CAMPUS FORUM

September 17, 2013
Strategic Plan

• Approved by Board of Control on April 27, 2012

✔ Major Goals Remain Same
  ➢ People
  ➢ Distinctive Education
  ➢ Research/Scholarship/Creativity

• http://www.mtu.edu/stratplan/
BUDGET
## CURRENT FUND FY13

(in Thousands)

<table>
<thead>
<tr>
<th></th>
<th>Original Projection</th>
<th>Preliminary Close</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td>$257,840</td>
<td>$253,430</td>
</tr>
<tr>
<td><strong>Expense</strong></td>
<td>$(257,397)</td>
<td>$(252,723)</td>
</tr>
<tr>
<td><strong>Net Income</strong></td>
<td>$443</td>
<td>$707</td>
</tr>
<tr>
<td><strong>Current Fund Balance</strong></td>
<td>$12,931</td>
<td>$13,195</td>
</tr>
</tbody>
</table>

Note: Current Fund includes General Fund, Designated Fund, Auxiliaries, Retirement and Insurance, and the Expendable Restricted Funds.
Balance Sheet

Condensed Statement of Net Assets

as of June 30, 2013
(unaudited - in thousands)

<table>
<thead>
<tr>
<th></th>
<th>University</th>
<th>Tech Fund</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assets</td>
<td>$23,491</td>
<td>$7,805</td>
<td>$31,296</td>
</tr>
<tr>
<td>Noncurrent Assets:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capital Assets, net</td>
<td>253,672</td>
<td>-</td>
<td>253,672</td>
</tr>
<tr>
<td>Other Noncurrent Assets</td>
<td>25,000</td>
<td>112,032</td>
<td>137,032</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$302,163</td>
<td>$119,837</td>
<td>$422,000</td>
</tr>
<tr>
<td><strong>LIABILITIES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Liabilities</td>
<td>$21,115</td>
<td>$813</td>
<td>$21,928</td>
</tr>
<tr>
<td>Noncurrent Liabilities</td>
<td>84,350</td>
<td>4,134</td>
<td>88,484</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td>$105,465</td>
<td>$4,947</td>
<td>$110,412</td>
</tr>
<tr>
<td><strong>NET ASSETS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments in capital assets, net of related debt</td>
<td>$168,882</td>
<td>-</td>
<td>$168,882</td>
</tr>
<tr>
<td>Other net assets, restricted and unrestricted</td>
<td>27,816</td>
<td>114,890</td>
<td>142,706</td>
</tr>
<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td>$196,698</td>
<td>$114,890</td>
<td>$311,588</td>
</tr>
</tbody>
</table>
## State of Michigan

### Proposed Capital Outlay Plan

<table>
<thead>
<tr>
<th>Rank</th>
<th>Project Name</th>
<th>Gross Sq. Ft. New</th>
<th>Gross Sq. Ft. Renovated</th>
<th>Total Project Cost (000's)</th>
<th>State Funds (000's)</th>
<th>Est. Const. Univ. Funds (000's)</th>
<th>Start/End</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Advanced Energy Research Laboratories</td>
<td></td>
<td>122,500</td>
<td>$19,872</td>
<td>$14,623</td>
<td>$5,249</td>
<td>2015 – 2017</td>
</tr>
<tr>
<td>2</td>
<td>Human Health Research Center</td>
<td>100,000</td>
<td></td>
<td>$35,000</td>
<td>$26,250</td>
<td>$8,750</td>
<td>2016 – 2018</td>
</tr>
<tr>
<td>3</td>
<td>Net-Positive Exergy Microgrid Research Building</td>
<td>80,000</td>
<td></td>
<td>$29,000</td>
<td>$21,750</td>
<td>$7,250</td>
<td>2017 - 2019</td>
</tr>
</tbody>
</table>
2014 Merit Adjustment Timeline

September 30
Salary Worksheets to Dept.

October 18
Worksheets return to H.R.

November 4-8
Employees Notified

January 5, 2014
Effective Date

January 24, 2014
Paycheck with Adjustment

*Unions Negotiated Separately
2014 Benefits

Benefits Liaison Group (BLG)
- Meet on October 9
- Finalize recommendations

Considerations for 2014:
- Consider eliminating PPO plan
- Consider introducing employee premium on the HDHP
- Consider incentive-based HSA funding (individual/group)
- Review Medical opt-out credit
ENROLLMENT
<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>5623</td>
<td>5617</td>
</tr>
<tr>
<td>Graduate</td>
<td>1322</td>
<td>1359</td>
</tr>
<tr>
<td>Total</td>
<td>6945</td>
<td>6976</td>
</tr>
</tbody>
</table>
New COE female students

