THE OHIO STATE UNIVERSITY

Board of Trustees

210 Bricker Hall
190 North Oval Mall
Columbus, OH 43210-1358

614-292-6359 Phone
614-292-5903 Fax

osu.edu

November 21, 2019

Chancellor Randy Gardner
Ohio Department of Higher Education
25 South Front Street
Columbus, OH 43215

Chancellor Gardner,

Ohio State is proud of our record as a leader in operational excellence and resource stewardship, a strategic focus aligned with the goals of the Ohio Task Force on Affordability and Efficiency in Higher Education. As stated in Ohio State's strategic plan, "The university must be a responsible steward of its resources in order to re-direct investment into initiatives that will help us to achieve our bold aspirations."

Our 2019 report demonstrates Ohio State's significant progress in these areas. The university has dedicated more than $150 million in new need-based aid for low- and moderate-income Ohioans since 2015, funded through efficiency savings and new resource generation. More than 42,000 Buckeyes have benefitted from these affordability initiatives. Ohio State has already invested $800 million in proceeds from the Comprehensive Energy Management partnership to support student aid and other academic priorities and is on track to generate more than $200 million in efficiency savings through fiscal 2020. Highlights of our work include:

- **Buckeye Opportunity Program**: Starting in the 2018-19 academic year, all in-state students who qualify for Pell Grants receive an aid package that covers the full cost of tuition and mandatory fees. More than 4,000 students have already benefitted across all Ohio State campuses from this program, which is funded with an endowment created from Comprehensive Energy Management proceeds. (go.osu.edu/bop)
- **Digital Flagship**: Ohio State's comprehensive digital learning initiative is providing more than 24,000 incoming first- and second-year students with an iPad learning-technology suite as part of the university's Digital Flagship collaboration with Apple to support educational innovation for students and economic development opportunities for the community. The university is funding the program using efficiency savings. (digitalflagship.osu.edu)
- **Additional financial aid**: Administrative efficiencies have funded $85 million in President's Affordability Grants over four years, and other institutional funds have supported the expansion of the Land-Grant Opportunity Scholarship program to offer twice as many grants and to increase the value to cover the full cost of attendance. (go.osu.edu/testimony)
- **Tuition affordability**: The Ohio State Tuition Guarantee, now in its third year, offers incoming in-state students certainty about the cost of a college education by freezing rates for tuition, mandatory fees, room and board for four years. For students who began prior to the guarantee, in-state tuition has not increased since fiscal 2013. (go.osu.edu/tuitionguarantee)
- **Fee simplification and savings:** Starting in spring 2019, Ohio State eliminated 278-course fees, piloted a digital textbook program that will reduce student costs by 75 percent to 80 percent, waived additional tuition costs for eligible students who take heavy loads and broadened our policy that offers in-state tuition to military families.

Together, these four initiatives will save students up to $1.9 million a year. (go.osu.edu/fee-reduction)

- **Resource stewardship**: In a continued effort to control costs and provide unprecedented aid to students, the university prioritized strategic procurement to reduce costs. Since fiscal 2013, the university has produced $324 million in cumulative savings while negotiating 960 university contracts.

Collectively, these and other initiatives represent Ohio State’s continued momentum in advancing an affordable and excellent education for our students and their families.

Gary R. Heminger
Chairman of the Board of Trustees

Ohio Department of Higher Education

Mike DeWine, Governor
Randy Gardner, Chancellor

Affordability & Efficiency

Section I: Operational Efficiency

Affordability and efficiency in higher education are high among the DeWine-Husted administration's policy priorities. DHE continues to encourage institutions to consider the Ohio Task Force on Affordability and Efficiency's October 2015 report "Action Steps to Reduce College Costs" (Task Force) linked here: [www.ohiohighered.org/sites/ohiohighered.org/files/uploads/affordability-efficiency/Action-Steps-to-Reduce-College-Costs_100115.pdf.](http://www.ohiohighered.org/sites/ohiohighered.org/files/uploads/affordability-efficiency/Action-Steps-to-Reduce-College-Costs_100115.pdf) Although this year's template does not require each IHE to report on every recommendation of the Task Force, we are requesting that IHE's provide the most recent information available on selected items.

As presented in Recommendation 3B of the Task Force, IHE's have access to multiple joint purchasing agreements in the following categories:

- Copier/printer services
- Computer hardware
- Travel services
- Outbound shipping
- Scientific supplies and equipment
- Office supplies and equipment

Contract Type	Did your IHE participate in joint contracts in FY19? [yes, no, worked toward]	Monetary Impact
Copier/printer services	No	The university has a best-in-class contract for copiers, printers and multifunction devices. Ohio State sought to work with other schools to extend similar rates. None committed to the same kind of volume guarantees that we have adopted.
Computer hardware	Yes	Ohio State utilizes the State of Ohio state term schedule.
Travel services	Worked toward	The university works with a travel management company and has mandated employee utilization of this contract. This is a step required in the IUC Purchasing Group's three-phase action plan to develop an opportunity for joint purchasing.

Outbound shipping	Yes	Ohio State utilizes the State of Ohio state term schedule for outbound shipping.
Scientific supplies & equipment	Yes	Ohio State led a collaborative contract opportunity through the Inter-University Council Purchasing Group for scientific supplies and lab equipment. This process has resulted in contracts that are expected to save IUC members at least 7 percent on what is currently a $115 million annual spend among the public universities in Ohio.
Office supplies & equipment	No	Ohio State has generated significant savings on office supplies by ensuring near-universal contract utilization and by employing the process endorsed by the IUC Purchasing Group: focusing our spend on a core list of products. This resulted in a best-in-class contract for this category

Additionally, since fiscal 2012, Ohio State's strategic procurement program has produced cumulative savings of $388 million by utilizing the university's buying power to drive both savings and quality enhancements. In fiscal 2019 alone, the university saved $64.0 million through strategic procurement compared with contracted rates in fiscal 2012. These savings directly benefit colleges and other university units by reducing operating costs, which in turn has allowed the university to hold down student costs.

Per recommendation 4C of the Task Force, IHE's should evaluate opportunities for affinity relationships and sponsorships that can support students, faculty, and staff. Institutions can use these types of partnerships to generate new resources by identifying "win-win" opportunities with private entities that are interested in connecting with students, faculty, staff, alumni, or other members of their communities. Please complete the section below with the implementation status of your institution.

Did your institution initiate any new partnerships or sponsorships in FY19? If yes, please complete the below table for those new relationships.

