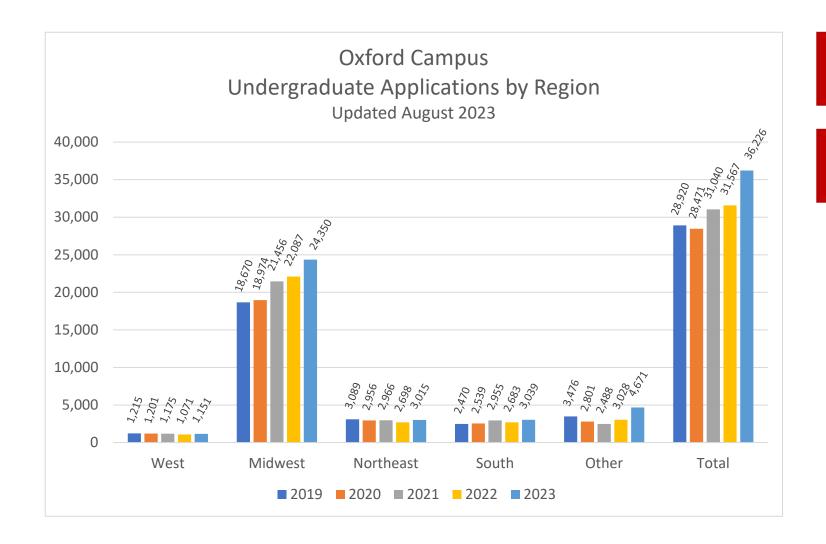




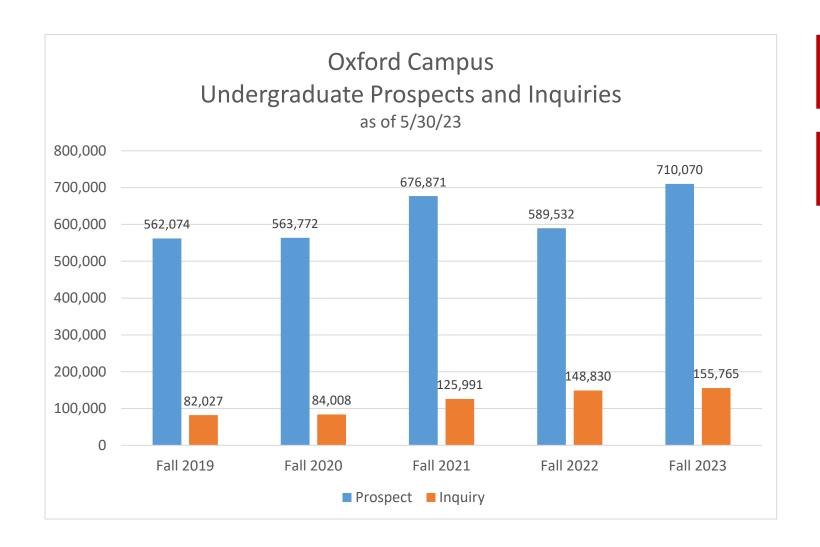
Confirmations reflect the extent to which the University's recruitment efforts have been successful. Success in non-resident recruitment is especially important for meeting the University's NIR goals.

Return to Home Page

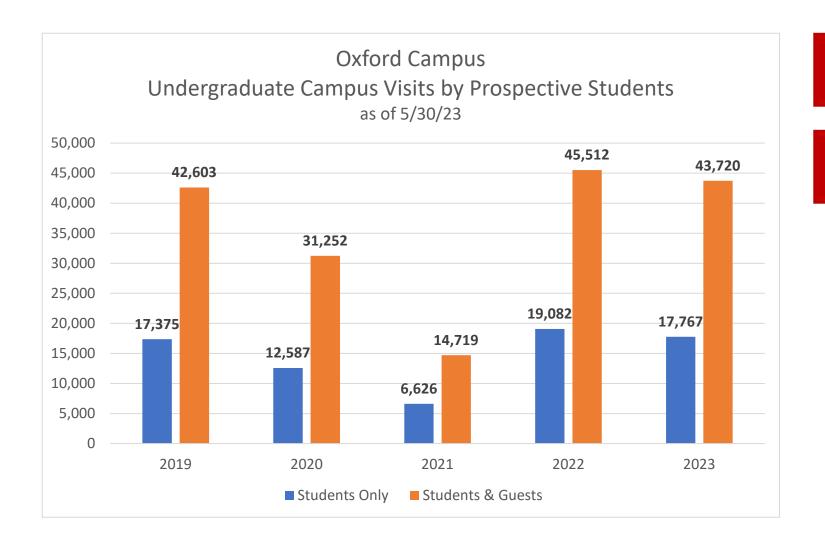
Oxford Campus
Undergraduate
Leading Part 2



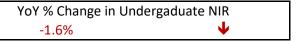
Oxford Campus
Undergraduate
Leading Part 3

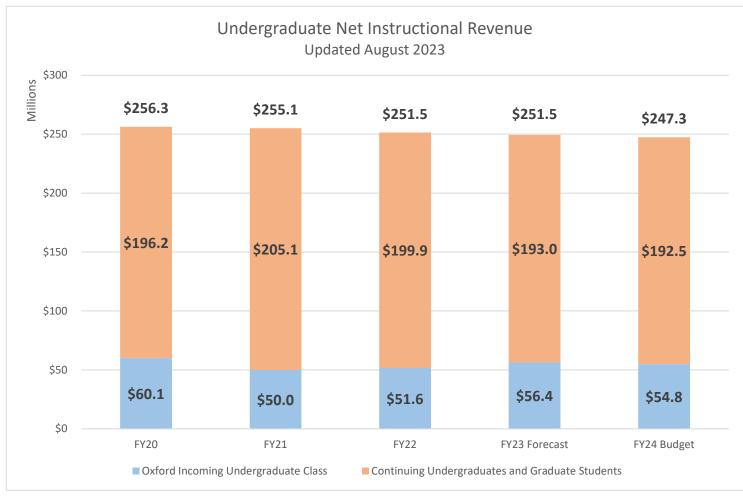


Oxford Campus
Undergraduate
Leading Part 3



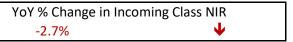
Oxford Campus
Undergraduate
Leading Part 3





Oxford Campus Undergraduate Lagging Part 1

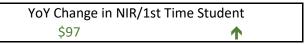
Undergraduate net instructional revenue (NIR) is the largest revenue source for the University. This category of revenue has been on the decline since FY2018. This is the most important indicator of financial stability for Miami.

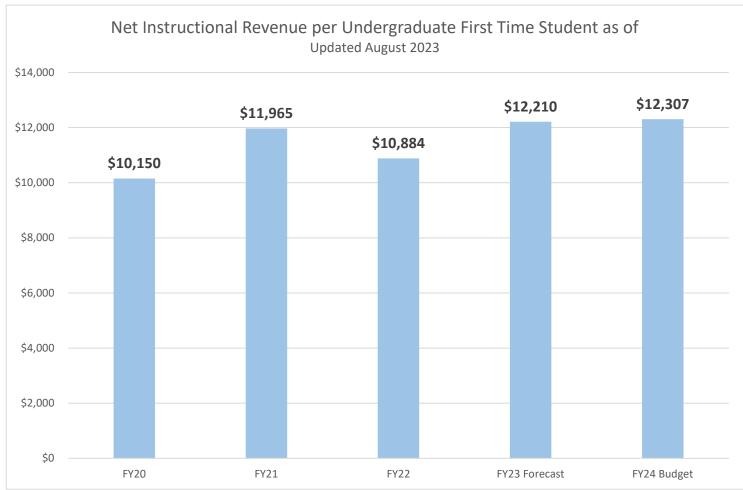




Oxford Campus Undergraduate Lagging Part 1

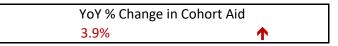
Revenue growth from the incoming class is the most significat predictor of future revenue. Revenue from the incoming class from fall 2022 increased for the first time following several years of decline.

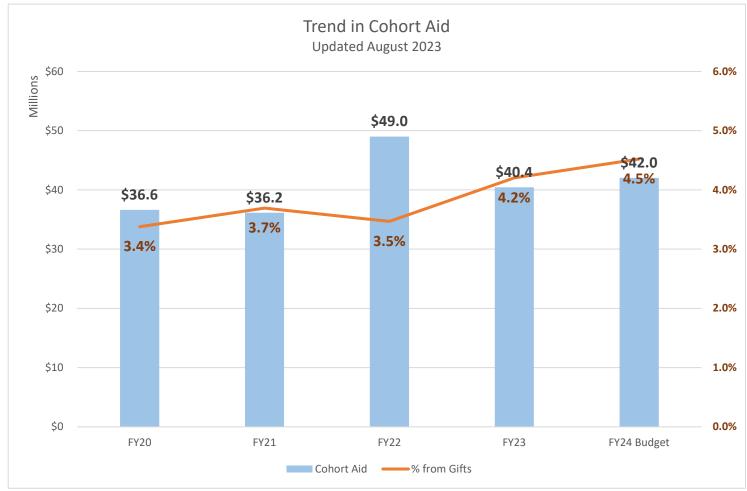




Oxford Campus Undergraduate Lagging Part 1

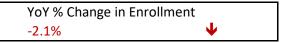
The NIR per undergraduate student reflects the combination of class size, discounting, and residency mix and the resulting resources available to the University. NIR per undergraduate student had been decreasing year over year until fall 2022.

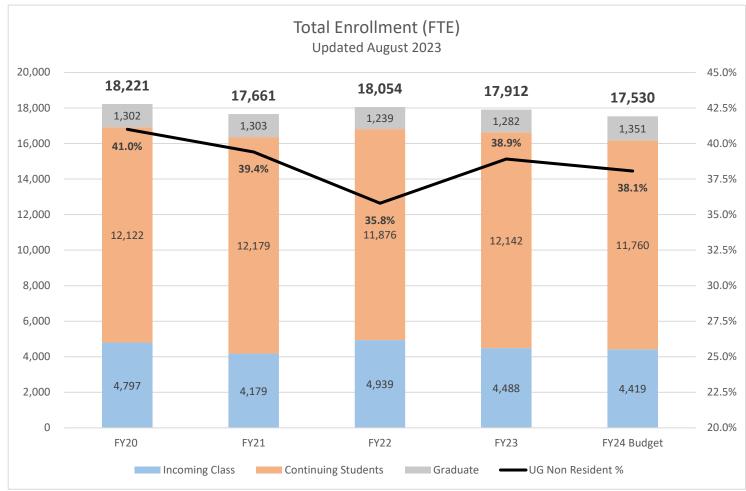




Oxford Campus Undergraduate Lagging Part 1

Cohort aid is the amount of scholarships awarded to the incoming class. As this aid rises it reduces the NIR available to fund compensation and university operations. The annual amount of cohort had generally been rising year over year until fall 2022 which led to declining net instructional revenue from the incoming class.

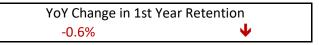


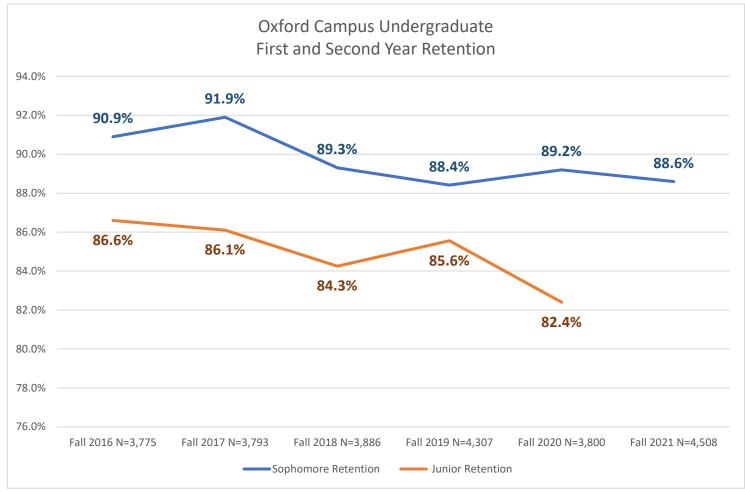


The NIR per undergraduate student reflects the combination of class size, discounting, and residency mix and the resulting resources available to the University. NIR per undergraduate student has been decreasing.

Return to Home Page

Oxford Campus Undergraduate Lagging Part 2

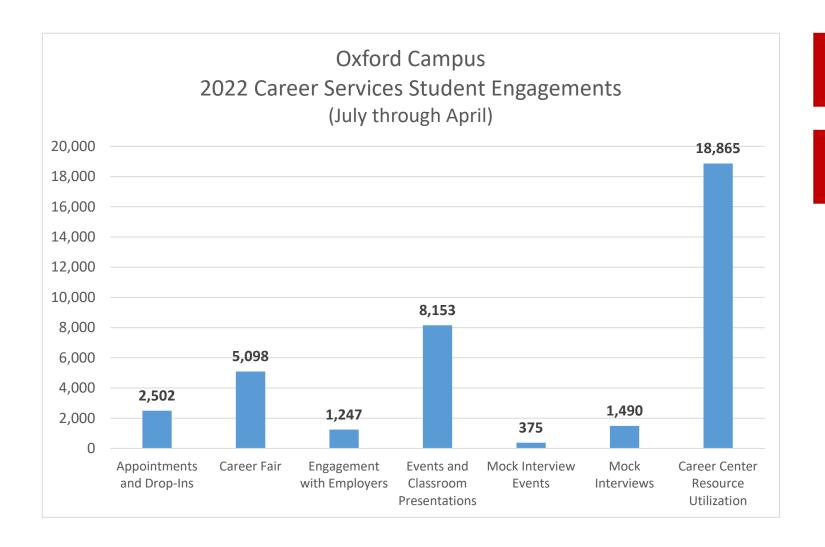




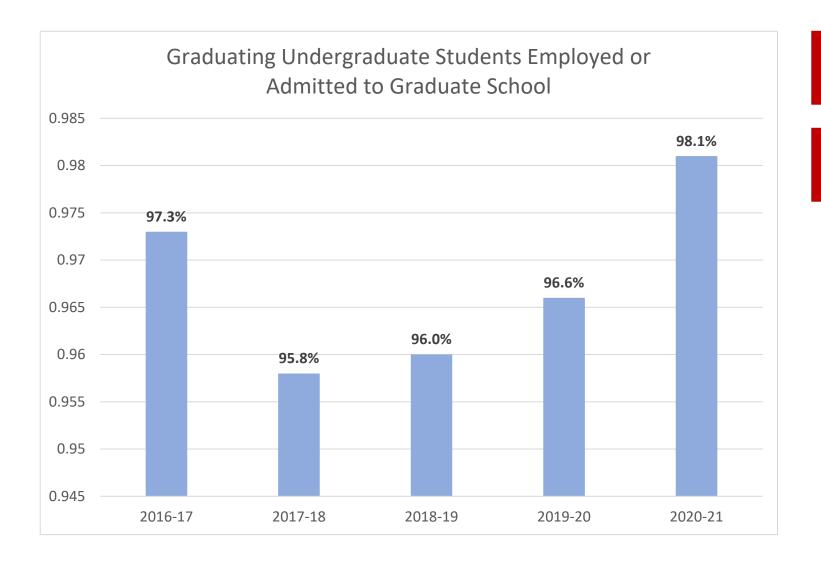
Retention measures student success and has an impact on tuition revenue. Decreases in retention will be followed by lower tuition revenue and lower graduation rates. After peaking for the Fall 2017 cohort, retention has declined but has remained around 89%.

Return to Home Page

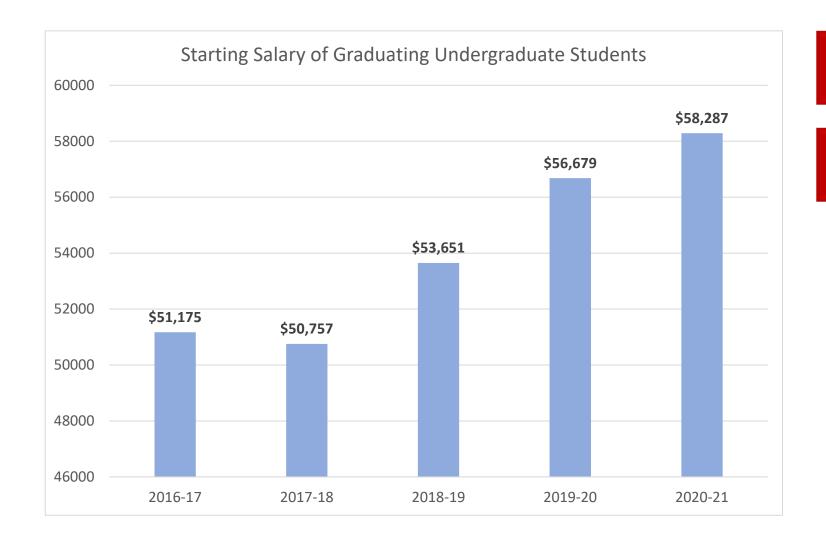
Oxford Campus Undergraduate Lagging Part 2



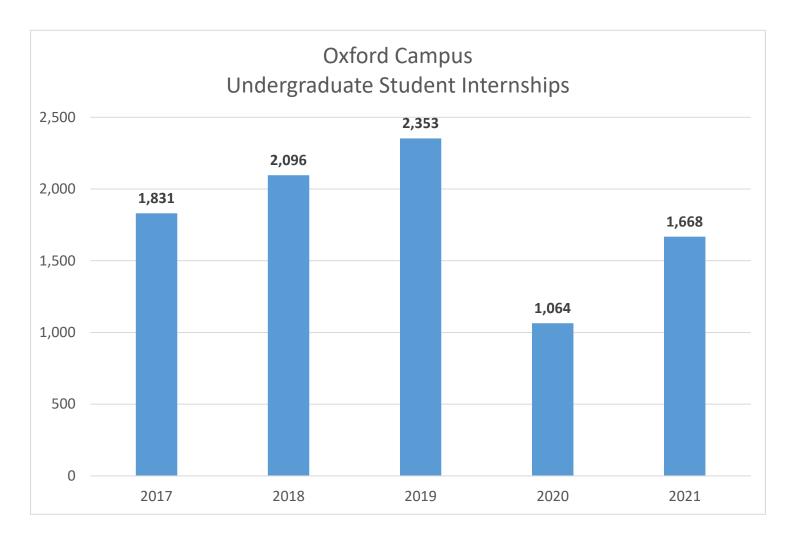
Student Sucess & Career Services



Student Sucess & Career Services

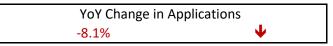


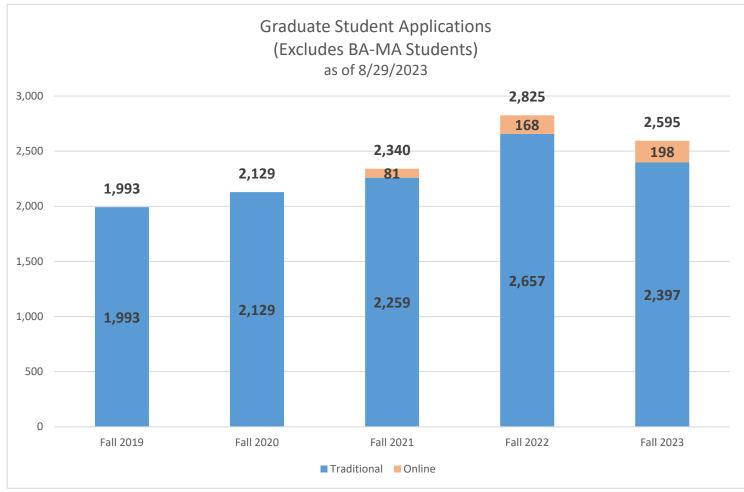
Student Sucess & Career Services



Student Sucess & Career Services

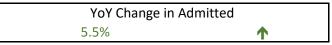
Source: Graduation survey response data joined with First Destination Survey (administered by NACE - the National Association of Colleges and Employers). These figures respresent the number of internships across a student's career. Many students have more than one.

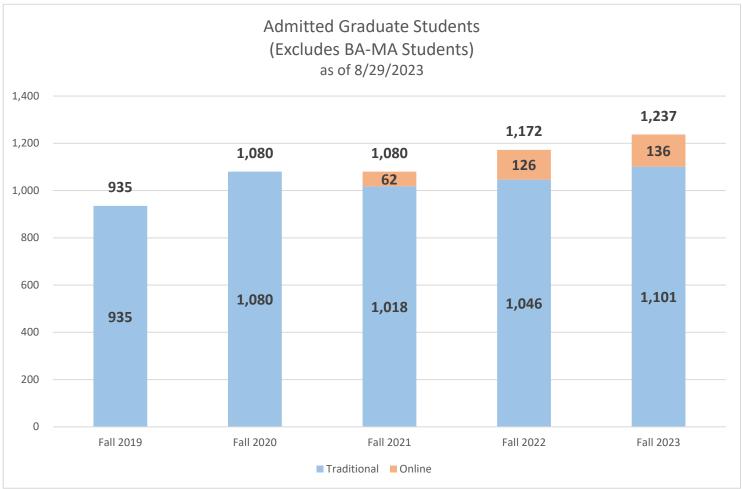




Oxford Campus Graduate Leading

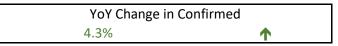
It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Applications reflect student demand for the program. With program offerings increasingly delivered on line the data are segmented between "traditional" and "online."

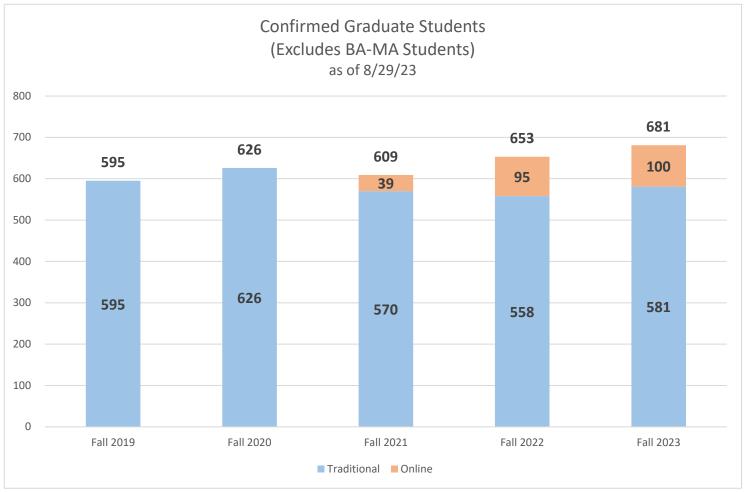




Oxford Campus Graduate Leading

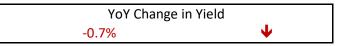
It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Graduate admssions are influenced by student demand, academic preparedness, and program size as determined by the academic department. As a result, the number of admitted students fluctuates more than undergraduate students.

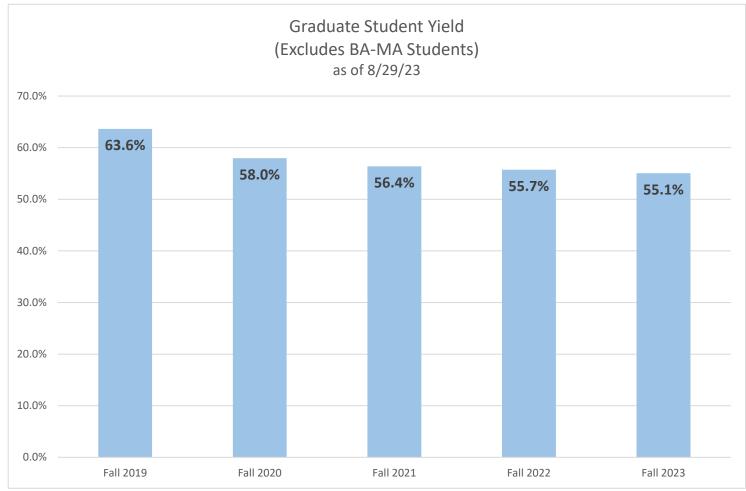




Oxford Campus Graduate Leading

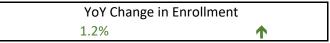
It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Confirmed students are those selecting Miami University for graduate study. The addition of new Boldly Creative graduate programs should result in increased confirmations.

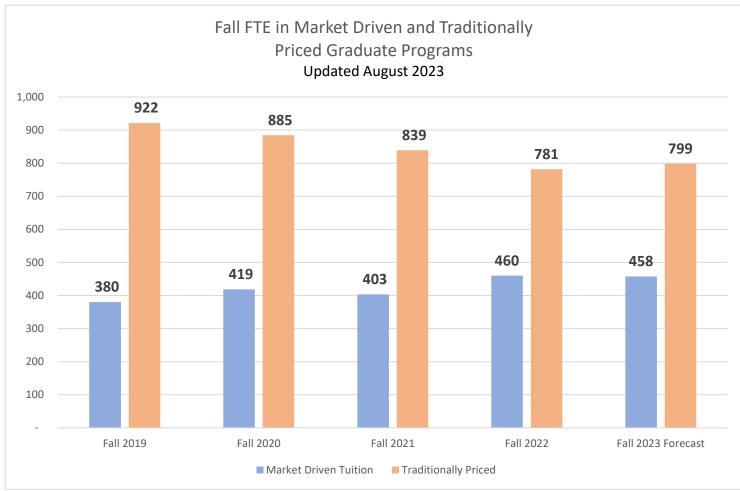




Oxford Campus Graduate Leading

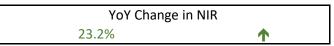
It is very early in the graduate recruitment cycle to draw a conclusion on this metric. Yield is the percentage of admitted students confirming attendance at Miami University. Generally, increasing yield rates reflect alignment of student demand with program offerings.

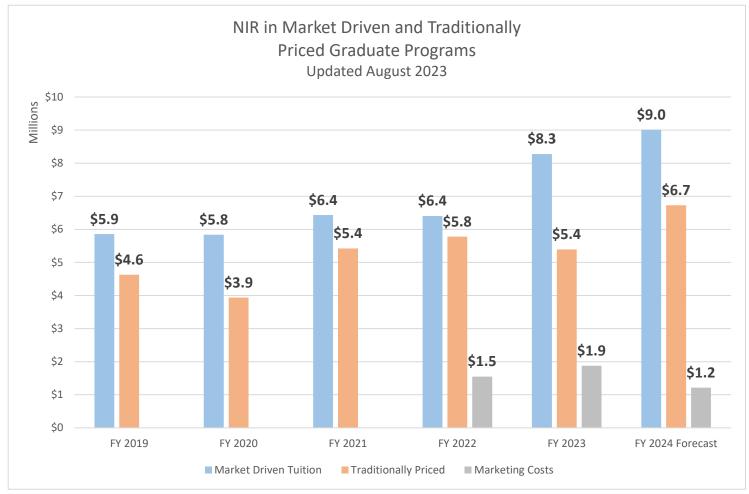




Oxford Campus Graduate Lagging Part 1

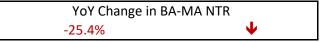
Miami University offers traditionally priced graduate programs that often have a student stipend and fee waiver. Market programs are priced based on market analysis and do not include stipends or fee waivers. The mix in these programs is changing over time as more professional (market driven) programs are offered.

