Marshall University Classified Staff Council Minutes

June 18th, 2026 Meeting via Microsoft Teams

Members Present: Jesse Baldwin, Nina Barrett, Lacie Bittinger, Kathy Brannock, Mark Brumfield, David Childers, Dean Crawford, Tiffani Daniels, Mary Layne, Becky Lusher, Nick Martin, Larry Morris, Elizabeth Rexroad, Marcos Serrat, Heather Smith, Nancy Tresch-Reneau, Amy Weaver

Members Absent: Kimberly Crigler,

Members Absent (Excused): Nathan Miller, Carleen O'Neill,

Guests: Attached

Chair Lacie Bittinger called the meeting to order.

John Marshall Service Awards

- Bruce announced that the following employee was awarded the John Marshall Service Award for various outstanding services to the University:
    - ***Heidi Blaisdell***
- 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

- President Smith noted that universities nationwide are navigating shifting policies, financial pressures, and evolving expectations regarding the value and purpose of higher education. He stated that although Marshall University cannot predict every future challenge, the institution can prepare itself to respond effectively through agility, teamwork, and proactive planning.

- **Summer Strategic Initiatives** - President Smith outlined four major initiatives underway during the summer that are intended to strengthen the university's strategic planning efforts and position Marshall for continued success.

  1. Listening Tour Feedback Analysis – the university is currently synthesizing feedback gathered through its listening tour initiative.

    - A total of 30 listening sessions were planned and over 1,000 individuals participated.
    - The final session will be held with medical professionals in the community.
    - Feedback has been analyzed using AI-assisted summarization tools.
        - Participants expressed strong confidence in the university's direction and leadership.
        - While feedback was largely positive, participants also identified challenges related to the university's growth and transformation:

        - Employee workload and strain on personnel.
        - Increasing pressure on institutional systems and infrastructure.
        - Challenges associated with operational capacity.
        - Need to ensure resources are properly aligned to sustain long-term success.
    - Concerns expressed will help guide future planning efforts focused on streamlining operations and ensuring resources are effectively deployed.

<u>2. Enrollment Planning and Future Scenarios</u>

- President Smith reviewed ongoing work to prepare the university for future enrollment trends.
- He highlighted three major external forces shaping higher education:
    - *Demographics* – The nationwide enrollment cliff resulting from declining numbers of traditional college-age students.
    - *Digital* – Rapid technological disruption, including artificial intelligence tools such as ChatGPT, Gemini, Anthropic, and others.
    - *Doubt* – Growing public skepticism regarding the necessity and value of earning a college degree.
- The university is actively developing plans for multiple potential enrollment outcomes, including continued enrollment growth, enrollment stabilization, and enrollment decline.
- Huron Consulting Group
    - President Smith announced that Marshall has contracted with Huron Consulting Group to assist with a comprehensive institutional review.
    - The consulting engagement will focus on three primary areas:
        a) Organizational Structure Assessment
            - Review university organizational structure.
            - Evaluate whether personnel are positioned appropriately.
            - Identify opportunities to improve efficiency and effectiveness.
        b) Revenue Optimization
            - Assess tuition and fee structures.
            - Evaluate other revenue opportunities.
            - Identify areas where adjustments may improve financial performance.
        c) Waste and Inefficiency Identification
            - Review operational processes.
            - Evaluate contracts and vendor agreements.
            - Identify potential cost savings opportunities.
            - Look for inefficiencies that may not currently be visible internally.

- Strategic Goals – President Smith stated that the initiative is designed to:
    - Reduce organizational friction.
    - Streamline university operations.
    - Create new sources of savings.
    - Support future performance-based compensation initiatives.
    - Address deferred maintenance needs.
    - Fund future strategic investments.
- Previous cost-saving efforts through the Save to Serve initiative have already generated significant efficiencies, and future savings will need to come from new areas of operational improvement.

3. Student Success Action Learning Team

- Chaired by Brian Morgan and consisting of approximately 15 members, including representation from shared governance groups and subject matter experts.
- Marshall's retention rates have historically ranged from the low 70% to high 70% range, while many peer institutions achieve retention rates in the low- to mid-80% range.
- The university seeks to:
    - Increase first-year to second-year retention rates to 80% or higher.
    - Meet or exceed retention benchmarks of peer Sun Belt institutions.
    - Improve graduation rates.
    - Reduce inconsistencies in the student experience.
- The team is conducting both external and internal reviews.
    - External Review
        - Studying peer institutions that consistently achieve retention rates above 80%.
        - Identifying best practices and successful intervention models.
    - Internal Review
        - Evaluating successful programs and initiatives already operating at Marshall.
        - Examining efforts led by key student success personnel.
- Future improvements must be built through scalable systems rather than relying solely on adding personnel.
- Final recommendations are expected by Labor Day.

4. Artificial Intelligence Strategic Planning

- The university intends to explore both:
    - The opportunities presented by artificial intelligence.
    - The challenges and risks associated with AI adoption.
- Rather than focusing exclusively on AI's benefits, campus leaders will intentionally discuss areas of concern and institutional tension.

- A university-wide strategic workshop is scheduled for July 13–14.
    - Participants will include university leadership, deans, cabinet members, academic leaders, shared governance representatives, AI operating committee members, and representatives from the university's organizational families.
    - The workshop will be facilitated by Paul LeBlanc, former President of Southern New Hampshire University and current Gates Foundation leader focused on AI and education.
    - The purpose of the workshop is to help Marshall establish priorities and develop a practical, campus-wide framework for AI integration.