Partnerships/Sponsorships	Description	Revenue Generated
Furniture Contract	10-year preferred vendor agreement. Includes purchasing incentive and a Trademark & Licensing agreement providing limited marketing and branding opportunities.	Licensing revenue generated
Dell Computers	ESports sponsorship support	$33,500 in donated computers to support the program startup.
Zippy Shell Storage	Sponsorship of Student Life and Office of International Affairs	$12,000
Energy Management P3 (2018)	The partnership is implementing a new digital energy control platform for the comprehensive management	$271,800 (FY2019)

	of buildings and utility plants. This platform has enabled the university to participate in regional Demand Response and Capacity Performance programs with the regional transmission operator.	

If the IHE realized efficiencies gained in FY19 from already existing relationships, please identify, specifically including revenue generated. *Include in the table above or add a similar table.*

Employee health benefits continue to be a major cost driver for all IHE's. The Task Force recommendations addressed this issue in 5D, recommending that a statewide working group identify opportunities to collaborate on health-care costs. At this point, we are especially interested in learning about best practices that could be applicable around the state. Please provide the following information if your institution has generated any significant savings or health benefits improvements in FY 19

What initiatives or plan changes did the IHE implement in FY19 to manage or reduce healthcare costs?

- **The university achieved $11.4 million in healthcare savings in calendar 2018.**

Has the institution achieved any expected annual cost savings through healthcare efficiencies in FY19? Please explain how cost savings were estimated.

Strategies that were implemented to realize these efficiencies included:

- Enhanced utilization management efforts, resulting in $5 million in savings. This was achieved through various methods, including:
  - Increasing the number of medical cases that were reviewed by the OSU Health Plan Medical Director to an all-time high of 19.9%. This provided the opportunity to reduce expensive inpatient stay lengths and redirect to an appropriate lower-cost setting, where possible.
  - Shifting more specialty medication reviews to internal pharmacy/clinical expertise to evaluate treatment options and base authorizations on those with the greatest opportunity for efficacy based on the individual's needs.
  - Implementing bundled pricing for total joint replacement procedures for hips and knees with capped pricing and shared savings opportunities based on meeting defined quality outcome measures.
- Improved contract pricing with our pharmacy benefit manager, as well as conducting ongoing audits of their claims adjudication and pricing, resulting in a total of $2.4 million in savings.
- Holding OSU provider contract fees flat for facilities for all of 2018 and for physicians for eight months of 2018, resulting in $4 million in savings.

Energy Efficiencies seek to refine sustainable methods utilized by the institution to procure and use energy (resulting in more efficient use of energy), including but not limited to lighting systems, heating & cooling systems, electricity, natural gas, and utility monitoring. Again, we are especially interested in learning about best practices that could be applicable around the state. Please provide the following information if your institution has undertaken any significant energy savings projects in FY19.

FY19 Projects/Initiatives	Efficiencies Gained, including Monetary Impact
ENGIE Digital Energy Management Platform - a new master control platform for the comprehensive management of buildings and utility plants. This platform is enabling the university to increase its participation in regional *Demand Response* and *Capacity Performance* programs with the regional transmission operator.	$271,800 in new ancillary revenues (FY2019)
Indoor and Outdoor Lighting retrofits – converting incandescent, fluorescent, and HID lamps to LED. These projects began in FY2018 and will continue through FY2020. To date, more than 100,000 lamps have been replaced	Total campus energy efficiency (measured as the amount of energy used per square foot of building space) improved by approximately 1.8% in FY2019. Most of that efficiency can be attributed to energy savings resulting from the earliest installations of the LEDs. The FY2019 energy costs savings attributable to the lighting retrofit is approximately $862,000

Has the institution gained efficiencies in FY19 from previously implemented projects/strategies? If yes, please discuss cumulative efficiencies gained.

The Task Force charged DHE with developing a common measurement of administrative productivity. However, the Task Force also acknowledged that each institution should have the latitude to develop its own standards of the proper level of productivity for its campus units. DHE will provide specific financial data for each institution as part of this year's reporting process. The Efficiency Advisory Committee will need to continue to evaluate this data and determine how best to utilize it taking into account the significant diversity of IHE's and their missions throughout Ohio.

Specific institutional measures to be evaluated include:

- Average Expenditure per Student
- Total Revenue per Student
- Facility Cost per Student
- Square Feet per Student

Regional Compacts

Ohio Revised Code Section 3345.59 requires regional compacts of Ohio's public institutions, with an executed agreement in place by June 30, 2018 for institutions to collaborate more fully on shared operations and programs. Per O.R.C. §3345.59 {E} colleges and universities shall report within their annual efficiency reports the efficiencies gained as a result of the compact.

Please discuss efficiencies gained or opportunities for future partnerships as a result of each of the categories within the compact.

Category	Description	Monetary Impact
Reducing duplication of academic programming	There continues to be no program duplication evident for the university within the Central Ohio region, or at the regional campus locations. The university, internally, monitors program size and duplication through its regular academic program development, implementation and review processes.	N/A
Implementing strategies to address workforce education needs of the region	The universities, through their program planning strategies, identify needs in counties where they are jointly locating staff. Programming is focused on 4-H Youth Development, Family and Consumer Sciences, Community Development, and/or 4-H Youth Development.	N/A
Sharing resources to align educational pathways and to increase access within the region	In Aug. 2019, Ohio State re-affirmed its 2011 agreement with Columbus State Community College to support the Preferred Pathway Program. The initiative was designed to expand access to higher education and make it easier for Columbus State students to earn a bachelor's degree by providing a guaranteed path for transferring.	N/A
Reducing operational and administrative costs to provide more learning opportunities and collaboration in the region	In identified counties where there are staff from CSU and OSU co-located, agreements are (or will be) in place to facilitate the use of facilities and administrative support.	Once fully implemented, it is estimated that Ohio State would realize $30,000 annually in efficiencies.
Enhancing career counseling and experiential learning opportunities for students	N/A	N/A
Collaboration and pathways with information technology centers, adult basic and literacy education programs and school districts	N/A	N/A

Enhancing the sharing of resources between institutions to expand capacity and capability for research and development	N/A	N/A
Identifying and implementing the best use of university regional campuses	In May 2019, Ohio State's board of trustees approved a new bachelor of science in engineering technology with a concentration in engineering, which will be offered on the university's Lima, Mansfield and Marion campuses in autumn 2020 and is tentatively scheduled to begin on the Newark campus in 2023. Also, universities, through their program planning strategies, identify needs in counties where they are jointly locating staff. Programming is focused on 4-H Youth Development, Family and Consumer Sciences, Community Development, and/or 4-H Youth Development.	