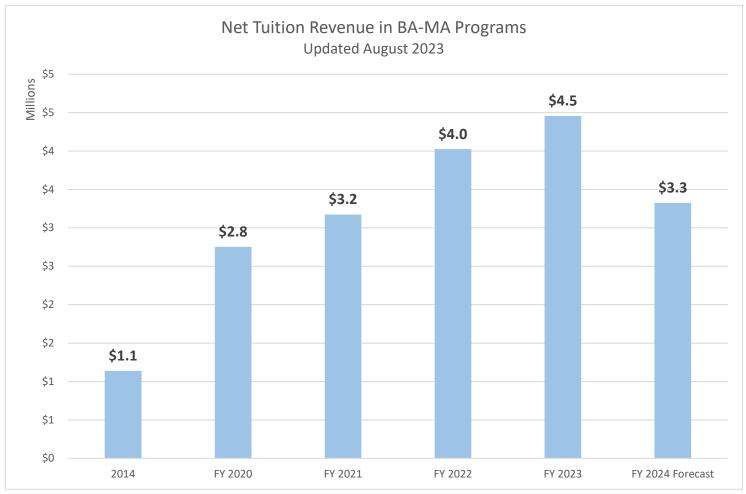




Oxford Campus Graduate Lagging Part 1

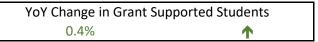
Miami University offers traditionally priced graduate programs that often have a student stipend and fee waiver. Market programs are priced based on market analysis and do not include stipends or fee waivers. The shift to market driven programs is a revenue diversification and growth strategy.





Oxford Campus Graduate Lagging Part 1

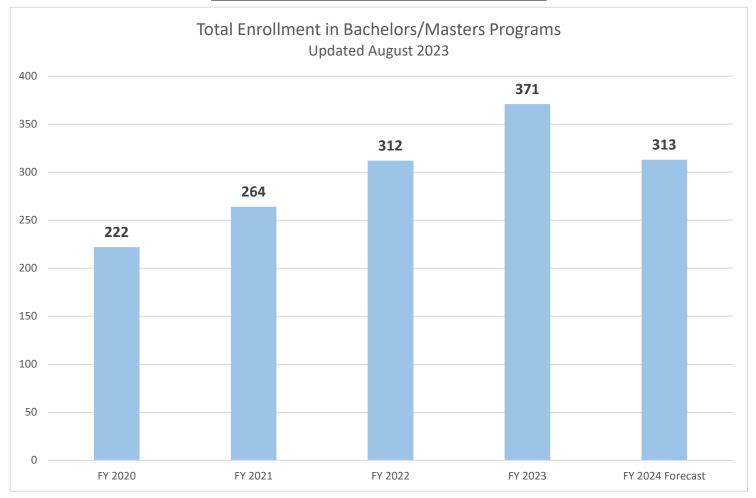
Miami University offers over 50 program pathways where undergraduate students can transition into a masters program as early as their third year. It is difficult to discern whether BAMA tuition revenue is "new" or merely retained revenue. Either outcome is preferable to foregone revenue.





Oxford Campus Graduate Lagging Part 1

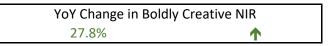
Funding graduate stipends and fee waivers for students in traditionally priced programs reduces pressure on the tuition supported budget. Faculty in graduate programs have increased the level of grant support for graduate students.

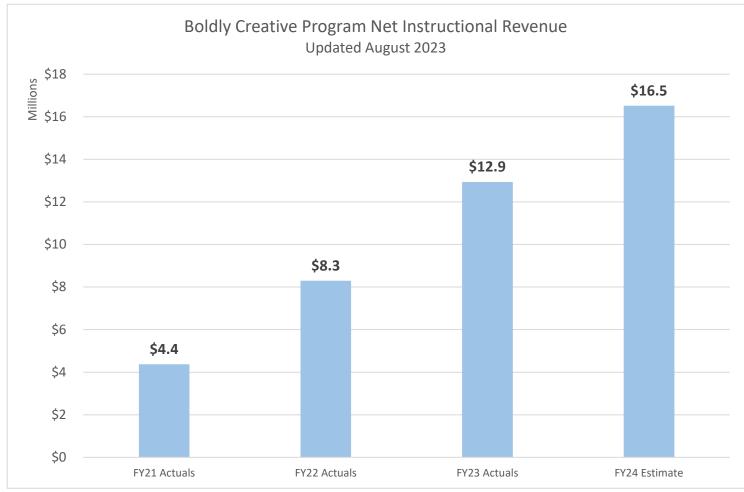


Return to Home Page

Oxford Campus Graduate Lagging Part 2

Miami University offers over 50 program pathways where undergraduate students can transition into a masters program as early as their third year. Students find these opportunities appealing and are increasingly pursuing the option.





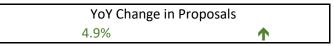
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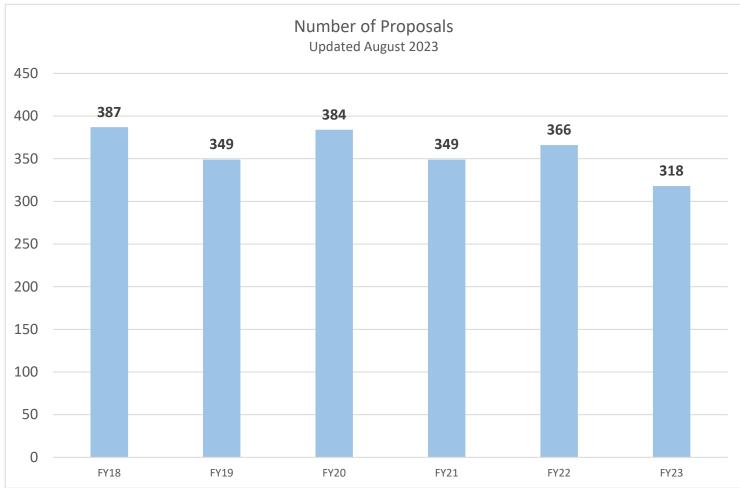
Oxford Campus

Graduate Lagging

Part 2

The Boldly Creative initiative has resulted in the creation of new, in-demand programs. As program enrollments fill in, instructional revenue should increase.

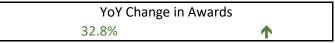


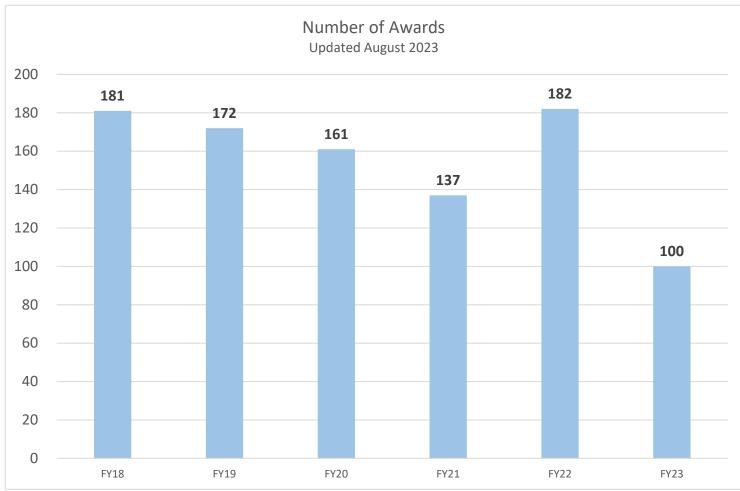


Return to Home Page

Research Activity
Part 1

Increasing revenues from grants requires a consistent pipeline of grant proposal. However, the count of proposals doesn't capture the quality of the proposal. For instance, the number of proposals in FY21 and FY22 were below FY19, but research revenue increased in FY22.

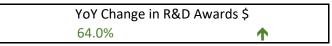


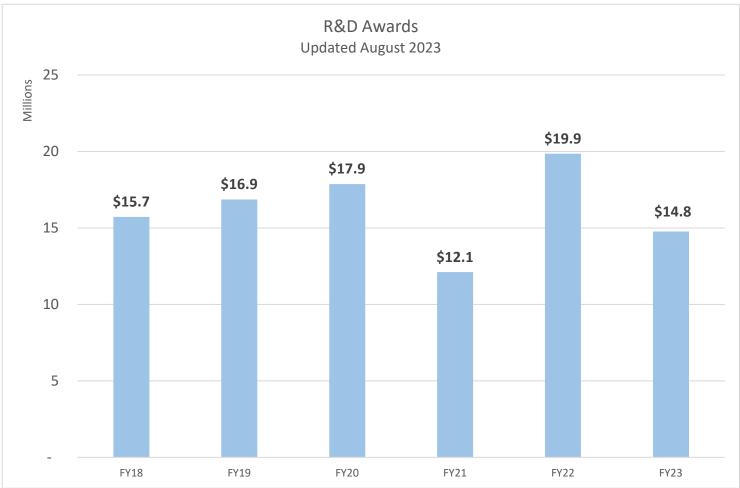


Return to Home Page

Research Activity
Part 1

Increasing revenues from grants requires a consistent pipeline of grant awards. However, the count of awards doesn't capture the quality of the proposal or the amount of. For instance, the number of awards in FY21 and FY22 were below FY19, but research revenue increased in FY22.

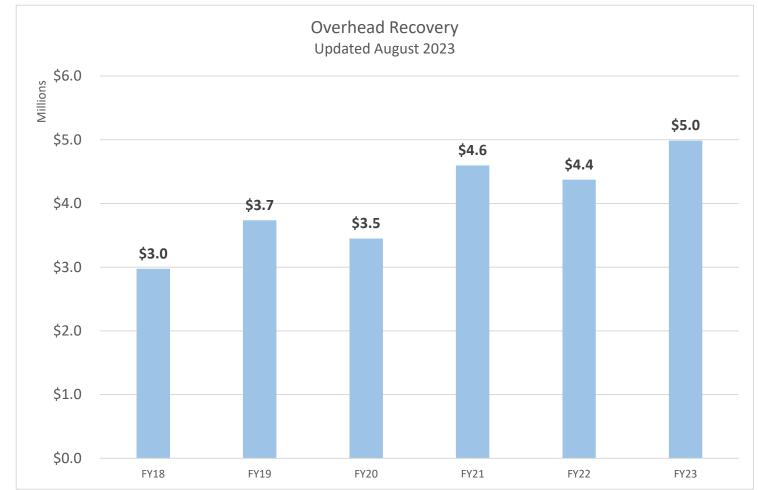




Research Activity
Part 1

R&D Awards support the University's scholarly research activity. Increases in R&D awards help to diversify revenues and decrease pressure on the tuition supported budget. R&D awards have been increasing except for FY21 which was impacted by COVID.





Return to Home Page

Research Activity
Part 1

Many grants allow for an administrative recovery. Increasing overhead recoveries help to take pressure of the tuition supported portion of the university's budget.

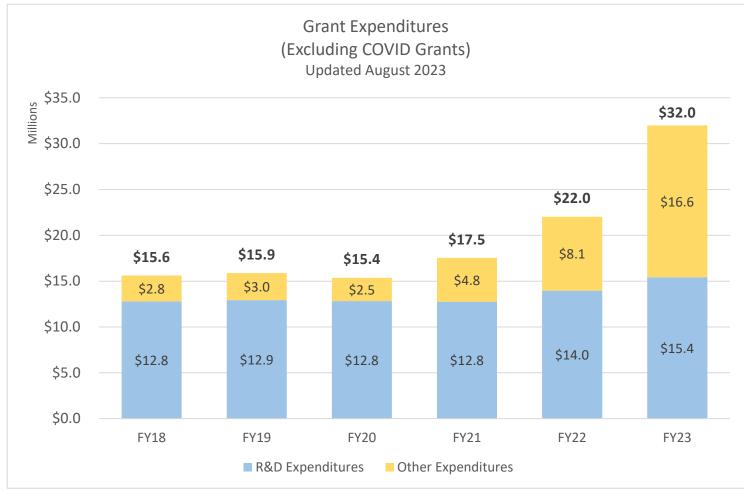


Research Activity Part 2

Return to Home Page

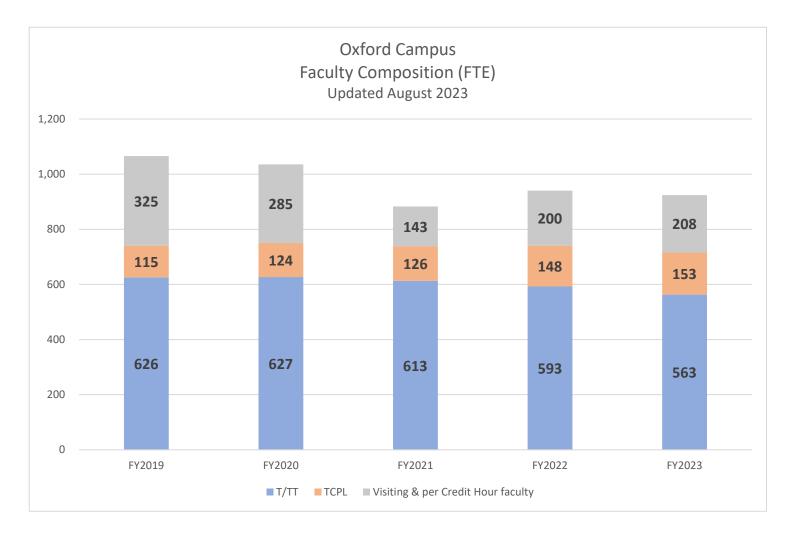
Grant revenue has been on an upward trend, with a substantial increase in FY22. The revenues increased despite a decline in proposals and awards suggesting higher quality proposals and better relationships with grant making agencies.





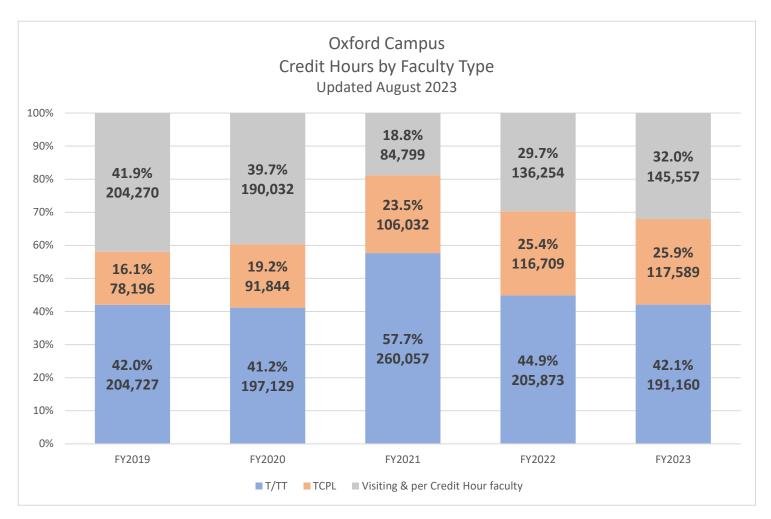
Research Activity
Part 2

Grant expenditures reflect the amount of spending from grant revenues. The level of grant expenditures has been increasing, with a substantial increase in FY22. Federal and state grants to offset the impacts of COVID are not reflected in the chart.



Oxford Campus
Faculty Resources
Part 1

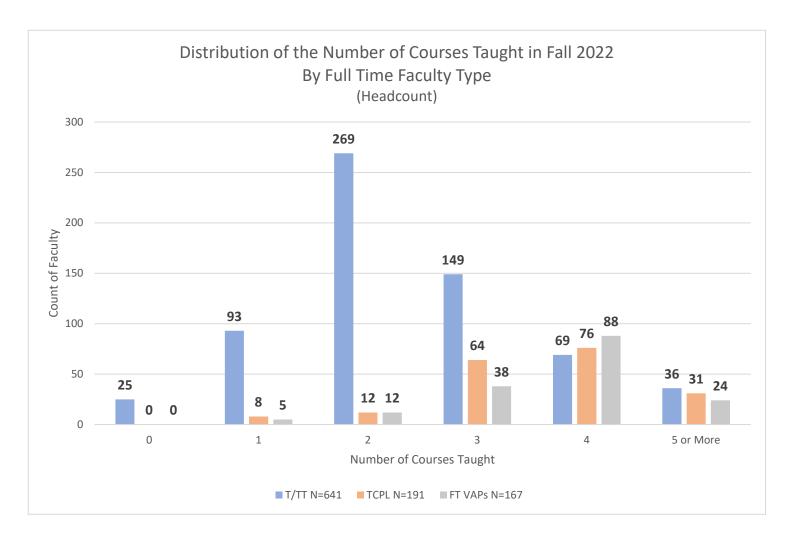
The number and mix of faculty determines the capacity of the university to deceiver in academic programs, and fulfill research and service objectives.



Credit hours instructed by faculty type are one measure of instructional load and the allocation of faculty resources. Instructional activity by VAPs & per credit hour faculty have decreased the last to fiscal years. The decrease has been offset by an increase in credit hours delivered by tenure-tenure track faculty.

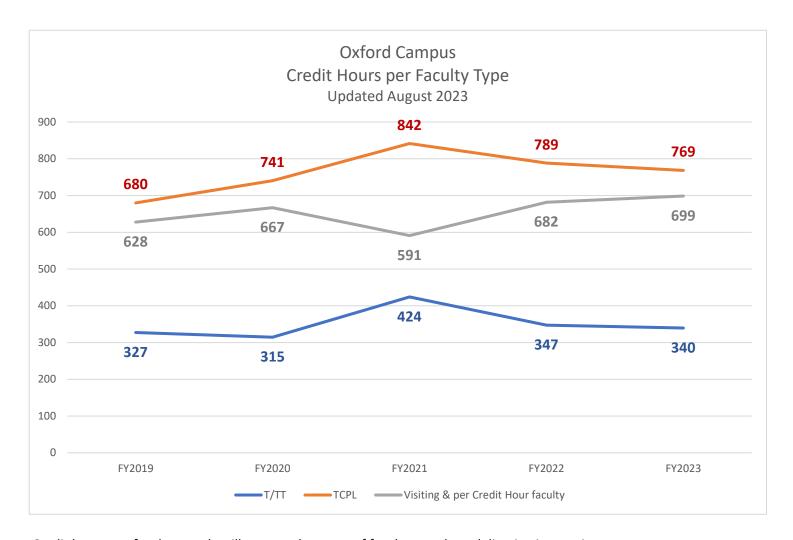
Return to Home Page

Oxford Campus Faculty Resources Part 1



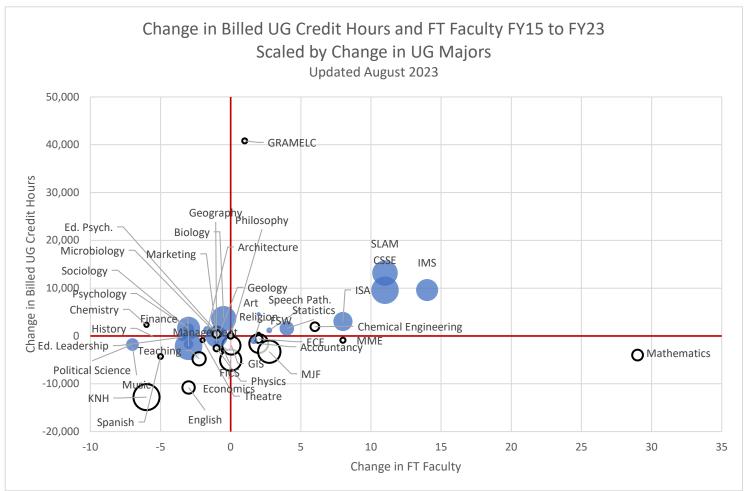
Oxford Campus
Faculty Resources
Part 1

The number of course taught by faculty type generally illustrates instruction load. Instructional load for a tenure-tenure track faculty member is 3/2 or 3/3. Instructional load for a clinical faculty and full time visiting members is 4/4.



Oxford Campus
Faculty Resources
Part 1

 $Credit\ hours\ per\ faculty\ member\ illustrates\ they\ type\ of\ faculty\ members\ delivering\ instruction.$



Faculty resources are aligned when the change in faculty matches the change in student demand (credit hours).

Departments in the upper right quadrant increased faculty to meet increased credit hours. Departments in the lower left

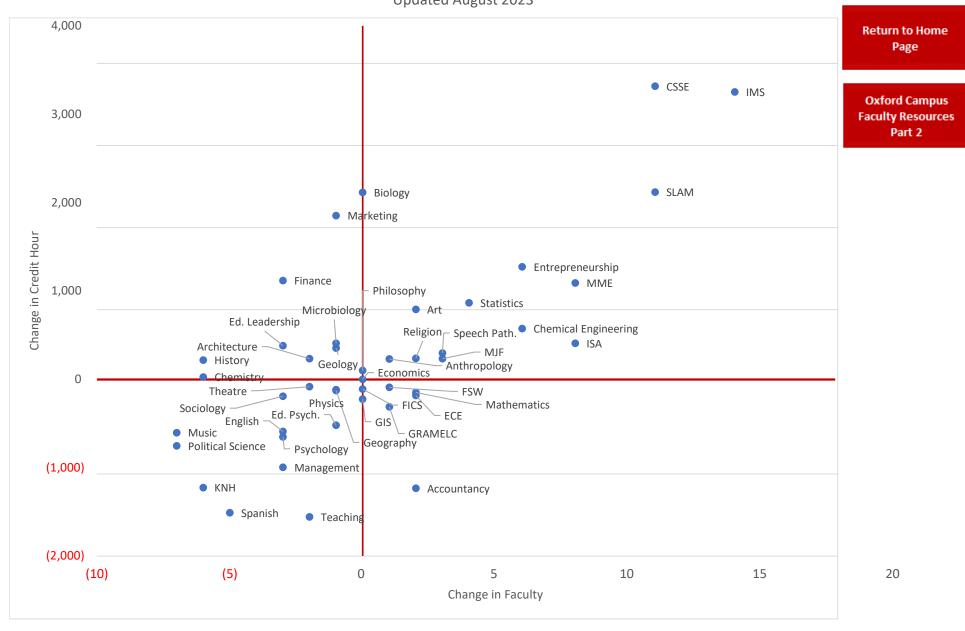
quadrant decreased faculty as credit hours decreased. The change in faculty did not match student demand the lower

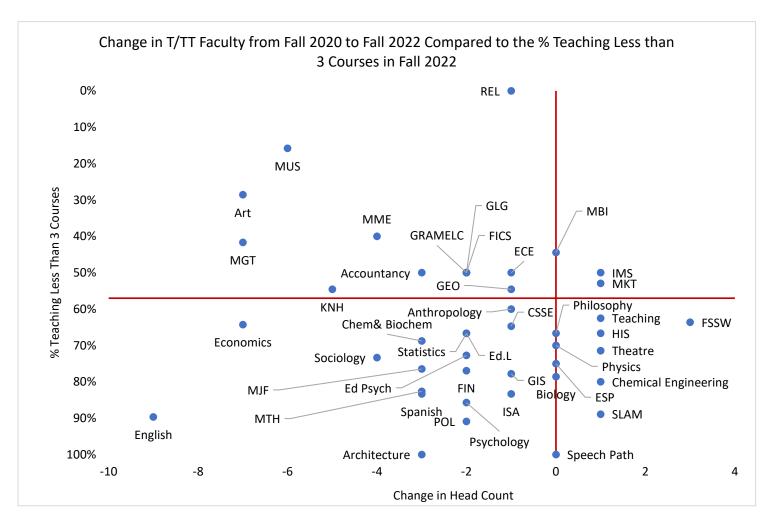
right quadrant (fewer credit hours, more faculty) and upper left quadrant (more credit hours, fewer faculty).

Return to Home Page

Oxford Campus Faculty Resources Part 2

Change in Upper Division Credit Hours FY15 to FY23 by Change in Full Time Faculty (T/TT& TCPL) Updated August 2023

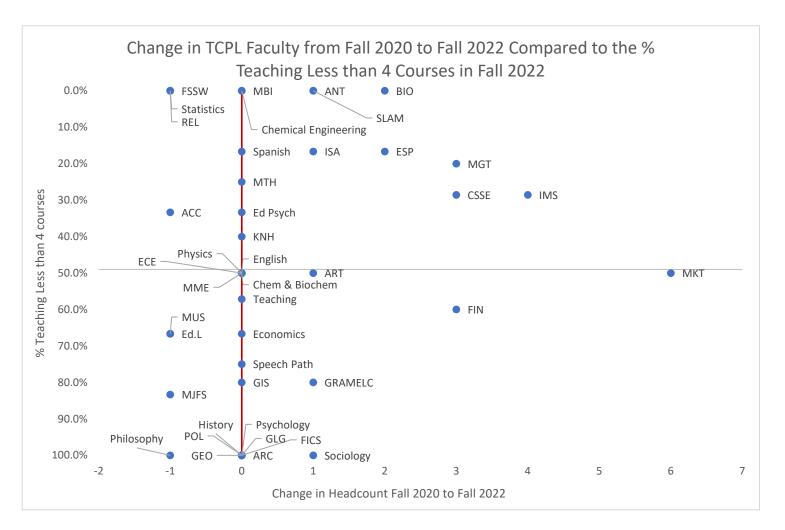




Generally, tenure-tenure track faculty teaching loads are 3/3 (3/2). Departments in the upper right quadrant had an increase in faculty and a lower than average percent of their faculty teaching less than 3 courses. Departments in the lower right quadrant had an increase in faculty and a higher than average percent of their faculty teaching less than 3 courses. Departments in the upper left quadrant had a decrease in faculty and a lower than average percent of their faculty teaching less than 3 courses. Departments in the lower left quadrant had a decrease in faculty and a higher than average percent of their faculty teaching less than 3 courses.

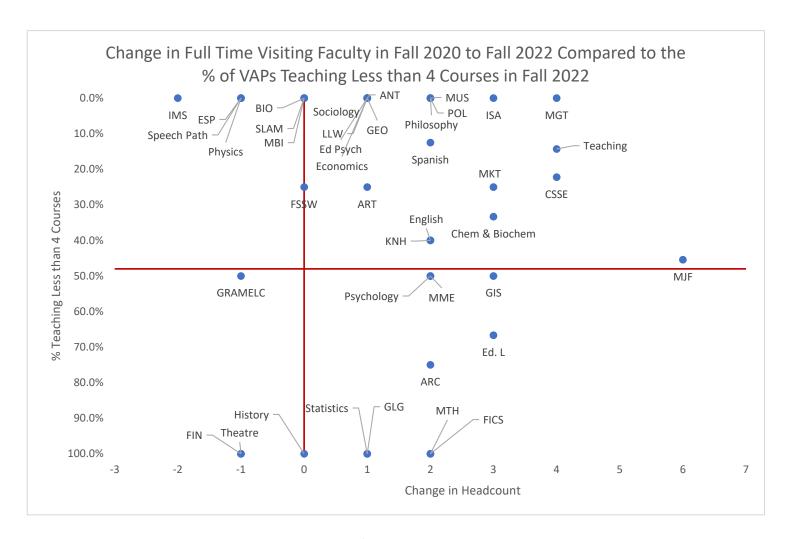
Return to Home Page

Oxford Campus Faculty Resources Part 3



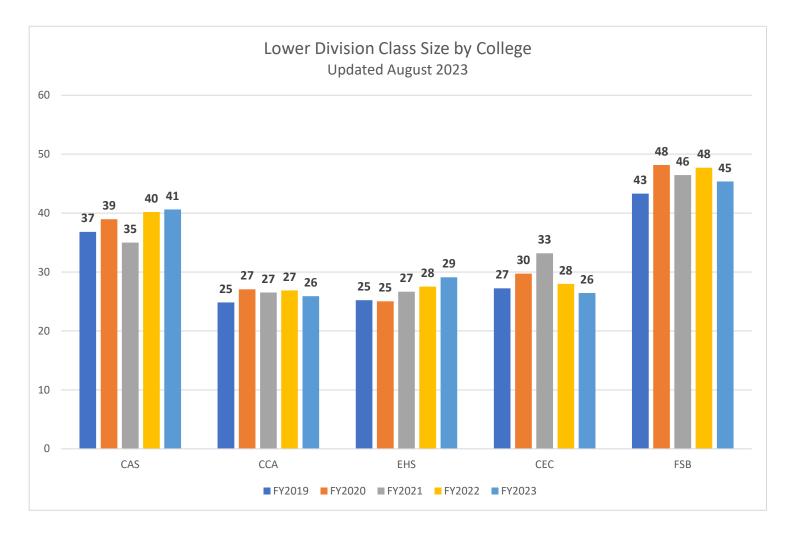
Generally, TCPL faculty teaching loads are 4/4. Departments in the upper right quadrant had an increase in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower right quadrant had an increase in faculty and a higher than average percent of their faculty teaching less than 4 courses. Departments in the upper left quadrant had a decrease in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower left quadrant had a decrease in faculty and a higher than average percent of their faculty teaching less than 4 courses.

