

Marshall University Classified Staff Council Minutes

April 16th, 2026 Meeting via Microsoft Teams

Members Present: Jesse Baldwin, Nina Barrett, Lacie Bittinger, Kathy Brannock, Mark Brumfield, Dean Crawford, Tiffani Daniels, Becky Lusher, Nick Martin, Larry Morris, Carleen O’Neill, Elizabeth Rexroad, Marcos Serrat, Heather Smith, Amy Weaver

Members Absent: David Childers, Kimberly Crigler, Mary Layne, Nathan Miller, Nancy Tresch-Reneau,

Members Absent (Excused):

Guests: Attached

Chair Lacie Bittinger called the meeting to order.

John Marshall Service Awards

- Bruce announced that the following employees were awarded the John Marshall Service Award for various outstanding services to the University:
 - **Mary Waller**
 - **Elizabeth Ramsey**
- If you know of an employee who goes above and beyond in their job, please let us know by submitting a nomination for them here: <https://www.marshall.edu/human-resources/john-marshall-service-award/>. (Please be sure to be very detailed in your submission).

President Brad Smith & CFO Matt Tidd Presentation

The powerpoint slides from this presentation can be found at the end of these minutes starting on p. 14.

- **Institutional Position & Identity**
 - Marshall University:
 - R2 research institution (top ~3.5% of nation’s colleges and universities can claim this)
 - 13 colleges and schools
 - 13,239 students; 1,895 faculty and staff
 - 120,000 alumni
 - 3 physical locations and 5 airports across the state where our programs are taught
 - School of Medicine celebrating 50th anniversary in 2027
 - Student profile:
 - ~50% first-generation
 - ~50% Pell-eligible (families make \$65,000 or less)
 - Role & Impact
 - “Prosperity platform” focused on access and upward mobility
 - Produced \$68 million in grants & contracts
 - 69% of graduates remain in WV, supporting state economy
- **Current Higher Education Environment**
 - Institutions facing significant uncertainty driven by:

- Demographics: Enrollment decline (demographic cliff)
 - ~10% fewer 18-year-olds nationally starting 2026
 - WV among hardest hit (aging population, outmigration)
- Digital: learning to use new technologies and generative AI
- Doubt: Declining public confidence
 - College value perception dropped from ~90% (1990s) to ~36% (2024)
 - ~150 institutions have closed since 2015
- **Strategic Plan: “Marshall for All, Marshall Forever”**
 - Marshall saw the coming changes and difficulties and developed the “Marshall for All, Marshall Forever” plan.
 - Structure
 - Developed through 60 campus workshops with McKinsey Consulting, which was financed by a donor and not taken out of state or university funds (2022)
 - Three phase plan:
 - Optimize financial structure to be sustainable
 - Adopt best practices of others we have learned from
 - Become national model
 - Guiding Principles to get through phase one:
 - Grow students, not fees;
 - Invest in employees
 - Maintain facilities
 - Ensure financial stability
 - Guiding Principles to get through phases two and three:
 - Worked with whole campus and mapped out a “plan-on-a-page.”
- **Progress on Strategic Priorities**
 - Enrollment & Access
 - +7.5% growth (vs. ~1% national and ~1.5 State)
 - +22% growth since plan launch
 - Affordability
 - Lowest cost among:
 - WV institutions
 - Southeast (SREB)
 - R2 peers
 - Metro program:
 - Fees reduced 11%
 - Enrollment +61%
 - Student Success & Retention
 - Retention improving but below top peers (~high 70s for our peers)
 - Putting together action learning team this summer to study the best practices of those schools that are doing better
 - Deliver On Demand
 - Opportunity we learned from other schools in listening sessions in 2022
 - Gives us the opportunity to have classroom courses, online courses, and a hybrid mix of the two
 - Online enrollment:

- +24% (year)
 - ~+60% overall since put in place
 - Enable lifetime achievements
 - ~33% student participation (internships, work study, practicums, etc.)
 - Targeted for expansion because we feel we could be doing better
- **Student Affordability Initiatives**
 - Tuition-Free WV – rolled out in Fall 2025
 - Income eligibility: <\$65K households, student can attend without tuition or fees
 - 868 students served this year
 - Marshall For All
 - Debt-Free Program: 400 students participating
 - Growing cohorts (100 → 220/year)
 - Outcomes:
 - Higher GPA
 - ~10% higher retention vs. similar students
 - Impact
 - Reducing Pell vs. non-Pell completion gap
 - WV gap ~20 percentage points
- **Academic & Economic Priorities (6 Pillars)**
 - Cybersecurity
 - Healthcare
 - Manufacturing
 - Energy
 - Aviation
 - Entrepreneurship
 - Key developments:
 - Cybersecurity and Forensics:
 - Academic Center of Excellence opening Fall 2027
 - Healthcare:
 - \$61.8M fundraised for new School of Medicine building
 - Manufacturing:
 - ~1,000 trainees/year who might choose not to go to college
 - Energy:
 - Marshall is making sure we've got the workforce educated and ready for data centers, hydrogen, nuclear, etc.
 - Aviation:
 - 18 students & 2 planes → 312 students, 11 planes 2 helicopters
 - Expanded programs (drones, air traffic control, flight attendant programs)
 - Entrepreneurship:
 - 5,000+ trained in design thinking
 - IDEA District coming to life
- **Financial Status (CFO Update)**
 - Save-to-Serve has been a strategic financial initiative for the past three years. We're wrapping it up in FY27 but will continue to look for ways to save.

- We continue to operate inside our incentivized budget model.
- Budget Position
 - Initial deficit: \$28M
 - Current: ~\$10M
 - FY27 projection: ~\$2.9M deficit
 - Target:
 - Break-even by FY27–FY28
 - Surplus in following years
- Revenue Strategy
 - Enrollment growth
 - 2.5% tuition increase
 - Growth in:
 - grants/contracts
 - auxiliary units (housing, dining, athletics)
- **Tuition & Return on Investment**
 - Average net cost: ~\$7,500 (substantially less than our peers)
 - Average salary (2–3 years post-grad): ~\$44,000
 - Result:
 - Strong and fast return on investment compared to peers
- **Staffing & Workforce**
 - Staffing ratios aligned with SREB average benchmarks
 - Currently staffed for our faculty at 13,600 students. Finished this year with around 13,200 students.
 - Hiring overseen by Strategic Hiring Committee
 - Data-driven workforce planning implemented
- **Invest in our Team**
 - Funding
 - FY26: No state allocations for raises received.
 - The university committed \$369,000 to fund the minimum of the new salary scale for 156 people.
 - FY27:
 - \$550K (institution-funded):
 - Market adjustments (faculty & staff below range)
 - \$2.2M (state-funded):
 - Salary increases
 - Distribution Method (see p. 34 for visual and breakdown)
 - Progressive model (equity-based):
 - Higher % increases for lower-paid employees
 - Developed through shared governance (Budget Advisory Committee)
 - Working on a login using MUID to calculate your own raise.
 - Additional Actions
 - Minimum pay raised to \$14/hour
 - Future:

- Performance-based increases at unit level
 - Ongoing academic portfolio reviews:
 - Academic Program Reviews
 - Annually internal
 - Benchmarking and Market reviews
 - External, every 5 years
 - Incentivized Budget Model
 - Assess program cost and return on investment
 - Data Driven Class Scheduling
 - Better course availability and minimize cost of instruction
- **Taking Care of the House**
 - “Shock and Awe” campaign
 - Invoiced almost \$18.5 million in projects
 - 16 more projects to go
 - 10 Year Campus Master Plan
 - Several projects completed, some remaining.
 - Full list on p. 38
 - Community Cares Week
 - May 19th – 22nd
 - Goal: just over 1,000 volunteers and 3,119 service hours
- **Efficiency & Budget Strategy**
 - Save to Serve Initiative
 - ~\$10M savings over 3 years
 - ~3–3.5M additional reductions in FY27
 - Savings reinvested
 - Future Focus
 - Continued efficiencies
 - Increased use of AI and automation
- **Budget Model**
 - Incentivized model:
 - Allocates resources based on:
 - enrollment
 - credit hours
 - performance
 - Improves: transparency & accountability
- **Cash Flow & Financial Stability**
 - Target minimum balance: ~\$15M
 - Seasonal fluctuations tied to tuition cycles
 - No projected need to use reserves
 - Positive cash outlook in future years
- **Key Institutional Achievements**
 - Enrollment: +22% growth
 - Deficit reduction: \$28M → ~\$2.9M forecast
 - Compensation increases: ~\$10M
 - Workforce growth: +109 employees (post-COVID)

- Maintained affordability while expanding access
- **Next Steps**
 - Improve retention and graduation rates
 - Continue enrollment growth initiatives
 - Implement compensation calculator tool
 - Expand efficiency and AI efforts
 - Transition to full financial stability
- **Q:** When the State gives funding for raises, how much does every dollar equal for us? What is that breakdown?
 - **A:**
 - Total payroll: ~\$150M
 - State-funded portion: ~55% (~\$70–75M)
 - Non-state funded portion (tuition, grants, etc.): ~45%
 - The State of WV only funds raises on its portion of payroll
 - A 3% state raise = ~\$2.2M total funding from the State
 - When distributed across all employees (100% of payroll):
 - This equals about 1.6% total campus-wide increase
 - Key point:
 - 3% (state portion) → becomes ~1.6% overall when spread to everyone
 - Marshall chooses to:
 - Distribute raises to all employees, not just state-funded positions
 - Supplement with institutional funds (e.g., market adjustments)
- **Q:** To clarify: all employees, regardless of their funding source, are considered state employees?
 - **A:** Yes.
- **Q:** Can you speak to why we are doing percentage raises as opposed to across the board raises?
 - **A:** A flat increase for all employees was considered, but it was determined that it would not be equitable to the lower earners. The Budget Advisory Committee recommended a progressive percentage-based increase designed to direct more funding to lower paid employees.
- **Q:** Do employees who are under contract for a certain number of years take part in the state-funded raises?
 - **A:** No, not unless there is a clause that says they will have an escalator for cost-of-living adjustments.
- **Q:** Do our raises account for cost-of-living increases?
 - **A:** West Virginia doesn't have a policy for giving cost-of-living increases to employees, but this is one way to help offset those costs.