Section II: Academic Practices

Textbook Affordability

Textbook Cost Study

Ohio Revised Code Section 3333.951(D) requires Ohio's public colleges and universities to annually conduct a study to determine the current cost of textbooks for students enrolled in the institution and submit the study to the Chancellor. Please attach the analysis of textbook costs developed by your institution labeled "[Institution Name – Academic Year – Textbook Cost Study]" Please summarize the results of your institution's study below.

Category	Amount
Average cost for textbooks that are new	$103.36
Average cost for textbooks that are used	$78.36
Average cost for rental textbooks	$67.78 for new rentals; $41.16 for used rentals (Note: Averages are for textbooks that are available for rent through the university's bookstore.)

Average cost for eBook	$70.14 to buy; $46.52 to rent (Averages are for eBooks that are available through the university's bookstore.)

Note: Ohio State utilized a methodology developed last year by the Inter-University Council's textbook working group. Our analysis focused on the top undergraduate major based on the total number of unduplicated students majoring in each area in the following eight areas:

- Arts (Art)
- Business (Finance)
- Education (Early Childhood Education)
- Engineering (Computer Science and Engineering)
- Health Professions (Nursing)
- Humanity (English)
- Natural Sciences (Biology)
- Social Sciences (Psychology)

Ohio State refined its methodology for 2018 to better capture a typical range of course materials in these majors, including potential electives. As a result, these data are not comparable to the previous report. The average prices listed are based on university bookstore pricing and do not include open educational materials, other course materials that are offered at no charge to students or through the CarmenBooks inclusive access program.

Reducing Textbook Costs for Students

Ohio Revised Code Section 3333.951(C) requires Ohio's public colleges and universities to report their efforts toward reducing textbook costs for students. Please discuss all initiatives implemented, including those referenced below that ensure students have access to affordable textbooks.

1. Does your institution offer inclusive access purchasing of college textbooks? If yes, what percentage of courses participate?

   - Yes. Ohio State takes advantage of the Engage eReader and publisher inclusive access contract made available through our membership in the Unizin consortium. We have branded this program as CarmenBooks, which offers digital copies of selected textbooks for a fraction of the cost of a new, physical copy. With CarmenBooks, students typically save 80% off the retail price of publisher textbooks, and 40% off the cost of access to publisher online homework systems. Students access the Engage eReader and digital course materials through the Learning Management System (CarmenCanvas). Students retain access to digital course materials throughout their enrollment at Ohio State.

   - In academic year 2018-2019, CarmenBooks was used in 21 courses by 2,212 students with a total of $288,000 in savings (calculated as list price vs. inclusive access price). This represents 0.2% of total courses offered at Ohio State. As this was the pilot year for the CarmenBooks program, future numbers will show an increase in CarmenBooks usage.

2. Does your institution offer open educational resources (OER) in lieu of purchased materials? If yes, what percentage of courses participate? How many non-duplicative students benefit currently from OER?

   - Yes. Ohio State has a grant program that supports faculty transitioning from conventional textbooks to OER resources. Through Autumn 2019, the Affordable Learning Exchange has funded projects in 70 courses on all campuses. ALX is a partnership between units concerned with teaching and learning at Ohio State, and pairs excellence with affordability through grants, research, and faculty outreach.
     ALX projects have contributed to affordability at Ohio State by:
     - Impacting hundreds of faculty across all OSU campuses with grant and learning opportunities
     - Saving students nearly $5 million by the end of academic year 2018-19
     - Switching to OERs in 0.7% of courses at Ohio State, benefitting 17,950 non-duplicative students
     - Contributing to a local and global discussion of OER and student affordability
     - Establishing a strong Affordable Learning brand that reaches beyond Ohio State
     - Enabling research on student engagement and outcomes with OERs and other affordable learning tools

3. Is your institution a member of an organization that works to develop high-quality, low-cost materials including OER? If yes, what organization? Please describe.

   - In June 2017, Ohio State in partnership with North Central State College and Ohio Dominican universities, and 15 other community colleges received an Ohio Department of Higher Education Innovation Grant in the amount of $1.3 million. The grant was awarded to support the development of open educational resources (OER) and other materials in an effort to reduce the cost of textbooks for students. The culmination of that work is the development of open course materials for 21 of our shared high-enrollment courses.

     Faculty teams representing Ohio's 2-year and 4-year colleges and universities, both public and private, put guides together to present alternatives to commercial textbooks for Ohio students. Full course guides using OER materials are available for many of Ohio's high enrollment courses. They can be adopted in full or in part to meet the needs of course instructors. The courses have been divided into modules that meet the objectives of the Ohio Department of Higher Education's Transfer Assurance Guides (TAGs) and Ohio Transfer Module (OTM) guidelines.

     Ohio State is also a founding member of the Open Textbook Network, a national organization that curates high-quality open textbooks and offers faculty and librarian professional development programs to encourage use of OERs.

     Ohio State is also a member of the Unizin consortium. This membership facilitates the use of the Engage eReader, a cornerstone of our inclusive access program, among other benefits related to student cost reduction.

4. What other practices does your institution utilize to improve college textbook affordability?

- We offer faculty professional development opportunities around OERs and textbook affordability through both our Professional Learning program and the University Institute for Teaching and Learning.

Please provide any relevant information in the table below.

Initiative	Explanation of Initiative	Cost Savings to Students
CarmenBooks	Inclusive Access pilot	$288,000
Affordable Learning Exchange	Supports faculty in developing no- or low-cost materials	$910,000

Textbook Selection Policy

Ohio Revised Code Section 3345.025 requires the board of trustees of each state IHE to adopt a textbook selection policy for faculty to use when choosing and assigning textbooks and other instructional materials. The policy shall include faculty responsibilities and actions faculty may take in selecting and assigning textbooks and other instructional materials. Examples of topics addressed within such a policy include textbook adoption deadlines, faculty ethics rules on personal use/resale of publisher-provided free textbooks, disclosure of personal interest/royalties and textbook ownership of faculty-use books.