Return to Home Page



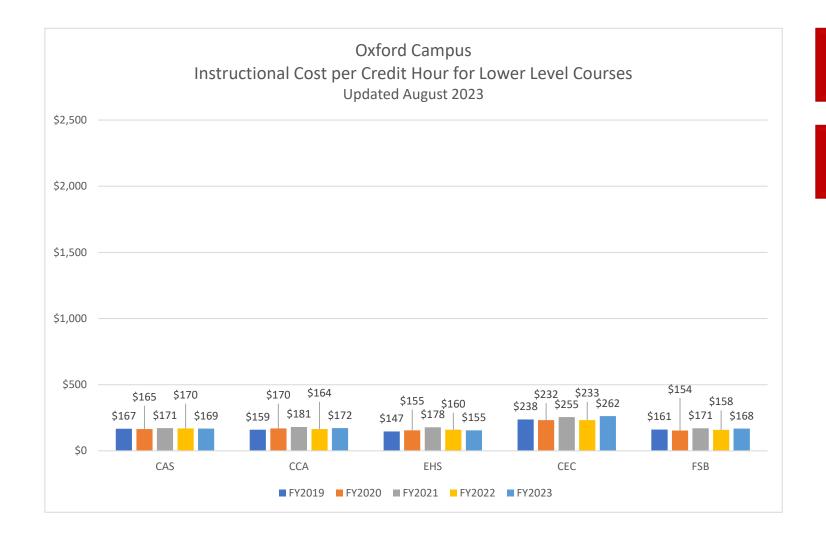
Generally, full-time visiting faculty teaching loads are 4/4. Departments in the upper right quadrant had an increase in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower right quadrant had an increase in faculty and a higher than average percent of their faculty teaching less than 4 courses. Departments in the upper left quadrant had a decrease in faculty and a lower than average percent of their faculty teaching less than 4 courses. Departments in the lower left quadrant had a decrease in faculty and a higher than average percent of their faculty teaching less than 4 courses.

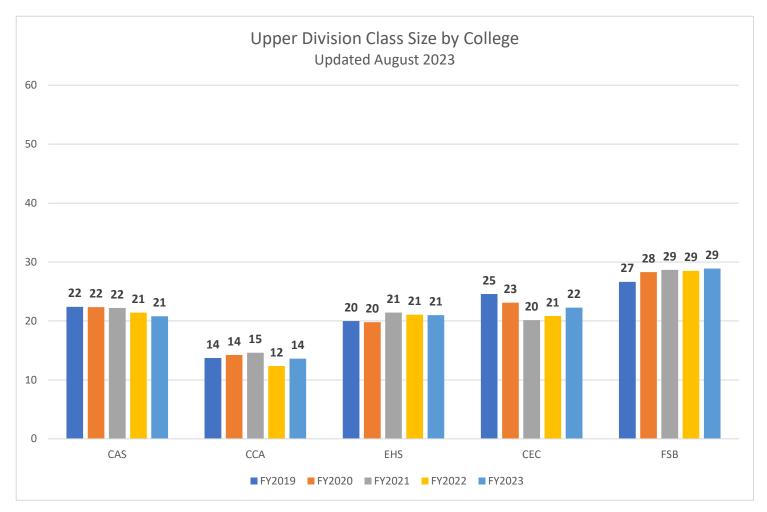
Return to Home Page



Oxford Campus Faculty Resources Part 4

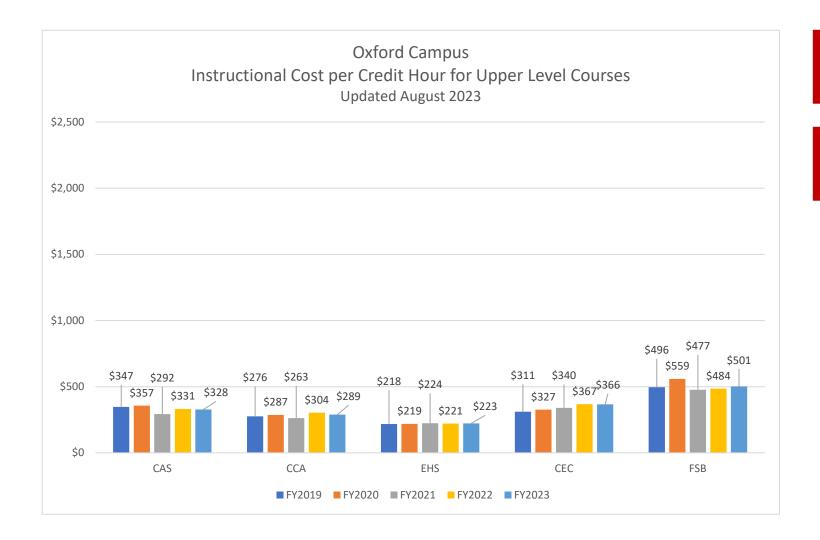
Section sizes are influenced by discipline and pedagogy. Generally, larger section sizes are associated with the efficient use of faculty and lower costs of instruction.

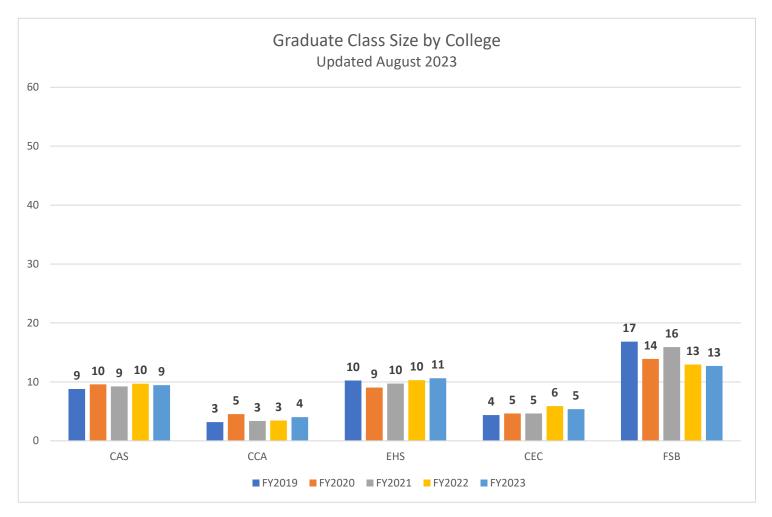




Section sizes are influenced by discipline and pedagogy. Generally, larger section sizes are associated with the efficient use of faculty and lower costs of instruction.

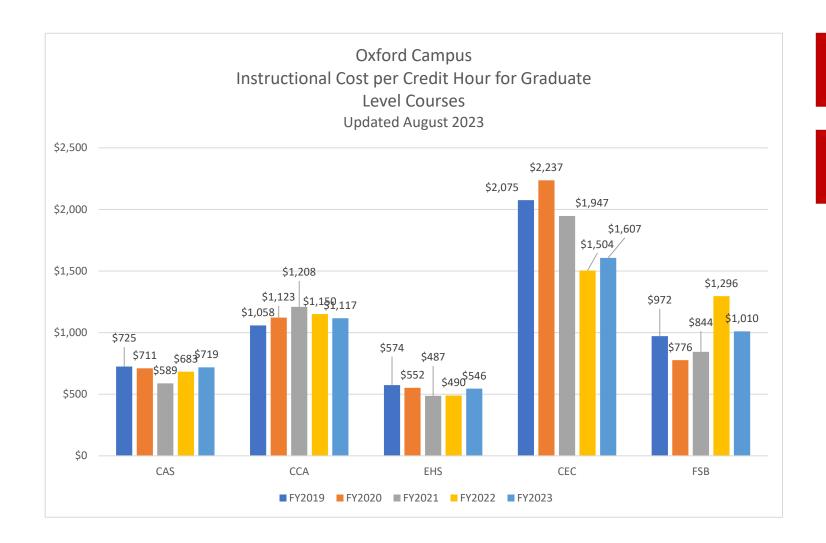
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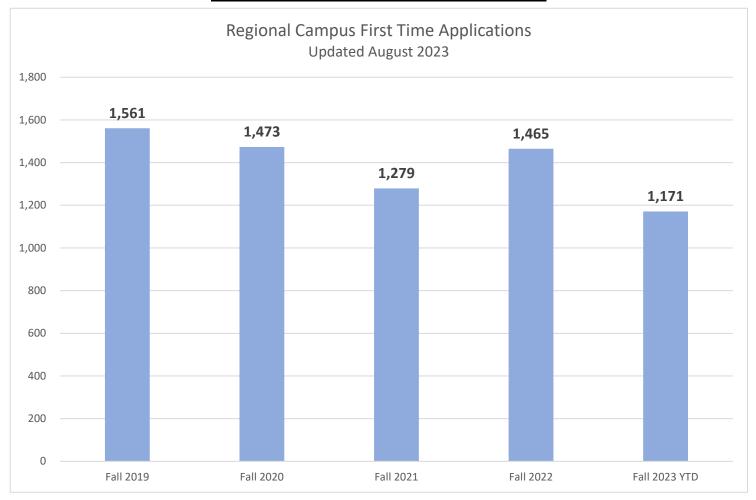




Section sizes are influenced by discipline and pedagogy. Generally, larger section sizes are associated with the efficient use of faculty and lower costs of instruction. Graduate instruction tends to be more expensive than undergraduate instruction due to section size and the use of tenure-tenure track faculty for instruction.

Return to Home Page

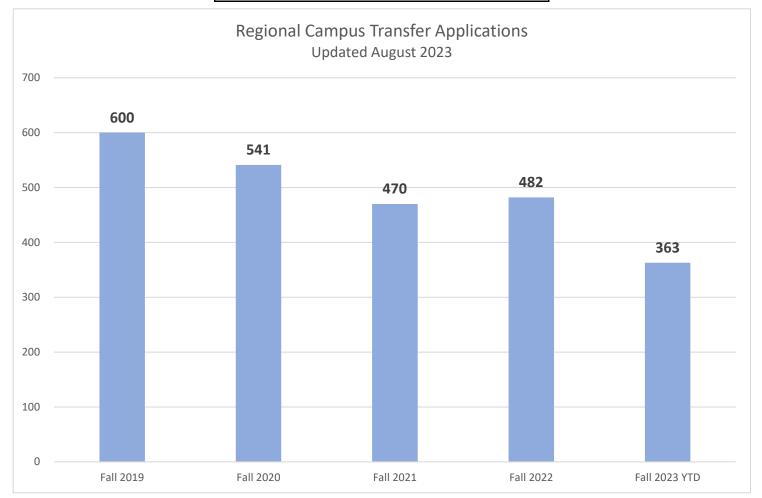




Return to Home Page

Regional Campus Leading

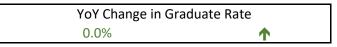
It is very early in the regional recruitment cycle to draw conclusions about this metric. The size of the application pool is the earliest indicator of whether the regional campuses will meet its NIR goals. First time applications increased in fall 2022 following a decline in Fall 2021 likely due to the tight labor market.

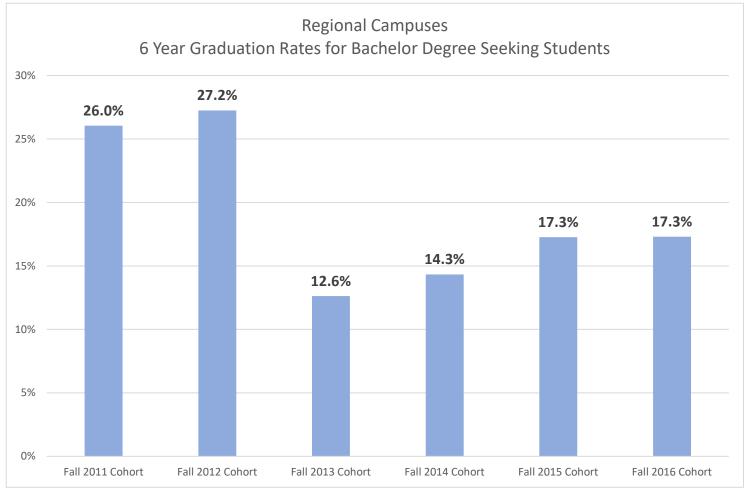


Return to Home Page

Regional Campus Leading

It is very early in the regional recruitment cycle to draw conclusions about this metric. Compared to the main camp, transfer students make up a larger portion of the regional campus incoming class. Transfer application have been trending down since fall 2019.



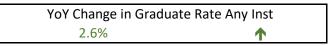


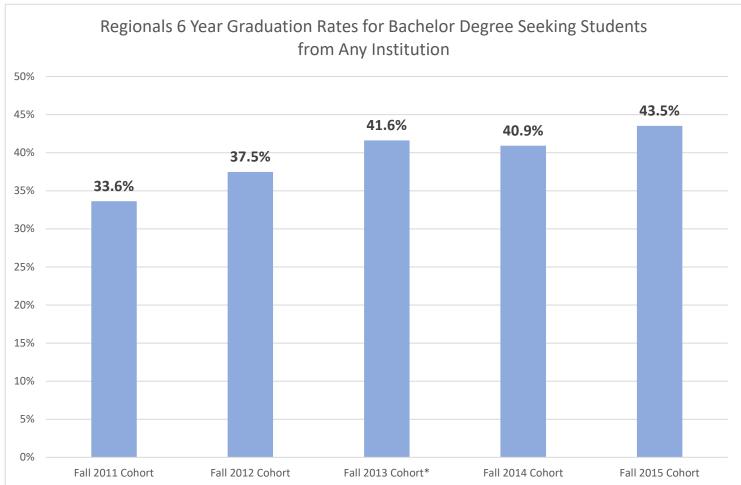
Return to Home Page

Regional Campus

Leading

Regional campus graduate rates tend to be lower than main campus graduation rates due to the open access to admissions and the greater likelihood students will complete their degree at the main campus or another institution.



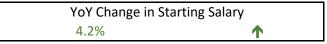


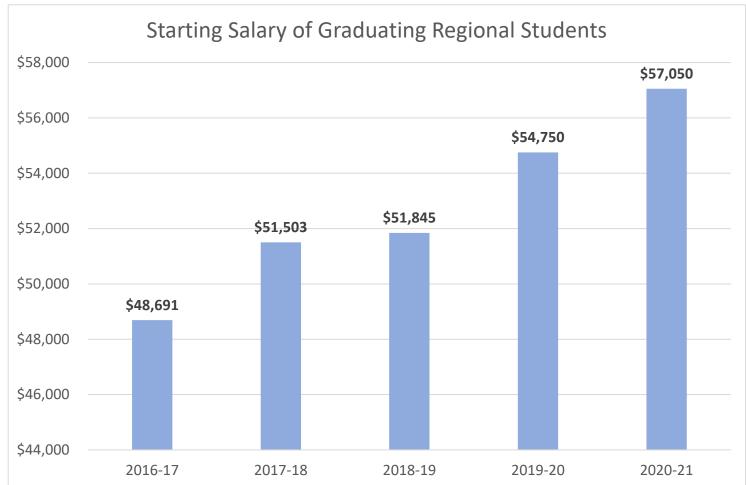
Return to Home Page

Regional Campus

Leading

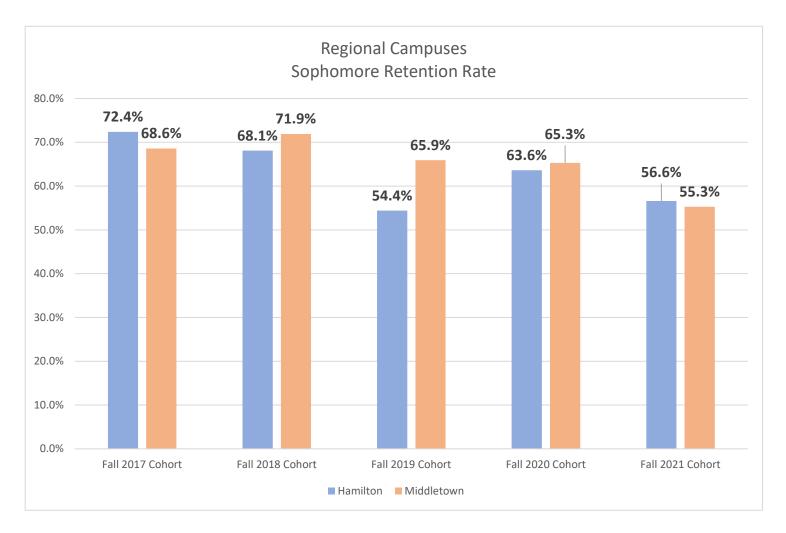
When factoring in graduation at any institution, regional student graduation rates reflect greater academic success.





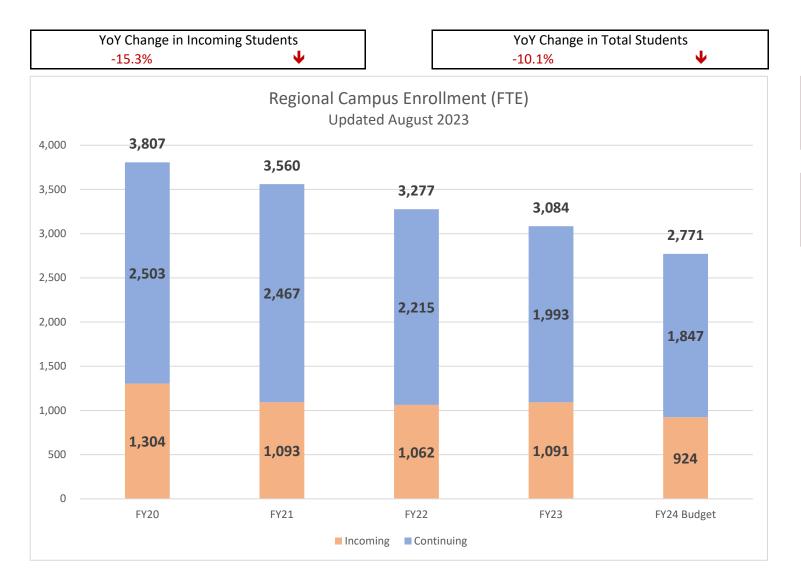


Regional Campus Lagging



Regional Campus Lagging Part 1

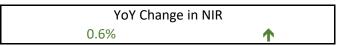
While volatile from year to year, regional retention rates have been on a downward trend.

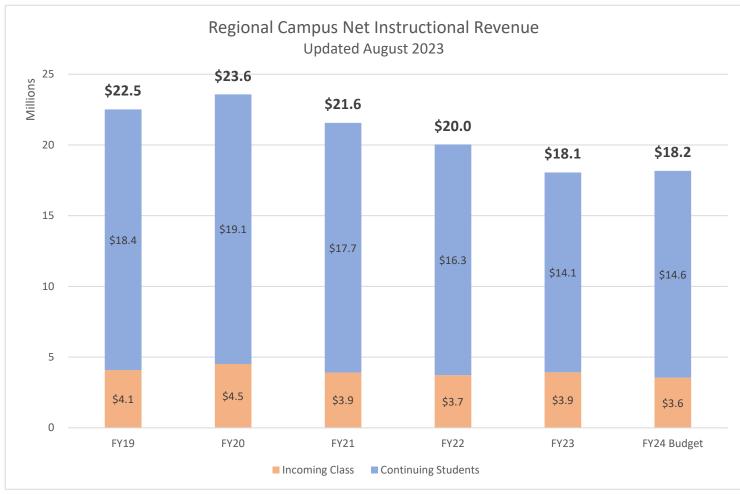


Regional campus enrollments have been on a downward trend since FY19 due to smaller incoming classes, and lower retention rates.

Return to Home Page

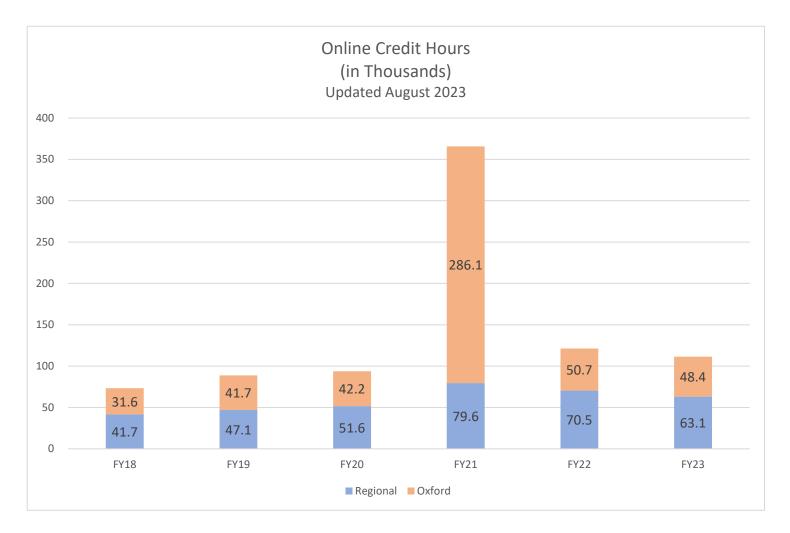
Regional Campus Lagging Part 2





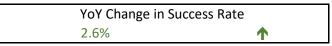
Regional Campus Lagging Part 2

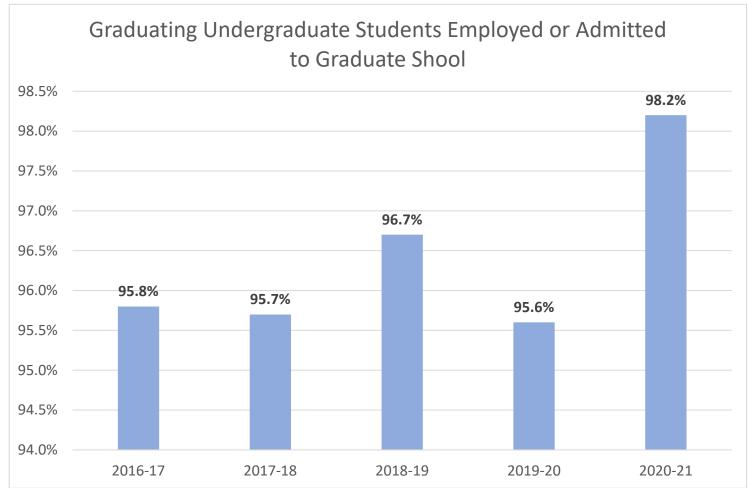
Instructional revenue has declined as enrollments decreased.



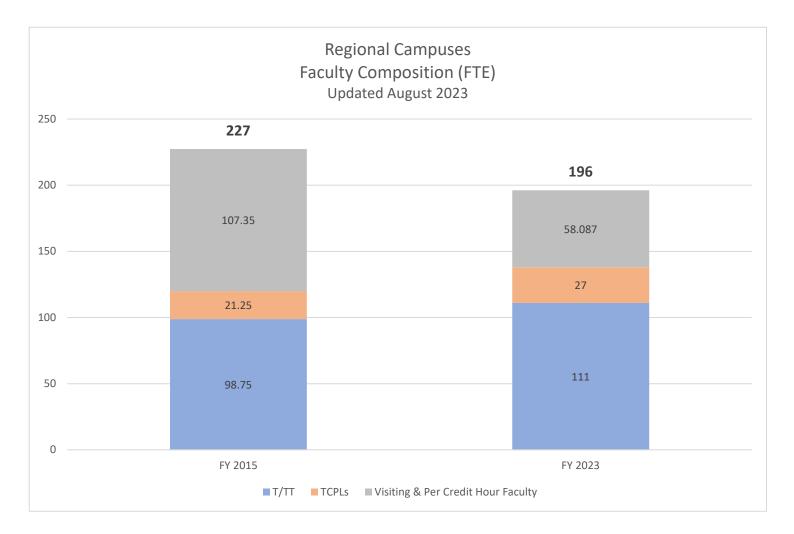
Regional Campus
Lagging
Part 2

The online delivery of courses and programs has been increasing for the regionals. Online credit hours taken on the regional campuses have for students enrolled at the regional campuses and on the Oxford campus.



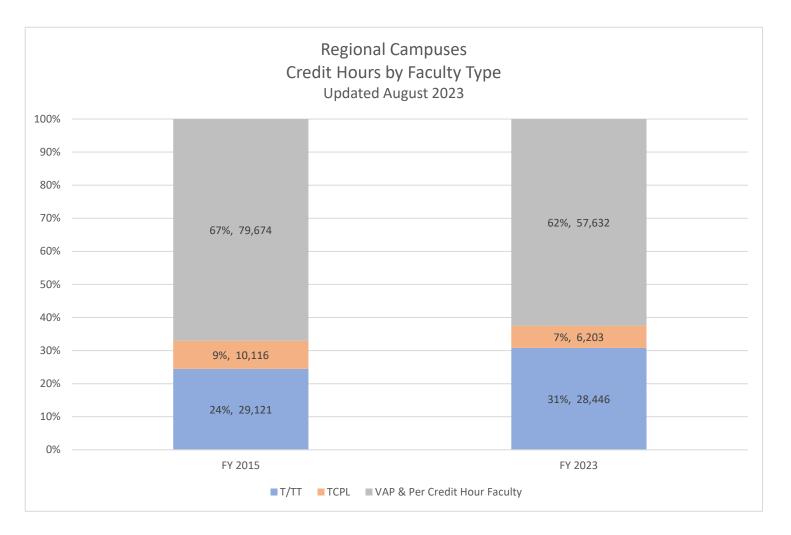


Regional Campus Lagging Part 2



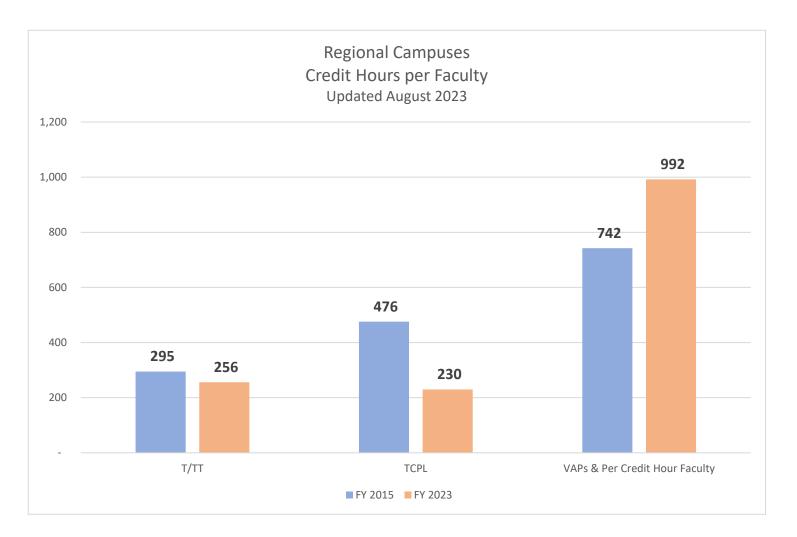
Regional Campus Faculty Resources Part 1

The number and mix of faculty determines the capacity of the university to deceiver in academic programs, and fulfill research and service objectives.