Interim Provost Dr. Bookwalter – Academic Affairs

- **HLC Accreditation Visit**
 - Successful visit
 - Final outcome pending review and vote by accrediting board
 - Preliminary feedback indicated:
 - Strong mission focus
 - Integrity in operations, communication, and business practices
 - High-quality teaching and learning

- Active assessment of academic quality
 - Demonstrated sustainability of resources
- **Student Survey Feedback (2,000+ responses)**
 - Strengths
 - Knowledgeable faculty
 - Effective academic advising (course placement)
 - Student satisfaction with progress toward degree
 - Lower-rated areas (still ~3.5–3.99 range)
 - Financial aid and loan information clarity
 - Understanding cost of degree
 - Help selecting academic programs
 - Themes from open-ended feedback:
 - Positive:
 - Strong academics
 - Supportive campus culture (“family” environment)
 - Concerns:
 - Course availability limitations
 - Communication delays (e.g., email response times)
 - Perceived inconsistency in guidance across offices
 - Students sometimes feeling dismissed
 - Parking availability
- **Continuous Improvement Focus**
 - Accreditation process identified areas to strengthen:
 - More consistent communication
 - Enhanced support for:
 - undecided students
 - students with complex needs
 - Better coordination of services
 - Emphasis on:
 - Supporting students “at the margins”
 - Improving pathways to graduation and success
- **Digital Accessibility Initiative**
 - Current compliance: ~72%
 - Target: 90%
 - Original deadline (April 24) not fully met
 - Revised expectation:
 - Continue progress through calendar year
 - Focus areas:
 - Website accessibility
 - Captioned videos
 - Accessible PDFs and documents
 - Image tagging
 - Blackboard/course materials compliance
- **Enrollment & Orientation Efforts**
 - Strong indicators:

- Applications and acceptances ahead of prior year
 - Increased student intent-to-enroll
 - Goal:
 - Converting intent into orientation registration
 - Action steps:
 - Increased outreach to accepted students
 - Encourage orientation sign-up
 - Advisors and departments asked to actively engage students
- **Student Success Quality Initiative**
 - New initiative launched following HLC visit
 - Led by Brian Morgan
 - Focus:
 - Benchmarking best practices from other institutions
 - Improving:
 - retention rates
 - 4- and 6-year graduation rates
 - overall student services
 - Goal:
 - Better coordination across existing support services
- **Announcement**
 - New Dean, College of Liberal Arts
 - Dr. Chris Morrow (University of Texas Permian Basin)
 - Start date: June 29

Bruce Felder – Human Resources

- **Open Enrollment**
 - Dates: April 2 – May 15
 - No action required if no benefit changes (e.g., marriage, dependents, plan updates)
 - Employees encouraged to:
 - Log into PEIA system annually to review benefits
 - Verify selections (e.g., smoking status discounts)
 - On-campus support:
 - Mountaineer Flexible Benefits (FBMC): April 23–24
 - PEIA representatives: April 24
 - Appointments available to reduce wait times
- **Training & Development**
 - Training currently decentralized across departments
 - Noted strong areas:
 - IT training resources
 - Purchasing/procurement training
 - Title IX training
 - Improvement underway:
 - Centralized training hub in Blackboard
 - Led by T&D Coordinator
 - Goal: one-stop access to all training resources

- Additional training reminders:
 - Compensation 101 (recorded)
 - Compensation 102 (live/Teams)
 - Covers salary structure, market ranges, and pay framework
- **Remote Work Inquiry**
 - Question raised about expanded remote work due to cost (e.g., gas)
 - Guidance:
 - Consider carpooling options
 - Remote work may be considered at department level
 - Criteria:
 - Must not impact:
 - Student services
 - Employee service delivery
 - Must be applied equitably across staff
- **Compensation & Market Analysis**
 - Salary Strategy Overview:
 - Developed over past 2+ years
 - Focus:
 - Establish Marshall-specific salary structure
 - Identify competitive market ranges
 - Implementation:
 - All employees funded to minimum salary scale (initial phase)
 - Current phase:
 - Move employees to ~80% of market midpoint
 - Raise minimum wage to \$14/hour
- **Estimated Raise Impacts**
 - Employees below \$14/hour:
 - ~10% increase
 - Employees receiving market adjustment (via \$550K pool):
 - ~7% increase
 - Employees above market band:
 - ~2% increase
- **Market Data & Transparency Question**
 - Data Sources Used:
 - PayScale
 - CUPA-HR (1,000+ institutions)
 - Bureau of Labor Statistics (BLS)
 - Process:
 - Reviewed top 3–5 job duties per position
 - Benchmarked against local and national market data
 - Results previously shared:
 - With Vice Presidents
 - Then distributed to departments
 - Current Status:
 - Data is now ~2 years old
 - HR prioritizing updated analysis moving forward

- Will provide prior data upon request if needed
- **Q:** Does the \$14/hour minimum wage increase apply to all employees, including temporary staff?
 - **A:** No, it applies to budgeted full-time positions only, including classified and non-classified employees.
- **Q:** If the market data used for salary ranges is outdated by two years, then why are we still using it since that doesn't keep up with inflation and current market rates?
 - **A:** The data was used to get a baseline market range target for us to identify where salaries should be and serve as a foundation for compensation adjustments. Marshall plans to do a full market analysis every 3-5 years, with the next update expected in 12-18 months. Continuous, real-time updates are not feasible and would require a larger compensation staff and resources. New data will be collected though and incorporated moving forward.
- **Q:** Would an employee be penalized if one of their supervisors does not sign off on the employee's performance evaluation? If a second level supervisor missed putting their signature on an employee's evaluation, can they retroactively add their signature to avoid penalizing the employee?
 - **A:** The system for 2025 was closed in order to start the 2026 evaluation process. It is still possible to print a physical copy for 2025 and get the supervisor's signature to place the evaluation in the employee's file. Going forward, there is a recommendation that if a supervisor has not completed all of their evaluations for their employees, then their own salary increase would be on hold until they are all completed.
 - Bruce stated that he will be co-leading a performance evaluation training soon.

Jodie Penrod – IT

- **Policy Updates (Shared Governance)**
 - Two policies upcoming for shared governance review:
 - Technology Project Management Policy
 - Video Surveillance Policy (in collaboration with Facilities & MUPD)
 - Both have already been reviewed by:
 - Administrative Technology Committee
 - Faculty Technology Committee
 - Campus feedback will be requested
- **Microsoft Licensing Changes**
 - Upcoming Microsoft contract renewal
 - New persona-based licensing model:
 - License types assigned based on employee role
 - Proposed structure:
 - Full-time employees: full desktop license
 - Part-time employees/faculty: A1 (web-based) license
 - Additional details to be communicated as finalized
- **Phone Number Assignment**
 - Moving to a request-based system for external/direct dial numbers
 - Previously auto-assigned → now by request only
 - No cost to departments
 - Goal: Improve management and reduce unnecessary assignments

- **Learning Technology Change**
 - Transition from Panopto → Echo360
 - Reasons:
 - More features
 - Added AI capabilities
 - Cost savings (aligned with Save to Serve)
 - Timeline:
 - Transition targeted for Spring 2027
 - Faculty will be given extended preparation time
- **Infrastructure Improvements**
 - New wireless network equipment installation over the summer
 - Funded in part by student vote/support
 - Goal: Improve campus network performance and user experience
- **Q:** Could there be an opportunity to use AI to help students who are deaf, hard-of-hearing, impaired from notetaking, etc. with their notetaking for classes?
 - **A:** This is handled under WCAG 2.1 accessibility in digital compliance. The current compliance regulation is that all live lectures that are given over Teams have to be transcribed through closed captioning and all recorded lectures have to be transcribed.

Carleen O’Neill – Board of Governors

- **Academic & Student Affairs**
 - Approved policy revision: Rule AA-6
 - Covers:
 - Faculty classification types
 - Appointments, rank, promotion
 - Tenure, dismissal, resignation for cause
 - Merit status
- **Finance Committee Actions**
 - FY27 Budget Approved
 - Tuition & Fee Increase:
 - 2.5% increase approved
 - Facilities / “Taking Care of the House” Projects Approved:
 - Fire alarm upgrades
 - Elevator modernization
 - Henderson Center stair repairs
 - Playhouse exterior door improvements
- **“Herd Hotels” Program**
 - Booking through portal provides:
 - 50% revenue return to the university
 - Available for:
 - Personal travel
 - Visitors (e.g., family, guests)
- **Recognition Highlights**
 - Women's Basketball won the WNIT Championship
 - Student Media radio stations won honors
 - SOM has national recognition in developing a chemo device for brain cancer

- University College, Student Affairs, and SGA for all the efforts and planning they do in support of Marshall, Maintaining a strong, unified partnership with students, parents and the community.
- **Q:** What was the change, particularly, to the types of faculty and/or the promotion & tenure process?
 - **A:** It was just a renewal of verbiage, which can be found here: <https://www.marshall.edu/policies/>

Minutes

- The March 26th, 2026 minutes were approved as written.

Classified Staff Council Committees

- **Elections/Communications Committee – Nina Barrett** – No report.
- **Legislative Committee – Larry Morris**
 - SB 59: New voter residency law may impact student voters.
 - Other actions: Governor vetoed \$38M fund; 10% tax cut and 3% state pay raise approved.
 - Legislature: Data-center bill reduces local control; new Senate leadership named.
- **Personnel/Finance Committee – Becky Lusher** – No report.
- **Physical Environment Committee – Becky Lusher**
 - Stadium lights: Not left on overnight; turned on early mornings (4–5 a.m.) for workouts and practices to simulate game conditions and meet broadcast needs.
 - Jumbotron: Sometimes left on overnight to engage the community; intended for 24/7 use.
- **Staff Development/Service Committee – Tiffani Daniels**
 - Training update: Spencer came to the meeting and shared information on Skills Exchange training in Coursera.
 - Skills Exchange: Limited catalog, mostly AI-focused, with some business and higher-ed content.

Announcements

The Service Awards Luncheon will be held on Tuesday, May 26th.