- **Strategic Planning**
    - Information gathered from the four summer initiatives will provide data and guidance to use in the fall and complete the following:
        - Refresh the institutional "Plan on a Page."
        - Align updates with the Marshall For All strategic vision.
        - Share the draft broadly across campus.
        - Seek campus community feedback.
        - Incorporate suggestions and identify gaps.
        - Finalize the strategic plan for implementation.
- **Q:** Is there still a hiring freeze?
    - **A:** The only positions we are currently filling are those that were already budgeted for or are a backfill, like when someone leaves their position and they get replaced because the position was already in the budget. Additionally, we will be looking at whether we can move employees around to make better use of the people we have. For example, we may have more employees than necessary in one area but have a need for additional employees on another part of campus. The process of figuring this out will be transparent and data driven.

Interim Provost Dr. Bookwalter – Academic Affairs

- **HLC Accreditation**
    - The university experienced a successful accreditation visit.
    - The HLC site team was highly impressed with Marshall's operations and processes.
    - The review team identified areas for improvement, which is a standard component of accreditation reviews.
    - The university received a positive exit interview and favorable preliminary report.
    - The final accreditation decision will move forward to the HLC board for formal review and approval.
- **Leadership Changes**
    - Chris Morrow – Dean of the College of Liberal Arts
    - Scott Davis – Dean of College of Health Professions.

  - Dr. Gautam Pillay – Vice President for Research
- **Dean Collaboration and Budget Management** – One of Dr. Bookwalter's responsibilities as Interim Provost was to integrate newly hired deans into the existing leadership structure.
  - The dean leadership team has worked effectively and collaboratively throughout the year.
  - The first year of implementing Marshall's new budget model presented challenges.
  - Despite these challenges, the university successfully avoided significant budget reductions heading into the new fiscal year.
  - Budget stabilization efforts have provided the institution with a greater degree of financial certainty moving forward.
  - A formal onboarding manual was developed to assist newly hired deans in understanding their responsibilities and institutional processes.
  - A collaborative approach helped navigate implementation of the new budget model.
- **General Education Redesign Initiative –** Dr. Bookwalter discussed ongoing efforts to redesign Marshall's General Education (Gen Ed) curriculum.
  - Significant work has been completed by the redesign committee.
  - Some activities were intentionally paused during the HLC accreditation visit to avoid implementing major changes while accreditation reviewers were on campus.
  - The project is now moving into its next phase.
  - Over the summer:
    - Governance groups will begin reviewing the proposed model.
    - The university community will have opportunities to preview the framework.
    - Feedback will be gathered regarding the structure and implementation of the proposed curriculum.
  - During Fall 2026:
    - Faculty and academic units will engage in extensive review and discussion.
    - Additional feedback and recommendations will be collected.
    - Modifications can still be made before final approval.
  - One goal of the redesign is to address modern educational needs that were not incorporated into the current model developed in 2010.
    - New areas of emphasis include:
      - Artificial Intelligence (AI) literacy
      - Financial literacy
      - Design thinking concepts and skills
  - While many traditional Gen Ed components will remain intact, the updated model is intended to better prepare students for contemporary workplace and societal demands.
  - Timeline:
    - Fall 2027 target implementation date.
    - The final model will continue to be refined based on campus feedback before implementation.
- **Student Retention Efforts –** Dr. Bookwalter highlighted continued efforts to strengthen student retention.
  - Brian Morgan is leading work with a dedicated task force focused on student success initiatives.

- The task force is examining methods to better coordinate existing student support services.
- The objective is to improve retention rates by creating stronger connections between student success programs and resources.

- **Enrollment Growth –** Enrollment trends are encouraging.
  - Marshall is approaching its fourth consecutive year of enrollment growth following an extended period of enrollment decline.
  - Current projections indicate enrollment growth ranging from approximately 1.1% to 3.1%.
    - This exceeds the minimum assumptions used in the university's budget planning process.
  - Dual Credit Expansion
    - The university is projecting approximately 2,400 dual-credit students for the upcoming year.
    - Dual-credit enrollment continues to represent an important component of overall enrollment growth.
  - Fall Enrollment Projections – Enrollment trends remain positive, supporting both institutional stability and financial health.
    - Current projections estimate total enrollment between 13,400 students and 13,900, including dual credit students.

Matt Tidd – CFO

Presentation slides can be found on pages 15-24.

- **Huron Assessment Engagement**
  - Matt announced the launch of a Huron assessment focused on identifying opportunities to improve institutional efficiency and long-term financial sustainability.
  - The engagement will focus on three primary areas:
    1. Cost Containment
       - The assessment will review shared administrative functions rather than academic units and will include areas such as finance, human resources, payroll, athletics, information technology, and facilities and operations.
       - Areas of analysis include:
         - Administrative staffing levels and organizational sizing
         - Strategic sourcing and purchasing practices
         - Contract management
         - Space utilization
         - Opportunities to leverage artificial intelligence
    2. Organizational Optimization
       - Huron will evaluate:
         - Organizational structure
         - Administrative processes