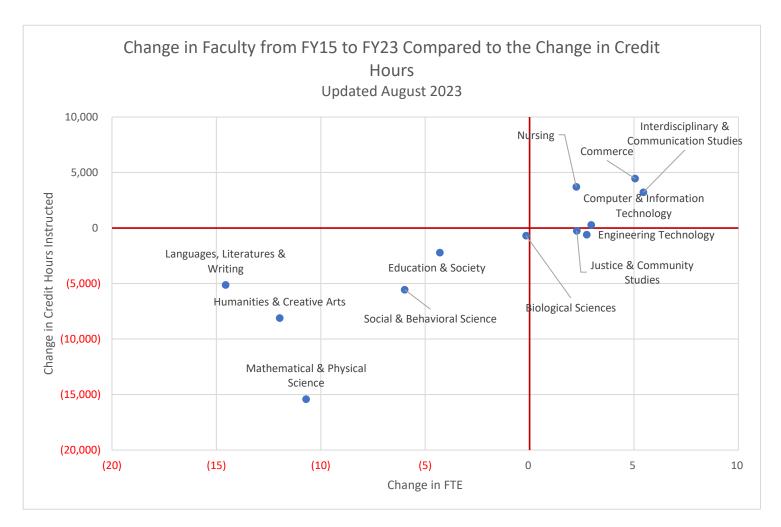
Regional Campus Faculty Resources Part 1

Credit hours instructed by faculty type are one measure of instructional load and the allocation of faculty resources. Instructional activity by VAPs & per credit hour faculty have decreased the last to fiscal years. The decrease has been offset by an increase in credit hours delivered by tenure-tenure track faculty.

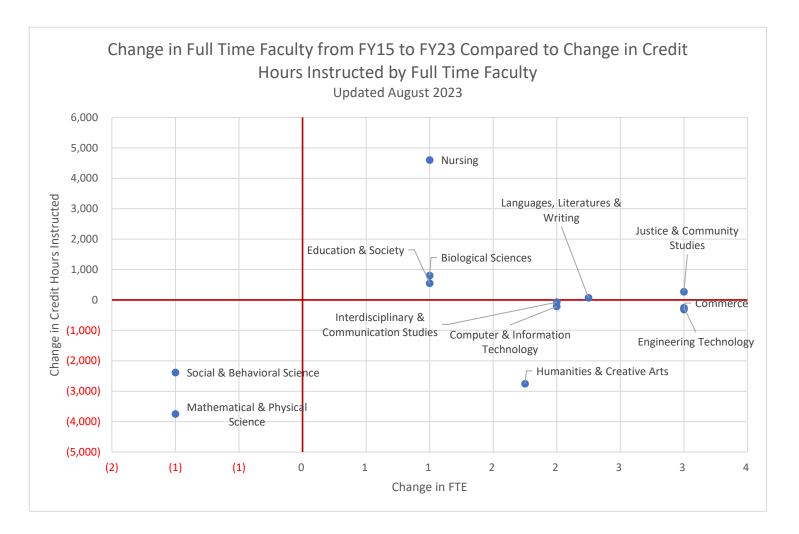


Regional Campus Faculty Resources Part 1

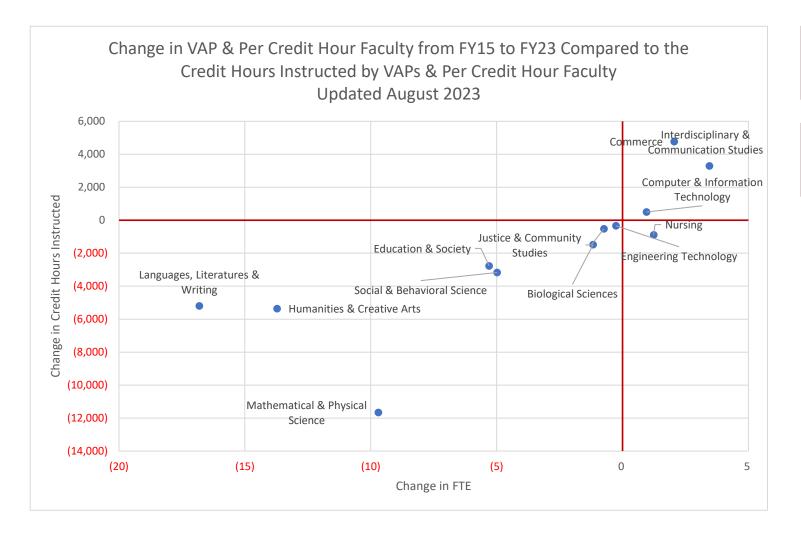
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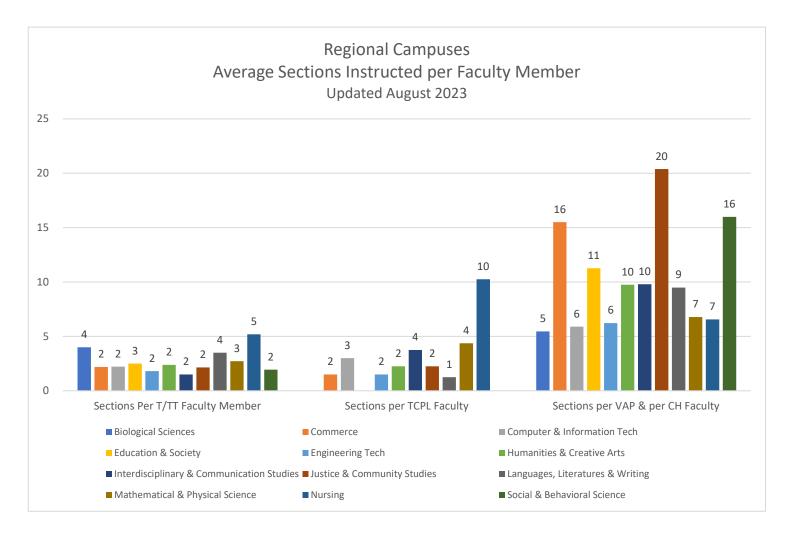
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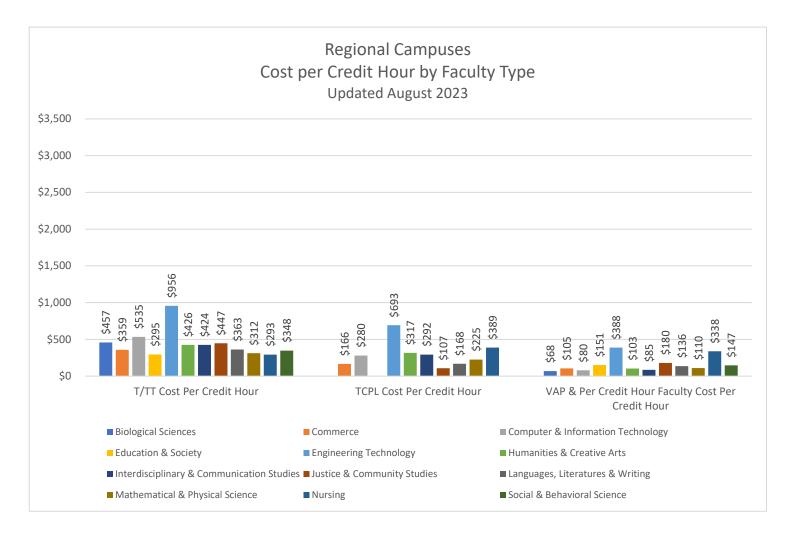
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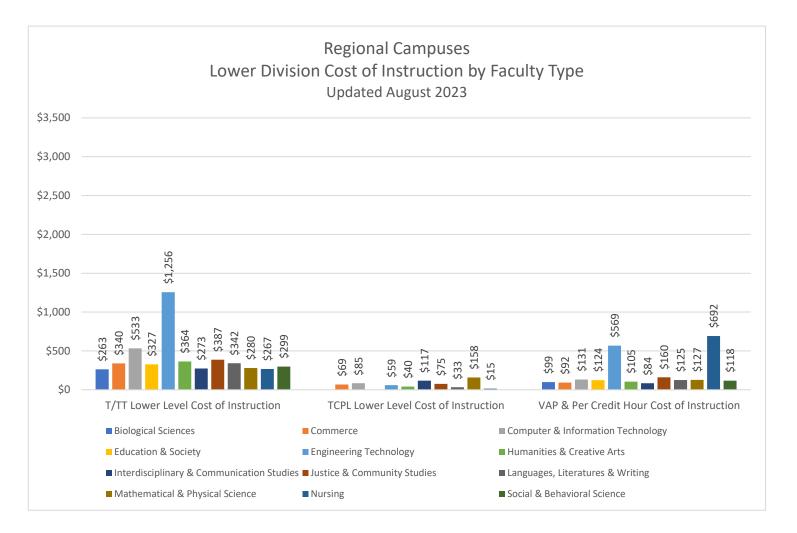
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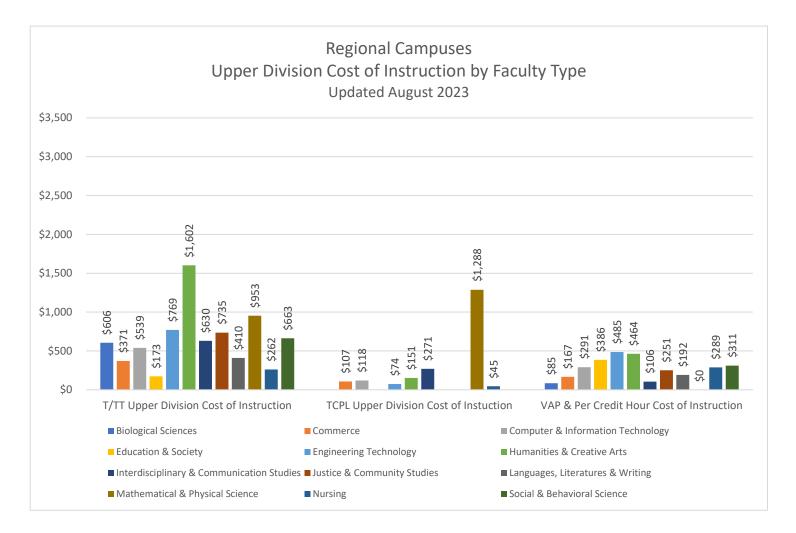
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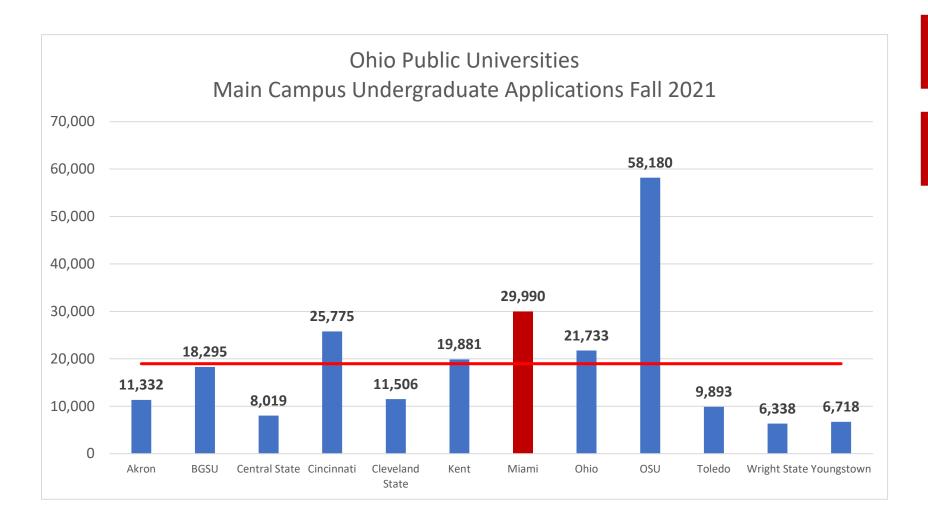
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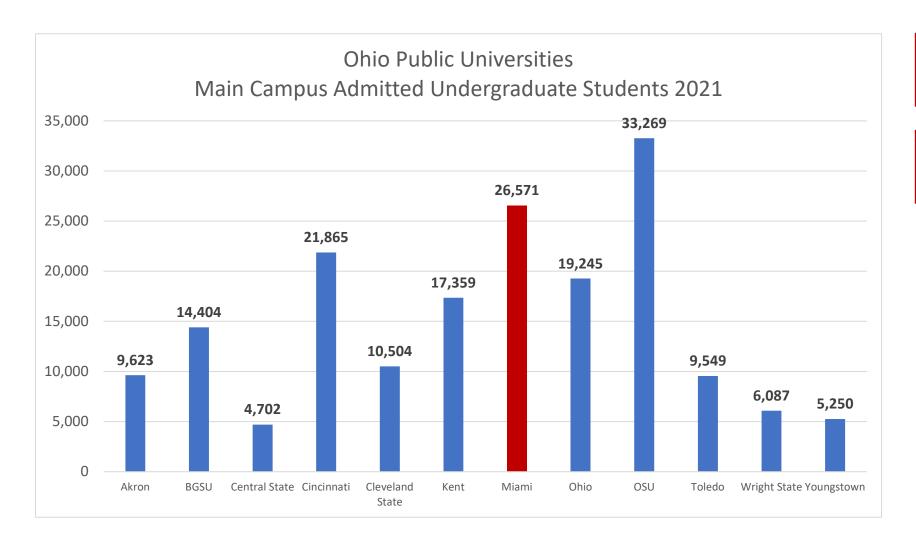


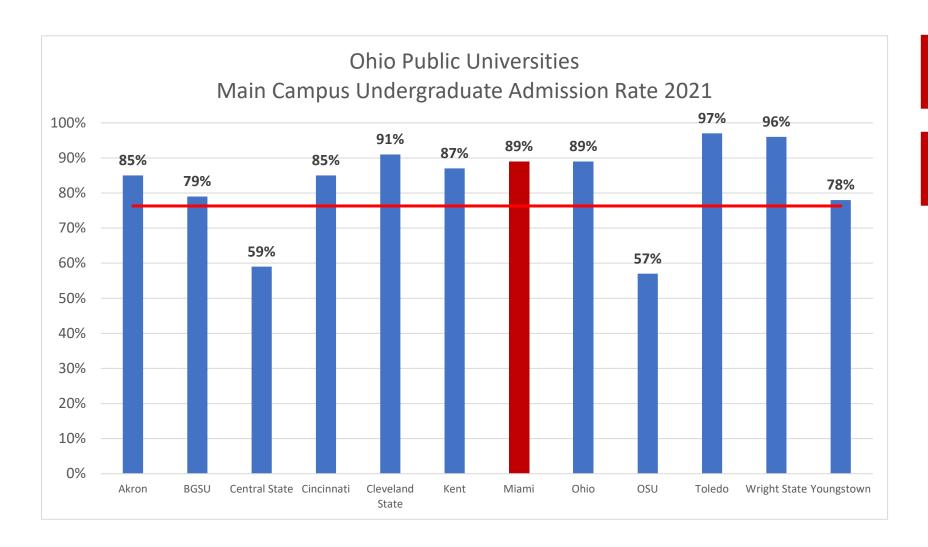
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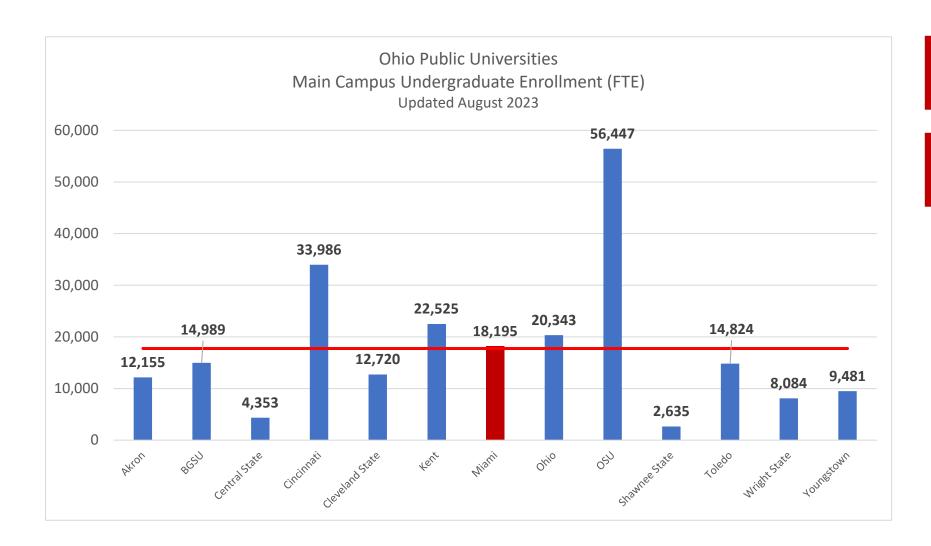


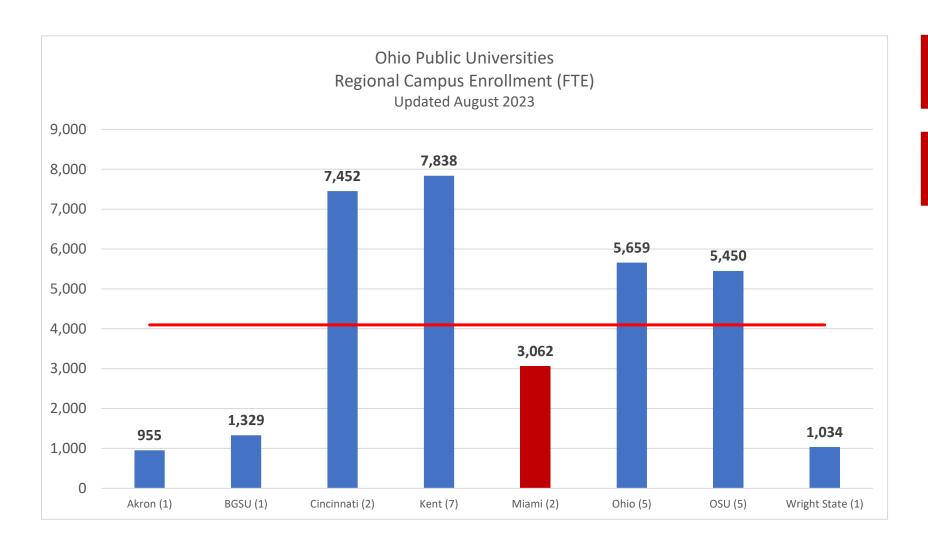
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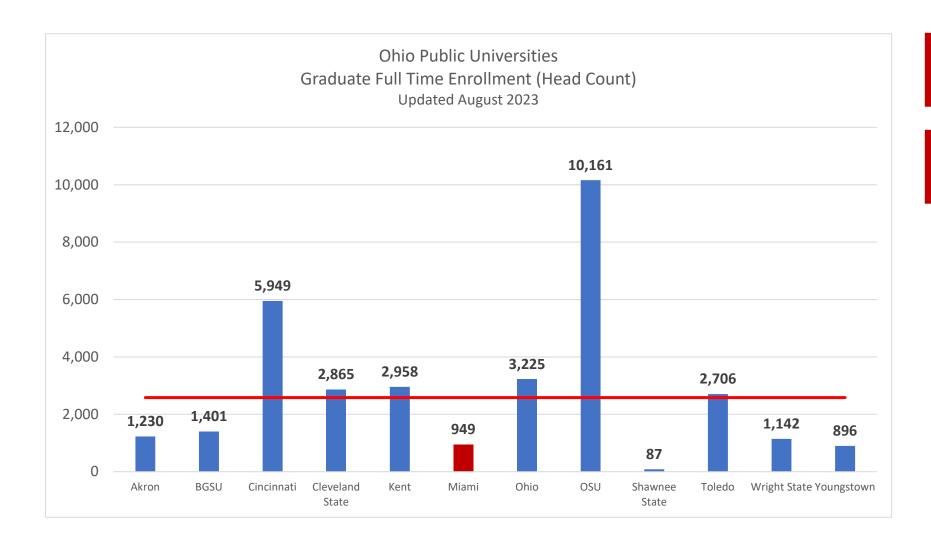


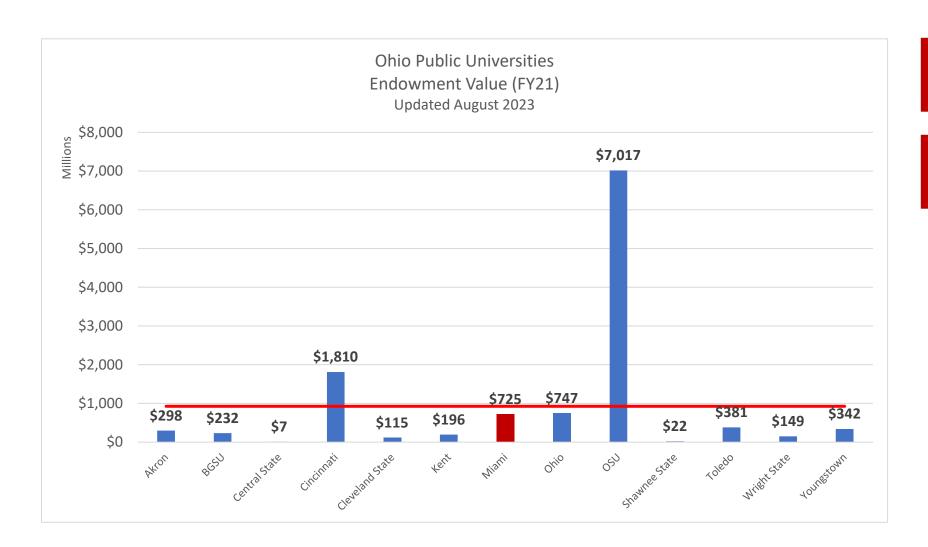


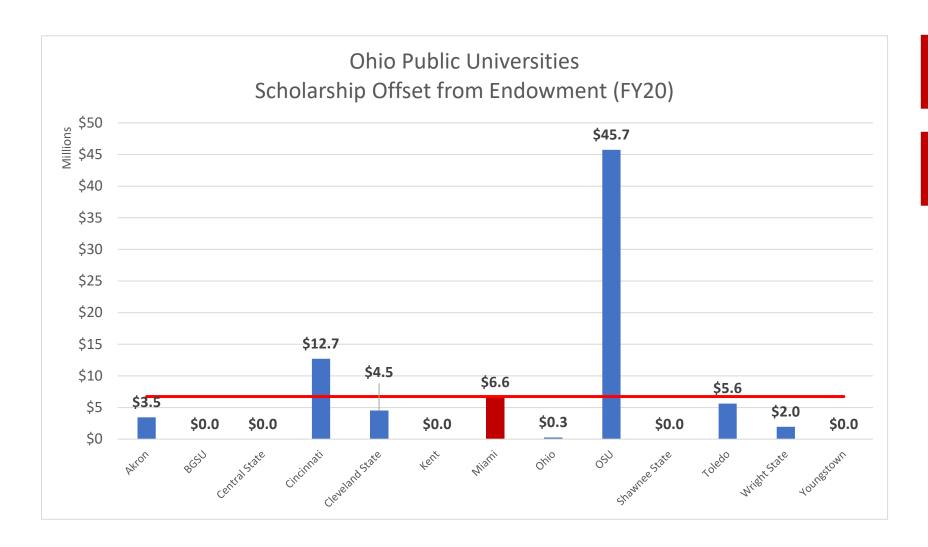


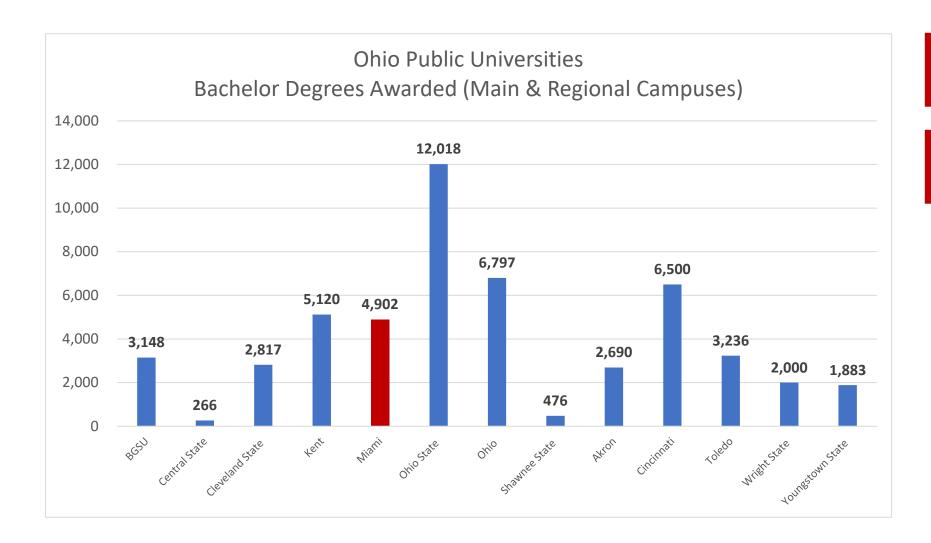




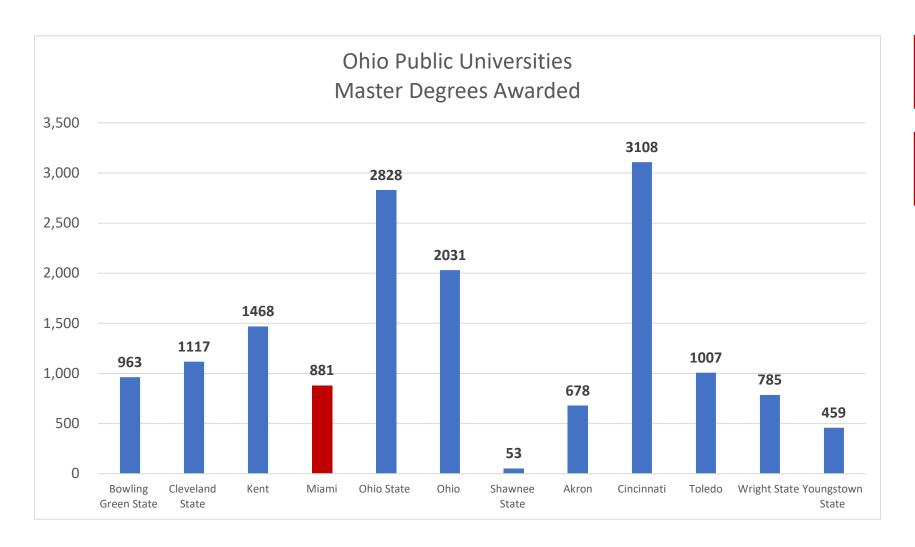




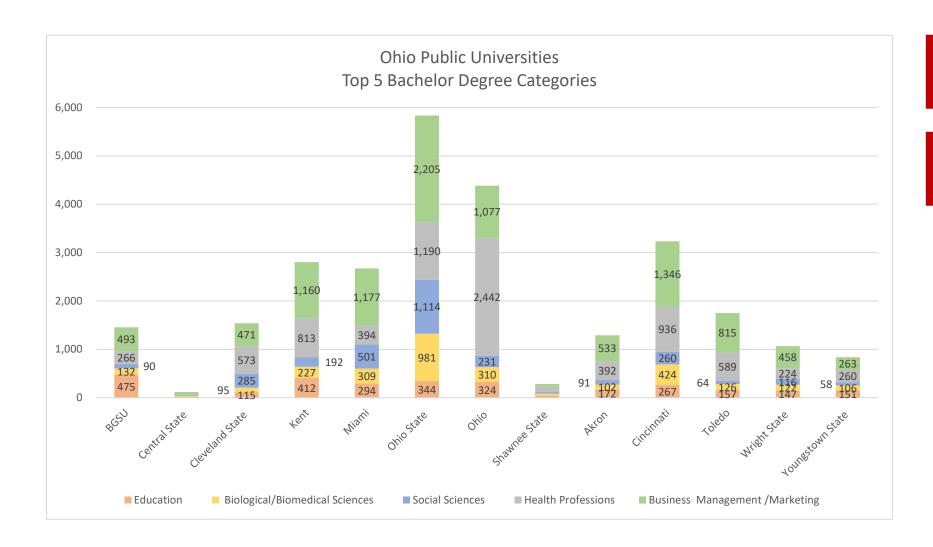




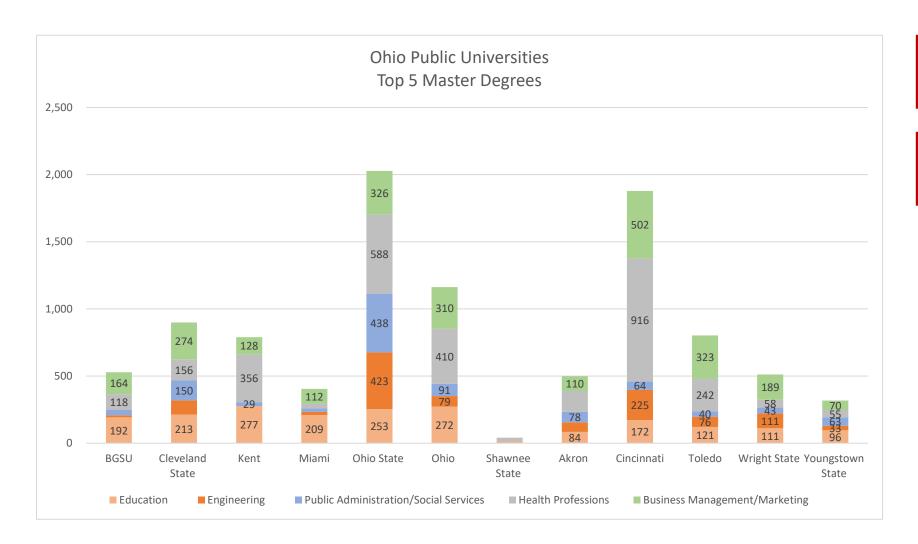
Ohio Public University Comparisons Part 3