Minutes taken and prepared by: _____
Katie M. Counts, Program Assistant, Classified Staff Council

Minutes approved by: _____
Lacie Bittinger, Chair, Classified Staff Council

Minutes read by: _____
Brad D. Smith, University President

Adams, Diana	Crawford, Dean	Lapole, Christopher	Payne, Leah	Ulrich, Sarah
Adkins, Jason	Cutler, Jon	Lauhon, Cheyenne	Penrod, Jodie	Vannatter, Kristen
Agnello, Tricia	Cyrus, Meg	Legg, Erik	Persinger, Daniel	Vineyard, Jimil
Allen Williams	Daniels, Tiffani	Lester, Amy	Powell, Tina	Walker, Bob
Allen, Mike	Davis, Sarah	Levering, Susan	Puckett, Tabby	Walker, Lacey
Anders, Brandi	Dean, Benjamin	Lewis, Olivia	Quodala, Leslie	Wallace, Troy
Atkins, Christopher	Decker, Kaleigh	Lloyd, Sandee	Ramsey, Elizabeth	Waller, Mary
Bailey, Bonnie	Donathan, Alex	Lopez, Sebastian	Rexroad, Elizabeth	Weaver, Amy
Bailey, Travis	Dorado, Bob	Lucas, Taylor	Rhodes, Jessica	Weber, Charlotte
Bailey, Zach	Douglas, Sarah	Lupashunski, Spencer	Risch, Christine	West, Lance
Baldwin, Jesse	Drake, Laura A	Lusher, Becky	Roberts, Alice	Wheeler, Michelle
Barrett, Nina	Dunbar, Shaylen	Marcum, Kelly	Rodkey, Sarah	White, Caitlin
Bell, Jodi	Dunfee, Carey	Martin, Madison	Rose, Angie	Wiley, Denise
Biggs, Billy	Dunmore, Holly	Martin, Nick	Ross, Jerry	Williamson, Sabrina
Biggs, Michelle	Edmonds, Travis	Maynard, Becky	Roush, Emily	Wintz, Kathi
Bittinger, Lacie	Eskins, Cara	Maynard, Kevin	Rowe, Kandice	Woods, Cameron
Bond, Cassi	Eskins, Katrina	McComas, Karen	Salustro, Kristin	Xu, Cindy
Bookwalter, Robert	Evans, Howard	McDade, Michael	Saunders, Amy	Young, Howard
Booth, Sharon	Fain, Cicero	McDavid, Cristina	Saunders, Patricia	Young, Miriah
Bradley, Johnny	Felder, Bruce	McDavid, Sherry	Saxton, Caleb	Zanter, Mark
Brannock, Kathy	Fry, Austin	McGhee, Otesha	Schray, Kateryna	
Brooks, Jason	Fulks, Allison	McGuffey, Linda	Serrat, Marcos	
Brown, Hannah	Gallaher, Melanie	McKenna, Char	Sharp, Tyler	
Brown, Jennifer	Gates, Lisa	McKinley, Garnet	Sheets, Elizabeth	
Brumfield, Mark	Golliher, Annie	McSweeney, Teresa	Simms, Marcie	
Buchanan, Amy	Gooding, Andrew	Meek, Rebecca	Sims, Kristin	
Burgess, Brent	Gooding, Grace	Merritt, Hannah	Skaggs, Will	
Burriss, Butch	Greenwood, Kenneth	Midkiff, Glen	Slate, Nick	
Bush, Jesseka	Hall, Cody	Midkiff, Susan	Smith, Brad	
Byrd, Kevin	Harrold, Lisa	Milam, Darrell	Smith, Heather	
Call, Cody	Hawthorne, Justin	Mills, Cassandra	Smith, Jami	
Canterbury, Thomas	Hendrick, Ashley	Mirzakhani, Amad	Smith, Lindsay	
Cantrell-Johnson, Sonja	Henshaw, Kit	Moore, Patrick	Smith, Tracy	
Carey, Allison	Hill, Michael	Morgan, Brian	Smith-Holmes, Demeley	
Carico, Paul	Himes, Eric	Morgan, Jennifer	Spradlin, Wes	
Carothers, Kelly	Holiskey, Sam	Morris, Larry	Stafford, Robyn	
Chaffin, Perry	Holmes, Linda	Mummert, Carl	Starcher-Patton, Autumn	
Chapman, Mary	Hughart, Bravin	Murphy, Katherine	Stephens, Sarah	
Clark, Jackie	Hurula, Carol	Murray, Heather	Stepp, Sherri	
Clark, Kim	Jacobs, Brandi	Neace, Becky	Taylor, John	
Clark, Ralph	Jarrell, Jimmy	O'Neill, Carleen	Taylor, Robin	
Collins, Tabby	Kennedy, Paige	Pack, Rebecca	Thomas, Erica	
Contreras, Kassandra	Kompanek, Simone	Painter, Ginny	Thomas, Kim	
Counts, Katie	Langer, Jonathan	Parker, Dicky	Thornton, Mindy	



Marshall for All, Marshall Forever

Spring General Faculty Meeting

April 9, 2026

Our Storied History

189 YEARS OF GROWTH AND ADVANCEMENT



1837
Marshall Academy created

1858
Becomes a college

1863
Civil War; **Salina Hite Mason** saves Marshall College by purchasing the property at auction and supporting the school financially

1907
Enrollment passes **1,000**

1929
During the **Great Depression**, students pay for tuition in "IOUs" and potatoes

1937
Ohio River **flooding** damages campus facilities



1970
Airplane crash kills 75 football players, coaches, administrators and supporters

1938
Board of Education authorizes Marshall to offer **master's degrees**

1946
More than **500 veterans** enroll in program **allowing graduation in three years**

1947, 1948
Men's basketball wins **national championship**; football plays in **Tangerine Bowl**

1961
University status achieved



1990
Enrollment exceeds **12,000**

1977
Medical School opens

1992, 1999
First **football championship** (Division 1-AA); **top 10 ranking** and **Motor City Bowl** win over BYU



2023
"Marshall for All, Marshall Forever" **strategic roadmap** developed; first cohort of 100 "**Marshall for All**" students arrives

2025-26
3rd cohort of "**Marshall for All**" arrives; "**Tuition-Free WV**" launches

2018
R2 research institution designation received from the Carnegie Classification of Institutions

2020
Men's soccer wins school's first **NCAA Division 1 National Championship**



Marshall University

A VIBRANT ECOSYSTEM

- Public research university - R2
- 13 colleges and schools
- 13,239 total | 3,264 graduate students
- 78% are from West Virginia
- 48% are first-generation college
- 55% are Pell Eligible
- Admitted from 50 countries
- 1,895 full-time faculty and staff



Marshall University **Academics**

- Huntington
- South Charleston
- Point Pleasant
- WV International Yeager Airport;
Huntington Tri-State Airport;
Eastern WV Regional Airport;
Ohio County Airport;
Greenbrier Valley Airport



Marshall University **Athletics**



Joan C. Edwards **School of Medicine**



Marshall University **Foundation Inc.**



Marshall University **Research Corporation**



Marshall Health **Network**

Marshall University

OUR ROLE AND IMPACT

WE ARE ... A Prosperity Platform to Accelerate Individual Success, Innovative Ideas and Economic Impact

INDIVIDUAL SUCCESS

2,500 Graduates/Year
78% from West Virginia
48% First Generation



120,000+ Alumni:
Admirals & Generals, Governors,
Fortune 500 CEOs, Emmy/Tony/Pulitzer
Prize Award-Winners, Doctors, Lawyers,
Scientists, Educators, Professional
Athletes & Coaches, Heisman Trophy
Finalists and Hall of Fame Inductees

INNOVATIVE IDEAS

Research
Scholarship
Creativity



\$68M Research Grants & Contracts
Carnegie R2 (3.5% of Institutions)
Cybersecurity & Forensics | Rural Health
Addiction Science | Obesity | Gerontology
Advanced Manufacturing | Energy
Aviation | Digital Humanities
Design Thinking | Entrepreneurship

ECONOMIC IMPACT

Educate
Innovate
Collaborate



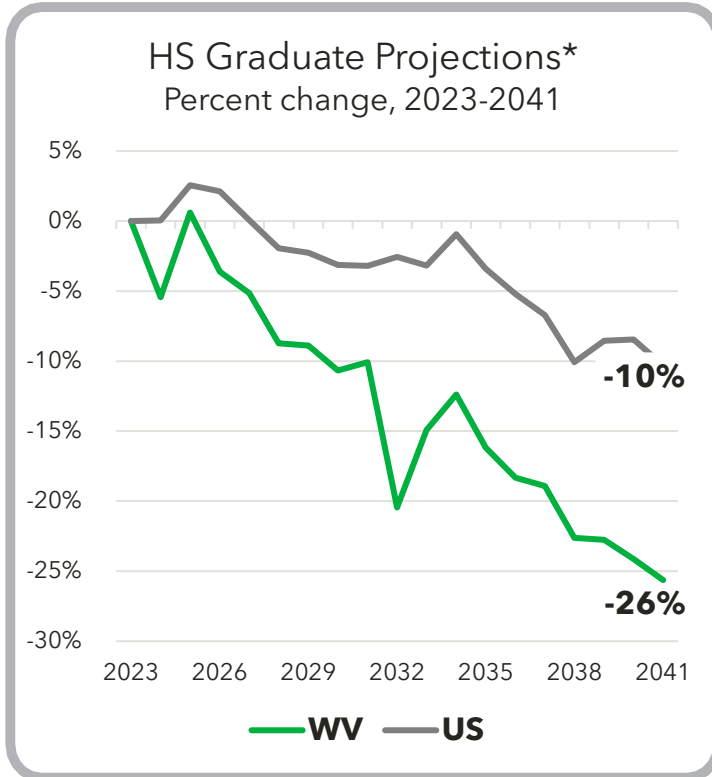
69% Graduates Remain in WV
300+ Companies Helped/Year
1,000+ People Trained/Year
Flight School | Aviation Maintenance
\$1 Invested Yields 18X Return
\$1.2B Economic Impact/Year
"Choose West Virginia" Tour

Sources: Center for Economic and Business Research, West Virginia
Higher Education Policy Commission Funding Formula

A Shifting Landscape Necessitates Change

HEADWINDS RESHAPING HIGHER EDUCATION

DEMOGRAPHICS



Enrollment Cliff
Declining Interest in College
Return-on-Investment

DIGITAL



Digital Transformation
Non-Traditional Alternatives
Generative AI Implications

DOUBT



Gallup Survey
Federal Funding
Deficits / Mergers / Closures

*Source: Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates, 2024*, www.wiche.edu/knocking.