        - Shared service opportunities
        - Resource alignment across departments
        - AI-driven automation possibilities
      - The goal is to identify ways to improve operational efficiency while maintaining service quality.
   3. Revenue Enhancement
      - The engagement will also explore opportunities to generate additional revenue through:
        - Strategic partnerships
        - Better utilization of university assets
        - Technology transfer opportunities
        - Research-related revenue streams
        - Revenue-producing activities within administrative units
- The Huron engagement is expected to span approximately 14 weeks, with most substantive work occurring during the first 10 weeks.
- <u>Phase 1: Discovery and Benchmarking</u>
  - Activities will include:
    - Data Collection
    - Interviews with campus stakeholders
    - Peer benchmarking
    - Review of administrative functions and expenditures
  - Huron will develop initial hypotheses regarding potential opportunities for improvement.
- <u>Phase 2: Opportunity Identification</u>
  - During this phase:
    - Initial hypotheses will be evaluated in greater detail.
    - Areas identified as potential opportunities will undergo deeper analysis.
    - Regular updates will be provided to the Steering Committee and Budget Advisory Committee.
- <u>Phase 3: Implementation Planning</u>
  - Once opportunities have been identified, discussions will focus on:
    - Feasibility of implementation
    - Prioritization of recommendations
    - Timing and resource requirements
    - Strategic alignment with university goals
- <u>Weeks 11 – 14</u>
  - The final stage will focus on:
    - Refinement of recommendations
    - Additional stakeholder feedback
    - Implementation support and planning
- Governance Structure
  - Executive Sponsor – Brad Smith
  - Steering Committee – representatives from:

        - Athletics
        - Academic Affairs
        - Administration
        - Budget Office
        - Classified Staff
        - Non-Classified Staff
      - Additional support personnel include:
        - Brian Morgan (data support)
        - Bob Walker (data support)
        - Lisa Ransbottom (project coordination and scheduling)
  - Staff Council members will receive regular updates throughout the process.
- **Institutional Merit Waiver Simplification**
  - The Board of Governors approved a significant restructuring of Marshall's institutional merit scholarship program.
  - Applies only to incoming freshmen beginning Fall 2027.
    - Current students and students entering before Fall 2027 will not be affected.
  - Currently, Marshall offers 11 separate institutional merit scholarship categories.
  - Beginning Fall 2027, scholarships will be streamlined into four levels under a single John Marshall Scholarship brand:
    - John Marshall Level 1
    - John Marshall Level 2
    - John Marshall Level 3
    - John Marshall Level 4
  - While GPA and award amounts have been adjusted, the highest-tier John Marshall Scholarship remains unchanged.
  - The simplification is expected to:
    - Save approximately $800,000 per semester.
    - Generate nearly $2 million annually in savings initially.
    - Produce approximately $3 million in annual savings once fully implemented after four years.
- **Institutional Merit Waiver Stacking Policy**
  - The Board also approved changes to how institutional scholarship funds may be combined with other aid.
  - Institutional scholarship dollars could previously:
    - Be fully stacked with other aid.
    - Result in significant student refunds.
  - Marshall was found to be an outlier among peer institutions and within West Virginia in allowing unrestricted refundable institutional aid.
  - Beginning with Fall 2027, the following will apply to incoming students:
    - Institutional aid will function more as a "last-dollar" award.
    - Aid will first be applied to student charges.
    - Student accounts will be covered up to a zero balance.
    - Refunds generated from institutional aid will be capped at:
      - $750 per semester

            - $1,500 annually
        - Had this policy been in effect previously, the university would have realized approximately $500,000 in annual savings.
    - **Q:** Will student aid calculations include student housing charges?
        - **A:** Yes, on-campus housing charges are included as part of the student account balance when determining institutional aid eligibility and application.
    - **Q:** Will students receiving other scholarships and waivers (ex. HSTA) still qualify to receive merit funds?
        - **A:**
            - HSTA students remain eligible for institutional merit awards.
            - Students whose HSTA funding already covers all educational costs may still receive institutional merit funding up to the new refund cap.
            - If a student still has charges remaining after HSTA funding is applied, they may receive their full eligible merit award amount.
- **Metro Rate Expansion**
    - The Board approved a phased expansion of Marshall's Metro Tuition Rate program.
    - Phase One – Fall 2027
        - This expansion creates a true 150-mile radius around the university.
        - The current Metro Rate will expand beyond Ohio and Kentucky to include eligible counties within:
            - Indiana
            - Pennsylvania
            - Virginia
            - Tennessee
            - North Carolina
    - Phase Two – Fall 2028
        - A new Border State Benefit will be implemented.
        - Under this initiative, any student residing in a state that borders West Virginia will be eligible for the Metro Rate.
        - University leadership believes enrollment growth generated through this expansion will exceed break-even requirements and support future recruitment efforts.
- **Q:** Has Marshall examined programs available through the Academic Common Market to determine whether new academic offerings could help retain West Virginia students who currently leave the state to pursue unavailable programs?
    - **A:** Marshall regularly evaluates interest in prospective programs. Market analyses are conducted before new academic programs are proposed. However, the university cannot determine whether students attending out-of-state institutions would have otherwise enrolled at Marshall. Marshall receives approximately 8–9 Academic Common Market students annually.
- **FY26 Financial Projection Update**
    - Budgeted deficit: approximately $12 million
    - Projected actual deficit: approximately $10 million
    - Contributing factors:

        - Salaries and wages remaining on budget
        - Increased grants and contracts activity
        - School of Medicine grant performance
        - Property sales
        - Reduced spending on supplies and services
        - Savings generated through Save-to-Serve initiatives and contract management efforts
- **Financial Planning**
    - Although enrollment projections currently support budget assumptions, leadership continues to monitor potential risks if growth falls below the planned 1% increase.
    - A 2020 budget workgroup identified:
        - 22 potential cost-saving initiatives
        - Nearly $27 million in possible savings opportunities
        - While not all recommendations were implemented, Matt stated the process serves as a framework for future scenario planning.
    - Several long-term strategies are already underway:
        - The university is evaluating a tuition pricing strategy based on inflation cost plus 0.5%.
        - Merit waiver simplification
        - Institutional aid stacking reforms
        - Metro Rate expansion
        - Schedule optimization initiatives
        - Expanded use of artificial intelligence
        - Huron assessment recommendations
        - Additional Budget Advisory Committee review and planning
- **Q:** What is the purpose of maintaining a separate procurement ticket process when it duplicates effort, limits visibility, requires all questions to be routed through the ticket system rather than allowing direct communication with Procurement, and extends the overall timeline for completing requisitions, and can this step be eliminated in favor of using Marketplace as the primary system for requisition tracking and communication?
    - **A:** See p.24 for an extensive response from Matt.
- **Procurement Training**
    - Training was launched campus-wide several months ago.
    - Completion is mandatory for employees involved in procurement-related responsibilities.
    - Employees who do not complete the training may be unable to continue participating in procurement processes in the future.
    - Training can be found on the myMU training portal.

Bruce Felder – Human Resources

- **MURC Leadership Appointment**
  - After the successful completion of a national search for a new Executive Director of MURC, Dr. Gautam Pillay has been selected for the position and will begin on June 29.
  - He described Dr. Pillay as a highly qualified administrator who has previously served as CEO of multiple research organizations and achieved strong results throughout his career.
- **New PEIA Member Portal**
  - PEIA is implementing a new user portal, with an anticipated go-live date in August 2026.
  - The current portal remains active and employees should continue using it for address updates, dependent information changes, and other benefit-related updates.
  - No immediate action is required from employees.
  - Bruce advised employees that communications regarding the new portal are legitimate and should not automatically be assumed to be phishing or spam attempts.
- **PEIA Audits**
  - PEIA continues to conduct eligibility audits and will likely continue these efforts over an extended period.
  - Spousal Surcharge Audit
    - This audit is being conducted through PEIA's auditing partner, Myers and Stauffer.
    - Employees may receive emails requesting verification of:
      - Whether a spouse has health insurance available through another employer.
      - Whether a spouse appropriately qualifies for exemption from the spousal surcharge.
  - Divorce Audit
    - PEIA's divorce audit remains ongoing.
    - Employees who have recently divorced are required to notify PEIA and remove former spouses from their coverage unless a court order requires continuation of coverage.
    - Employees are encouraged to make these updates promptly to avoid eligibility or compliance issues.
  - Due to the spousal surcharge audit, PEIA has extended the opportunity for employees to make changes outside the normal open enrollment period through July 6.
    - Employees who discover that an ineligible spouse remains on their plan may use this additional window to remove that spouse.
  - Bruce stated that he did not have specific information regarding Myers and Stauffer's processing turnaround times. If employees are worried about getting theirs processed on time, He encouraged employees who have submitted documentation to:
    - Contact Myers and Stauffer directly for updates on their submission status.

        - Employees may also contact benefits@marshall.edu. HR can attempt to serve as a liaison between the employee, PEIA, and the third-party auditing firm.

- **Pay Increase Letters**
    - Pay increase letters were mailed on June 9th.
    - Faculty salary increase information will be included in their annual appointment notices.
    - Staff salary increase letters were mailed to departments and should have been received by employees.
    - Employees who have not received their letter should contact Human Resources or compensation@marshall.edu.
- **Juneteenth (June 19th) Holiday Clarification**
    - Juneteenth became a federal holiday in 2021.
    - It is not automatically a West Virginia state holiday.
    - State employees may receive the day off only if the Governor issues a proclamation recognizing the holiday for state agencies.
        - Proclamations were issued in 2021, 2022, and 2023.
        - No proclamation was issued in 2025 or 2026.
    - Marshall University had not received authorization to close for Juneteenth.
    - Employees were instructed to plan for normal business operations and regular work schedules on June 19.

Heather Smith – Board of Governors Proxy

BOG MEETING 06.10.26.

Official meeting minutes are located on the MU Board of Governors webpage.

These are condensed and notes from BOG rep. Carleen O'Neill

Athletics Committee (quick highlights)

- Sydni Burko was a highlighted student, softball MVP. Please watch this link: Bing Videos

- **Spring 2026 Department GPA: 3.43**

  All teams above 3.0, Teams with Record Semester Team GPAs:

  • Men's Basketball – 3.43

  • Women's Basketball – 3.61

  • Football – 3.27

  • Women's Soccer – 3.78

  • Volleyball – 3.84

  • 86 Student-Athletes with 4.0

  Softball

  • Third appearance in NCAA Tournament in program history (2013, 2017).

- Head coach Morgan Zerkle first to make NCAA Tournament as a player and a coach.
- Herd was 15-3 at Dot Hicks Field this season.
- Sydni Burko was named SBC Player of the Year and SBC
  - New Head Stunt Coach: Evynn Richard-Welcome

Please support our sporting events, there are several great ticket packages to take advantage of, go to Herd Zone and check your emails!