1. Has your institution's board of trustees adopted a textbook selection policy consistent with Ohio Revised Code 3345.025? The Policies and Procedures Handbook (item 1.8) details expectations for the use of self-authored materials. In addition, the University Senate approved a resolution in March 2017 encouraging faculty to submit timely textbook orders.
2. Has your institution adopted a faculty textbook auto-adoption policy that assigns the previous semester's version of a textbook when a faculty member does not actively select a new edition by the federally-required date of class registration? No.

Please attach the policy in full length and label the file as "[Institution Name – Academic Year – Textbook Selection Policy]."

Time to Degree

Reducing time to degree is one of the most effective ways to reduce student costs. The Task Force offered several recommendations for assisting students in reducing time to degree, including developing an educational campaign to increase student awareness on the importance of maintaining an adequate course load, providing incentives for students to attend full-time and graduate on time. Institutions have also been encouraged to review academic programs to assure the number of hours necessary to earn a degree align with recommended standards.

Standardize Credits

Recommendation 7C of the Task Force was for institutions to streamline graduation requirements so that most bachelor's degree programs can be completed within 126 credit hours or less, and associate degree programs can be completed within 65 credit hours or less.

Please provide a spreadsheet list of every degree program at your institution that requires more than 65 credit hours to complete and associate degree and/or 126 credit hours to complete a bachelor's degree, list the number of credit hours required in a separate column and label the file "[Institution Name – Academic Year – Time to Degree Standardization]"   Please complete the table below.

Percent of Programs that require more than the recommended minimum credit hours to earn a degree	Percent of FTE in programs that require more than the recommended minimum credit hours to earn a degree
14%*	10%*
Average number of credit hours earned by students awarded an associate degree in FY 19	**Average number of credit hours earned by students awarded a baccalaureate degree in FY 19**
84	145

***Note:** The vast majority of Ohio State's undergraduate programs require either the university's minimum of 121 semester hours or require the amount needed for accreditation. The provided data shows all programs that require more than 126 semester hours — including programs where these requirements are tied to accreditation.

Alternative Delivery Methods

Online and competency-based education are both growing dramatically as delivery platforms for higher education across the United States. Recommendation 7G of the Task Force was for institutions to consider developing or expanding programs that measure student success based on demonstrated competencies instead of through the amount of time students spend studying a subject.

1. Does your institution offer competency-based education? If yes, please provide a list of enrollment, degrees and course offerings.
   - Given Ohio State's student body, our analysis has been that competency-based education is not the best focus for enhancements. Instead, we are continually focused on refining our curriculum based on the high standards of our incoming students. However, the university is engaging with outside experts to better understand CBE opportunities and explore what role CBE may play in the future at Ohio State.

2. Has your institution seen a difference in completion rates relative to traditional modes of education? N/A

3. Have students experienced cost savings? How is the fiscal impact quantified? N/A

Flexible delivery methods, such as distance learning, provide an opportunity to improve access by providing students with additional opportunities to complete their education. In fact, enrollment in such programs has increased dramatically in recent years.

1. Does your institution offer distance-based or online education? If yes, please provide a list of enrollment, degrees and course offerings.
   - Yes. Ohio State offers online courses to all eligible students, as well as a portfolio of online programs through Ohio State Online. During AY18-19, Ohio State had 54,080 enrollments across 9,021 online offerings, of which 3,652 enrollments were from online programs. Currently, Ohio State has 38 online programs, 28 of which are enrolling in Autumn 2019.

2. Has your institution seen a difference in completion rates relative to traditional modes of education?
   - For graduates of programs offered as both on-ground and online, during 2018-19, Ohio State had 358 on-ground graduate students, taking an average of 5.7 terms (2.4 years) to complete their credential. During the same timeframe, Ohio State had 183 online graduate programs students, taking an average 5.4 terms (2.0 years). At the undergraduate level, there were 404 on-ground graduates, taking an average 4.5 terms (2.5 years) while the 150 undergraduate online programs students took 3.9 terms (2.0 years).

3. Have your students experienced cost savings? How is the fiscal impact quantified?
   - Ohio State Online students do not pay room and board or other expenses associated with on-campus experiences (e.g., parking, COTA). Further, all Ohio State Online students pay the in-state tuition rate. Also, open education resources are leveraged as much as possible across online programs. All students who enroll in an online program pay a $100 term fee (plus $5 for out-of-state students) that supports online exam security tools. Every online program provides a total cost-to-degree estimate at: https://online.osu.edu/tuition-and-fees. Finally, with a net decrease for time-to-degree for online programs students, students are enrolled for fewer terms, which further reduces the total cost.

Course and Program Evaluation

Recommendation 8 of the Task Force was for institutions to evaluate courses and programs for enrollment and consideration of continuation. Per O.R.C 3345.35, the colleges and universities need to address this recommendation every five years. The next applicable date is FY22.

Is your institution currently undertaking, or within the past year undertook, a review of course and degree enrollment for consideration of possible changes such as continuation or termination? If yes, please explain and list specific courses and degrees.

What steps, if any, did your IHE take in FY19 to share courses/programs with partnering institutions? N/A
If you implemented course/program sharing, please discuss efficiencies gained, including cumulative efficiencies to date.

Co-located Campuses

The Ohio State University

Ohio Revised Code Section 3333.951 requires Ohio's co-located colleges and universities to annually review best practices and shared services in order to improve academic and other services and reduce costs for students. Co-located campuses are then required to report their findings to the Efficiency Advisory Committee. (Reference also recommendation 9 from the Task Force.)

Ohio State Campus: Lima **Co-Located Campus:** Rhodes State College (Lima) **Estimated Total Cost Savings From Shared Services:** Approximately $1.4 million; no substantive changed from previous year		
Type of Shared Service or Best Practice (IE: Administrative, Academic, etc.)	**Please include an explanation of this shared service.**	**Monetary Impact from Shared Service**
Physical Facilities Operations (includes physical facilities leadership; grounds keeping; building maintenance and environment services; campus custodial; and scheduling of campus facilities)	Cost sharing for physical facilities leadership, building maintenance and environment services, campus custodial services is done on a building square feet method of calculation. Cost sharing for grounds keeping is done on an aggregate square feet method of calculation. Cost sharing for scheduling of campus facilities is done on a cost-share reconciliation method each quarter.	Estimated savings to university: $904,600
Academic Support Services (includes libraries)	Cost sharing for library services for personnel, materials and equipment are done on a campus full time equivalent (FTE) method of calculation. Cost sharing for library collection costs are done by direct cost collections unique to each institution.	Estimated savings to university: $168,300
Campus Security and Public Safety (includes public safety administration; traffic management; and police and emergency responses)	Not reported in FY18	
Student Life and Campus Events (includes student engagement; recreation and intramural sports and athletics)	Cost sharing for the personnel and operation expenses are done on a campus full time equivalent (FTE) method of calculation.	Estimated savings to university: $177,300
Administrative Services (includes Office of Advancement and shared marketing agency)	Not reported in FY18	
Auxiliary Services (includes childcare center, cafeteria and vending services; shared copying and printing services; and campus bookstore / gift shop)	The cafeteria and vending service is outsourced through a contract with external service providers. Cost sharing for contract is done on a full time equivalent (FTE) method of calculation. Cost sharing for shared copying and printing services on a cost-share reconciliation method each quarter. The bookstore and gift shop service is outsourced through a contract with external service providers. Cost sharing for contract is done on a full time equivalent (FTE) method of calculation. Cost sharing of telephone services	Estimated savings to university: $155,800