This is Not a Turnaround. **IT IS A TRANSFORMATION.**

Multi-Horizon Planning Approach ... Optimize → Transform → Leapfrog



1: Optimize to promote long-term sustainability

Realize the full potential of Marshall's current operating model with a sustainable financial structure and academic offerings



2: Transform to lead with the best

Launch targeted initiatives to match leading higher education institutions for access, affordability, student mentorship, flexible modalities and career pathways



3: Leapfrog to become the reference case

Pioneer "leapfrog" efforts to change the trajectory of post-secondary education and economic development in West Virginia and to set the bar for higher education innovation

Enduring **FINANCIAL PRINCIPLES**

1. Grow STUDENTS, Not Fees.

- ✓ Minimize tuition and fee increases.
- ✓ Institutional success is measured by our accessibility, affordability and lifetime value for the students we serve.

2. Invest in our TEAM.

- ✓ Align employee compensation with market.
- ✓ Incentivize for performance and living the Marshall University Creed.

3. Take Care of the HOUSE.

- ✓ Investments in facilities are essential to the university mission.
- ✓ Invest in innovative technologies to meet modern challenges.

4. Manage our Strategic RESOURCES.

- ✓ Build key reserves for fiscal and operational resiliency.
- ✓ Invest available resources to new market-driven opportunities.

Transforming & Leapfrogging
A STRATEGIC ROADMAP TO PROSPERITY



Our **PLAN-ON-A-PAGE**

VISION



“To inspire learning and creativity that ignites the mind, nurtures the spirit, and fulfills the promise of a better future”

CREED

Educational | Open | Civil | Responsible | Safe | Well | Ethical | Pluralistic | Socially Conscious | Judicious

2037 GOALS



Individual Success

100% Career Outcome Rates for Graduates
Zero Students Graduate with Student Loan Debt



Innovative Ideas

\$150M Research, Grants, Contracts
3X Start-Ups Incubated



Economic Impact

30X Return for Every \$1 Invested
3X GDP Impact in West Virginia (\$2.3B)

STAKEHOLDER GOALS

Students

Offer an affordable education with a distinctively supportive and flexible experience to ensure lifelong prosperity

Team

Empower faculty and staff to do the best work of their lives

West Virginia

Improve the well-being of all West Virginians by creating breakthrough opportunities and solutions

Financial Stakeholders

Build a resilient and sustainable institution to outlast headwinds

STRATEGY

Marshall for All, Marshall Forever

In-Demand Curriculum • On-Demand Delivery • Distinctive Value Proposition

PRIORITIES

Increase access

Ensure affordability

Grow support programs

Deliver on demand

Enable lifetime achievement

METRICS

- Strategic Enrollment Mgt. Plan
 - New student enrollment
 - Target segments enrollment
- Recruitment contacts
- Conversion rates
- Stopped-out/returning students

- Student debt load
- Debt-free cohorts/retention
- Internships and jobs
- M4A fundraising campaign
- Undergraduate ROI

- HerdConnect mentorship
- Center for Student Success
- 1st yr retention/6 yr graduation
- E2E student experience
- AI-based customized support

- In-demand programs & microcredentials
- HyFlex/Hybrid courses
- AI assessment/application
- Online degree programs

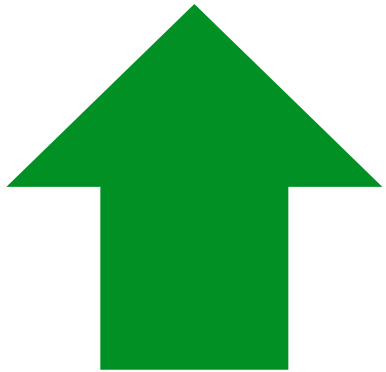
- Customized training - MAMC
- Academic pathways selected
- Career Engagement participation
- Lifelong learning



Marshall University

FIVE STUDENT-FIRST PRIORITIES

INCREASE ACCESS



Total Enrollment

Fall 25: **+ 7.5%**
Fall 22-25: **+22.2%**

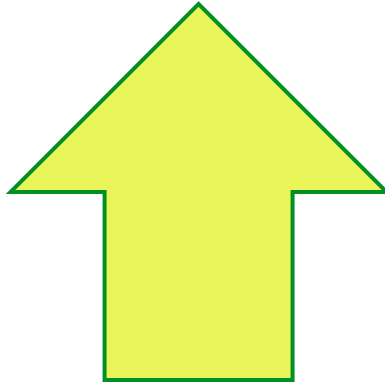
ENSURE AFFORDABILITY



Metro Enrollment

Fall 25: **+19.2%**
Fall 22-25: **+61.0%**

GROW SUPPORT PROGRAMS



First-Year Retention

Fall 25: **76.3%**
Fall 22: **74.4%**

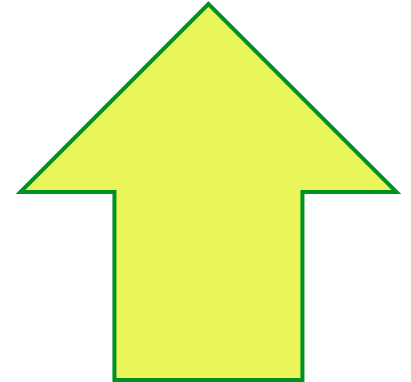
DELIVER ON DEMAND



Online Enrollment

Fall 25: **+24.3%**
Fall 22-25: **+59.9%**

ENABLE LIFETIME ACHIEVEMENT



Internships/Practicums

Fall 24-Spring 25: **37% of seniors**
Fall 22-Spring 23: **35% of seniors**

Accelerate Ideas to Impact

MARSHALL FOR ALL: TWO PATHWAYS

Tuition-Free WV



New for Fall 2025!

- Family income <\$65,000
- Covers tuition and mandatory fees
- Must apply and be accepted to Marshall
- Must complete the FAFSA

*Must be West Virginia resident and first-time, first-year freshman.

Debt-Free



3rd Cohort Enrolled in Fall 2025!

- 200 students randomly selected this year
- Covers tuition and fees, room/board, textbooks for 4 years
- Must attend financial literacy courses and do an internship
- Must sign up for summer orientation

*Must be West Virginia or Metro resident and first-time, first-year freshman.

Accelerate Ideas to Impact

MARSHALL FOR ALL: DEBT-FREE

Fall 2023: 100 students admitted
Fall 2024: 100 students admitted
Fall 2025: 200 students admitted
Fall 2026: 220 students to be admitted

The Grand Challenge: Six-Year Graduation Rates

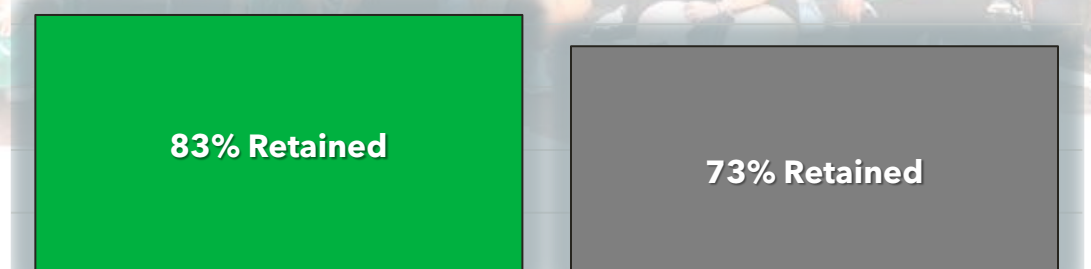
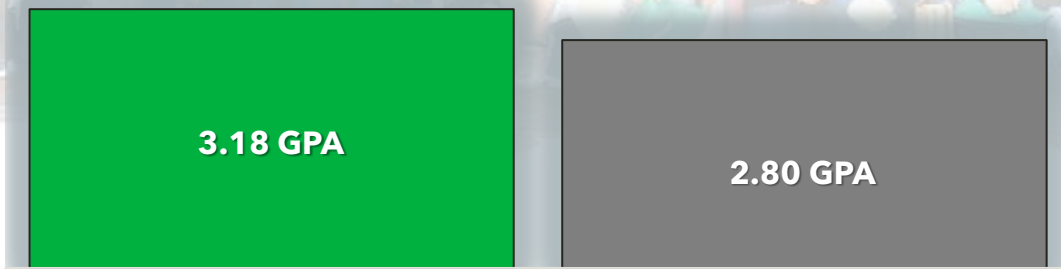


GPA - Pell-Eligible Students

Marshall Pell-Eligible Students

Retention - Fall 2024 → Fall 2025

Marshall Pell-Eligible Students



2nd Marshall for All Cohort

Marshall Peers

2nd Marshall for All Cohort

Marshall Peers

Marshall University

SIX AREAS OF DISTINCTIVE EXCELLENCE

CYBERSECURITY & FORENSICS



"Academic Center of Excellence"

Opening
Fall 2027
73,000 Sq. Ft.
13 Labs
Secure Ops Center (SOC)

HEALTH SCIENCES



Academic Health System

Serving 1.4M People
Centers of Excellence
Addiction Science,
Obesity, Gerontology,
Rural Health
Rural Surgery Residency
Recognition

ADVANCED MANUFACTURING



Workforce Hub Industry Services

300+ Companies Served
1,000+ Workers
Trained
National Hub for
Manufacturing
Apprenticeships
CTC/CTE Affiliations

ENERGY



POWER Tech Center

Workforce
Development
Cyber for
Critical Infrastructure
Leapfrog
Partnerships

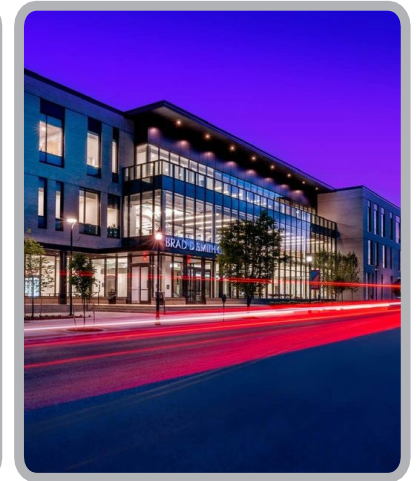
AVIATION



Pilots/ Maintenance Techs

Fall 2025
312 students
11 aircraft/2 rotorcraft
9 locations
New Programs
Dispatcher
Flight Attendant
Uncrewed Aircraft Systems