Academic Committee

Action items:

- Approval of Board of Governors Rule No. AA-17 – Faculty Conduct and Disciplinary Procedures– *approved.*
- Approval of 2025-26 Academic Program Review- *approved.*
  - This is Interim Provost Robert Bookwalter's last meeting and report, he certainly has left a legacy and we are grateful!

Provost report: (Highlights)

Center for Student Success: 21 campus employees were recognized as Student Success Champions, reflecting university-wide commitment to retention, student support, and student-centered engagement across all colleges and units.

Online Education Marshall Online completed a campus-wide Digital Accessibility Fix-a-Thon, generating 546 accessibility fixes in one day to advance compliance and improve digital learning access for students.

College of Education and Professional Development the HELP Program secured a $40,000 Teubert Foundation to support visually impaired students and expand services through a shared psychologist model and a new testing center initiative.

Full Board Meeting

April 2026 Meeting Minutes were approved.

Chair, Jeff Sheilds term has ended, 8 years; he will be remembered and missed. Student Representative Connor Waller is also met his term, along with William Smith Sr., 8 years, their contribution of time and knowledge will always remain with Marshall for All, Marshall Forever!

Finance, Audit and Facilities Planning Committee:

Approval of FY2027-32 Capital Project List- *approved*

Authorization of Reallocation of Funds from the State Institutions of Higher Education Deferred Maintenance Grant Program- a*pproved.*

Advisory Services- *Nothing during this reporting period*

Executive session- no action item was presented
Next meeting is Aug. 3-4, 2026 (Learning retreat)

Minutes

- The May 21st, 2026 minutes were approved as written.

Classified Staff Council Committees

- **Elections/Communications Committee – Nina Barrett** – No report.
- **Legislative Committee – Larry Morris** – No report.
- **Personnel/Finance Committee – Becky Lusher** – No report.
- **Physical Environment Committee – Becky Lusher**
    - Acknowledged Community Cares Project work.
        - Multiple dumpsters of trash
        - New paver pad near freshman dorms
        - Putting more chairs and hammocks out
        - Facilities and operations has been working to get any ballasts donated to campus and used for landscaping that would otherwise be thrown away.
        - Lots of deep cleaning
    - Elevator work discussed for Smith, Science & Corbly.
    - Addressed a parking lot between the Welcome Center and the Catholic Newman Center that floods easily.
    - No Parking signs replaced in circle around John Marshall statue.
    - Public Safety is working to get Park Mobile on campus by fall semester to give the option to pay for parking through a mobile app.
- **Staff Development/Service Committee – Tiffani Daniels –** No report.

Announcements

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

FINANCE UPDATE TOPICS

- Huron Institutional Resilience Assessment
- Merit Waiver Restructure
- Metro Rate Expansion
- FY26 Projection
- FY27 and Beyond Scenario Planning
- Questions

HURON

Marshall University
Institutional Resilience Assessment

What we will assess together

01

Cost containment

Huron will conduct targeted analyses **across all administrative functions to identify cost reduction and efficiency opportunities.**

Illustrative examples we may identify include:

- Right-sizing administrative departments
- Strategic sourcing
- Space utilization optimization
- Expanded AI usage

02

Organizational optimization

Huron will assess Marshall's **organizational structure and operating processes to identify opportunities for optimization.**

Illustrative examples we may identify include:

- Reduction of management layers
- Shared services opportunities
- Realignment of distributed administrative efforts
- Outsourcing back-office functions
- AI-driven automation

03

Revenue enhancement

Huron will evaluate Marshall's current revenue model and financial position to identify opportunities for **revenue growth and diversification.**

Illustrative examples we may identify include:

- Strategic partnerships
- Campus asset monetization
- Expanded non-academic programming
- Technology transfer & research revenue

Project timeline: June - September 2026

Phase 1	Phase 2	Phase 3	Phase 4
Project initiation	**Opportunity identification**	**Implementation planning**	**Refinement**
Weeks 1-2 Jun 22 - Jul 4	Weeks 3-8 Jul 7 - Aug 15	Weeks 9-10 Aug 18 - Aug 29	Weeks 11-14 Sep 1 - Sep 25
• Project kickoff • Data & interview requests • Preliminary benchmarking & diagnostic assessment • Peer benchmarking (IPEDS, HERD, NACUBO...) • Hypothesis development workshop	• Deep-dive cost containment analyses • Organizational optimization assessment • Revenue enhancement analysis • Bi-weekly Steering Committee touchpoints (Weeks 4, 6, 8)	• Opportunity prioritization with Steering Committee • High-level implementation roadmap (near/mid/long-term) • Opportunity forecast model & scenario analysis • Final executive presentation	• Stakeholder feedback review & integration • Deliverable updates based on feedback • Decision-making & implementation planning support
Key deliverable Confirmed governance; preliminary benchmarking; initial hypotheses	**Key deliverable** Opportunity inventory with financial impact ranges & benchmarking	**Key deliverable** Prioritized roadmap; multi-year opportunity forecast; final deck	**Key deliverable** Updated deliverables; implementation planning conversations