Ohio Public University Comparisons Part 3

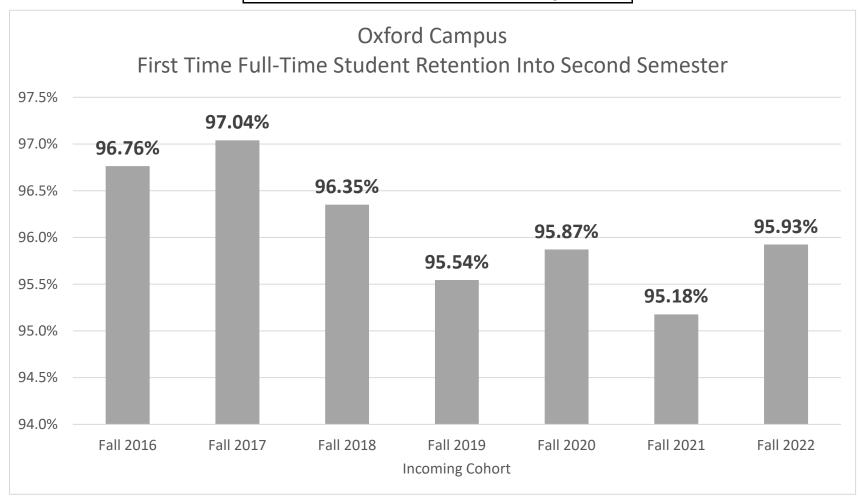


Ohio Public University Comparisons Part 3

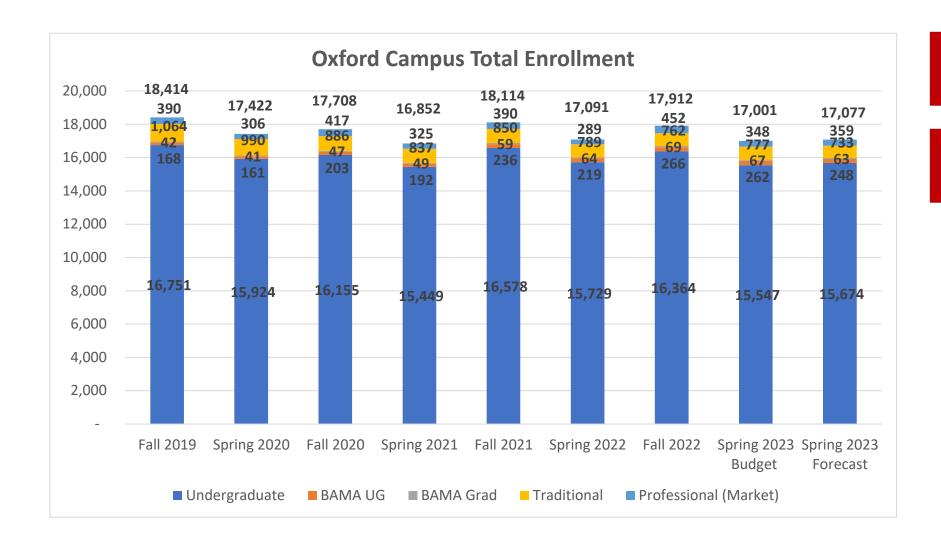


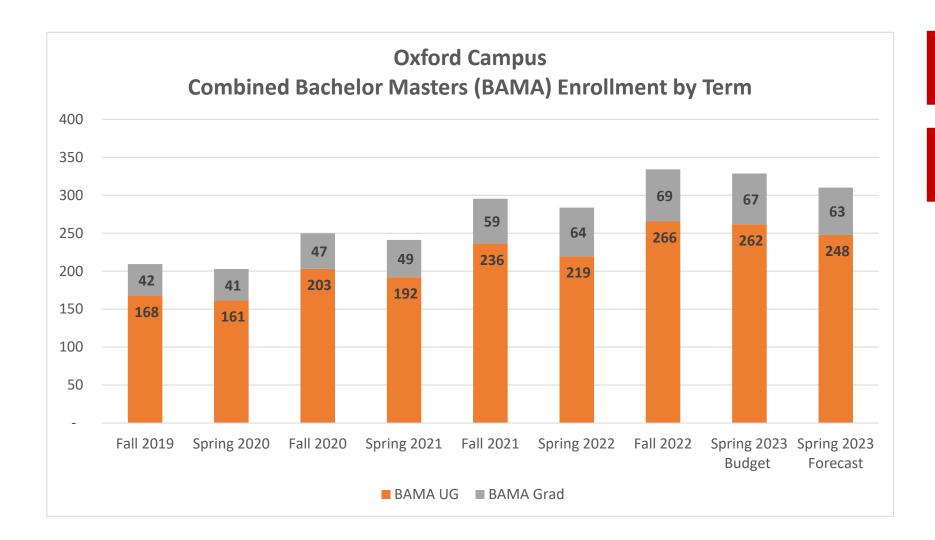
Ohio Public University
Comparisons Part 3

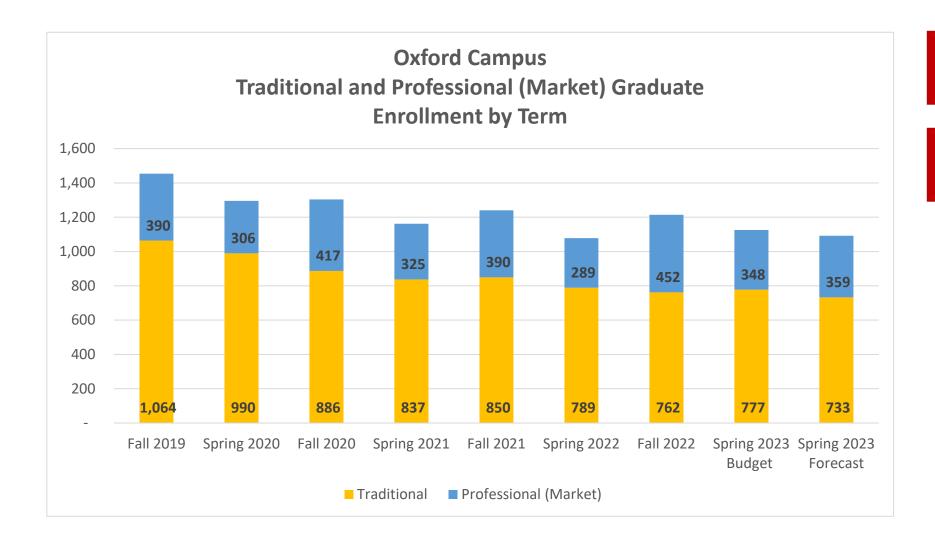
YoY Change in Retention to Second Semester
0.7%

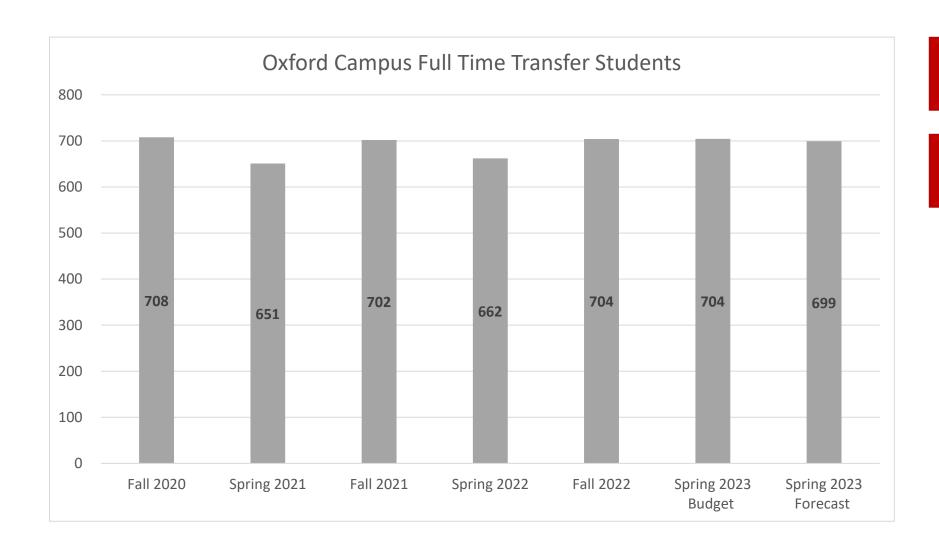


Return to Home Page









To: Finance & Audit Committee

From: Terry Moore, Chief Audit Officer

Subject: Internal Audit & Consulting Services — Status Report of High-Risk Internal Audit Issues

Log

Date: September 18, 2023

Status of High-Risk Audit Recommendations

The one high-risk audit recommendation outstanding since IACS' last report to the Committee in June has been closed. IT Services' Information Security Office has completed all remediation actions recommended by CBTS to address the vulnerabilities identified in their 2021 penetration test.

As shown in the table below, no high-risk audit recommendations have been added.

Risk Level	Open June 1 2023	Added	Closed	Open Sep 1 2023
High	1	0	1	0

The next page provides further details regarding the closed high-risk audit issue.

Closed Internal Audit Issues

Line	Audit Name And Date	Date Opened	Date Closed	Risk Level	Division	Recommendation	Responsible Person	Management Response and Status
1	207.1 - Outsourced Vulnerability Assessment - 9/2021	09/08/2021	08/24/2023	High	IT Services	CBTS finalized written reports of their findings from internal and external penetration tests in September 2021. The reports identified a number of weaknesses and vulnerabilities that could expose the University to risk of compromise. Vulnerabilities were categorized as high, medium, or low and specific recommendations were made to address the identified risks. IACS recommends IT Services Security, Compliance, and Risk Management take appropriate actions to address CBTS's recommendations and resolve the identified vulnerabilities.	John Virden, Asst VP for Security, Compliance & Risk Mgt and CISO	IACS followed up with IT Services' Information Security Office (ISO) in August 2023 and found that the two remaining cybersecurity vulnerabilities have been appropriately addressed. This audit recommendation is now closed, as the ISO completed all remediation recommended by CBTS.

Miami University

Financial Highlights

Year Ended June 30, 2023 Finance and Audit Committee

UNRESTRICTED GENERAL FUND SUMMARY

A majority of the university operations flow through the unrestricted general fund. In FY23, general fund revenues were \$467.4 million of the \$795.3 million in total revenues. The narrative section of the report is followed by a schedule summarizing all university operating budget results and detailed schedules for the general fund budget results for each campus. The general fund highlights are as follows:

- Net general fund revenues for all three campuses and the Voice of America Learning Center (VOALC) were \$467.4 million, exceeding the original budget of \$432.5 million by \$34.9 million.
- General Fund investment income was \$37.1 million above budget and the performance resulting in a year-end transfer to the reserve for investment fluctuations in the amount \$37.0 million.
- General fund expenses before transfers and year-end adjustments for all three campuses and the VOALC were \$352.4 million, or \$29.0 million below the \$381.4 million budget. The underspending was primarily from salaries and benefits due to the continuation of higher than normal vacancy rates.

Oxford Unrestricted General Fund

General revenues for Oxford were \$423.8 million, or \$35.5 million (9.1%) above budget. Net instructional revenue for the year was \$248.8 million, or \$0.7 million (-0.3%) below budget. General fee revenue for the year was \$48.8 million, or \$0.3 million (-0.6%) below budget. State appropriations were \$70.6 million, ending the year slightly below budget. Investment income was \$51.9 million above budget.

Total expenses for Oxford were below budget by \$28.2 million (-8.4%). Several categories of expense contributed to the positive performance.

- Salary and benefits expenses were \$13.2 million below budget. Health care spending was under budget by \$6.1 million due to the high employee vacancy rate and a decrease in utilization. Spending per beneficiary on health care continue to increase due to continued inflation pressures.
- Undergraduate financial aid is represented in two lines in the financial report. Aid is reported as a discount to revenue for scholarships awarded to new and continuing students under the university's merit aid programs. Expenses in this category of aid can fluctuate due to student yield and retention outcomes. This category of aid was \$0.4 million below the \$148.1 million budget. A second category of undergraduate scholarships, recognized in the report under expenses, is for categorical scholarship awards that are managed on a budgetary basis. Scholarships in this category were \$2.1 million below budget.
- Graduate assistant fee waivers and fellowships were \$4.6 million less than budget.
- Utilities expenses were \$0.5 million less then budget, even though higher energy prices persistent through the fiscal year.

 Departmental support costs were \$1.4 million under budget due. Spending of accumulated carry forward balances is not included in the current year operating budget, but are recognized as expenses in the final financial statements at the time they occur.

This year's financial results were influenced by year end transfers for the Oxford campus. A transfer of \$37.0 million to the reserve for investment fluctuations was made to cover investment losses per university policy. Additionally, transfers of \$7.5 million and \$2.0 million were made to support the university's enterprise resource planning (ERP) system and anticipated consulting costs, respectively. The budget included a draw from the carry forward reserve of\$13.0 million. This was offset by new carryforward of \$10.3 million being transferred to the carryforward reserve. Also, a transfer of \$5.4 million was made to Provost's departmental carry forward related to surplus earnings from net instructional revenue generated by the academic divisions under the RCM budget model. Finally, a transfer was made to divisional carryforwards of \$4.32 million.

Hamilton and Middletown General Fund

The Hamilton general fund balance ended the fiscal year with a deficit of \$2.7 million, before year-end adjustments. Net instructional revenues were just below \$20.3 million budget. Cross campus revenues exceeded the \$5.8 million budget by \$0.5 million. The general fee revenues of \$0.9 million were \$139,524 under budget. State subsidy (SSI) was below budget by \$8,900. The Hamilton campus budget assumed \$1.5 million in underspending for salaries and benefits. Actual underspending on salaries and benefits was slightly more than budgeted. The budget also had a year-end return from the benefit recovery fund of \$68,814. The actual year-end benefit return was \$\$0.5 million. Spending for utilities was \$138,843 below budget. Departmental support expenses were above budget by \$138,843 for the fiscal year. Finally, the above financial results exclude in depreciation expense. There was an \$18,124 transfer to the Hamilton facility renewal and replacement fund.

The Middletown campus general fund balance had a deficit of \$2.7 million before adjustments. Net tuition for the campus was \$8.8 million, ending the year \$697,780 short of the budget. Cross campus tuition was slightly below the \$1.6 million budget. State subsidy (SSI) for the campus was below budget by \$4,809. The Middletown campus budget assumed \$3.0 million in underspending for salaries and benefits. Actual underspending on salaries and benefits were \$0.2 million more than budgeted Finally, the above financial results exclude in depreciation expense and there was a \$148,245 draw from the Middletown facility renewal and replacement fund.

Voice of America Learning Center (VOALC)

Funding for the VOALC is transferred from the other campuses as follows: Oxford (50%), Hamilton (25%), and Middletown (25%). The VOALC ended the fiscal year with a surplus of \$7,718.

Investments

Central banks around the world have aggressively increased interest rates to their highest levels in decades. These actions have slowed the pace of inflation and given some optimism to capital markets. The ultimate response of global economies is unclear. Inflation remains well above target levels and persistently tight labor markets remain a key inflationary threat. Global equity prices as measured by the MSCI All Country World Index (ACWI) rose 16.5 percent after declining 15.7 percent the previous year. U.S. stocks were strong, with the S&P 500 up almost 20 percent and the NASDAQ up 25 percent. Investment grade bonds provided no safe haven, as rising interest

rates led to negative returns for many debt instruments, though high yield bonds were up 9 percent. Traditional inflation hedges such as commodities and real estate generally struggled during the year. The University's non-endowment pool posted a gain of 6.3 percent for the fiscal year ended June 30, 2023, while the endowment had an estimated gain of 8.1 percent (please note the FY2023 return is incomplete, since we do not yet have results for all private capital investments which have a significant reporting delay).

DESIGNATED AND RESTRICTED FUNDS

The designated and restricted funds consist of numerous individual accounts. Designated funds are largely small self-supporting operations that are primarily managed by chairs, directors, and other department heads. The designated fund is also used to segregate funds set aside for major initiatives. Total designated fund balances increased by \$15.7 million while restricted fund balances increased by \$1.1 million. Total restricted fund revenues exceeded the budget by \$31.96 million. In total, 90% of the restricted fund revenues are attributable to grants and contracts (\$51.5 million) and donor restricted gifts (\$31.1 million).

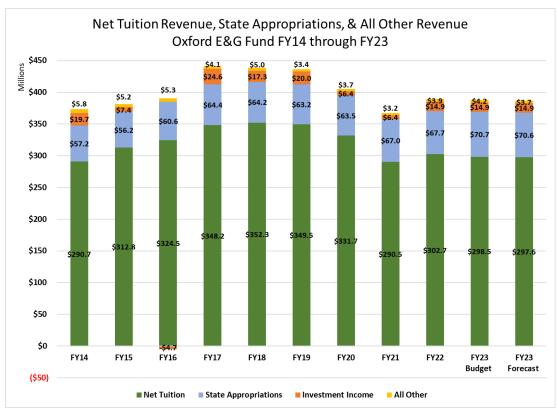
BUDGET CONTINGENCIES AND RESERVES

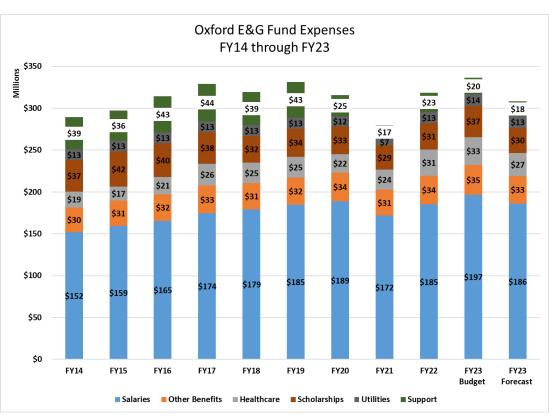
Included in the attachments is a detailed schedule providing information on the status of the reserves. Total balances decreased by \$37.4 million or 26.2 percent before consideration of the change in the pension liability primarily due to performance of investments. Also enclosed later in the packet is a separate schedule summarizing the budget carry forward balances.

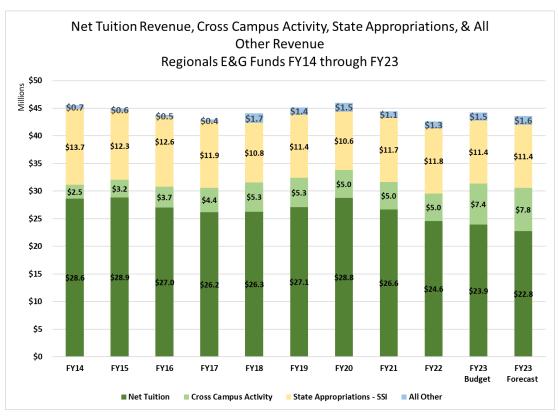
AUXILIARIES

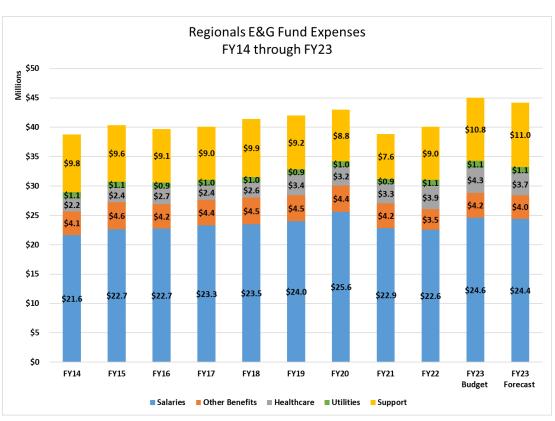
The "Financial Analysis – Auxiliary Units" report provides details for each auxiliary enterprise. Auxiliary revenues increased by \$10.5 million over fiscal year 2022. Expenses increased by \$31.8 million for the same period. Auxiliary enterprises incurred an overall operating surplus of \$28.2 million for the year. The table below presents financial results before year end corrections from the sources described in the following paragraphs.

The Armstrong Student Center ended the year with a surplus of \$1.7 million and contributed \$1.5 million to CR&R. The Marcum Center ended the year with a surplus of \$0.3 million and contributed \$24,493 to CR&R. Intercollegiate Athletics ended the year with a deficit of \$223,011. Residence and Dining Halls ended the year with a surplus of \$0.7 million and contributed \$0.5 million to CR&R. The Shriver Center ended the year with a surplus of \$1.1 million and made \$0.4 million contribution to CR&R. Transportation Services operated with a surplus of \$1.3 million for the year and moved \$0.8 million 600,00 to CR&R. Recreation Center operated with a surplus of \$0.7 million for the year and moved \$0.8 million for the year and moved \$0.7 million to CR&R. Finally, the Utility Enterprise operated with a surplus of \$6.8 million for the year and moved \$0.7 million \$2.3 million to CR&R.