	is done by direct cost by extension and on a cost-share reconciliation method each quarter for expenses.	
Approach and Process to Sharing Services with Co-located Campus	In accordance with state policy and by mutual accord, the University and the co-located institution share resources and connect programs to benefit the students of both institutions. This collaboration allows for multiple pathways for student education, reducing unnecessary duplication of services, and promotes the effective use of state fiscal, physical, and personnel resources. The University and co-located institution have formal collaboration agreements and partner wherever possible with the goal of heightening academic quality, operational transparency, and economic efficiency.	

Ohio State Campus: Mansfield
Co-Located Campus: North Central State College
Estimated Total Cost Savings From Shared Services: Approximately $1.44 million; no substantive changes from previous year

Type of Shared Service or Best Practice (IE: Administrative, Academic, etc.)	Please include an explanation of this shared service.	Monetary Impact from Shared Service
Physical Facilities Operations (includes physical facilities leadership; grounds keeping; building maintenance and environment services; campus custodial; and scheduling of campus facilities)	Cost sharing is managed generally by a formula based on assigned square feet for each co-located institution.	Estimated savings to university: $793,900
Academic Support Services (includes libraries)	Cost sharing for library services is 55% for the university and 45% for the co-located campus; cost- sharing for internship programming is 50/50 basis.	Estimated savings to university: $128,850
Campus Security and Public Safety (includes public safety administration; traffic management; and police and emergency responses)	Cost sharing for public safety admin, traffic management personnel, and police and emergency response services is generally on a 50/50 basis for the University and for the co-located institution.	Estimated savings to university: $159,100
Student Life and Campus Events (includes student engagement; recreation and intramural sports and athletics)	Cost sharing for student engagement and recreation and intramural sports is 75% for the University and 25% for the co-located institution. Cost sharing for athletics is based on student participation from each institution and is tracked monthly.	Estimated savings to university: $58,800
Administrative Services (includes Office of Advancement and shared marketing agency)	Cost sharing for office of advancement is shared on mutually shared activities/events; cost for institution-specific activities/events are paid by the specific institution; each institution pays for its own personnel. Cost	Estimated savings to university: $92,200

	sharing for shared marketing "agency" is split 50/50 on mutual shared activities/events and personnel; cost for institution specific activities/events are paid by the specific institution.	
Auxiliary Services (includes childcare center, cafeteria and vending services; shared copying and printing services; and campus bookstore / gift shop)	Cost for childcare center is supported by revenue generated from user fees and grants. Cafeteria and vending services have proceeds from contracts directed to a Campus Improvement Fund to benefit shared improvements. Cost for shared copying and printing services are managed and paid by the co-located institution and provided on a cost basis to the University.	Estimated savings to university: $202,200
Approach and Process to Sharing Services with Co-located Campus	In accordance with state policy and by mutual accord, the University and the co-located institution share resources and connect programs to benefit the students of both institutions. This collaboration allows for multiple pathways for student education, reducing unnecessary duplication of services, and promotes the effective use of state fiscal, physical, and personnel resources. The University and co-located institution have formal collaboration agreements and partner wherever possible with the goal of heightening academic quality, operational transparency, and economic efficiency.	

Ohio State Campus: Marion
Co-Located Campus: Marion Technical College
Estimated Total Cost Savings From Shared Services: Approximately $1.28 million

Type of Shared Service or Best Practice (IE: Administrative, Academic, etc.)	Please include an explanation of this shared service.	Monetary Impact from Shared Service
Physical Facilities Operations (includes physical facilities leadership; grounds keeping; building maintenance and environment services; campus custodial; and scheduling of campus facilities)	Cost sharing for these services is done using a formula that combines each institution's on-campus assignable square footage (ASF) and faculty/staff/student full time equivalent (FTE).	Estimated savings to the university of $980,000
Academic Support Services (includes libraries)	Cost sharing for library services is done using a formula that combines each institution's on-campus assignable square footage (ASF) and faculty/staff/student full time equivalent (FTE). Some testing, mental health,	Estimated savings to the university of $113,500

	and disabilities services are shared between the institutions on an exchange basis	
Campus Security and Public Safety (includes public safety administration; traffic management; and police and emergency responses)	Cost sharing for these services is done using a formula that combines each institution's on-campus assignable square footage (ASF) and faculty/staff/student full time equivalent (FTE).	Estimated savings to the university of $65,000
Student Life and Campus Events (includes student engagement; recreation and intramural sports and athletics)	Cost sharing for these services is done using a formula that assigns 75% of the cost to Ohio State Marion and 25% of the cost to Marion Technical College in recognition of comparative use by each institution's students.	Estimated savings to the university of $8,000
Administrative Services (includes Office of Advancement and shared marketing agency)	Not shared	
Auxiliary Services (includes childcare center, cafeteria and vending services; shared copying and printing services; and campus bookstore / gift shop)	Cost sharing for these services is done using a formula that combines each institution's on-campus assignable square footage (ASF) and faculty/staff/student full time equivalent (FTE).	Estimated savings to the university of $98,000
Technology Services	Cost sharing for these services is done using a formula that combines each institution's on-campus assignable square footage (ASF) and faculty/staff/student full time equivalent (FTE).	Estimated savings to the university of $17,000
Approach and Process to Sharing Services with Co-located Campus	In accordance with state policy and by mutual accord, the University and Marion Technical College share resources and connect programs to benefit the students of both institutions. This collaboration allows for multiple pathways for student education, reducing unnecessary duplication of services, and promotes the effective use of state fiscal, physical, and personnel resources. The University and Marion Technical College have formal collaboration agreements and partner wherever possible with the goal of heightening academic quality, operational transparency, and economic efficiency. Resources from both institutions are combined for some infrastructure and building renovation projects.	