Project Roles and Members

Role	Names and Titles
Executive Sponsor	Brad Smith - President
Steering Committee	Alissa Davis - Student Body President Rick Gage - Faculty Senate President Richard Egleton - Graduate Council Laci Bittinger - Classified Staff Brian Morgan - Non Classified Staff Jodie Penrod - Cabinet / Chief Information Officer Niesha Campbell - Athletics TBD - Academic Affairs Matt Tidd - Chief Financial Officer Katrina Eskins - Budget Director
Data Support	Brian Morgan - VP Institutional Research Bob Walker - Director Finance IT
Project Support	Lisa Ransbottom - Executive Assistant

Grow Students, Not Fees

APPROVED: MERIT WAIVER STRUCTURE

CURRENT					
	AND				
Name	HS GPA Requirement	Test Score Requirement	Resident	Metro	Non-Resident
John Marshall	>= 3.9	ACT >= 30 or SAT >= 1360	$ 5,500	$ 7,966	$ 14,000
John Laidley	>= 3.7	ACT >= 28 or SAT >= 1300	$ 4,500	$ 6,196	$ 12,000
Board of Governors	>= 3.5	ACT >= 26 or SAT >= 1230	$ 4,000	$ 4,426	$ 10,500
Presidential	>= 3.25	ACT >= 24 or SAT >= 1160	$ 3,000	$ 3,540	$ 8,000
A. Michael Perry	>= 3.0	ACT >= 22 or SAT >= 1100	$ 2,500	$ 2,213	$ 6,000
Opportunity Grant	>= 3.0	ACT >= 20 or SAT >= 1030-1090	$ 2,000	$ 1,770	$ 5,000
Get Started Scholarship	>= 4.2		$ 3,500	$ 4,647	$ 7,000
	>= 3.8 - 4.19		$ 2,500	$ 3,319	$ 5,000
	>= 3.5 - 3.79		$ 1,500	$ 1,991	$ 3,000
	>= 3.2 -3.49		$ 1,250	$ 1,660	$ 2,500
	>= 3.0 - 3.19		$ 750	$ 996	$ 1,500

PROPOSED					
	OR				
Name	HS GPA Requirement	Test Score Requirement	Resident	Metro	Non-Resident
John Marshall					
Level 1	>= 3.9	ACT >= 30 or SAT >= 1360	$ 5,500	$ 8,000	$ 14,000
Level 2	>= 3.8		$ 3,000	$ 4,200	$ 9,000
Level 3	>= 3.5		$ 2,000	$ 3,000	$ 7,000
Level 4	>= 3.0		$ 1,250	$ 2,000	$ 5,000

Merit Waiver Simplification

- Fall 2027 incoming freshman class
- Reduce current structure of **11** merit waivers **down to 4**
- All merit waivers to be named for **John Marshall**
  - John Marshall will have **four levels** based on GPA
  - No changes to current top-level John Marshall requirements or amounts

Financial Impact

- **~$800,000** savings per semester; **~$1.6M** annually
- After full implementation (4 years): **~$3M** annually

Grow Students, Not Fees

APPROVED: FINANCIAL AID STACKING

Approved for Fall 2027 Freshmen

Eliminate the ability for merit waivers to be 100% stackable on top of other financial aid sources. The concept of **"last dollar in"** for institutional merit waivers would get student's **account to $0** *and* allow for a maximum **$750 refund per semester** to cover books and other expenses.

Impact: The fall 2025 freshman class received ~$2.8M in merit waivers and $1.2M in refunds.

Under this proposed structure, the university would have saved ~$500,000.

Benchmarking: Researched the merit structure and stacking policies of 40+ institutions and Marshall University is an outlier in allowing institutional dollars to be stacked and fully refundable.

FY26 PROJECTION

	Marshall University				
	FY24 Actuals	FY25 Actuals	FY26 Projection	FY26 Budget	FY26 Projection vs FY26 Budget
Operating Revenues					
Student Tuition and Fees (net of allowance)	72,286,000	65,616,000	73,600,000	76,146,000	(2,546,000)
Grants and Contracts	53,841,000	122,880,000	141,620,000	122,439,000	19,181,000
Auxiliary Enterprise Revenue	38,531,000	30,242,000	35,327,000	43,827,000	(8,500,000)
Other Operating Revenues	16,987,000	12,804,000	10,998,000	12,303,000	(1,305,000)
Total Operating Revenues	238,006,000	231,542,000	261,545,000	254,715,000	6,830,000
Operating Expenses					
Salaries and Wages	159,747,000	164,392,000	165,776,000	166,072,000	(296,000)
Benefits	34,460,000	46,402,000	43,051,000	41,518,000	1,533,000
Supplies and Other Services	86,088,000	95,019,792	82,454,000	95,954,000	(13,500,000)
Utilities	11,137,000	12,277,000	11,625,000	12,450,000	(825,000)
Scholarships and fellowships	27,694,000	18,312,000	17,525,000	27,100,000	(9,575,000)
Depreciation	21,252,000	25,692,000	23,394,000	20,500,000	2,894,000
Other Operating Expenses	203,000	229,000	-	-	-
Total Operating Expenses	340,581,000	362,323,792	343,825,000	363,594,000	(19,769,000)
Operating Income (Loss)	(102,575,000)	(130,781,792)	(82,280,000)	(108,879,000)	26,599,000
Nonoperating Revenues (expenses)					
State Appropriations	116,418,000	76,037,000	77,108,000	76,188,000	920,000
Federal Pell Grants	18,965,000	22,872,000	22,900,000	22,500,000	400,000
Gifts	1,804,000	3,922,000	2,750,000	2,550,000	200,000
Investment Income	11,383,000	6,508,000	7,300,000	2,750,000	4,550,000
Interest on indebtedness	(7,265,000)	(7,775,000)	(7,670,000)	(7,242,000)	(428,000)
Fees assessed by Commission for Debt Service	(285,000)	(234,000)	(285,000)	(285,000)	-
Other nonoperating revenues (expenses)	(673,000)	(2,000)	-	-	-
Total Nonoperating Revenues (expenses)	138,348,000	101,328,000	102,103,000	96,461,000	5,642,000
Increase/Decrease in Net Assets	35,773,000	(29,453,792)	19,823,000	(12,418,000)	32,241,000
One-time adjustments		-	(30,000,000)	-	(30,000,000)
Capital Grants and Gifts	(50,348,866)	11,330,000	-	-	-
Increase/Decrease in Net Assets - Adjusted	(14,575,866)	**(18,123,792)**	**(10,177,000)**	**(12,418,000)**	**2,241,000**