ENTREPRENEURSHIP



Center for Business and Innovation

Hub for Regional
Groups/Events
5,000+ Trained in
Design Thinking
IDEA District

Manage Our Strategic Resources

PROMOTE LONG-TERM SUSTAINABILITY

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STRATEGIC INITIATIVES

"Save-to-Serve"

- Identifying/taking action:
 - Procurement Savings: Marshall Marketplace
 - Scheduling/Program Reviews: Ad Astra
 - Productivity: Benchmarks/Automation/AI
- Operationalized Budget Advisory Committee
 - Monthly meetings
 - Purchasing best practices
 - Spending deep dives
- Goal of \$14.5M in savings over four years

Incentivized Budget Model

- Resources aligned with strategic goals
- Shared financial governance
- Culture of trust, responsibility, accountability
- Data informed

WHERE WE STARTED... FINANCIAL ROADMAP

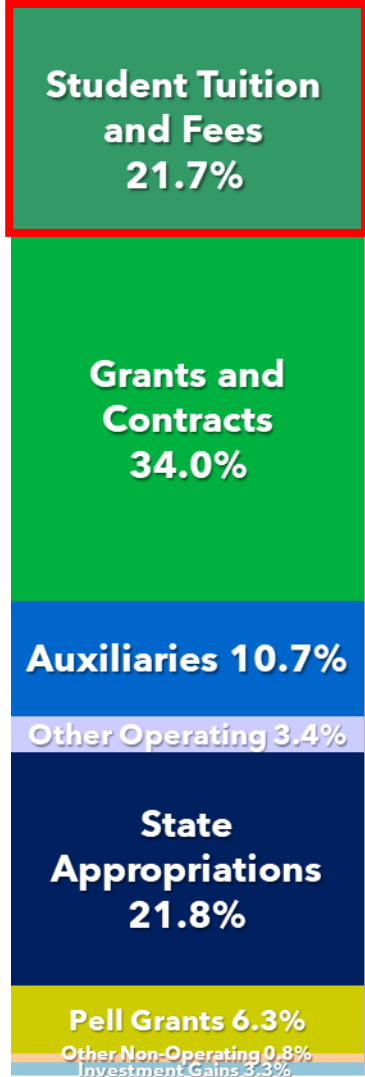
Original FY24-27



Grow Students, Not Fees

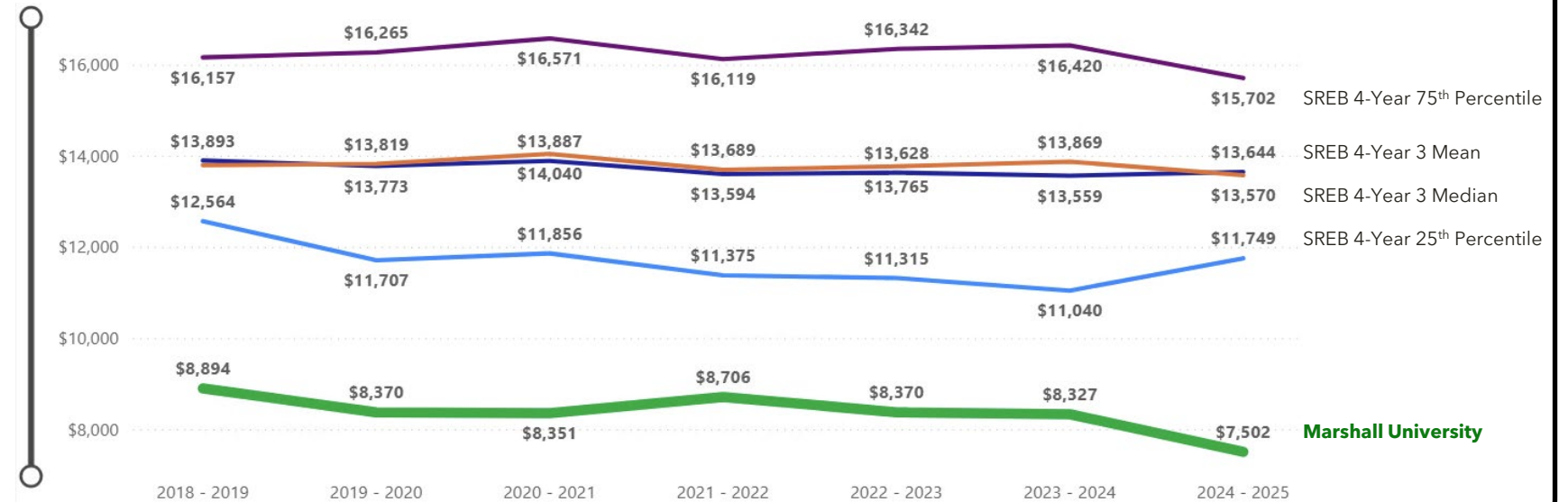
TUITION/FEES AND AFFORDABILITY

FY2027 - Budgeted
\$373.4M



Comparison to Southern Regional Education Board (SREB) 4-Year Institutions

Average Net Price



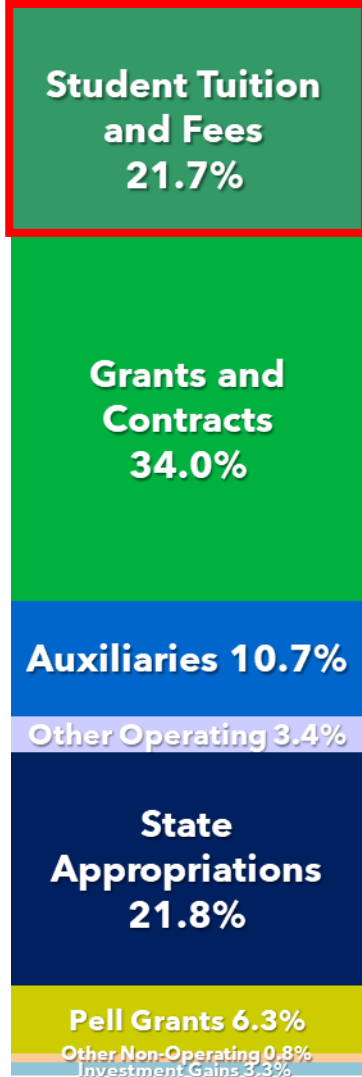
Sources: Integrated Postsecondary Education Data System (IPEDS) and College Scorecard, U. S. Department of Education



Grow Students, Not Fees

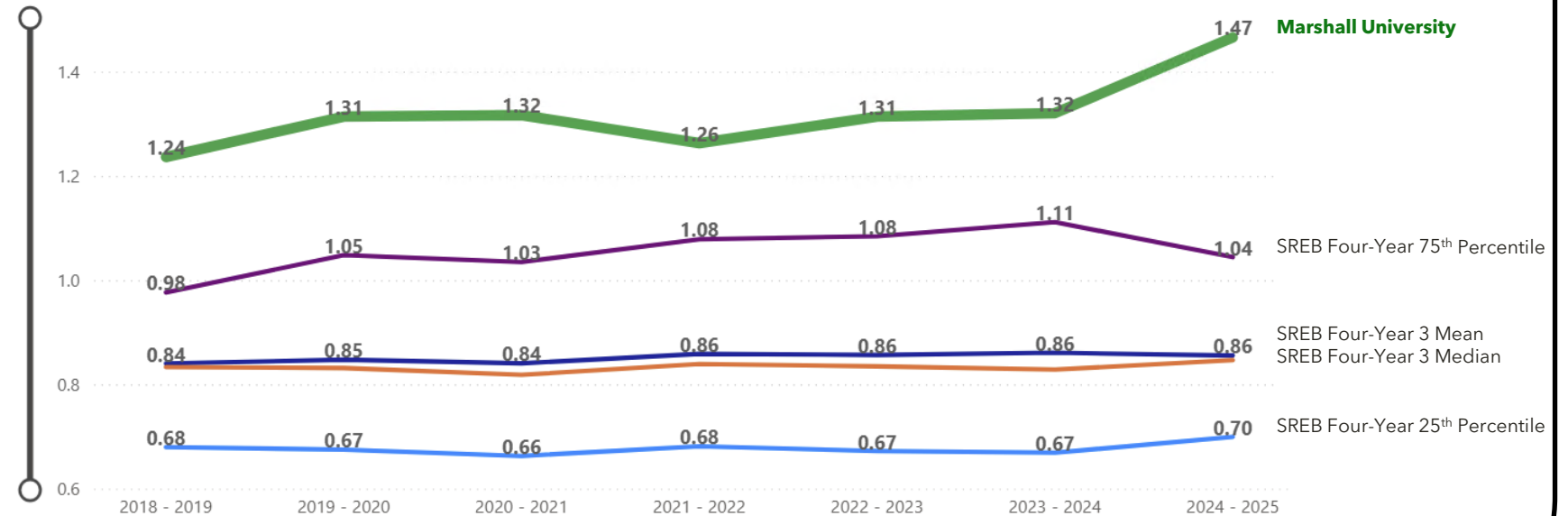
RETURN ON INVESTMENT

FY2027 - Budgeted
\$373.4M



Comparison to Southern Regional Education Board (SREB) 4-Year Institutions

Earnings Ratio



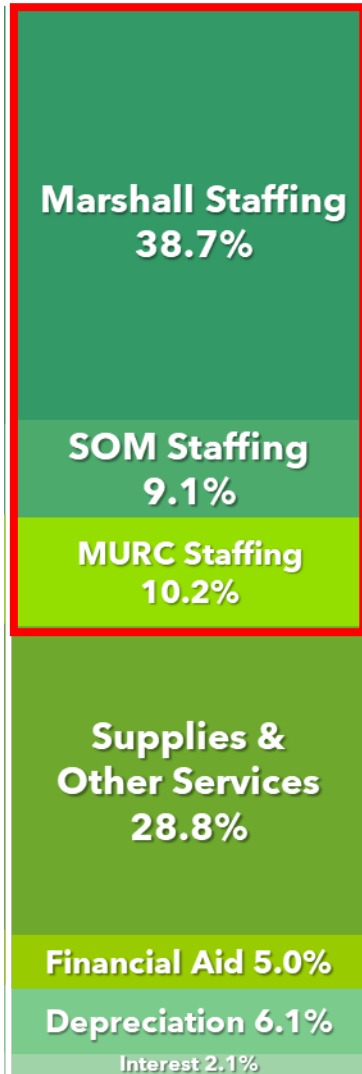
Sources: Integrated Postsecondary Education Data System (IPEDS) and College Scorecard, U. S. Department of Education