Ohio State Campus: Newark
Co-Located Campus: Central Ohio Technical College
Estimated Total Cost Savings From Shared Services: approximately $1.28 million; no substantive change from previous year.

Type of Shared Service or Best Practice (IE: Administrative, Academic, etc.)	Please include an explanation of this shared service.	Monetary Impact from Shared Service
Public Service (includes conference services)	Cost sharing for conference services is shared on a 50/50 basis.	Estimated savings to university: $1,470
Physical Facilities Operations (includes physical facilities leadership; grounds keeping; building maintenance and environment services; campus custodial; and scheduling of campus facilities) **Campus Security and Public Safety** (includes public safety administration; traffic management; and police and emergency responses)	Cost sharing for all of these services is done on a full time equivalent (FTE) method of calculation.	Estimated savings to university: $655,067
Academic Support Services (includes libraries)	Cost sharing for both these services is done on a full time equivalent (FTE) method of calculation.	Estimated savings to university: $134,400
Student Life and Campus Events (includes student engagement; recreation and intramural sports and athletics)	Cost sharing for these services is done on a headcount method of calculation.	Estimated savings to university: $72,799
Administrative Services (includes Office of Advancement and shared marketing agency)	Cost sharing for executive office, office of development, business and finance office, accounting, performing arts, and welcome center is done on a 50/50 method of calculation. Cost sharing for human resources, purchasing, bursar, technology services, marketing and public relations, staff development committee, services center, telecommunications, and telephone services is done on a full time equivalent (FTE) method of calculation.	Estimated savings to university: $157,318
Auxiliary Services (includes childcare center, cafeteria and vending services; shared copying and printing services; and campus bookstore / gift shop)	No changes	
Approach and Process to Sharing Services with Co-located Campus	In accordance with state policy and by mutual accord, the University and the co-located institution share resources and connect programs to benefit the students of both institutions. This collaboration allows for multiple pathways for student education, reducing unnecessary duplication of services, and promotes the effective use of state fiscal, physical, and personnel resources. The University and co-located institution have formal collaboration agreements and partner wherever possible with the goal of heightening academic quality, operational transparency, and economic efficiency.	

Section III: Policy Reforms

Financial Advising

Recommendation 10A of the Task Force was for institutions to provide financial literacy as a standard part of students' education. In addition, the Ohio Attorney General's Student Loan Debt Advisory Group report of June 2017 made a similar recommendation as well as other proposals on how to improve processing of student accounts and debts. The report can be found at: www.ohioattorneygeneral.gov/Files/Publications-Files/Publications-for-Schools/Ohio-Attorney-General-s-Student-Loan-Debt-Collecti.aspx

1. Has your institution considered the Ohio Attorney General's Student Loan Debt Advisory Group report recommendation on financial literacy? If so, please describe your institution's implementation.

Yes. Ohio State follows best practices that are responsive to the advisory group recommendations, including in the following areas:

a) Institutions should encourage student financial responsibility.
   - Ohio State students must sign a financial responsibility statement each semester.

b) Ohio colleges and universities should adopt best practices for student financial literacy.
   - Ohio State has a dedicated collection staff that advises and counsels students about their loan repayment options and available options to stay out of default. Customer Service staff and Collection staff advise students of their options with institutional debt.
   - The university publishes its debt collection policy, which includes the role of the Attorney General's Office. Student loans differ depending on the type of loan and the loan fund (donor). The terms of the loan and collection consequences are outlined in the promissory note the student signs.

c) Institutions should obtain express prior consent from students to contact them by any available communication method, specifically artificial recorded voice technology systems.
   - As part of Ohio State's financial responsibility statement, the student agrees that we can contact them by various methods including, but not limited to, cell phone (call & text) and email.

2. Does your institution provide a standard course for incoming students that includes financial literacy education?
   - The institution offers an optional Scarlet & Gray Financial Coaching program to students and all students can access iGrad online financial literacy modules. https://swc.osu.edu/services/financial-education/financial-coaching/ https://osu.igrad.com/

3. Does the course explain the institution's debt collection practices, fees, notifications and referral process to the AG? N/A

4. Does the institution have a process to inform students that they do not have to accept the entire student loan amount for which they are eligible? Yes.

Financial Aid

Ohio IHEs should strive to meet guidance issued by the U.S. Department of Education (USDE) on April 15, 2019: (https://ifap.ed.gov/eannouncements/041519RecWhatPostInstShouldWork2Avoid.html).
The guidance calls for not describing loans as "awards", including the total cost of attendance in letters, breaking costs down into clear components, avoiding comingling grants, scholarships, loans and work-study together, and always including a net cost calculation in financial aid letters. The State of Ohio also wishes to ensure that financial aid dollars it provides are supplementing financial aid for students, not supplanting dollars that would otherwise be given to a similar or identical student.

1. What strategies does your institutions use to coordinate multiple forms of financial aid (institutional or otherwise) for students that are certain or likely to receive state-sponsored financial aid in the form of OCOG, Choose Ohio First, Ohio National Guard Scholarships, War Orphans Scholarships, etc. or other state aid?

   - Ohio State's financial aid packaging strategy incorporates state aid in the process of determining aid as either estimated or actual awards whenever possible. This allows for a total package that addresses federal, state and institutional aid as accurately as possible and attempts to maximize all aid eligibility in an effort to meet our institutional goals to improve affordability and reduce indebtedness.

2. Which of the April 15, 2019 recommendations made by the USDE regarding financial aid letters has your institution implemented? If you have chosen not to implement a particular recommendation, please explain why.

   - There have been multiple updates to the financial aid letters over the last few years. Ohio State's notifications satisfy the USDE requirements in the following manner:
     - Includes the cost of attendance broken down by component.
     - Grants, scholarships, loans and work study are grouped and identified separately. Including indicating what needs to be repaid and what is earned through work.
     - Sources of aid are clearly titled.
     - Parent PLUS loans are not listed as offer in the initial financial aid notification.
     - Net costs are calculated and provided in the letter.
     - Next steps are included in the initial notification.
   - Also, Ohio State's financial aid notifications that will be sent for 2020-2021 will:
     - Provide additional information on next steps within the financial aid notification.
     - The financial aid notification will not be referred to as an award letter.