FY2023 Forecast

Oxford General Fund Only

As of June 30, 2023

		Budget	I	June End-of-Year Forecast		Budget to Projection
REVENUES:						-
Instructional & OOS Surcharge	\$	397,496,831	\$	396,396,709	\$	(1,100,123)
Less Cohort Financial Aid Discount		148,058,617		147,623,790		(434,827)
Net Instructional Fee & Out-of-State Surcharge		249,438,214		248,772,919	•	(665,296)
General		49,089,188		48,806,573	\$	(282,615)
Other Student Revenue		2,596,500		1,195,277		(1,401,223)
Tuition, Fees and Other Student Charges		301,123,903		298,774,769		(2,349,134)
State Appropriations		70,651,582		70,566,626	\$	(84,956)
Investment Income		14,900,000		51,924,863	\$	37,024,863
Other Revenue		1,572,405		2,489,556	\$	917,151
Total Revenues	\$	388,247,890	\$	423,755,814	\$	35,507,924
EXPENDITURES:						
Salaries		196,646,688		186,107,669		(10,539,019)
Benefits		35,495,227		32,853,379		(2,641,849)
Healthcare Expense		33,490,909		27,395,662		(6,095,247)
Graduate Assistant, Fellowships & Fee Waivers		21,998,300		17,427,431		(4,570,869)
Undergraduate Scholarships & Student Waivers		15,073,303		12,924,523		(2,148,780)
Utilities		14,004,735		13,474,927		(529,808)
Departmental Support Expenditures		15,997,229		14,620,705		(329,606)
Multi-year Expenditures		3,633,163		3,381,735		(251,428)
Total Expenditures	\$	336,339,555	\$	308,186,031	¢	(28,153,524)
rotar Experiatures	Ψ	330,339,333	Ψ	300,100,031	Ψ	(20,100,024)
DEBT SERVICE AND TRANSFERS:						
General Fee		(48,599,321)		(48,316,706)		282,615
Capital, Renewal & Replacement		(6,476,400)		(6,123,114)		353,286
Debt Service		(12,687,273)		(12,516,036)		171,237
Support for VOALC (50%)		(427,532)		(427,532)		-
Other Miscellaneous Operational Transfers		(1,692,478)		(1,493,098)		199,381
Other Transfers (net)		5,001,563		4,260,270		(741,293)
Total Debt Service and Transfers	\$	(64,881,442)	\$	(64,616,216)	\$	265,226
Net Revenues/(Expenditures) Before Adjustments	\$	(12,973,107)	\$	50,953,567	\$	63,926,674
ADJUSTMENTS:						
Departmental Budgetary Carryforward				(10,338,276)		(10,338,276)
Reserve for Carry Forward		12,973,107		12,973,107		-
Divisional Revenue Carry Forward				(5,413,901)		(5,413,901)
Reserve for Investment Fluctuations				(37,024,863)		(37,024,863)
Reserve for Encumbrances				1,636,522		1,636,522
Reserve for Litigation				(90,000)		(90,000)
Other Miscellaneous Adjustments				(9,500,000)		(9,500,000)
Net Increase/(Decrease) in Fund Balance	\$	1	\$	3,196,156	\$	3,196,156

FY2023 Forecast

Hamilton General Fund Only

As of June 30, 2023

				June		
				End-of-Year		Budget to
		Budget		Forecast		Projection
REVENUES:		<u> Duuget</u>		TOTECASE		FTOJECTION
Instructional & OOS Surcharge - Regional Students	\$	15,273,273	\$	14,909,324	\$	(363,949)
Instructional & OOS Surcharge - Cross Campus	Ψ	5,842,465	Ψ	6,309,401	Ψ	466,936
Less Continuing & New Scholarships		766,206		783,959		17,754
Net Instructional Fee & Out-of-State Surcharge		20,349,533		20,434,766		85,233
General		1,031,947		892,423		(139,524)
Other Student Revenue		193,500		66,790		(126,710)
Tuition, Fees and Other Student Charges		21,574,980		21,393,979		(181,001)
ranion, recount outer stadent charges		21,011,000		21,000,070		(101,001)
State Appropriations - SSI		7,401,512		7,392,612		(8,900)
State Appropriations - CCP		446,620		411,712		(34,909)
Investment Income		50,000		95,600		45,600
Other Revenue		79,500		131,479		51,979
Total Revenues	\$	29,552,612	\$	29,425,382	\$	(127,230)
70.007.0000		20,002,012		20,120,002		(121,200)
EXPENDITURES:						
Salaries		16,610,696		16,594,482		(16,214)
Allowance for Unspent Salaries		(1,198,099)		(1,031,058)		167,041
Benefits		3,418,345		3,386,054		(32,292)
Allowance for Unspent Benefits		(327,667)		(451,326)		(123,659)
Healthcare Expense		2,439,102		2,439,102		0
Anticipated Benefit Recovery		(68,914)		(449,645)		(380,731)
Graduate Assistant Fee Waivers		-		31,175		31,175
Utilities		694,000		555,919		(138,081)
Departmental Support Expenditures		6,446,725		6,585,567		138,843
Multi-year Expenditures		, , , <u>-</u>		22,044		22,044
Total Expenditures	\$	28,014,188	\$	27,682,314	\$	(331,874)
DEBT SERVICE AND TRANSFERS:						
General Fee		(342,636)		(203,111)		139,525
Capital, Renewal & Replacement				(18,124)		(18,124)
Debt Service		(1,906,512)		(1,906,512)		(0)
Support for VOALC (25%)		(213,766)		(213,766)		-
Other Transfers Out		(2,017,037)		(2,121,523)		(104,486)
Other Transfers In		-		57,518		57,518
Total Debt Service and Transfers	\$	(4,479,950)	\$	(4,405,518)	\$	74,433
Net Revenues/(Expenditures) Before Adjustments	\$	(2,941,526)	\$	(2,662,450)	\$	279,076
ADJUSTMENTS:						
Departmental Budgetary Carryforward						-
Divisional Budgetary Carryforward		-		348,968		348,968
Strategic Investment Funding - Divisional Carryforward						-
Reserve for Carry Forward		2,941,526		2,941,528		2
Transfer from Fund Balance						-
Reserve for Encumbrances				231		231
Reserve for Investment Fluctuations						-
Reserve for Future Budgets						
Net Increase/(Decrease) in Fund Balance	\$	(0)	\$	628,276	\$	628,276
,		(-)	-	, -		

234/263

FY2023 Forecast

Middletown General Fund Only

As of June 30, 2023

				June		
				End-of-Year		Budget to
		Budget		Forecast		<u>Projection</u>
REVENUES:		<u> </u>		<u> </u>		
Instructional & OOS Surcharge - Regional Students	\$	9,005,359	\$	8,338,612	\$	(666,748)
Instructional & OOS Surcharge - Cross Campus	·	1,574,890	·	1,525,857		(49,033)
Less Continuing & New Scholarships		1,108,903		1,090,903		(18,000)
Net Instructional Fee & Out-of-State Surcharge		9,471,346		8,773,566		(697,780)
General		508,595		490,984		(17,611)
Other Student Revenue		80,700		35,797		(44,903)
Tuition, Fees and Other Student Charges		10,060,641		9,300,347		(760,293)
State Appropriations - SSI		3,998,875		3,994,066		(4,809)
State Appropriations - CCP		577,585		615,902		38,317
Investment Income		50,000		96,817		46,817
Other Revenue		10,402		177,980		167,578
Total Revenues	\$	14,697,503	\$	14,185,112	\$	(512,391)
EXPENDITURES:						
Salaries		11,442,522		11,399,772		(42,750)
Allowance for Unspent Salaries		(2,271,603)		(2,531,802)		(260,199)
Benefits		1,891,020		1,800,857		(90,164)
Allowance for Unspent Benefits		(757,887)		(729,016)		28,871
Healthcare Expense		2,009,041		2,009,041		0
Anticipated Benefit Recovery		(49,738)		(258,472)		(208,734)
Graduate Assistant Fee Waivers		-		-		-
Utilities		396,000		449,708		53,708
Departmental Support Expenditures		4,034,454		4,079,911		45,457
Multi-year Expenditures Total Expenditures	\$	16,693,809	\$	- 16,219,998	\$	(473,811)
Total Exponentario		70,000,000	Ψ	10,210,000	Ψ_	(47 0,011)
DEBT SERVICE AND TRANSFERS:						
General Fee		(75,422)		(57,811)		17,612
Capital, Renewal & Replacement		-		148,245		148,245
Debt Service		(61,357)		(42,461)		18,896
Support for VOALC (25%)		(213,766)		(213,766)		-
Other Transfers Out		-		(2,927,430)		(2,927,430)
Other Transfers In		2,017,037		2,424,735		407,698
Total Debt Service and Transfers	\$	1,666,492	\$	(668,488)	\$	(2,334,980)
Net Revenues/(Expenditures) Before Adjustments	\$	(329,814)	\$	(2,703,374)	\$	(2,373,560)
ADJUSTMENTS:						
Departmental Budgetary Carryforward						_
Divisional Budgetary Carryforward				2,552,258		2,552,258
Strategic Investment Funding - Divisional Carryforward				_,00_,_00		-,002,200
Reserve for Carry Forward		329,814		329,814		0
Transfer from Fund Balance		,		,		-
Reserve for Encumbrances				38,175		38,175
Reserve for Investment Fluctuations						, -
Reserve for Future Budgets						-
Not Increase//Decrease) in Fund Polance	¢	0	¢	246 072	¢	246 072
Net Increase/(Decrease) in Fund Balance	<u>Ψ</u>	0	Φ	216,873	φ	216,873

235/263

FY2023 Forecast

Voice of America Learning Center General Fund Only

As of June 30, 2023

		Budget_		June nd-of-Year Forecast	Budget to Projection
REVENUES:	-	<u>Daagot</u>	_	<u> </u>	<u> </u>
Instructional & OOS Surcharge - Regional Students					\$ -
Instructional & OOS Surcharge - Cross Campus					-
Less Continuing & New Scholarships					
Net Instructional Fee & Out-of-State Surcharge General		-		-	-
Other Student Revenue					_
Tuition, Fees and Other Student Charges		-		-	-
State Appropriations - SSI					-
State Appropriations - CCP					-
Investment Income					-
Other Revenue				6,935	6,935
Total Revenues	<u> \$ </u>	-	\$	6,935	\$ 6,935
EXPENDITURES:					
Salaries					-
Allowance for Unspent Salaries					-
Benefits Allowance for Unspent Benefits					-
Healthcare Expense					-
Anticipated Benefit Recovery					_
Graduate Assistant Fee Waivers					-
Utilities		50,319		56,128	5,809
Departmental Support Expenditures		274,720		248,399	(26,321)
Multi-year Expenditures	_	005.000		004.507	 (00.540)
Total Expenditures	\$	325,039	\$	304,527	\$ (20,512)
DEBT SERVICE AND TRANSFERS:					
General Fee					-
Capital, Renewal & Replacement		(100,706)		(123,706)	(23,000)
Debt Service		(429,319)		(429,319)	0
Support for VOALC Other Miscellaneous Operational Transfers		855,064		855,063 3,271	(1) 3,271
Total Debt Service and Transfers	\$	325,039	\$	305,310	\$ (19,729)
Net Revenues/(Expenditures) Before Adjustments	\$	-	\$	7,718	\$ 7,718
ADJUSTMENTS:					
Departmental Budgetary Carryforward				37,773	37,773
Divisional Budgetary Carryforward					-
Strategic Investment Funding - Divisional Carryforward Reserve for Carry Forward					-
Transfer from Fund Balance					- -
Reserve for Encumbrances					-
Reserve for Investment Fluctuations					-
Reserve for Future Budgets					
Net Increase/(Decrease) in Fund Balance	\$	-	\$	45,491	\$ 45,491

MIAMI UNIVERSITY Financial Analysis by Operational Unit (Oxford Campus)

	Year End	Actual	Budget	Т	hrough June 30		% of 23	% Change
	FY2021	FY2022	FY2023	FY2023	FY2022	FY2021	Budget	from 22 YTD
College of Arts & Sciences								
Salaries	\$51,375,701	\$51,411,592	\$51,438,840	\$50,932,520	\$51,411,592	\$51,375,701	99%	-1%
Benefits	\$15,308,407	\$13,988,625	\$16,975,290	\$15,685,575	\$13,988,625	\$15,308,407	92%	12%
Scholarships & Fellowships	\$7,986,380	\$8,071,299	\$9,878,710	\$8,033,533	\$8,071,299	\$7,986,380	81%	0%
Departmental Support Expenses	\$2,838,681	\$3,080,480	\$3,809,426	\$3,776,243	\$3,080,480	\$2,838,681	99%	23%
College of Arts & Sciences Total	\$77,509,169	\$76,551,996	\$82,102,266	\$78,427,871	\$76,551,996	\$77,509,169	96%	2%
College of Education, Health, and Society								
Salaries	\$13,832,683	\$14,454,698	\$12,858,851	\$14,804,039	\$14,454,698	\$13,832,683	115%	2%
Benefits	\$4,164,181	\$4,038,592	\$4,454,461	\$4,545,710	\$4,038,592	\$4,164,181	102%	13%
Scholarships & Fellowships	\$1,289,780	\$1,731,687	\$2,053,094	\$1,463,382	\$1,731,687	\$1,289,780	71%	-15%
Departmental Support Expenses	\$614,042	\$854,481	\$1,095,200	\$927,475	\$854,481	\$614,042	85%	9%
College of Education, Health, and Society Total	\$19,900,686	\$21,079,458	\$20,461,605	\$21,740,606	\$21,079,458	\$19,900,686	106%	3%
College of Engineering and Computing								40.
Salaries	\$9,707,579	\$10,366,286	\$9,432,509	\$10,745,884	\$10,366,286	\$9,707,579	114%	4%
Benefits	\$3,090,248	\$3,151,523	\$3,375,845	\$3,387,520	\$3,151,523	\$3,090,248	100%	7%
Scholarships & Fellowships	\$497,166	\$777,871	\$1,022,863	\$863,209	\$777,871	\$497,166	84%	11%
Departmental Support Expenses	\$457,566	\$642,272	\$1,262,809	\$942,965	\$642,272	\$457,566	75%	47%
College of Engineering and Computing Total	\$13,752,559	\$14,937,952	\$15,094,025	\$15,939,578	\$14,937,952	\$13,752,559	106%	7%
Farmer Cahaal of Business								
Farmer School of Business	¢20 F00 100	¢21 172 440	410 210 F72	¢31 404 130	¢21 172 440	#30 F00 100	1170/	2%
Salaries	\$20,588,109	\$21,172,449	\$18,318,573	\$21,494,130	\$21,172,449	\$20,588,109	117%	-
Benefits	\$6,577,227	\$6,968,776	\$7,006,217	\$7,182,160	\$6,968,776	\$6,577,227	103% 42%	3% 4%
Scholarships & Fellowships	\$376,905	\$250,067	\$619,102	\$260,059	\$250,067	\$376,905		-
Departmental Support Expenses	\$196,323	\$196,711	\$6,000	\$205,989	\$196,711	\$196,323	3433%	5%
Farmer School of Business Total	\$27,738,563	\$28,588,003	\$25,949,892	\$29,142,339	\$28,588,003	\$27,738,563	112%	2%
College of Creative Arts								
Salaries	\$10,970,517	\$10,945,982	\$9,836,969	\$11,101,015	\$10,945,982	\$10,970,517	113%	1%
Benefits	\$3,470,200	\$2,939,235	\$3,570,997	\$3,547,188	\$2,939,235	\$3,470,200	99%	21%
Scholarships & Fellowships	\$1,288,719	\$1,109,572	\$1,372,790	\$1,097,564	\$1,109,572	\$1,288,719	80%	-1%
Departmental Support Expenses	\$419,348	\$820,663	\$727,057	\$970,762	\$820,663	\$419,348	134%	18%
College of Creative Arts Total	\$16,148,784	\$15,815,453	\$15,507,813	\$16,716,529	\$15,815,453	\$16,148,784	108%	6%
	1 -, -, -	, .,,	1 -/ /-	1 -7 -7-	, -,,	, , , ,		
Dolibois European Center - Luxemburg								
Salaries	\$952,161	\$1,113,772	\$1,259,158	\$1,051,555	\$1,113,772	\$952,161	84%	-6%
Benefits	\$137,624	\$177,262	\$428,482	\$182,105	\$177,262	\$137,624	43%	3%
Scholarships & Fellowships	\$0	\$0	\$0	\$0	\$0	\$0	0%	0%
Departmental Support Expenses	\$179,092	\$218,984	\$286,477	\$239,481	\$218,984	\$179,092	84%	9%
Dolibois European Center - Luxemburg Total	\$1,268,877	\$1,510,017	\$1,974,116	\$1,473,141	\$1,510,017	\$1,268,877	75%	-2%

MIAMI UNIVERSITY Financial Analysis by Operational Unit (Oxford Campus)

	Year End	l Actual	Budget	Т	hrough June 30		% of 23	% Change
	FY2021	FY2022	FY2023	FY2023	FY2022	FY2021	Budget	from 22 YTD
Graduate School								
Salaries	\$2,980,540	\$2,694,706	\$3,333,742	\$2,744,495	\$2,694,706	\$2,980,540	82%	2%
Benefits	\$652,482	\$552,799	\$792,779	\$687,150	\$552,799	\$652,482	87%	24%
Scholarships & Fellowships	\$3,550,511	\$3,815,616	\$4,231,022	\$3,734,823	\$3,815,616	\$3,550,511	88%	-2%
Departmental Support Expenses	\$195,052	\$164,427	\$661,246	\$388,601	\$164,427	\$195,052	59%	136%
Graduate School Total	\$7,378,586	\$7,227,548	\$9,018,789	\$7,555,069	\$7,227,548	\$7,378,586	84%	5%
Other Provost Departments								
Salaries	\$10,523,860	\$11,645,888	\$25,895,985	\$13,209,366	\$11,645,888	\$10,523,860	51%	13%
Benefits	\$3,958,012	\$3,868,810	\$8,191,628	\$4,698,934	\$3,868,810	\$3,958,012	57%	21%
Scholarships & Fellowships	\$531,512	\$1,488,123	\$1,503,063	\$1,108,383	\$1,488,123	\$531,512	74%	-26%
Departmental Support Expenses	\$6,143,067	\$6,820,930	\$6,414,161	\$6,167,702	\$6,820,930	\$6,143,067	96%	-10%
Other Provost Departments Total	\$21,156,450	\$23,823,751	\$42,004,837	\$25,184,386	\$23,823,751	\$21,156,450	60%	6%
Academic Affairs	+120 021 150	+422 005 272	+422 274 626	+126 002 005	+422 005 272	+120 021 150	050/	20/
Salaries	\$120,931,150	\$123,805,373	\$132,374,626	\$126,083,005	\$123,805,373	\$120,931,150	95%	2%
Benefits	\$37,358,381	\$35,685,622	\$44,795,698	\$39,916,341	\$35,685,622	\$37,358,381	89%	12%
Scholarships & Fellowships	\$15,520,973	\$17,244,234	\$20,680,644	\$16,560,954	\$17,244,234	\$15,520,973	80%	-4%
Departmental Support Expenses	\$11,043,170	\$12,798,948	\$14,262,376	\$13,619,219	\$12,798,948	\$11,043,170	95%	6%
Academic Affairs Total	\$184,853,674	\$189,534,178	\$212,113,344	\$196,179,518	\$189,534,178	\$184,853,674	92%	4%
Physical Casilities								
Physical Facilities	¢12 202 604	¢12 F12 F20	#1E 270 41E	¢14 240 267	#12 F12 F20	¢12 202 604	93%	6%
Salaries	\$13,283,604	\$13,513,539	\$15,379,415	\$14,348,267	\$13,513,539	\$13,283,604	93% 86%	12%
Benefits	\$4,707,871	\$4,549,772	\$5,894,960	\$5,098,813	\$4,549,772	\$4,707,871	0%	0%
Scholarships & Fellowships	\$0	\$0 (#2,692,339)	\$0 (\$3,903,041)		\$0 (#2.692.229)	\$0	70%	-26%
Departmental Support Expenses	(\$4,552,450)	(\$3,682,328) \$14,380,983	\$17,371,334	(\$2,719,259) \$16,727,820	(\$3,682,328) \$14,380,983	(\$4,552,450)	96%	-26% 16%
Physical Facilities Total	\$13,439,024	\$14,360,963	\$17,371,334	\$10,727,820	\$14,360,963	\$13,439,024	90%	10%
Other Flores & Bushace Co. 1 Bushace								
LITHOR FINANCO & RUSINOSS SORVICOS DONARTMONTS								
Other Finance & Business Services Departments	¢6 275 720	¢8 865 468	¢0 653 523	¢8 007 221	¢8 865 468	¢6 275 720	030%	10/2
Salaries	\$6,275,729 \$2,111,817	\$8,865,468 \$3,044,056	\$9,653,523 \$3,702,416	\$8,997,221 \$2,984,163	\$8,865,468 \$3,044,056	\$6,275,729 \$2,111,817	93% 81%	1% -2%
Salaries Benefits	\$2,111,817	\$3,044,056	\$3,702,416	\$2,984,163	\$3,044,056	\$2,111,817	81%	-2%
Salaries Benefits Scholarships & Fellowships	\$2,111,817 \$0	\$3,044,056 \$0	\$3,702,416 \$0	\$2,984,163 \$0	\$3,044,056 \$0	\$2,111,817 \$0	81% 0%	-2% 0%
Salaries Benefits Scholarships & Fellowships Departmental Support Expenses	\$2,111,817 \$0 \$1,157,106	\$3,044,056 \$0 \$1,355,539	\$3,702,416 \$0 \$1,455,691	\$2,984,163 \$0 \$1,407,664	\$3,044,056 \$0 \$1,355,539	\$2,111,817 \$0 \$1,157,106	81% 0% 97%	-2% 0% 4%
Salaries Benefits Scholarships & Fellowships	\$2,111,817 \$0	\$3,044,056 \$0	\$3,702,416 \$0	\$2,984,163 \$0	\$3,044,056 \$0	\$2,111,817 \$0	81% 0%	-2% 0%
Salaries Benefits Scholarships & Fellowships Departmental Support Expenses Other Finance & Business Services Departments Total	\$2,111,817 \$0 \$1,157,106	\$3,044,056 \$0 \$1,355,539	\$3,702,416 \$0 \$1,455,691	\$2,984,163 \$0 \$1,407,664	\$3,044,056 \$0 \$1,355,539	\$2,111,817 \$0 \$1,157,106	81% 0% 97%	-2% 0% 4%
Salaries Benefits Scholarships & Fellowships Departmental Support Expenses Other Finance & Business Services Departments Total Enrollment Management & Student Success	\$2,111,817 \$0 \$1,157,106 \$9,544,652	\$3,044,056 \$0 \$1,355,539 \$13,265,063	\$3,702,416 \$0 \$1,455,691 \$14,811,630	\$2,984,163 \$0 \$1,407,664 \$13,389,048	\$3,044,056 \$0 \$1,355,539 \$13,265,063	\$2,111,817 \$0 \$1,157,106 \$9,544,652	81% 0% 97% 90%	-2% 0% 4%
Salaries Benefits Scholarships & Fellowships Departmental Support Expenses Other Finance & Business Services Departments Total Enrollment Management & Student Success Salaries	\$2,111,817 \$0 \$1,157,106 \$9,544,652 \$6,706,625	\$3,044,056 \$0 \$1,355,539 \$13,265,063 \$6,894,441	\$3,702,416 \$0 \$1,455,691 \$14,811,630 \$8,190,668	\$2,984,163 \$0 \$1,407,664 \$13,389,048 \$7,254,592	\$3,044,056 \$0 \$1,355,539 \$13,265,063 \$6,894,441	\$2,111,817 \$0 \$1,157,106 \$9,544,652 \$6,706,625	81% 0% 97% 90%	-2% 0% 4% 1%
Salaries Benefits Scholarships & Fellowships Departmental Support Expenses Other Finance & Business Services Departments Total Enrollment Management & Student Success Salaries Benefits	\$2,111,817 \$0 \$1,157,106 \$9,544,652 \$6,706,625 \$2,304,792	\$3,044,056 \$0 \$1,355,539 \$13,265,063 \$6,894,441 \$2,350,021	\$3,702,416 \$0 \$1,455,691 \$14,811,630 \$8,190,668 \$3,132,581	\$2,984,163 \$0 \$1,407,664 \$13,389,048 \$7,254,592 \$2,419,392	\$3,044,056 \$0 \$1,355,539 \$13,265,063 \$6,894,441 \$2,350,021	\$2,111,817 \$0 \$1,157,106 \$9,544,652 \$6,706,625 \$2,304,792	81% 0% 97% 90% 89% 77%	-2% 0% 4% 1% 5% 3%
Salaries Benefits Scholarships & Fellowships Departmental Support Expenses Other Finance & Business Services Departments Total Enrollment Management & Student Success Salaries	\$2,111,817 \$0 \$1,157,106 \$9,544,652 \$6,706,625	\$3,044,056 \$0 \$1,355,539 \$13,265,063 \$6,894,441	\$3,702,416 \$0 \$1,455,691 \$14,811,630 \$8,190,668	\$2,984,163 \$0 \$1,407,664 \$13,389,048 \$7,254,592	\$3,044,056 \$0 \$1,355,539 \$13,265,063 \$6,894,441	\$2,111,817 \$0 \$1,157,106 \$9,544,652 \$6,706,625	81% 0% 97% 90%	-2% 0% 4% 1%

MIAMI UNIVERSITY Financial Analysis by Operational Unit (Oxford Campus)

	Year End	d Actual	Budget	Т	hrough June 30		% of 23	% Change
	FY2021	FY2022	FY2023	FY2023	FY2022	FY2021	Budget	from 22 YTD
<u>President</u>								
Salaries	\$4,880,309	\$5,688,193	\$6,750,879		\$5,688,193	\$4,880,309	107%	26%
Benefits	\$1,795,397	\$2,129,112	\$2,590,077	\$2,403,883	\$2,129,112	\$1,795,397	93%	13%
Scholarships & Fellowships	\$1,000	\$578	\$0	\$185	\$578	\$1,000	0%	-68%
Departmental Support Expenses	\$3,053,059	\$4,791,669	\$4,945,795	\$5,126,265	\$4,791,669	\$3,053,059	104%	7%
President Total	\$9,729,765	\$12,609,551	\$14,286,751	\$14,721,826	\$12,609,551	\$9,729,765	103%	17%
Student Life								
Salaries	\$5,278,479	\$5,977,085	\$6,726,800		\$5,977,085	\$5,278,479	95%	7%
Benefits	\$1,782,238	\$6,557,486	\$2,491,035	\$2,217,316	\$6,557, 4 86	\$1,782,238	89%	-66%
Scholarships & Fellowships	\$484,222	\$351,617	\$423,168	' '	\$351,617	\$484,222	94%	13%
Departmental Support Expenses	(\$3,047,131)	(\$1,990,937)	(\$1,769,743)	(\$1,868,724)	(\$1,990,937)	(\$3,047,131)	106%	-6%
Student Life Total	\$4,497,807	\$10,895,252	\$7,871,260	\$7,161,889	\$10,895,252	\$4,497,807	91%	-34%
<u>University Advancement</u>								
Salaries	\$7,849,003	\$7,455,071	\$8,297,463		\$7,455,071	\$7,849,003	88%	-2%
Benefits	\$2,667,423	\$2,581,121	\$3,193,907	\$2,439,211	\$2,581,121	\$2,667,423	76%	-5%
Scholarships & Fellowships	\$14,596	\$29,674	\$0		\$29,674	\$14,596	0%	-5%
Departmental Support Expenses	\$842,009	\$815,355	\$1,102,912	\$1,122,760	\$815,355	\$842,009	102%	38%
University Advancement Total	\$11,373,031	\$10,881,221	\$12,594,281	\$10,907,931	\$10,881,221	\$11,373,031	87%	0%
Tufa-matian Taskaslam								
Information Technology	¢C 402 427	47.212.20C	¢0.460.F31	A7 002 701	₹7.212.20 €	¢C 402 427	0.40/	10%
Salaries	\$6,482,427	\$7,213,296	\$9,469,531	\$7,963,761	\$7,213,296	\$6,482,427	84%	
Benefits	\$2,325,904	\$2,498,056	\$3,645,769	\$2,523,081	\$2,498,056	\$2,325,904	69%	1%
Scholarships & Fellowships	\$0	\$0	\$0	\$0	\$0	\$0	0%	0%
Departmental Support Expenses	\$2,045,366	\$1,797,214	\$1,846,560	\$692,624	\$1,797,214	\$2,045,366	38%	-61%
Information Technology Total	\$10,853,697	\$11,508,567	\$14,961,860	\$11,179,465	\$11,508,567	\$10,853,697	75%	-3%
Centrally Budgeted Funds								
Departmental Support Expenses	\$2,711,913	¢4 115 576	\$5,547,142	\$2,659,203	\$4,115,576	¢2 711 012	48%	-35%
Departmental Support Expenses	\$2,711,913	\$4,115,576	\$3,347,142	\$2,039,203	\$ 4 ,113,370	\$2,711,913	40%	-33%
Grand Total								
Salaries	\$171,707,223	\$179,480,182	\$196,407,052	\$185,574,673	\$179,480,182	\$171,707,223	94%	3%
Benefits	\$55,089,611	\$59,444,000	\$69,225,773	\$60,045,611	\$59,444,000	\$55,089,611	87%	1%
Scholarships & Fellowships	\$159,830,259	\$168,301,747	\$185,130,220	\$177,975,744	\$168,301,747	\$159,830,259	96%	6%
Utilities	\$11,741,296	\$13,170,226	\$13,962,855	\$13,426,340	\$13,170,226	\$11,741,296	96%	2%
Departmental Support Expenses	\$16,379,729	\$24,664,025	\$29,779,899		\$24,664,025	\$16,379,729	85%	3%
Admin Service Charge	(\$3,170,690)	(\$9,912,368)	(\$13,740,790)	(\$13,740,790)	(\$9,912,368)	(\$3,170,690)	100%	39%
Multi Year Accounts	\$769,122	\$3,275,665	\$3,633,163	\$3,381,735	\$3,275,665	\$769,122	93%	3%
	' '		' ' '					
Total Expenses	\$412,346,549	\$438,423,478	\$484,398,171	\$452,117,659	\$438,423,478	\$412,346,549	93%	3%