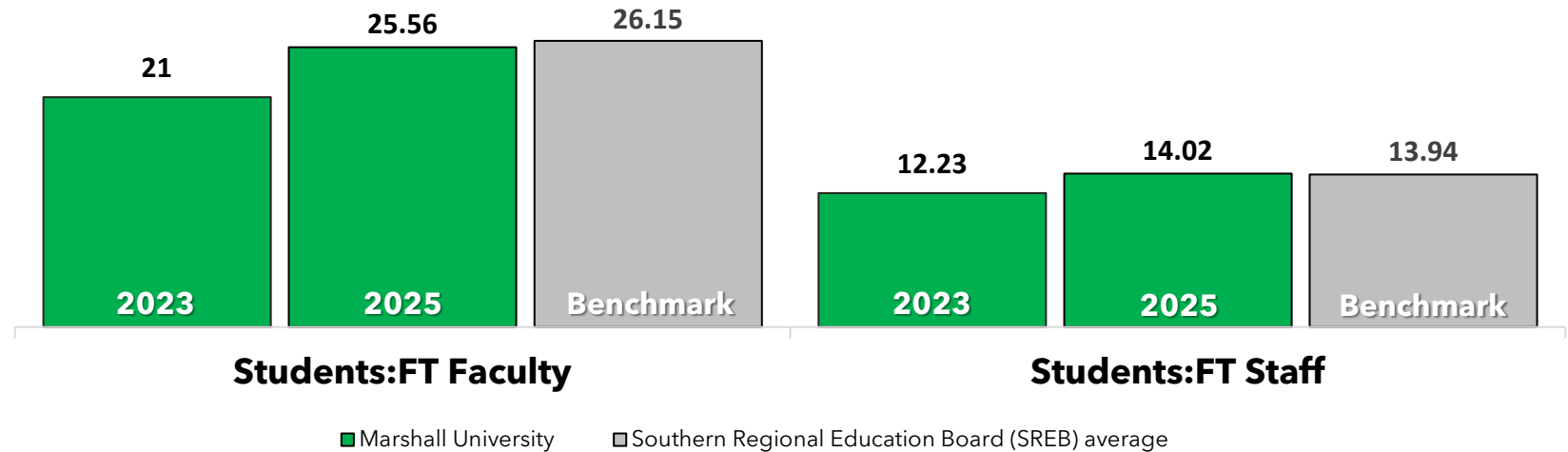
Invest in Our Team

STAFFING TRENDS

FY2027 - Budgeted
\$376.3M



Monitoring Staffing to Mirror Enrollment



- ✓ Strategic Hiring Committee → Optimize at University Level
- ✓ Operation CORE Strength → Best-in-Class Ratios
- ✓ Faculty for 13,600 Students

*Source: Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics, U.S. Department of Education; excludes School of Medicine employees.

Invest in Our Team

OPERATION CORE STRENGTH

FY2027 - Budgeted
\$376.3M

Marshall Staffing
38.7%

SOM Staffing
9.1%

MURC Staffing
10.2%

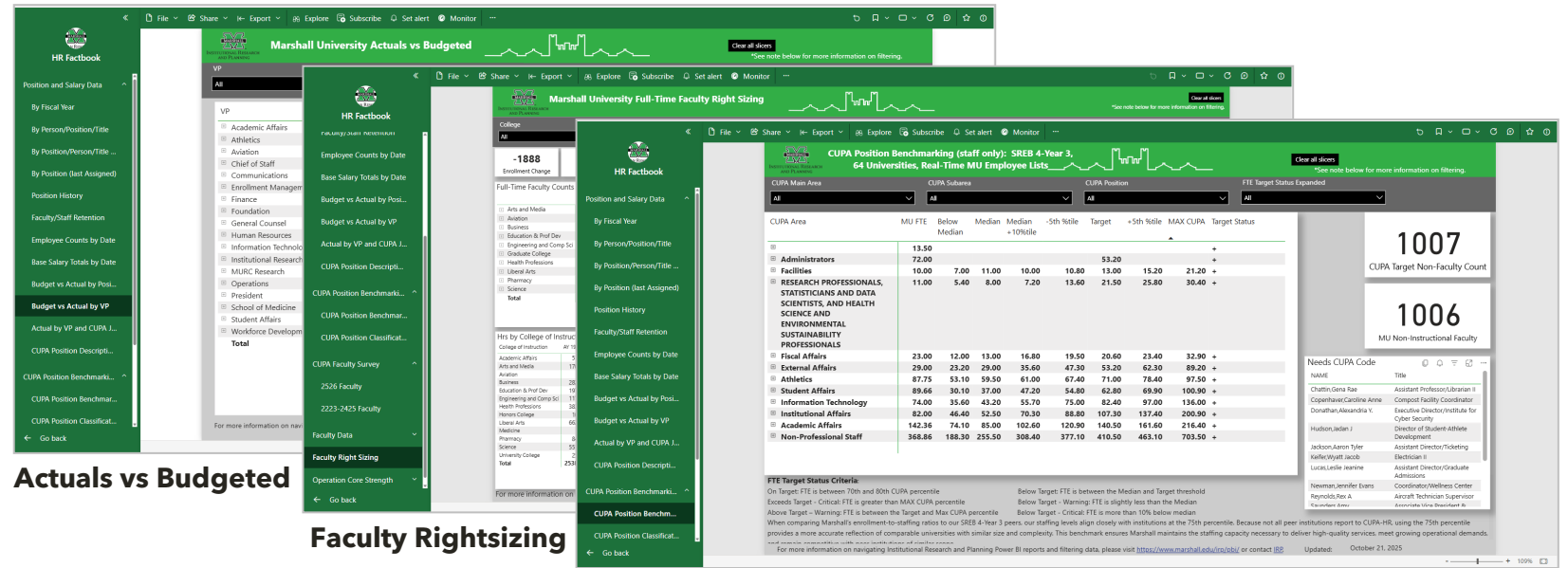
Supplies &
Other Services
28.8%

Financial Aid 5.0%

Depreciation 6.1%

Interest 2.1%

PowerBi Dashboards



- Hiring authorities use dashboards to make informed decisions.
- Strategic Hiring Committee is safety net.
- Headcount added based on data, accreditation needs, etc.
- AI Task Force to look at optimizing administrative tasks.

Invest in Our Team

MARKET RATES → PERFORMANCE-BASED INCREASES

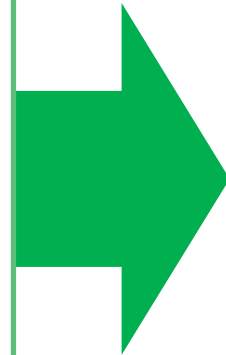
FY26 ACTIONS

State Appropriations

- No State allocation received

Market Equity Adjustments

- \$369K to fund minimum of new salary scale for 156 employees



FY27 BUDGET

Market Equity Adjustments (1st)

- \$550K to fully fund competitive market range for all remaining employees:
 - \$345K (264 staff)
 - \$205K (62 faculty)

State Appropriations (2nd)

- \$2.2M (calculated on employees paid through State allocations only)
- Layered structure
- Progressive, equity focused

FY28–29 CONSIDERATIONS

Market Equity Adjustments

- Ongoing monitoring for any needed adjustments

Performance-Based Increases

- Funds distributed at division level based on performance

Sources:

- State appropriations
- Efficiencies driven by AI, etc.

Since 2022: **\$7.8M** has been reinvested to increase market-based salaries.

Invest in Our Team

DISTRIBUTING STATE-FUNDED PAY RAISES

This approach uses a **layered, progressive raise structure** to provide higher-percentage increases to lower-paid employees, while still providing meaningful raises for all employees. Rather than assigning a single percentage based on a salary band, each employee's raise is calculated in **layers**, similar to the way tax brackets work. This approach ensures there are **no cutoff cliffs** where someone earning slightly more receives a smaller raise.

How the Raise is Calculated:

Each portion of salary receives a different increase:

- **First \$40,000** of salary → **2%**
- **Next \$40,000** (from \$40,001-\$80,000) → **1%**
- **Next \$45,000** (from \$80,001-\$125,000) → **0.75%**
- **Next \$75,000** (from \$125,001-\$200,000) → **0.5%**
- **Salary above \$200,000** → **0.25%**

Every employee receives the increases for *each layer their salary reaches*. For example, someone earning \$90,000 receives the 2% on the first \$40,000, 1% on the next \$40,000, and 0.75% on the remaining \$10,000.