Certification Practices

Ohio Revised Code 131.02 requires state IHE's to certify their outstanding debt to the Ohio Attorney General's office (AGO) for collection either 45 days after the amount is due or within 10 days after the start of the next academic session, whichever is later. However, Ohio's institutions certify their outstanding debt pursuant to varying policies and practices. To ensure that all Ohio students are treated fairly and uniformly, the recommendation #7 of the Student Loan Debt Advisory Group report is that state institutions adopt uniform certification practices that emphasize transparency for both debtors and the AGO. The advisory group recommended that the Ohio Bursars Association, in partnership with the Ohio Association of Community Colleges and the Inter-University Council, facilitate this effort.

Specifically, institutions were asked to develop uniform practices for collecting debt with attention to the type, content, and frequency of notices issued to students; and the fees and other collection costs applied to student debts.

1. Has your institution reviewed its certification practices per the 2017 AG Student Loan Debt Advisory Group report? If yes, explain.
    - Yes, we determined our practices that were already in place met the recommendations.

2. When your institution certifies debt to the Attorney General, are late fees or other penalties that your institution charged to the student included before certification, thereby leading to collection fees applied to prior collection fees?
    - When debt is certified, collection fees are separated from principal thus providing the OAG with the original principal amount and the amount of collection fees. The OAG can then apply collection fees to principal only and avoid collection fees applied to prior collection fees.

3. Does your institution provide student debtors with opportunities for settlement of debt before certification to the AG? If not, has your institution explored options with the AG to allow settlement?
    - Yes, we provide settlement opportunities prior to certification and we have also granted the OAG settlement authority within agreed upon guidelines.

Section IV: Students Benefit

When institutions save money, they ideally invest a portion of those savings into student benefits, such as reduced fees, increased institutional aid, quality improvements, etc.

For fiscal year 2019 only, please explain what, if anything, your institution is doing that is a new benefit for your students. Answers may be financial benefits or intangibles such as efforts to improve career counseling, undergraduate teaching, research, etc. If you have targeted financial aid for tuition, fees, room and board, books, technology or other expenses, please explain the focus of cost reduction.

If you have seen a significant savings from an initiative in the past fiscal year, please describe that here.

Chart #1:

Category	Initiative	FY19 (*Actual*)

Cost savings/avoidance to the college/university in FY19 ONLY	3A: Campus contracts	$64 million
	4B: Operations review – efficiency savings	$53.8 million
	5E: Data centers	$1.4 million
	Subtotal of Institutional Efficiency Savings	**$119.2 million**
New resource generation for the college/university in FY19 ONLY	4A: Asset review	$43.6 million (includes (annual distributions from energy, Coke, and Nike endowments, as well as one-time payments)
	4C: Affinity partnerships and sponsorships	
	Subtotal of New Resource Generation	**$43.6 million**
Cost savings/avoidance to students in FY19 ONLY	4B: Operations review (President's Affordability Grants)	$25 million
	4B: Operations review (Land Grant Opportunity Scholarships)	$553,500
	6B: Textbook affordability	$1.2 million
	6C: Digital Flagship	$12.3 million
	7B: Completion grants	$120,900
	7E: Summer programs	$9.2 million
	7B: Tuition Waiver for 18+ credit hours	$325,000
	Subtotal of Student Savings	**$48.7 million**

Additional Practices

Some IHE's may implement practices that make college more affordable and efficient, but which have not been the topic of a specific question in this reporting template. This section invites your institution to share any positive practices you have implemented that benefit student affordability and/or institutional efficiency.

Please share any additional best practices your institution is implementing or has implemented.

- Ohio State continued its focus on operational excellence and resource stewardship, generating $53.8 million in administrative savings in FY19 through efficiency initiatives. These savings are re-deployed to student financial aid programs (specifically the Buckeye Opportunity Grants) and the Digital Flagship program, which provides incoming students with an iPad digital learning suite.
- The university extended its pouring-rights agreement with Coca-Cola for another 15 years. With a total projected value of $84.7 million, the contact provides funds to support student initiatives and strategic priorities, including scholarships, student discovery projects, educational initiatives and internships.

- Ohio State continued the Ohio State Tuition Guarantee, providing incoming Ohio resident students with predictability about the cost of a four-year education by freezing tuition, mandatory fees, housing and dining costs for four years. Although not tied to a specific number of credits per semester, this program creates an incentive for students to complete their degree in four years. Exceptions are allowed for students in programs that requires more than four years to complete or who face circumstances such as military service, medical emergencies or family emergencies. The class that entered Ohio State in fall 2019 (FY20) is the third under the Tuition Guarantee model.
- Completion grants were awarded to 140 students for 2018-2019. These grants go to those who are very near to graduation and in jeopardy of being dropped for non-payment. Each completion grant averaged $864, an amount that allows students to stay in school and work toward completing their degrees. The grants are funded through institutional and donor funds available through the University Innovation Alliance, a collaborative of 11 public research institutions committed to increasing the number and socioeconomic diversity of college graduates.
- The university has also approved a new tuition waiver, which started in spring 2019, that will assist students who are taking more than 18 credit hours in a term to complete their degrees or to take advantage of internships or research opportunities. For eligible students who obtain the approval of their academic advisors, these waivers would provide savings of more than $400 per additional credit hour. In Spring 2019, 459 students used the waivers at a savings of more than $325,000.

Section V: Future Goals

This year's template does not require updates on every recommendation of the Task Force. Nonetheless, it is important that each institution continue to track its progress on achieving its Five-year goals that have been identified in prior years' submissions. An updated copy of the five-year goal template is attached. Please provide the data to complete the template, including information already provided in Section IV. In addition, if you have any updates or changes that need to be made to your five-year goals submitted in 2016, please update.

See attached MasterRecommendation2.

The DeWine-Husted administration recognizes that each institution of higher education in Ohio faces unique challenges and opportunities with respect to the institution's highest priority goals over the next several years. With that in mind, please provide any suggestions about possible roles the state could play in supporting your institutional goals.