		FY2021	FY2022		FY2023		% of '23	% Change from '22
		Actual	Actual	Budget	Year-end Actual	Variance	Budget	Year-end
Residence & Dining Halls								
Revenue		60,963,849	125,993,187	133,077,803	133,735,026	657,223	100%	6%
General Fee Support		-	-	-	-	-	0%	0%
	Total Sources	60,963,849	125,993,187	133,077,803	133,735,026	657,223	100%	6%
Salary		12,106,863	13,864,212	18,025,908	10,063,799	(7,962,109)	56%	-27%
Benefits		3,923,349	4,289,347	5,968,600	3,345,976	(2,622,624)	56%	-22%
Utilites		5,668,749	6,672,862	7,521,784	7,190,413	(331,371)	96%	8%
Charge Outs		(286,360)	(593,642)	(374,678)	(570,079)	(195,401)	152%	-4%
Operating Expenses		21,953,068	38,383,949	43,765,097	45,936,136	2,171,039	105%	20%
Inventory Purchases		2,008,633	4,697,435	4,737,643	12,858,886	8,121,243	271%	174%
Debt Service		38,730,990	39,719,433	39,250,129	39,362,886	112,757	100%	-1%
	Total Uses	84,105,292	107,033,596	118,894,483	118,188,017	(706,466)	99%	10%
Net Before Non-Mand	atory Transfers	(23,141,443)	18,959,591	14,183,320	15,547,009	1,363,689	110%	-18%
Net Transfers		(428,273)	5,025,585	8,310	(237,736)	(246,046)	-2861%	-105%
CR&R Transfers		(340,128)	(7,204,266)	(14,191,630)	(14,306,637)	(115,007)	101%	99%
Net Total		(23,909,844)	16,780,910	-	1,002,636	1,002,636		-94%
Shriver Center		5.740.000	0.074.000	0.470.700	5 000 057	(4 000 040)	2001	000/
Revenue		5,712,089	6,871,809	6,478,700	5,389,657	(1,089,043)	83%	-22%
General Fee Support	T-1-10	507,855	796,526	848,790	848,790	- (4 000 040)	100%	7%
Oalan	Total Sources	6,219,944	7,668,335	7,327,490	6,238,447	(1,089,043)	85%	-19%
Salary		1,188,131	893,043	1,029,890	909,085	(120,805)	88%	2%
Benefits		339,025	295,263	346,627	271,447	(75,180)	78%	-8%
Utilities		154,167	200,291	234,307	218,715	(15,592)	93%	9%
Charge Outs		(471,059)	(655,650)	(500,000)	(467,879)	32,121	94%	-29%
Operating Expenses		826,716	747,626	632,580	588,312	(44,268)	93% 72%	-21%
Inventory Purchases Debt Service		4,865,900 44,248	5,200,201 45,861	5,027,000 32,714	3,622,828 32,714	(1,404,172)	100%	-30% -29%
Debt Service	Total Uses	6,947,128	6,726,635	6,803,118	5,175,222	(1,627,896)	76%	-29% -23%
Net Before Non-Mand		(727,184)	941,700	524,372	1,063,225	538,853	203%	13%
Net Transfers	atory Transiers	222,604	208,168	201,385	196,849	(4,536)	98%	-5%
CR&R Transfers		(406,029)	(1,011,708)	(725,757)	(834,417)	(108,660)	115%	-3 <i>%</i> -18%
Net Total		(910,609)	138,160	(123,131)	425,657	425,657	11370	208%
Not Total		(310,003)	130,100	•	420,007	420,007		20070

	FY2021	FY2022		FY2023		% of '23	% Change from '22
	Actual	Actual	Budget	Year-end Actual	Variance	Budget	Year-end
Marcum Conference Center							
Revenue	59,587	1,293,327	1,434,007	1,564,830	130,823	109%	21%
General Fee Support	-	-	-	-	-	0%	0%
Total Sources	59,587	1,293,327	1,434,007	1,564,830	130,823	109%	21%
Salary	119,322	237,252	328,364	287,877	(40,487)	88%	21%
Benefits	42,800	76,311	103,572	82,221	(21,351)	79%	8%
Utilities	123,699	150,841	194,460	161,006	(33,454)	83%	7%
Charge Outs	-	-	-	-	-	0%	0%
Operating Expenses	188,490	574,426	775,168	716,275	(58,893)	92%	25%
Inventory Purchases	2,524	7,017	7,950	11,457	3,507	144%	63%
Debt Service	-	-	-	-	-	0%	0%
Total Uses	476,835	1,045,847	1,409,514	1,258,836	(150,678)	89%	20%
Net Before Non-Mandatory Transfers	(417,248)	247,480	24,493	305,994	281,501	1249%	24%
Net Transfers	(1,715)	171,986	-	(1,160)	(1,160)	0%	-101%
CR&R Transfers	-	(7,593)	(24,493)	(24,493)	-	100%	223%
Net Total	(418,963)	411,873	-	280,341	280,341		-32%
Intercollegiate Athletics							
Revenue	3,222,302	6,911,592	8,109,176	8,695,836	586,660	107%	26%
General Fee Support	11,064,469	17,096,904	17,621,949	17,681,949	60,000	100%	3%
Designated Revenue	-	870,251	739,100	1,047,365	308,265	142%	20%
Restricted Revenue	-	1,386,574	2,113,857	1,603,637	(510,220)	76%	16%
Total Sources	14,286,771	26,265,321	28,584,082	29,028,787	444,705	102%	11%
Salary	7,861,215	9,038,758	9,061,137	9,231,494	170,357	102%	2%
Benefits	2,589,050	3,077,684	2,971,463	3,118,998	147,535	105%	1%
Utilities	157	4,734	2,550	59	(2,491)	2%	-99%
Charge Outs	(39,531)	(120,777)	-	(125,350)	(125,350)	0%	4%
Operating Expenses	9,658,935	13,199,404	13,645,975	14,082,249	436,274	103%	7%
Inventory Purchases	10	-	-	-	-	0%	0%
Debt Service	-	-	-	-	-	0%	0%
Designated Expense	_	621,702	739,100	1,155,346	416,246	156%	86%
Restricted Expense	_	1,460,893	2,113,857	1,789,002	(324,855)	85%	22%
Total Uses	20,069,836	27,282,398	28,534,082	29,251,798	717,716	103%	7%
Net Before Non-Mandatory Transfers	(5,783,065)	(1,017,077)	50,000	(223,011)	(273,011)	-446%	-78%
Net Transfers	107,065	1,211,403	(50,000)	62,203	112,203	-124%	-95%
CR&R Transfers	· -	-	-	-	-	0%	0%
Net Total	(5,676,000)	194,326	-	(160,808)	(160,808)		-183%

		FY2021	FY2022		FY2023		% of '23	% Change from '22
		Actual	Actual	Budget	Year-end Actual	Variance	Budget	Year-end
Recreation Center								
Revenue		1,123,771	2,184,981	2,492,995	2,639,926	146,931	106%	21%
General Fee Support		2,061,328	3,199,744	3,281,957	3,281,957	, -	100%	3%
	Total Sources	3,185,099	5,384,725	5,774,952	5,921,883	146,931	103%	10%
Salary		1,562,466	1,645,597	1,906,096	1,851,095	(55,001)	97%	12%
Benefits		396,559	446,328	558,560	431,459	(127,101)	77%	-3%
Utilities		676,124	778,782	903,652	800,833	(102,819)	89%	3%
Charge Outs		(1,928)	(11,805)	(20,000)	(11,750)	8,250	59%	0%
Operating Expenses		1,196,799	1,824,446	1,719,525	1,905,990	186,465	111%	4%
Inventory Purchases		90,797	187,249	176,400	241,442	65,042	137%	29%
Debt Service		-	-	-	,	-	0%	0%
	Total Uses	3,920,817	4,870,597	5,244,233	5,219,069	(25,164)	100%	7%
Net Before Non-Manda		(735,718)	514,128	530,719	702,814	172,095	132%	37%
Net Transfers	•	(30,989)	(49,804)	(48,000)	(48,360)	(360)	101%	-3%
CR&R Transfers		333,670	(647,396)	(482,719)	(499,501)	(16,782)	103%	-23%
Net Total		(433,037)	(183,072)	-	154,953	154,953		-185%
Namain Iao Avona								
Boggin Ice Arena		4 474 000	4 050 047	4 50 4 000	4 000 440	0.45 4.40	4450/	440/
Revenue		1,174,260	1,653,617	1,594,000	1,839,440	245,440	115%	11%
General Fee Support	T	3,287,969	4,242,279	4,343,068	4,343,067	(1)	100%	2%
Oalaa	Total Sources	4,462,229	5,895,896	5,937,068	6,182,507	245,439	104%	5%
Salary		929,815	1,048,359	1,118,630	1,067,703	(50,927)	95%	2%
Benefits		292,606	280,724	370,278	346,574	(23,704)	94%	23%
Utilities Charge Outs		824,789	932,794	1,090,570	982,727	(107,843)	90% 137%	5% 13%
J.		(83,711)	(157,449)	(130,000)	(177,984)	(47,984)		
Operating Expenses		670,179	874,885	797,279	973,236	175,957	122%	11%
Inventory Purchases		64,882	144,600	185,000	158,645	(26,355)	86%	10%
Debt Service	T-1-111	1,836,458	1,842,272	1,815,694	1,815,694	(00.050)	100%	-1%
Net Before Non-Manda	Total Uses	4,535,018 (72,789)	4,966,185 929,711	5,247,451 689,617	5,166,595 1,015,912	(80,856) 326,295	98% 147%	4% 9%
Net Transfers	atory mansiers	(37,147)	(40,410)	22,000	(13,480)	(35,480)	-61%	-67%
CR&R Transfers		(37,147)	(1,003,030)	(711,617)	(711,617)	(33,400)	100%	-07% -29%
Net Total		(106,335)	(1,003,030)	(111,011)	290,815	290,815	100 /0	-356%
110t Total		(100,000)	(110,123)		230,013	200,010		00070

		FY2021	FY2022		FY2023		% of '23	% Change from '22
		Actual	Actual	Budget	Year-end Actual	Variance	Budget	Year-end
Student Health Services								
Revenue		236,234	-	-	-	-	0%	0%
General Fee Support		-	-	-	-	-	0%	0%
	Total Sources	236,234	-	-	-	-	0%	0%
Salary		(36,156)	-	-	-	-	0%	0%
Benefits		(53,863)	-	-	-	-	0%	0%
Utilities		-	-	-	-	-	0%	0%
Charge Outs		-	-	-	-	-	0%	0%
Operating Expenses		478,951	-	-	-	-	0%	0%
Inventory Purchases		20,706	-	-	-	-	0%	0%
Debt Service		-	-	-	-	-	0%	0%
	Total Uses	409,638	-	-	-	-	0%	0%
Net Before Non-Mand	latory Transfers	(173,404)	-	-	-	-	0%	0%
Net Transfers		-	-	-	-	-	0%	0%
CR&R Transfers		-	-	-	-	-	0%	0%
Net Total		(173,404)	-	-	-	-		0%
Transportation Commisses								
Transportation Services Revenue		927,108	2,731,428	2 200 000	2 727 204	247 204	115%	0%
General Fee Support		•		2,390,000	2,737,391	347,391 1	100%	0% 2%
General Fee Support	Total Sources	2,164,773 3,091,881	2,658,198 5,389,626	2,719,116 5,109,116	2,719,117 5,456,508	347,392	100%	2% 1%
Salary	Total Sources	188,841	165,631	233,165	171,386	(61,779)	74%	3%
Benefits		66,021	58,184	83,620	59,035	(24,585)	74% 71%	3% 1%
Utilities		00,021	30,104	03,020	39,033	(24,303)	0%	0%
		(00.704)	(44.077)	(00,000)	(70 500)	(50,500)		
Charge Outs		(33,734)	(44,677)	(20,000)	, ,	(52,506)	363%	62%
Operating Expenses		2,236,414	894,932	2,770,042	2,445,805	(324,237)	88%	173%
Inventory Purchases		4 500 600	4 505 000	4 504 705	4 504 704	- (4)	0%	0%
Debt Service	Total Uses	1,530,698 3,988,240	1,535,296	1,521,735 4,588,562	1,521,734	(1)	100% 90%	-1% 58%
Net Before Non-Mand			2,609,366		4,125,454	(463,108)	256%	-52%
Net Transfers	acory mansiers	(896,359) 525,382	2,780,260 (1,141,504)	520,554 550,000	1,331,054 513,925	810,500 (36,075)	93%	-52% -145%
CR&R Transfers		525,362 7,299	, , ,	•	•	(30,073)	93% 100%	13%
Net Total		(363,678)	(945,816) 692,940	(1,070,554)	(1,070,554) 774,425	774,425	100%	12%
ivet Total		(303,076)	092,940		114,423	114,425		1270

		FY2021	FY2022		FY2023		% of '23	% Change from '22
		Actual	Actual	Budget	Year-end Actual	Variance	Budget	Year-end
lity Enterprise								
Revenue		-	-	-	-	-	0%	0%
General Fee Support		-	-	-	-	-	0%	0%
	Total Sources	-	_	-	_	-	0%	0%
Salary		1,167,980	1,289,531	1,540,362	1,507,154	(33,208)	98%	17%
Benefits		406,068	477,929	585,032	517,855	(67,177)	89%	8%
Utilities		6,906,737	11,372,641	12,740,190	11,960,121	(780,069)	94%	5%
Charge Outs		(6,273)	(47,931)	(38,000)	(34,528)	3,472	91%	-28%
Expense Recovery		(20,310,191)	(23,193,863)	(25,621,136)	(24,417,544)	1,203,592	95%	5%
Operating Expenses		1,876,619	1,572,437	2,023,444	1,564,316	(459,128)	77%	-1%
Inventory Purchases		897	2,426	-	305	305	0%	-87%
Debt Service		2,257,382	2,299,758	2,131,560	2,131,561	1	100%	-7%
	Total Uses	(7,700,781)	(6,227,071)	(6,638,548)	(6,770,760)	(132,212)	102%	9%
Net Before Non-Manda	atory Transfers	7,700,781	6,227,071	6,638,548	6,770,760	132,212	102%	9%
Net Transfers		(4,423,141)	(4,359,908)	(4,443,900)	(4,345,660)	98,240	98%	0%
CR&R Transfers		(52,607)	(2,180,541)	(2,194,648)	(2,298,932)	(104,284)	105%	5%
Net Total		3,225,033	(313,378)	-	126,168	126,168		-140%
mstrong - Student Affairs	<u> </u>							
Revenue		26,201	164,930	162,640	181,436	18,796	112%	10%
General Fee Support		4,681,533	5,798,049	5,861,491	5,861,490	(1)	100%	1%
	Total Sources	4,707,734	5,962,979	6,024,131	6,042,926	18,795	100%	1%
				0,0= 1,101			10070	
Salary		440,247	513,534	695,664	588,240	(107,424)	85%	15%
Salary Benefits		440,247 104,336	513,534 104,722					15% 27%
•				695,664	588,240	(107,424)	85%	
Benefits		104,336	104,722	695,664 122,089	588,240 132,824	(107,424) 10,735	85% 109%	27%
Benefits Utilities		104,336	104,722	695,664 122,089	588,240 132,824	(107,424) 10,735	85% 109% 99%	27% 4%
Benefits Utilities Charge Outs		104,336 283,311 -	104,722 313,853 -	695,664 122,089 328,344	588,240 132,824 325,720	(107,424) 10,735 (2,624)	85% 109% 99% 0%	27% 4% 0%
Benefits Utilities Charge Outs Operating Expenses		104,336 283,311 -	104,722 313,853 -	695,664 122,089 328,344	588,240 132,824 325,720	(107,424) 10,735 (2,624)	85% 109% 99% 0% 97%	27% 4% 0% 12%
Benefits Utilities Charge Outs Operating Expenses Inventory Purchases Debt Service	Total Uses	104,336 283,311 - 637,395 - 2,450,000 3,915,289	104,722 313,853 - 730,829 - 2,450,000 4,112,938	695,664 122,089 328,344 - 849,015 - 2,449,999 4,445,111	588,240 132,824 325,720 - 820,652 - 2,449,999 4,317,435	(107,424) 10,735 (2,624)	85% 109% 99% 0% 97% 0% 100%	27% 4% 0% 12% 0% 0%
Benefits Utilities Charge Outs Operating Expenses Inventory Purchases		104,336 283,311 - 637,395 - 2,450,000 3,915,289 792,445	104,722 313,853 - 730,829 - 2,450,000 4,112,938 1,850,041	695,664 122,089 328,344 - 849,015 - 2,449,999 4,445,111 1,579,020	588,240 132,824 325,720 - 820,652 - 2,449,999 4,317,435 1,725,491	(107,424) 10,735 (2,624) - (28,363) - (127,676) 146,471	85% 109% 99% 0% 97% 0% 100% 97%	27% 4% 0% 12% 0% 0% 5%
Benefits Utilities Charge Outs Operating Expenses Inventory Purchases Debt Service		104,336 283,311 - 637,395 - 2,450,000 3,915,289	104,722 313,853 - 730,829 - 2,450,000 4,112,938	695,664 122,089 328,344 - 849,015 - 2,449,999 4,445,111	588,240 132,824 325,720 - 820,652 - 2,449,999 4,317,435 1,725,491 (280,935)	(107,424) 10,735 (2,624) - (28,363) - - (127,676)	85% 109% 99% 0% 97% 100% 97% 109%	27% 4% 0% 12% 0% 0% 5% -7% -8262%
Benefits Utilities Charge Outs Operating Expenses Inventory Purchases Debt Service Net Before Non-Manda		104,336 283,311 - 637,395 - 2,450,000 3,915,289 792,445	104,722 313,853 - 730,829 - 2,450,000 4,112,938 1,850,041	695,664 122,089 328,344 - 849,015 - 2,449,999 4,445,111 1,579,020	588,240 132,824 325,720 - 820,652 - 2,449,999 4,317,435 1,725,491	(107,424) 10,735 (2,624) - (28,363) - (127,676) 146,471	85% 109% 99% 0% 97% 0% 100% 97%	27% 4% 0% 12% 0% 0% 5%

	FY2021	FY2022		FY2023		% of '23	% Change from '22
	Actual	Actual	Budget	Year-end Actual	Variance	Budget	Year-end
Miscellaneous Facilities							
Revenue	63,757	12,452	108,000	156,092	48,092	145%	1154%
General Fee Support	228,973	308,681	321,014	321,012	(2)	100%	4%
Total Sources	292,730	321,133	429,014	477,104	48,090	111%	49%
Salary	-	-	-	=	-	0%	0%
Benefits	-	-	-	-	-	0%	0%
Utilities	-	-	-	-	-	0%	0%
Charge Outs	-	-	-	-	-	0%	0%
Operating Expenses	69,252	105,862	177,263	216,697	39,434	122%	105%
Inventory Purchases	-	-	-	-	-	0%	0%
Debt Service	308,268	309,149	321,013	321,011	(2)	100%	4%
Total Uses	377,520	415,011	498,276	537,708	39,432	108%	30%
Net Before Non-Mandatory Transfers	(84,790)	(93,878)	(69,262)	(60,604)	8,658	87%	-35%
Net Transfers	(22,974)	-	-	-	-	0%	0%
CR&R Transfers	71,290	-	69,262	-	(69,262)	0%	0%
Net Total	(36,474)	(93,878)	-	(60,604)	(60,604)		-35%
<u>Total Auxiliary</u>				4=0.000.004		1010/	00/
Revenue	73,509,158	147,817,323	155,847,321	156,939,634	1,092,313	101%	6%
General Fee Support	23,996,900	34,100,381	34,997,385	35,057,382	59,997	100%	3%
Designated Revenue	-	870,251	739,100	1,047,365	308,265	142%	20%
Restricted Revenue	-	1,386,574	2,113,857	1,603,637	(510,220)	76%	16%
Total Sources	97,506,058	184,174,529	193,697,663	194,648,018	950,355	100%	6%
Salary	25,528,724	28,695,917	33,939,216	25,677,833	(8,261,383)	76%	-11%
Benefits	8,105,951	9,106,492	11,109,841	8,306,389	(2,803,452)	75% 94%	-9% 6%
Utilities Charge Outs	14,637,733 (922,596)	20,426,798 (1,631,931)	23,015,857 (1,082,678)	21,639,594 (1,460,076)	(1,376,263) (377,398)	94% 135%	-11%
Expense Recovery	, ,	(23,193,863)	(25,621,136)	(24,417,544)	1,203,592	95%	-11% 5%
Operating Expenses	(20,310,191) 39,792,818	58,908,796	67,155,388	69,249,668	2,094,280	103%	18%
Inventory Purchases	7,054,349	10,238,928	10,133,993	16,893,563	6,759,570	167%	65%
Debt Service	47,158,044	48,201,769	47,522,844	47,635,599	112,755	107 %	-1%
Designated Expense	47,130,044	621,702	739,100	1,155,346	416,246	156%	86%
Restricted Expense	_	1,460,893	2,113,857	1,789,002	(324,855)	85%	22%
Total Uses	121,044,832	152,835,501	169,026,282	166,469,374	(2,556,908)	98%	9%
Net Before Non-Mandatory Transfers	(23,538,774)	31,339,028	24,671,381	28,178,644	3,507,263	114%	-10%
Net Transfers	(4,223,485)	1,028,958	(3,901,365)	(4,154,354)	(252,989)	106%	-504%
CR&R Transfers	(930,136)	(14,485,255)	(20,770,016)	(21,258,498)	(488,482)	102%	47%
Net Total	(28,692,395)	17,882,731	-	2,765,790	2,765,790		-85%

	FY23	FY22	FY21	FY20	FY19	FY18	FY17	FY16	FY15	FY14	FY13
Revenue	134,164,728	131,777,972	78,423,016	126,002,718	115,298,363	110,343,907	105,966,230	99,675,905	95,379,311	88,831,459	81,287,838
Expense											
Salaries & Benefits	13,409,776	18,153,559	16,030,212	19,628,466	17,668,325	17,747,770	21,629,860	20,457,009	19,779,250	19,282,892	19,143,162
Operating Expenses & Food Pruchases	59,327,675	43,221,020	23,407,824	36,978,467	37,545,248	36,488,478	32,938,874	34,534,197	32,202,763	30,177,911	27,110,500
Residence Life Transfer to Student Life	6,087,680	5,939,584	5,936,265	4,538,085	5,908,139	5,833,638	5,336,093	5,323,404	5,059,978	4,786,056	4,802,246
Total Expenses	78,825,132	67,314,163	45,374,301	61,145,018	61,121,712	60,069,886	59,904,827	60,314,610	57,041,991	54,246,859	51,055,908
Net Income before Debt Service & Transfers	55,339,597	64,463,809	33,048,715	64,857,700	54,176,651	50,274,021	46,061,403	39,361,295	38,337,320	34,584,600	30,231,930
Debt Service and Transfers											
Debt Service	(39,362,885)	(39,926,813)	(38,730,991)	(41,870,644)	(42,391,185)	(41,597,907)	(35,973,640)	(33,873,421)	(30,866,290)	(22,030,542)	(19,882,993)
Capital Projects	(15,974,075)	(24,256,086)	(764,735)	(16,794,192)	(13,956,020)	(8,545,255)	(10,087,720)	(5,487,287)	(7,463,613)	(11,845,020)	(10,305,050)
Total Facility Investment	(55,336,961)	(64,182,899)	(39,495,726)	(58,664,836)	(56,347,205)	(50,143,162)	(46,061,360)	(39,360,708)	(38,329,903)	(33,875,562)	(30,188,043)
Change in Fund Balance	2,636	280,910	(6,447,010)	6,192,865	(2,170,555)	130,859	43	587	7,417	709,038	43,887
Total All Fund Balances & Reserves	49,022,110	49,969,151	52,721,370	49,538,143	62,234,752	57,476,589	80,112,906	71,931,648	66,164,901	60,014,075	51,780,699

MIAMI UNIVERSITY FY2023 Budget-To-Actual and Non Endowment Fund Activity As of June 30, 2023

Oxford General Fund Investments	FY2023 Original <u>Budget</u>	FY2023 YTD <u>Actual</u>	Budget- to-Actual <u>Variance</u>
Dividends and Interest (net of fees)	\$14,900,000	\$9,501,158	(\$5,398,842)
Realized Gains (Losses)		10,171,201	10,171,201
Unrealized Gains (Losses) - change in market value Mark to market as of June 30		32,737,613	32,737,613
Allocations to Other Funds		(292,417)	(292,417)
Total Unrestricted General Fund Investment Income	\$14,900,000	\$52,117,555	\$37,217,555

Endowment and Quasi-endowment Funds	Endowment <u>Funds</u>	Quasi- <u>Endowment</u>	Total <u>Endowment</u>
Beginning Balance	\$105,803,131	\$156,616,103	262,419,234
Dividends and Interest (net of fees)	26,920	177,620	204,540
Reinvested Realized Gains/(Losses) - (net of administrative fees) Realized gains remaining after spending distribution	(4,923,226)	(6,598,137)	(11,521,363)
Unrealized Gains - change in market value Mark to market as of June 30	8,268,005	12,638,123	20,906,128
Gifts	514,061	5,974,880	6,488,941
Other	(231,423)	215,310	(16,113)
Total Endowment and Quasi-endowment funds	\$109,457,468	\$169,023,899	\$278,481,367
Investment Earnings Distributed to Expendable Funds	\$3,867,583	\$4,849,770	\$8,717,353

Analysis of Investment Fluctuation Fund as of June 30, 2023

Current Balance of Investment Fluctuation Fund \$169,597,847

Policy Target for Fund: \$117,554,146

Two Years of Investment Earnings Budget \$44,000,000

Required Fund \$161,554,146

Surplus (Shortfall) \$8,043,701



Miami University Preliminary & Unaudited FY 2023 Operating Results

Miami University

Statement of Net Position June 30, 2023

	Miami Ur	niversity		University	Found	dation
	2023	2022		2023		2022
		· · · · · · · · · · · · · · · · · · ·				
\$	146,686,342	\$ 151,434,460	\$	27,473,539	\$	22,350,711
	744.235.532			· · · -		· · · -
				7.770.882		5,126,600
				-		-,,
				_		_
				35.244.421		27,477,311
	000,020,012	011,010,001		00,2, .2 .		2.,,0
	_	_		13 837 804		9.716.799
	278 378 003	261 704 480		- , ,		663,603,390
	-,,-					
				19,003,910		23,776,426
	, ,			-		-
				-		-
				-		
				-		-
		2,656,036		-		-
	1,702,659,663	1,657,238,505		746,398,672		697,096,615
	2.669.483.635	2.634.249.496		781.643.093		724,573,926
		, , , , , , , , , , , , , , , , , , , ,	-	, , , , , , , , , , , , , , , , , , , ,		, ,
	160 200	170 076				
						-
				-		-
	111,289,223	53,930,647				
\$	2,780,772,858	\$ 2,688,180,143	\$	781,643,093	\$	724,573,926
\$			\$	25,413,052	\$	19,999,547
	16,504,688	16,378,536		-		-
	1,830,336	1,810,286		-		-
	13,997,195	13,603,089		-		-
	10,212,158	11,005,621		-		-
	42.216.197	39.285.778		-		_
				504.511		551,377
	134,698,400	122,250,511		25,917,563		20,550,924
	16 618 057	16 610 703		_		_
				-		-
				-		-
		2,101,040		-		-
				-		-
				-		-
		136,868,035		-		-
	3,721,759	-				
	-	-		281,891,999		265,485,438
	929,855,449	784,030,250		281,891,999		265,485,438
	1,064,553,849	906,280,761		307,809,562		286,036,362
	10,417,872	11,274,072		-		-
	2,259,867	2,259,867		-		-
	30,653,519	163,180,019				
	16,760,510	38,080,215		-		-
	6,704,869	8,322,296	_			
_	66,796,637	223,116,469		-		-
\$	747,628,133	716,592,140		-		-
	109,457,468	105,803,131		309,877,807		292,024,405
	117,374,032	118,343,484		159,498,076		142,208,657
	117,374,032	110,040,404		100,400,010		
	674,962,739	618,044,158		4,457,648		4,304,502
_			_			
	\$ \$	\$ 146,686,342 744,235,532 63,174,770 1,756,556 10,970,772 966,823,972 278,378,903 21,684,396 1,618,864 17,339,124 111,872,856 1,262,098,405 9,667,115 1,702,659,663 2,669,483,635 169,398 98,726,366 12,393,459 111,289,223 \$ 2,780,772,858 \$ 49,637,826 16,504,688 1,830,336 13,997,195 10,212,158 42,216,197 300,000 134,698,400 16,618,957 583,286,081 1,795,416 4,350,249 759,532 77,868 319,245,587 3,721,759 929,855,449 1,064,553,849 10,417,872 2,259,867 30,653,519 16,760,510 6,704,869 66,796,637	\$ 146,686,342 \$ 151,434,460 744,235,532 760,423,631 63,174,770 56,605,513 1,756,556 2,663,331 10,970,772 5,884,056 966,823,972 977,010,991 278,378,903 261,704,489 21,684,396 25,005,402 1,618,864 2,676,326 17,339,124 32,907,791 111,872,856 132,450,083 1,262,098,405 1,199,838,378 9,667,115 2,656,036 1,702,659,663 1,657,238,505 2,669,483,635 2,634,249,496 169,398 179,876 98,726,366 52,343,162 12,393,459 1,407,609 111,289,223 53,930,647 \$ 2,780,772,858 \$ 2,688,180,143 \$ 49,637,826 \$ 39,617,201 16,504,688 16,378,536 1,830,336 1,810,286 13,997,195 13,603,089 10,212,158 11,005,621 42,216,197 39,285,778 300,000 550,000 134,698,400 122,250,511 16,618,957 16,619,703 583,286,081 626,582,346 1,795,416 2,101,040 4,350,249 759,532 1,519,065 77,868 340,061 319,245,587 136,868,035 3,721,759 - 929,855,449 784,030,250 1,064,553,849 906,280,761	\$ 146,686,342 \$ 151,434,460 \$ 744,235,532 760,423,631 63,174,770 56,605,513 1,756,556 2,663,331 10,970,772 5,884,056 966,823,972 977,010,991	\$ 146,686,342 \$ 151,434,460 \$ 27,473,539	\$ 146,686,342 \$ 151,434,460 \$ 27,473,539 \$ 744,235,532 760,423,631 63,174,770 56,605,513 7,770,882 1,756,556 2,663,331 7,770,882 10,970,772 5,884,056 966,823,972 977,010,991 35,244,421 13,837,804 13,837,804 278,378,903 261,704,489 712,896,952 21,684,396 25,005,402 19,663,916 1,618,864 2,676,326 1,7339,124 32,907,791 111,872,856 132,450,083 - 1,262,098,405 1,199,838,378 9,667,115 2,656,036 1,702,659,663 1,657,238,505 746,398,672 2,669,483,635 2,634,249,496 781,643,093 169,398 179,876 98,726,366 52,343,162 12,393,459 1,407,609 111,289,223 53,393,647 111,289,223 53,393,647 111,289,223 53,393,647 111,289,223 53,393,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 111,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,223 53,390,647 11,289,64 - 11,2

See notes to financial statements.