Why This Model Works:

- ✓ Prevents salary inversion at band edges
- ✓ Provides proportionally larger support to lower-paid employees
- ✓ Still rewards higher salaries for increased responsibility
- ✓ Transparent and easy to explain
- ✓ Aligns with equity and retention goals

Salary Amount	Raise Amount	Total Raise %
\$ 40,000	\$ 800.00	2.0%
\$ 50,000	\$ 900.00	1.8%
\$ 60,000	\$ 1,000.00	1.7%
\$ 70,000	\$ 1,100.00	1.6%
\$ 80,000	\$ 1,200.00	1.5%
\$ 90,000	\$ 1,275.00	1.4%
\$ 100,000	\$ 1,350.00	1.4%
\$ 110,000	\$ 1,425.00	1.3%
\$ 120,000	\$ 1,500.00	1.3%
\$ 130,000	\$ 1,562.50	1.2%
\$ 140,000	\$ 1,612.50	1.2%
\$ 150,000	\$ 1,662.50	1.1%
\$ 200,000	\$ 1,912.50	1.0%
\$ 250,000	\$ 2,037.50	0.8%

Invest in Our Team

ONGOING ACADEMIC PORTFOLIO REVIEW

A Continuous, Data-Driven Health Check



Academic Program Reviews

- Internal
- Annually
- Monitors:
 - Enrollment trends
 - Student outcomes
 - Instructional costs
 - Workforce needs



Benchmarking and Market Reviews

- External
- Every five (5) years
- Ensures:
 - Measurement against peers
 - Alignment with labor market realities



Incentivized Budget Model

- Assesses program cost/ROI
- Ensures resources are directed to programs that demonstrate value to students and the state
- Creates clarity, accountability and transparency
- Faculty right-sizing aligns positions with strategic need



Data-Driven Class Scheduling

- Better course availability
- Minimizes cost of instruction
- Aligns schedules with student demands
- Increased student satisfaction, retention and graduation rates

Take Care of the House

DEFERRED MAINTENANCE

CAPITAL PROJECT PRINCIPLES FOR ALLOCATION

Building System Stabilization	35%
Health and Safety	25%
Equitable Environment/Title IX	20%
Invest to Accelerate Growth	15%
Miscellaneous	5%
Total Points	100%

PROJECT “SHOCK AND AWE”

\$21.8M from State for Deferred Maintenance

- ✓ **Chiller Replacements - Smith Hall and Drinko Library (\$3.3M)**
- ✓ **Roof Replacements - South Charleston, Drinko Library (\$3.6M)**
- ✓ **Structural Repairs - Old Main (\$1M)**
- ✓ **Air Handler Units - Science Building (\$1.3M)**
- ✓ Emergency Generator/Safety Phase I (\$687K)
- ✓ **Fire Alarm Upgrades (\$363K)**
- ✓ Elevator Modernization (\$1.1M)
- ✓ Sanitary Pipe Replacement - Henderson Center E-Level (\$540K)
- ✓ Morrow Library ADA Updates (\$1.2M)
- ✓ **Locks - Smith Hall and Fine Arts (\$300K)**
- ✓ **Floor Renovations - Erma Ora Byrd Clinical Center (\$268K)**
- ✓ **Concrete - Smith Hall and Henderson Center (\$250K)**
- ✓ **Stormwater Improvements Phase I (\$1.1M)**
- ✓ **Demolition - Laidley and Holderby Halls (\$1.6M)**
- ✓ **Renovations - Fine Arts (\$2.3M)**
- ✓ **Restroom Renovations - Memorial Student Center (\$880K)**
- ✓ **HVAC Replacement - Former MRI Building (\$222K)**
- ✓ **Classroom/Restroom Repair/Renewal - Campus-wide (\$1.4M)**
- ✓ **Band Bleacher Replacement - Henderson Center (\$400K)**

Completed projects are bolded. All other projects are under way.
\$18.5M total invoiced as of March 3, 2026.

Take Care of the House

10-YEAR CAMPUS MASTER PLAN



MU2023 Master Plan

Student First Master Plan

Decision Principles:

1. **One Marshall in the community:** a singular, integrated, and holistic plan that incorporates the needs of all areas of the university and its communities
2. **Safety and security:** a plan and design that optimizes for people and resources
3. **Research, teaching, and learning innovation:** encompass a larger, more varied student base
4. **Sense of belonging:** inclusivity and accessibility, ensuring every student is successful
5. **Stewardship:** maximizes strategic use of existing and new assets in a data-driven and sustainable way

Marshall's campus has clearly defined campus zones, each with unique opportunities and challenges:

- Core Campus
- 4th Avenue Innovation District
- Health Sciences at Hal Greer Boulevard
- Athletics
- Satellite Locations

Master Plan recommendations address:

- Space optimization
- Safe circulation
- Landscape activation
- Enhancements to each distinct campus zone
- Building renewal

Project List:

Main Campus

- | | |
|-----------------------------------|--|
| 1 Smith Music Renovation | 8 Prichard Hall Swing Space Preparation |
| 2 Smith Hall Renovation | 9 Drinko Library - IT Staff Relocation |
| 3 Smith Communications Renovation | 10 Corby Hall Partial Renovation |
| 4 Morrow Library Renovation | 11 Demolish Holderby Hall and New Apartment-Style Residence Hall |
| 5 Science Building Renovation | 12 Twin Towers Renovations |
| 6 Harris Hall Renovation | 13 Gullickson Hall Renovation |
| 7 Demolish Laidley Hall | 14 Henderson Center Renovation |

Health Sciences Campus At Hal Greer Boulevard

- 15 Forensic Landscape Improvement
- 16 The Landing Landscape and Drop Off Improvement
- 17 Potential Coffee Shop
- 18 Fifteenth Street Clinic Walkway Improvement
- 19 Columbia Avenue Gateway and Streetscape Improvement
- 20 Charleston Avenue Gateway and Streetscape Improvement

Satellite Campuses

- 21 South Charleston Parking Lot and Pedestrian Improvement

The One Marshall Plan focuses on:

- Space optimization
- Safe circulation
- Landscape activation
- Enhancements to each distinct zone
- Building renewal

Priority Projects:

- Classroom renovations
- Flooding interventions
- Science Building renovation
- Harris Hall renovation
- Smith Hall renovation
- New School of Medicine building

Take Care of the House

10-YEAR CAMPUS MASTER PLAN

Completed

- Laidley Hall Demolition
- Marshall Plaza Demolition
- Holderby Hall Demolition
- ADA Pedestrian Route – Smith Hall and Morrow Library
- Baseball/Softball Completion
- MOVC Landscape Activation and Accessibility
- Football North Endzone

Fundraising

- Science Building Renovation
- Smith Hall Renovation
- School of Medicine Building
- Marshall Advanced Manufacturing Center

In Progress

- Classroom Renovations
- Stormwater Interventions, Phase I
- Training Table
- Corbly Hall Partial Renovations
- Holderby Hall Lawn

Under Review

- Natatorium/Volleyball Reconfiguration
- Sand Volleyball Court
- Sports Performance/Weight Room

Removed

- Indoor Tennis Center
- Athletics Facilities Lettering
- Outdoor Track and Field



Take Care of the House

COMMUNITY CARES WEEK

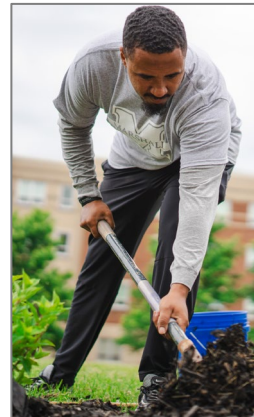
YEAR 4 RESULTS

985 volunteers (**300** in Alumni chapters)

2,970 service hours

\$63,793 saved through sweat equity

- **8.5 dumpsters** of spring cleanout items
- **28 tons** of gravel, stone, pavers and rock
- **3,500** bags of mulch
- **2,020** flowers
- **100** gallons of paint



YEAR 5 PLANS



2026

May 18 - Prep Day

May 19-22 - Volunteer Projects

GOAL: +5% = 1,034 VOLUNTEERS AND 3,119 SERVICE HOURS

www.marshall.edu/cares

Manage Our Strategic Resources

“SAVE-TO-SERVE”

WHAT IS IT?

- Campus-wide priority
- Cost-saving initiative
- \$14.5M goal over three years

AREAS OF FOCUS

- Non-personnel spending
 - “Supplies and Other Services”
- Contract reviews
- Procurement policy review

PROGRESS TO DATE

- Spending reductions
 - FY24 = \$3.1M Reductions Achieved
 - FY25 = \$2.7M Reductions Achieved
 - FY26 = ~ \$3M Reductions Budgeted
- 5% annual reduction in Supplies and Other Services targeted through FY27
- Marshall Marketplace e-procurement implementation

Manage Our Strategic Resources

INCENTIVIZED BUDGET MODEL - IMPLEMENTED

Academic Unit-Level Proformas

Revenues



Tuition, Fees and Aid

- Based on credit hours of instruction/college of record



State Appropriations

- Aligned with State Funding Formula incentives

Expenses



Direct and Shared Costs


- Units responsible for direct expenses
- Assessed share of indirect costs



Strategic Funding Mechanism

- Units fund strategic investment pool
- Make other units whole

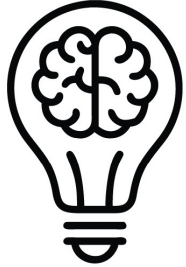


	Division of Aviation	College of Business
<i>Incentive-Based Budget Model Fiscal Year 2022</i>	Total	Total
Revenues		
Total Undergraduate Tuition	141,496	6,893,599
Total Graduate and Professional Tuition	-	1,927,315
Total Fees	537,069	2,523,213
Total Scholarships & Waivers	(59,789)	(4,077,204)
Total Net Tuition & Fees	618,776	7,266,923
State Appropriations - Deferred Maintenance	-	-
State Appropriations - Instruction & Enrollment	48,342	3,122,609
State Appropriations - Degree Completion	-	3,379,201
State Appropriations - Sponsored Programs	-	240
State Appropriations - Student Segment Population Supplement	5,644	337,186
State Appropriations - Direct	-	-
Total State Appropriations	53,985	6,839,237
Total Contracts & Grants	379,890	980,201
Total Sales/Services	-	-
Total Gifts and Other Revenue	575,000	125,450
TOTAL REVENUES	1,627,652	15,211,810
Expenditures		
Total Salaries and Wages	709,081	7,086,171
Total Benefits	192,742	1,922,785
Total Salaries, Wages, and Benefits	901,823	9,008,956
Supplies and Other Services	6,065,064	299,067
Utilities	35,074	-
Travel	21,994	14,288
Other Expense	-	-
Interest on Indebtedness	-	37
Depreciation	-	-
Total Supplies, Services, and Other	6,122,133	313,392
TOTAL DIRECT EXPENDITURES	7,023,956	9,322,348
MARGIN BEFORE SUPPORT UNIT COST ALLOCATIONS	(5,396,304)	5,877,712
<i>Margin Before Support Unit Cost Allocations %</i>	-332%	39%
Allocated Administrative Support Unit Costs		
Academic Support	34,743	1,981,798
Athletics	37,521	1,905,248
Facilities	407,542	400,130
General Administration	39,955	2,125,273
Research	9,931	25,625
Student Support	6,773	496,675
Total Allocated Support Unit Costs	536,465	6,934,750
TOTAL EXPENDITURES + ALLOCATED SUPPORT UNIT COSTS	7,560,421	16,257,098
Participation Fee Payment (Outflow) - 20.0%	-	-
Strategic Initiative Contribution (Outflow) - 0.0%	-	-
MARGIN AFTER PARTICIPATION AND STRATEGIC FUND CONTRIBUTION	-	-
Subvention Fund Disbursement (Inflow)	3,471,387	2,197,162
MARGIN AFTER FUND DISBURSMENTS	3,471,387	2,197,162