ANALYSIS

- **Operating Revenue (+$6.8m)**
  - **Auxiliary Revenue (-$8.5m):** Primarily due to the change in scholarship allowance calculation offset by increases Housing revenue
  - **Tuition and Fees (-$2.5m):** Increased gross tuition offset by change in scholarship allowance calculation
  - **Grants and Contracts (+$19.2m):** Increase due to SOM building State Grant (+$30m) offset by decreases in federal and other state grants at MURC and the SOM
  - **Other Operating Revenue (-$1.3m)**
- **Non-Operating Revenues (+$5.6m)**
  - **Investment Income (+$4.6m):** Meketa portfolio actual gains through April
  - **Pell Grants ($0.4m):** Continued increases in Pell student population
- **Operating Expenses (-$19.8m)**
  - **Salaries and Benefits (+$1.2m):** Increased projection to align with FY25 actuals and capture FY26 year-to-date activity.
  - **Supplies and Other Services (-$13.5m):** Decrease in supplies due to decreased federal and state grants for MURC and the SOM.
  - **Scholarships (-$9.6m):** Due to change in scholarship allowance calculation. Scholarship expense decreased while the tuition and fee allowance increased.

FY27 and Beyond
Scenario Planning

What if... *Enrollment falls below 1% growth assumption*

FY27

- What can be done within the current fiscal year?
- Budget Advisory Committee engaged to provide recommendations
  - **June 2020** Budget Work Group identified **22** possible **areas** of **savings** totaling **$26.5m**

FY28 and Beyond

- Tuition and Fee increases: **Inflation + 0.5%**
- Merit Waiver Simplification – **Approved**
  Institutional Aid Stacking Policy - **Approved**
- Metro Rate Expansion - **Approved**
- Scheduling Efficiencies: Ad Astra – **In Process**
- AI Capabilities – **Summer 2026**
- Huron Financial Institutional Resilience Engagement – **In Process**

QUESTION RECEIVED IN ADVANCE

Question: What is the purpose of maintaining a separate procurement ticket process when it duplicates effort, limits visibility, requires all questions to be routed through the ticket system rather than allowing direct communication with Procurement, and extends the overall timeline for completing requisitions, and can this step be eliminated in favor of using Marketplace as the primary system for requisition tracking and communication?

Response:

Consistent Communication

During the second quarter of FY 2026, Marshall University worked with the Marshall Advanced Manufacturing Center to support an Action Learning Team (ALT) reviewing procurement processes. The audit found that 70% of requisitions pending more than two business days had already received a Marketplace comment or status update, and the average cycle time was approximately 2.5 days from requisition entry to purchase order completion. This indicates that most requisitions were processed in less than 2 days and required no additional communication with departments.

However, the average also reflects extended legal negotiations and other project delays, which exceeded 2.5 days. The ALT determined that these longer, more complex projects lacked sufficient transparency during the pre-requisition phase. As a result, the ALT recommended implementing a ticketing system using Salesforce, like the one used by Information Technology, to provide centralized status updates accessible to departmental end users. This system allows Procurement Services and the Office of General Counsel to communicate progress in real-time with full visibility to requestors.

Supplier Requests

Supplier requests were separated from purchase requests within the ticketing system because they represent distinct workflows with different stakeholders, documentation requirements and processing paths. This separation ensures that each request is routed directly to the appropriate Procurement Services staff member.

Ticket Visibility

The ticketing system assigns a single case owner because the departmental end user initiating the request is expected to serve as the project lead. This individual is responsible for providing documentation and responses needed to advance the request. When additional stakeholders must be included, departments may identify those individuals and request that Procurement Services tag them within the ticketing system or Marketplace, both of which support user tagging for broader visibility. These expectations should be established within the campus department and then communicated to Procurement Services.

Salesforce allows only one case owner per ticket to maintain clear accountability and accurate reporting. Multiple owners would break several core functions that Salesforce relies on to keep service operations clean and auditable. A case has one owner because someone must be ultimately accountable, and Salesforce's automation and reporting rules depend on a single point of responsibility.

Dual Entry

During implementation, the ALT, Procurement Services, and IT recognized that using both the ticketing system and Marketplace would create dual entry and some duplication of effort. However, this was deemed necessary to ensure full trackability and accountability during the pre-requisition phase. While Marketplace includes a comment feature, inconsistent use by campus departments slowed response times and created internal confusion. Centralizing all requests through the ticketing system provides a single point of entry and enables Procurement Services to manage projects more effectively. With that in mind, any potential automation such as a connector between Salesforce and Marshall Marketplace could be considered at a later time; however, this type of implementation is not available to us currently.