Miami University

Statement of Revenues, Expenses, and Changes in Net Position Year Ended June 30, 2023

Coparating revenues:			Miami Ur	iversity	University Fo	oundation
Public P					 	
Loss allowance for student changes \$5,00746, 15, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,688 \$7, 84,243,888 \$7,						
Seasowance for student scholarships						
Sales and services of auxillary enterprises	-	\$			\$ -	\$ -
Sales and services of auxiliary enterprises 157,654,794 149,401,310	·				 -	-
Common C	Net tuition, fees, and other student charges		337,956,206	332,819,930	-	-
Common C	Sales and services of auxiliary enterprises		157,654,794	149,401,310	-	-
Pederal grants					-	-
Sales and services of educational activities 1,813,157 1,728,902 2,728,728 2,728	Net sales and services of auxiliary enterprises				 -	-
Sales and services of educational activities 1,813,157 1,728,902 2,728,728 2,728	Fadaral manta		04 000 500	47.062.007		
Sales and services of educational activities	•			17,903,097	4 207 670	2 126 762
Private grants				1 728 002	4,207,079	3,120,702
State grants					-	-
Decision 1928 192	· ·				_	
Total operating revenues	=				-	-
Total operating evenues S37,490,528 S15,830,109 4,207,679 3,126,762					-	-
Departing expenses: Education and general:					 4.207.679	3,126,762
Education and general:			201,122,222	0.0,000,000	 .,=0.,0.0	2,1-2,1-2
Instruction and departmental research						
Separately budgeted research	<u> </u>		100 000 005	400 000 000		
Public service					-	-
Academic support \$7,838,281 \$0,904,252 \$. \$. \$. \$. \$. \$. \$. \$. \$. \$. \$. \$. \$.					-	-
Student services 33,761,284 35,150,189 - -					-	-
Institutional support	·				-	-
Comparation and maintenance of plant 31,983,038 30,769,978					-	-
Scholarships and fellowships 34,810,543 42,46,140 - - -	***				-	-
Auxiliary enterprises 114,723,797 107,86,756	·				-	-
Depreciation					-	-
Pension and other postemployment benefit expense (revenue)					-	-
Non-operating expenses Response Respon	·				-	-
Total operating expenses 650,100,406 593,635,623					-	-
Net operating (loss) income (112,609,878) (77,805,514) 4,207,679 3,126,762 Non-operating revenues (expenses): State appropriations 83,932,380 81,096,760 - - - Gifts, including those from the University Foundation 40,259,773 32,160,512 - - - Federal grants 17,217,749 44,716,548 - - - Net investment income (loss), net of investment expense of - (63,939,651) 29,444,562 (23,737,152 State grants 2,566,796 2,464,421 - - - Interest on debt 2,1914,373 (25,184,878) - - - Payments to Miami University - - (20,635,060) (17,894,968) Other non-operating revenues (expenses) 3,812,426 (5,551,511) 573,519 (1,650,985) Net non-operating revenues (expenses, gains or losses 86,390,152 (12,043,313) 13,590,700 (40,156,343) Other revenues, expenses, gains or losses: 86,390,152 (12,043,313) 13,590,700 (40,156,343) <td></td> <td></td> <td></td> <td></td> <td> </td> <td>-</td>					 	-
Non-operating revenues (expenses): State appropriations					 4 207 679	3 126 762
State appropriations 83,932,380 81,096,760 - - Gifts, including those from the University Foundation 40,259,773 32,160,512 - - Federal grants 17,217,749 44,716,548 - - Net investment income (loss), net of investment expense of 73,125,279 (63,939,651) 29,444,562 (23,737,152) State grants 2,566,796 2,464,421 - - - Interest on debt (21,914,373) (25,184,878) - - - Payments to Miami University - - (20,635,060) (17,894,968) - - - (20,635,060) (17,894,968) - - - (20,635,060) (17,894,968) - - - (20,635,060) (17,894,968) - - - (20,635,060) (17,894,968) - - - (20,635,060) (17,894,968) - - - (20,635,060) (17,894,968) - - - - (20,635,060) (17,894,968) - -			(**=,****,****)	(,,,	 1,=01,010	*, -= *, - *=
Gifts, including those from the University Foundation 40,259,773 3,2160,512 Federal grants 17,217,749 44,716,548 Federal grants 17,217,749 44,716,548						
Federal grants 17,217,749 44,716,548	·····			, ,	-	-
Net investment income (loss), net of investment expense of \$4,340,739 for the University and \$2,021,624 for the Foundation in FY 23 73,125,279 (63,939,651) 29,444,562 (23,737,152). State grants 2,566,796 2,464,421				, ,	-	-
\$4,340,739 for the University and \$2,021,624 for the Foundation in FY 23 73,125,279 (63,939,651) 29,444,562 (23,737,152 State grants 2,566,796 2,464,421 (20,635,660) (17,894,968 Other non-operating revenues (expenses) Net non-operating revenues (expenses) Income (loss) before other revenues, expenses, gains or losses State capital appropriation Capital grants and gifts Additions to permanent endowments Total other revenues, expenses, gains or losses Change in net position 73,125,279 (63,939,651) 29,444,562 (23,737,152 24,644,421 (20,635,660) (17,894,968 (5,551,511) 573,519 (1,650,985 (5,551,511) 573,519 (1,650,985 (1,2043,313) 13,590,700 (40,156,343 Change in net position 74,148 75,221 75,267 75,267 75,268,081 75,267 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081 75,268,081	· · · · · · · · · · · · · · · · · · ·		17,217,749	44,716,548	-	-
State grants 2,566,796 2,464,421 - - Interest on debt (21,914,373) (25,184,878) - - Payments to Miami University - (20,635,060) (17,894,968 Other non-operating revenues (expenses) 3,812,426 (5,551,511) 573,519 (1,650,985 Net non-operating revenues (expenses) 199,000,030 65,762,201 9,383,021 (43,283,105) Income (loss) before other revenues, expenses, gains or losses 86,390,152 (12,043,313) 13,590,700 (40,156,343) Other revenues, expenses, gains or losses: State capital appropriation 2,154,864 21,651,809 - - Capital grants and gifts 1,607,025 1,807,221 - - - Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)						
Interest on debt	\$4,340,739 for the University and \$2,021,624 for the Foundation in FY 23		73,125,279	(63,939,651)	29,444,562	(23,737,152)
Interest on debt	State grants		2 566 706	2 464 424		
Payments to Miami University - - - (20,635,060) (17,894,968 Other non-operating revenues (expenses) 3,812,426 (5,551,511) 573,519 (1,650,985 Net non-operating revenues (expenses) 199,000,030 65,762,201 9,383,021 (43,283,105 Income (loss) before other revenues, expenses, gains or losses 86,390,152 (12,043,313) 13,590,700 (40,156,343 Other revenues, expenses, gains or losses: State capital appropriation 2,154,864 21,651,809 - - - Capital grants and gifts 1,607,025 1,807,221 - - - Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262	ů				-	-
Other non-operating revenues (expenses) 3,812,426 (5,551,511) 573,519 (1,650,985) Net non-operating revenues (expenses) 199,000,030 65,762,201 9,383,021 (43,283,105) Income (loss) before other revenues, expenses, gains or losses 86,390,152 (12,043,313) 13,590,700 (40,156,343) Other revenues, expenses, gains or losses: 2,154,864 21,651,809 - - - Capital grants and gifts 1,607,025 1,807,221 - - - Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)			(21,914,373)	(23,104,070)	(20 635 060)	(17 904 069)
Net non-operating revenues (expenses) 199,000,030 65,762,201 9,383,021 (43,283,105) Income (loss) before other revenues, expenses, gains or losses 86,390,152 (12,043,313) 13,590,700 (40,156,343) Other revenues, expenses, gains or losses: State capital appropriation 2,154,864 21,651,809 - - - Capital grants and gifts 1,607,025 1,807,221 - - - Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)			3 912 426	- (5 551 511)		
Income (loss) before other revenues, expenses, gains or losses gains or losses 86,390,152 (12,043,313) 13,590,700 (40,156,343) Other revenues, expenses, gains or losses: State capital appropriation 2,154,864 21,651,809 - - - Capital grants and gifts 1,607,025 1,807,221 - - - Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)						
gains or losses 86,390,152 (12,043,313) 13,590,700 (40,156,343) Other revenues, expenses, gains or losses: State capital appropriation 2,154,864 21,651,809 - - - Capital grants and gifts 1,607,025 1,807,221 - - - Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)			133,000,000	00,702,201	 3,000,021	(40,200,100)
Other revenues, expenses, gains or losses: State capital appropriation 2,154,864 21,651,809 - - - Capital grants and gifts 1,607,025 1,807,221 - - - Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)	Income (loss) before other revenues, expenses,					
State capital appropriation 2,154,864 21,651,809 - <td>gains or losses</td> <td></td> <td>86,390,152</td> <td>(12,043,313)</td> <td>13,590,700</td> <td>(40,156,343)</td>	gains or losses		86,390,152	(12,043,313)	13,590,700	(40,156,343)
State capital appropriation 2,154,864 21,651,809 - <td>Other revenues expenses gains or lesses:</td> <td></td> <td></td> <td></td> <td></td> <td></td>	Other revenues expenses gains or lesses:					
Capital grants and gifts 1,607,025 1,807,221 -	· · · · · · · · · · · · · · · · · · ·		2 154 964	21 651 900		
Additions to permanent endowments 487,418 1,799,033 21,705,267 16,996,081 Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)					-	-
Total other revenues, expenses, gains or losses 4,249,307 25,258,063 21,705,267 16,996,081 Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)	· · ·				24 705 267	16 006 004
Change in net position 90,639,459 13,214,750 35,295,967 (23,160,262)	·	-			 , ,	
	rotal other revenues, expenses, gains or losses		4,249,307	25,258,063	 21,705,267	18,996,081
Total net position at beginning of year, as restated \$ 1,545,568,163 438,537,564 461,697,826	Change in net position		90,639,459	13,214,750	35,295,967	(23,160,262)
ψ 1,000,100,100 1,000,100 100 100,000,100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100 100,000,100,000,100,000,100,000,100,000,100,000,100	Total net position at beginning of year, as restated	_\$	1,558,782,913	1,545,568,163	 438,537,564	461,697,826
Total net position at end of year \$\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	Total net position at end of year	\$	1,649,422,372	\$1,558,782,913	\$ 473,833,531	\$ 438,537,564

Review of Net Position, Carry Forward Balances and Other Financial Results



Miami University

Unrestricted Net Position at June 30, 2023 and 2022

Summary

	FY2023	FY2022	FY2021
Fund Balances & Reserves- Before Pension Liability	\$ 223,805,931	\$ 183,139,965	\$ 246,374,418
Ohio Pension Liability	(240,303,562)	(248,793,381)	(311,764,830)
Fund Balances and Reserves - Net	(16,497,631)	(65,653,416)	(65,390,412)
Carry Forward and Designated - Academic Divisions	195,172,927	204,100,326	206,231,673
Carry Forward and Designated - Administrative Divisions	95,739,573	97,072,271	76,080,203
Facility Renewal & Replacement Funds	247,201,984	240,583,280	220,971,351
Quasi-Endowment	<u>153,345,885</u>	<u>141,941,697</u>	<u>152,648,148</u>
Total Unrestricted Net Position	\$ 674,962,73 <u>9</u>	\$ 618,044,158	<u>\$ 590,540,963</u>



Miami University

Unrestricted Net Position

at June 30, 2023 and 2022

Oxford General Central Fund Balances & Reserves

		FY2023		FY2022		FY2021
Unallocated Fund Balance	\$	3,724,175	\$	528,018	\$	1,788,786
Reserve for Future Budgets		0		0		0
Reserve for Investment Fluctuations		169,597,847		132,572,984		195,752,650
Reserve for Health Care Stabilization		19,855,765		19,855,765		19,855,765
Reserve for Financial Aid		8,468,533		8,219,593		8,232,854
Reserve for Litigation		<u>1,637,953</u>		<u>1,547,953</u>		<u>1,547,953</u>
Total Oxford Central Fund Balances	<u>\$</u>	203,284,273	<u>\$</u>	162,724,313	\$:	227,178,008
Regional Campus Central	Fui	nd Balances 8	& R	eserves		
Hamilton	\$	14,040,117	\$	13,411,842	\$	13,484,602
Middletown		542,156		325,284		345,933
Voice of America		<u>88,760</u>		<u>43,269</u>		<u>40,433</u>
Total Regional Campus Central Fund Balances		14,671,033		13,780,395		13,870,968
Auxiliary Enterprises		3,874,918		2,981,452		2,182,655
Encumbrances		<u>1,975,707</u>		<u>3,653,805</u>		<u>3,142,787</u>
Total All Fund Balances & Reserves	<u>\$</u>	223,805,931	\$	183,139,965	<u>\$</u>	<u>246,374,418</u>



Miami University Unrestricted Net Position at June 30, 2023 and 2022

Academic Affairs

Carryforward & Designated Funds

		FY2023		FY2022		FY2021
Provost	\$	127,710,396	\$	133,961,619	\$	145,215,948
Arts & Science		23,367,831		21,950,293		19,090,509
Education, Health & Society		5,773,955		5,662,485		5,568,932
Farmer School of Business		14,861,054		13,908,327		12,802,683
Engineering & Computer Service		5,557,638		5,241,982		4,333,163
Creative Arts		1,760,877		1,781,130		1,190,778
Hamilton Campus		5,794,601		8,505,089		7,190,409
Middletown Campus		10,280,286		12,985,342		10,736,704
Voice of America		<u>66,288</u>		<u>104,060</u>		<u>102,546</u>
Total Academic Divisions	<u>\$</u>	<u> 195,172,927</u>	<u>\$</u>	204,100,326	<u>\$</u>	206,231,673



Miami University

Unrestricted Net Position

at June 30, 2023 and 2022

Administrative Divisions

Carryforward & Designated Funds

	FY2023	FY2022	FY2021
President	\$ 11,195,029	\$ 5,797,069	\$ 6,031,873
Finance & Business Services	4,165,320	4,640,325	6,247,432
Physical Facilities	3,552,438	2,866,709	2,968,266
Enrollment Management & Student Success	7,228,826	6,644,314	4,330,255
Student Life	5,603,263	5,931,420	5,822,403
University Advancement	31,855,053	30,126,679	25,544,281
IT Services	15,023,159	15,393,614	14,225,724
Central Budget	<u>17,116,487</u>	<u>25,672,141</u>	<u>10,909,967</u>
Total Administrative Divisions	\$ 95,739,573	\$ 97,072,271	\$ 76,080,203



Miami University

Unrestricted Net Position

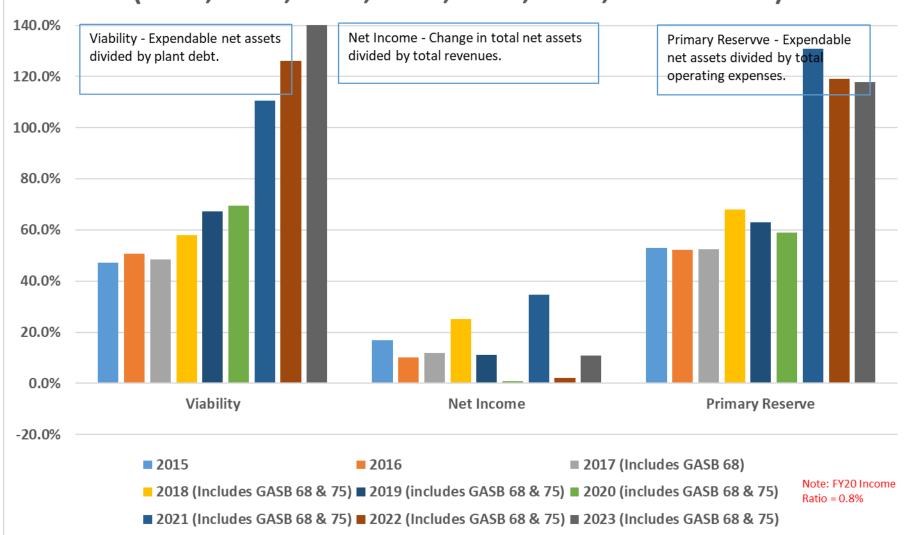
at June 30, 2023 and 2022

Facility & ERP Replacement Funds

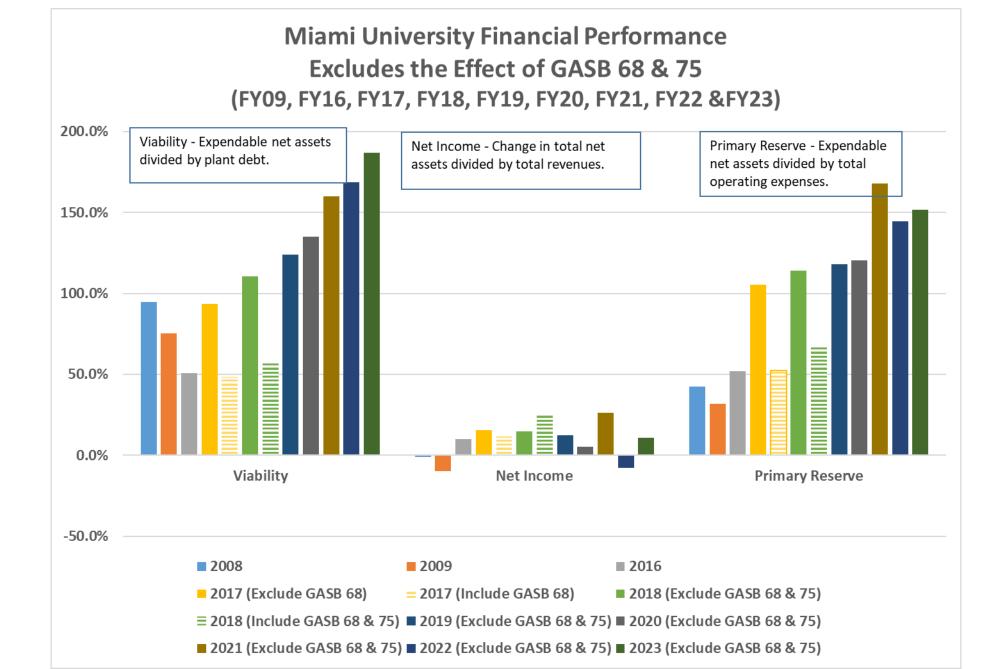
	FY2023		FY2022		FY2021	
Oxford- General	\$	69,551,537	\$	60,098,909	\$	57,632,176
Hamilton Campus		9,658,490		8,649,630		9,372,274
Middletown Campus		704,622		2,342,312		2,488,318
Voice of America		645,956		545,250		444,129
Oxford Auxiliary		73,690,856		73,056,207		77,590,645
Projects Funded/Not Expended		92,950,523		95,890,972		<u>73,443,809</u>
Total Facility Renewal & Replacement	<u>\$</u>	247,201,984	<u>\$</u>	240,583,280	<u>\$</u>	220,971,351



Miami University Financial Performance Includes the Effect of GASB 68 & 75 (FY16, FY17, FY18, FY19, FY20, FY21, FY22 &FY23)









Miami University FY23 SB 6 Ratios Compared to Other Insitutions (FY22)

	Includes GASB 68 & 75				Excludes GASB 68 & 75				
	Composit		Net	Primary	Composit		Net	Primary	
Institution	Score	Viability	Income	Reserve	Score	Viability	Income	Reserve	
Bowling Green	2.4	26.5%	2.7%	17.9%	3.4	86.3%	-7.1%	53.1%	
Cental State ¹	1.0	-126.8%	26.4%	-20.7%	3.7	116.4%	17.9%	17.0%	
Cleveland State	2.8	23.8%	5.1%	16.5%	3.4	85.4%	-6.1%	53.0%	
Kent State	2.8	23.2%	10.4%	15.1%	3.9	104.5%	-3.1%	59.1%	
Ohio State	4.4	91.3%	9.2%	55.1%	4.4	91.3%	9.2%	55.1%	
Ohio	3.6	46.0%	6.8%	47.1%	3.4	93.2%	-5.9%	83.9%	
Shawnee State	1.0	-85.3%	13.6%	-24.4%	3.0	80.0%	2.8%	20.3%	
Akron	1.8	0.7%	8.5%	0.8%	3.4	70.6%	-7.5%	69.3%	
Cincinnati	3.6	39.4%	12.9%	35.6%	4.4	78.0%	5.5%	64.9%	
Toledo	1.8	5.9%	8.0%	1.9%	3.4	126.6%	-2.7%	36.6%	
Wright State	1.0	-58.0%	21.6%	-13.3%	4.0	225.9%	4.3%	42.6%	
Youngstown State	1.0	-33.4%	7.2%	-10.4%	3.4	121.7%	-4.4%	33.8%	
Average (excludes MU)	2.3	-3.9%	11.0%	10.1%	4.7	106.7%	0.2%	49.1%	
Miami FY22	4.3	126.0%	2.1%	119.0%	3.7	168.6%	-7.8%	144.5%	
Miami FY23	4.7	143.5%	11.9%	117.9%	4.7	187.1%	10.8%	151.7%	

Note: ¹ The FY22 Financial Statements have not been approved.



Miami University Foundation Preliminary & Unaudited Financial Statement and Financial Performance for Fiscal Year 2023



Miami University Foundation

Preliminary & Unaudited

Statement of Financial Position June 30, 2023

(With Comparative Totals for June 30, 2022)

,	2023	2022
Assets		
Cash and cash equivalents	\$ 41,311,343	\$ 32,067,510
Pledges receivable, net	19,808,822	18,475,171
Other receivables, primarily investment related	7,625,976	10,427,855
Investments	711,092,451	661,767,450
Cash value of life insurance	1,804,501	1,835,940
Total assets	\$ 781,643,093	\$ 724,573,926
Liabilities		
Accounts payable and other liabilities	\$ 25,413,052	\$ 19,999,547
Assets held for other entities	277,951,890	261,261,753
Deferred revenue	1,135,500	1,362,295
Obligations under split-interest agreements	3,309,120	3,412,767
Total liabilities	307,809,562	286,036,362
Net Assets		
Without donor restrictions	4,457,648	4,304,502
With donor restrictions	469,375,883	434,233,062
Total net assets	473,833,531	438,537,564
Total liabilities and net assets	\$ 781,643,093	\$ 724,573,926

See notes to financial statements.

Preliminary & Unaudited

Miami University Foundation

Statement of Activities Year Ended June 30, 2023 (With Comparative Totals for the Year Ended June 30, 2022)

	Without Donor	With Donor	2023	2022
	Restrictions	Restrictions	Total	Total
Revenues and other additions:	·			
Contributions	\$ 26,777	\$ 25,886,169	\$ 25,912,946	\$ 20,122,843
Investment income:				
Dividend and interest income, net	20,076	2,001,548	2,021,624	1,314,869
Net realized and unrealized gains	323,428	31,413,386	31,736,814	(21,193,286)
Net investment income	343,504	33,414,934	33,758,438	(19,878,417)
Change in value of split-interest agreements	-	851,353	851,353	(1,356,627)
Net assets released from restrictions due to				
satisfaction of donor restrictions	25,009,590	(25,009,590)	-	-
Total revenues and other additions	25,379,871	35,142,866	60,522,737	(1,112,201)
Expenses and other deductions:				
Distributions to Miami University (Note 6)	20,635,060		20,635,060	17,894,968
Other expenses	277,789	45	277,834	294,358
Administrative expenses (Note 6)	4,313,876		4,313,876	3,858,735
Total expenses and other deductions	25,226,725	45	25,226,770	22,048,061
Change in net assets	153,146	35,142,821	35,295,967	(23,160,262)
Net assets - beginning of year	4,304,502	434,233,062	438,537,564	461,697,826
Net assets - end of year	\$ 4,457,648	\$ 469,375,883	\$ 473,833,531	\$ 438,537,564

See notes to financial statements.