Manage Our Strategic Resources

INCENTIVIZED BUDGET MODEL

Learnings to Date and Work Remaining



What We've Learned

- Academic units aware of revenue drivers
- Impact and cost structure for all shared units
- Cross-college teaching creates complex revenue allocations
- Transparency across campus has improved decision making
- Increased awareness of where and how to save money



What's Left to Do

- Continued refinement of cost allocations as fair, understandable and stable
- Improve academic program viability analytics
- Creation of strategic investment funds
- Encourage cross-college collaboration and simplify revenue allocations
- Campus-wide training



What Success Looks Like

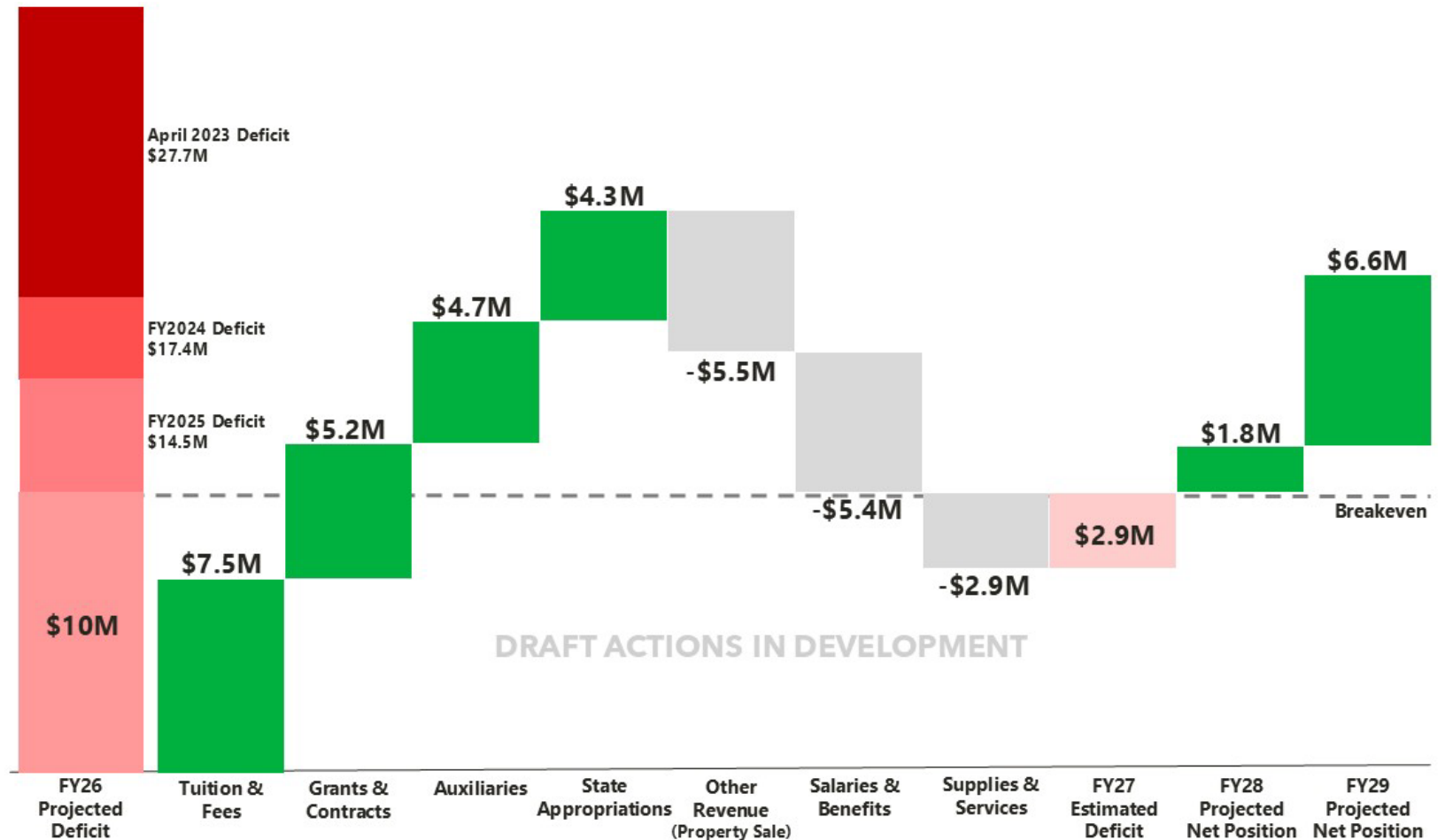
- Stronger enrollment growth strategies
- Financially sustainable program portfolios
- Clear accountability at both shared and academic units
- Better data for leadership decision making
- Improved university financial resilience

Manage Our Strategic Resources

PROMOTE LONG-TERM SUSTAINABILITY

Key Assumptions		
REVENUES	Original	Current
✓ Grants and Contracts	+3.5%	+3.5%
✓ Net Tuition/Fees		
• FY26	+2.5%	+4.4% *
• FY27	+2.5%	+2.5% **
• FY28	+2.5%	+2.5% **
✓ State Appropriations		
• FY26	+\$3.3M	+\$1.9M
• FY27	+\$1.5M	+\$1.9M
• FY28	+\$1.5M	+\$1.9M
✓ Auxiliary Revenue		
• FY26	+3.5%	+5%
• FY27	+3.5%	+5%
• FY28	+3.5%	+5%
EXPENSES		
✓ Salaries and Benefits		
✓ FY26 - FY28	+\$3.5M	+\$10M
✓ Supplies and Other Services: 5% reduction offset by School of Medicine and grant-funded spending		

Current FY26-29



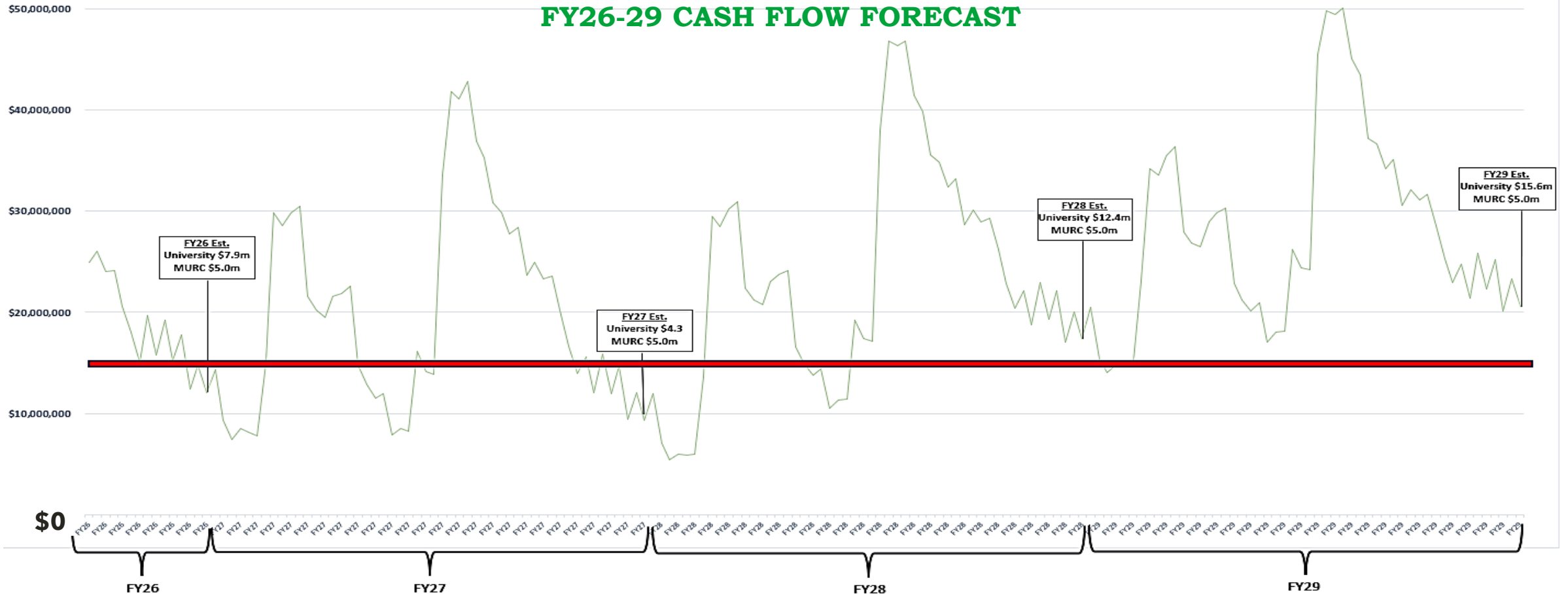
* Growth in FY26 Net Tuition and Fees excludes the impact of the WV Higher Education Grant in FY25.

** Excludes School of Medicine class growth and tuition increases.

Manage Our Strategic Resources

LONG-TERM FINANCIAL RESILIENCY

FY26-29 CASH FLOW FORECAST



Key Takeaways

- Cash Inflows: Fall (August/September) and Spring (January/February) inflows must sustain the university for entire year.
 - Growth in student revenue and federal and state grants
- Cash Outflows:
 - 2% growth in salaries and wages
 - -5% reduction in supplies and other services
- Goal: Maintain cash level at or above \$15M throughout the year to maintain day-to-day cash flow needs

Summary

MARSHALL FOR ALL, MARSHALL FOREVER

THANK YOU ... for your leadership, your partnership and your support

- Marshall is a prosperity platform for West Virginia and Appalachia.
- We're navigating transformational change and choosing to play offense.
- We've charted a strategic roadmap to future prosperity and it's working.
- Your partnership and support are sincerely appreciated.