Conclusion

We hope this detailed response clarifies each concern. Regarding the question of whether the ticketing system has extended project timelines, the average ticket approval time is 12.8 days, with only 6% of that time attributable to Procurement Services. The remaining 94% reflects waiting periods involving campus departments, suppliers, the State of West Virginia, and other external entities. Additionally, the average Marketplace cycle time is now 1.5 days. The ability to generate this level of data reflects the need the ALT identified during its work with Procurement Services last year.

Classified Staff Council Meeting June 18th, 2026 Attendance *Classified Staff Council members are in bold

Adams, Diana
Adkins, Jason
Adkins, Ryan
Agnello, Tricia
Akagbue, Bertha
Aliff, Matt
Allen, Lisa
Allen, Mike
Anders, Brandi
Arthur, Stacey
Atkins, Christopher
Bailey, Bonnie
Bailey, Cara
Bailey, Travis
Baldwin, Jesse
Ball, Tricia
Barrett, Nina
Bell, Jodi
Biggs, Michelle
Bird, Hannah
Bittinger, Lacie
Blaisdell, Heidi
Blankenship, Stephanie
Bond, Cassi
Bookwalter, Robert
Booth, Jim
Booth, Sharon
Bowen, John
Boyce, Charlotte
Bradley, Johnny
Branham, Maddy
Brannock, Kathy
Brumfield, Mark
Brydie-Johnson, Lalicia
Buchanan, Amy
Burgess, Brent
Bush, Jesseka
Byrd, Kevin
Canterbury, Thomas
Cantrell-Johnson, Sonja
Carey, Allison
Carico, Paul
Carothers, Kelly
Chaffin, Perry
Childers, David
Collins, Tabby
Contreras, Kassandra
Copenhaver, Caroline
Counts, Katie
Crawford, Dean
Curry, Ella
Cyrus, Meg
Daniels, Tiffani
Davis, Sarah
Dean, Benjamin
Decker, Kaleigh
Dragovich, Isabella
Drake, Laura A
Dunmore, Holly
Edmonds, Ashley
Elliott, Chloe
Ellison, Marc
Eskins, Katrina
Evans, Howard
Felder, Bruce
Fry, Austin
Gallaher, Melanie
Gates, Lisa
Gibson, Hilary
Gooding, Grace
Greenwood, Kenneth
Hall, Cody
Hanrahan, Elizabeth
Hawthorne, Justin
Hendrick, Ashley
Hill, Michael
Himes, Eric
Hoffman, Austin
Holiskey, Sam
Holmes, Linda
Hunter, Todd
Hurula, Carol
Jacobs, Brandi
Jarrell, Jimmy
Kennedy, Paige
Kennedy, Taylor
Kennedy-Rickman, Amy
King, Erin
Kompanek, Simone
Langer, Jonathan
Lapole, Christopher
Layne, Mary
Legg, Jay
Lemon, Leeann
Lester, Amy
Levering, Susan
Lewis, Olivia
Longoria, Jacob
Lopez, Sebastian
Lucas, Chase
Lucas, Taylor
Lusher, Becky
Lusher, Bryce
Marcum, Darian
Martin, Madison
Martin, Nick
Mathis, Anita
Maynard, Becky
Maynard, Kevin
Maynard, Lisa
McComas, Karen
McDade, Michael
McDavid, Cristina
McDavid, Sherry
McDonald, Carissa
McGhee, Otesha
McKenna, Char
McKinley, Garnet
McSweeney, Teresa
Meade, Mitzi
Means, Amanda
Meddings, Teresa
Meek, Rebecca
Metcalf, Larry
Midkiff, Glen
Midkiff, Susan
Milam, Darrell
Moore, Valerie
Morgan, Brian
Morris, Larry
Morrison, Michelle
Mummert, Carl
Murphy, Katherine
Murray, Sarah
Nancy Floyd
Neace, Becky
Nelson, Jeffrey
Pack, Rebecca
Painter, Ginny
Payne, Leah
Puckett, Tabby
Ransbottom, Lisa
Rexroad, Elizabeth
Rhodes, Jessica
Riley, Danielle
Roberts, Alice
Rose, Angie
Rowe, Kandice
Saunders, Patricia
Saxton, Caleb
Serrat, Marcos
Sharp, Tyler
Sheets, Elizabeth
Simms, Marcie
Sims, Kristin
Slate, Nick
Smith, Brad
Smith, Heather
Spears, Julia
Spradlin, Wes
Starcher-Patton, Autumn
Stephens, Sarah
Tambaliuc, Geanina
Taylor, James
Taylor, John
Taylor, Robin
Thomas, Erica
Thompson, Mary
Tidd, Matt
Trapp, Kyle
Tresch-Reneau, Nancy
Ulrich, Sarah
Vance, Ryan
Vineyard, Jimil
Walker, Bob
Walker, Lacey
Waller, Mary
Weaver, Amy
Wheeler, Michelle
Wiley, Denise
Williams, Allen
Williamson, Sabrina
Wintz, Kathi
Woods, Cameron
Workman, Missy
Xu, Cindy
Young, Howard
Young, Miriah