1. Please provide your thoughts and suggestions regarding ways that the State of Ohio can further support strength, resiliency and reputational excellence in Ohio's post-secondary education system.
   - Asking for authority to sell real estate via an act of the Board of Trustees (similar to how community colleges can currently) or via the state Controlling Board rather than needing a law change

- Allowing institutions to set differential tuition rates for space, facility, and faculty needs

2. What legislative obstacles or policy roadblocks, if any, inhibit efficiencies and affordability practices at the IHE's?
   - Explicitly provide that BOTs can purchase, sell, lease, or grant easements in perpetuity without needing a law change
   - Allow CEO/CFOs to sign financial statements (GASB 14)
   - Allow, in certain circumstances, BOTs to meet by videoconference

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Thank you for completing the FY19 Efficiency Reporting Template. We appreciate the important role Ohio's colleges and universities play in supporting Ohio students, economic growth, world-class research and the overall success for our state.

MASTER RECOMMENDATION 2: FIVE-YEAR GOAL FOR INSTITUTIONAL EFFICIENCY SAVINGS AND NEW RESOURCE GENERATION

Ohio State established a five-year plan for the years FY16-FY20 to generate a total of at least $400 million to be devoted to access, affordability and excellence. The university has already surpassed the goal of devoting at least $100 million of that total to student financial aid. Savings generated through the 2020 plan are incremental to other cost-savings and resource-generation activities.

The following chart aligns specifically with the 2020 plan.

Note: Section IV of the university's response to the task force report demonstrates the full range of operational excellence, innovative funding and resource stewardship activities at Ohio State, including ongoing efforts that pre-dated the 2020 Vision.

Category	Recommendation	Component	Description	FY16 (revised)	FY 2017 (Estimate)	FY 2017 (*Actual*)	FY 2018 (Estimate)	FY 2018 (*Actual*)	FY 2019 (Estimate)	FY 2019 (*Actual*)	FY 2020 (Estimate)	FY 2021 (Estimate)	Subtotal	Budget Narrative/Explanation of Efficiency Savings $$ (attach additional sheets if necessary)
Efficiency Savings	3A	Campus contracts	Require employees to use existing contracts for purchasing goods and services.	$ 3,040,000	$ -	$ -	TBD	$ -	TBD	$ 200,000	$ 200,000	TBD	**$ 3,440,000**	Since FY12, Ohio State's strategic procurement program has produced cumulative savings of $388 million by utilizing the university's buying power to drive both savings and quality enhancements. In FY19, the university saved $64.0 million through strategic procurement compared with contracted rates in fiscal 2012, with savings remaining within units.
	3B	Collaborative contracts	Pursue new and/or strengthened joint purchasing agreements.											
	4B	Operations review	Conduct an assessment of non-academic operations that might be run more efficiently by a regional cooperative, private operator or other entity.	$ 22,358,000	$ 30,000,000	$ 32,895,231	$ 30,000,000	$ 54,479,129	$ 48,461,000	$ 53,800,000	$ 42,000,000	TBD	**$ 253,993,360**	
	5A	Cost diagnostic	Identify key drivers of costs and revenue across the university.											
	5C	Organizational structure	Review organizational structure in line with best practices to identify opportunities to streamline and reduce costs.											
	5D	Health-care costs	Seek to control health-care costs											
			Subtotal Efficiency Savings	$ 25,398,000	$ 30,000,000	$ 32,895,231	$ 30,000,000	$ 54,479,129	$ 48,460,000	$ 54,000,000	$ 42,200,000		**$ 257,433,360**	
Category	**Recommendation**	**Component**	**Description**	**FY16**	**FY 2017**	**FY 2017 (*Actual*)**	**FY 2018**	**FY 2018 (*Actual*)**	**FY 2019**	**FY 2019 (*Actual*)**	**FY 2020**	**FY 2021**	**Subtotal**	**Budget Narrative/Explanation of New Resource Generation $$ (attach additional sheets if necessary)**
New Resource Generation	4A	Asset review	Conduct an assessment of non-core assets to determine their market value if sold, leased or otherwise repurposed.	$ -	$ -	$ -	$ 1,090,000,000	$ 1,096,587,718	$ 35,523,000	$ 34,842,506	$ 35,594,117	TBD	$ 1,167,024,341	Annual endowment distributions, philanthropy and other payments from energy partnership, Nike extension, and Coke pouring-rights contact, along with sale of non-essential real estate.
	4C	Affinity partnerships and sponsorships	Upon determining assets and operations that are to be retained, evaluate opportunities for affinity relationships and sponsorships.	$ 31,560,000	TBD	$ 1,007,444	TBD	$ 1,031,009	$ 8,328,600	$ 8,738,570	$ 3,559,160	TBD	$ 45,896,183	
			Subtotal New Resource Generation	$ 31,560,000	$ -	$ 1,007,444	$ 1,090,000,000	$ 1,097,618,727	$ 43,851,600	$ 43,581,076	$ 39,153,277		**$ 1,212,920,524**	
TOTAL OF COMBINED INSTITUTIONAL OPPORTUNITIES FOR ENHANCED STUDENT AFFORDABILITY				$ 56,958,000	$ 30,000,000	$ 33,902,675	$ 1,120,000,000	$ 1,152,097,856	$ 92,311,600	$ 97,581,076	$ 81,353,277		**$ 1,470,353,884**	

SPECIFIC RE-DEPLOYMENT OF SAVINGS TO STUDENTS: Please use the area below to describe, in detail, how you plan to re-deploy the institutional resources that are saved and/or generated through the task force components outlined above to reduce costs for students.

Since FY15, Ohio State has committed more than $150 million in additional need-based aid for Ohio students, with funding provided through efficiencies and new resource generation. Programs include the Buckeye Opportunity Program, President's Affordability Grants and the Land Grant Opportunity Scholarships.

Beyond these savings, the university has introduced the Digital Flagship, a collaboration with Apple that is the largest deployment of learning technology in the university's history. Efficiencies support this program, which provides each incoming student with an iPad and related technology.

The university uses other savings and new resources to invest in teaching excellence, and to control costs through initiatives such as the Ohio State Tuition Guarantee. Each dollar saved supports Ohio State's strategic plan.

SIGNIFICANT CHANGE(S) IN 5-YEAR GOALS FROM FY16 SUBMISSION TO FY17 SUBMISSION: Please use the area below to describe, in detail, significant deviation in your institution's 5-year goals from the FY16 submission to the FY17 submission, if applicable.

Efficiency savings in FY18 include contributions from colleges and support units that were deposited in efficiency accounts during that fiscal year, however the underlying efficiencies may have occurred in previous years.

The FY16 efficiency total has been revised to reflect the total to date toward the 2020 Vision goal of $200 million in savings.