- New COE Graduate Females
- New COE Undergraduate Females

<table>
<thead>
<tr>
<th>Year</th>
<th>New COE Graduate Females</th>
<th>New COE Undergraduate Females</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>20</td>
<td>144</td>
</tr>
<tr>
<td>2003</td>
<td>34</td>
<td>118</td>
</tr>
<tr>
<td>2004</td>
<td>26</td>
<td>108</td>
</tr>
<tr>
<td>2005</td>
<td>24</td>
<td>117</td>
</tr>
<tr>
<td>2006</td>
<td>35</td>
<td>116</td>
</tr>
<tr>
<td>2007</td>
<td>14</td>
<td>122</td>
</tr>
<tr>
<td>2008</td>
<td>34</td>
<td>152</td>
</tr>
<tr>
<td>2009</td>
<td>31</td>
<td>136</td>
</tr>
<tr>
<td>2010</td>
<td>41</td>
<td>130</td>
</tr>
<tr>
<td>2011</td>
<td>41</td>
<td>171</td>
</tr>
<tr>
<td>2012</td>
<td>50</td>
<td>171</td>
</tr>
<tr>
<td>2013</td>
<td>64</td>
<td>185</td>
</tr>
</tbody>
</table>
Female Engineering Enrollment

<table>
<thead>
<tr>
<th>Year</th>
<th>Graduate Female</th>
<th>U-Grad Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>85</td>
<td>669</td>
</tr>
<tr>
<td>2003</td>
<td>108</td>
<td>615</td>
</tr>
<tr>
<td>2004</td>
<td>108</td>
<td>559</td>
</tr>
<tr>
<td>2005</td>
<td>107</td>
<td>505</td>
</tr>
<tr>
<td>2006</td>
<td>119</td>
<td>519</td>
</tr>
<tr>
<td>2007</td>
<td>114</td>
<td>526</td>
</tr>
<tr>
<td>2008</td>
<td>122</td>
<td>551</td>
</tr>
<tr>
<td>2009</td>
<td>120</td>
<td>595</td>
</tr>
<tr>
<td>2010</td>
<td>144</td>
<td>586</td>
</tr>
<tr>
<td>2011</td>
<td>156</td>
<td>640</td>
</tr>
<tr>
<td>2012</td>
<td>199</td>
<td>674</td>
</tr>
<tr>
<td>2013</td>
<td>192</td>
<td>714</td>
</tr>
</tbody>
</table>
Domestic Student Diversity

- Pacific Islander
- African American Non-Hispanic
- Hispanic American
- Asian American
- American Indian
- Multiracial
- Domestic underrepresented percentage
Total Domestic and International Diversity

- Pacific Islander
- African American Non-Hispanic
- Hispanic American
- Asian American
- American Indian
- Multiracial
- International

Total diversity percentage:
- 16% in 2002
- 16% in 2003
- 15% in 2004
- 15% in 2005
- 15% in 2006
- 16% in 2007
- 16% in 2008
- 17% in 2009
- 18% in 2010
- 20% in 2011
- 21% in 2012
- 21% in 2013
- 22% in 2014

Teaching

Learning

Student Success
## Michigan Technological University

### Tenured/Tenure Track Faculty by Gender

**2008-09 through 2013-14**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>241</td>
<td>244</td>
<td>253</td>
<td>261</td>
<td>254</td>
<td>252</td>
</tr>
<tr>
<td>Female</td>
<td>71</td>
<td>85</td>
<td>89</td>
<td>93</td>
<td>94</td>
<td>89</td>
</tr>
<tr>
<td>Total</td>
<td>312</td>
<td>329</td>
<td>342</td>
<td>354</td>
<td>348</td>
<td>341</td>
</tr>
</tbody>
</table>

### Percent Female

|            | 22.8    | 25.8    | 26.0    | 26.3    | 27.0    | 26.1    |

**Note:** Figures include all tenured and tenure track instructional faculty. Also includes those faculty on sabbatical or on unpaid leave of absence. Deans, associate deans, department chairs, executives and professional staff with tenure are excluded.
Teaching-Learning-Student Success

Waino Wahtera Center for Student Success

- Consolidation of Student Support, Financial Aid and Counseling
- Increased support to Learning Centers
Teaching-Learning-Student Success

William G. Jackson Center for Teaching & Learning

- Classroom Technology
- Testing Facilities
- Training Facilities
- Blended and Online Learning Support
Teaching-Learning-Student Success

Information and Learning Commons

at Van Pelt & Opie Library

- Support for Online Information
- First-Class Computing Space
- First-Class Collaboration Space
Information Technology Services / Library Services
J. Robert Van Pelt and John and Ruanne Opie Library

Information Learning Commons Development

Design Solutions: 1st Floor
Design Solutions: 1st Floor
John Rovano Plaza

Made Possible by a Gift from Dave Brule, Sr. ’72
RESEARCH
Research Expenditures, FY13

$70.0 MM
- 2.8%
FY13 Sponsored Program Awards

+ 11%

+ 11%
U.S. News Best Colleges Ranking
(Undergraduate)

• Ranked 117th among national universities

• Ranked 57th among public national universities

• Named a Military Friendly School, an honor earned by only 20 percent of schools in the country

• Listed as an “A-plus School for B Students”
Business Insider

• 22\textsuperscript{nd} among top 25 most underrated schools listed in U.S. News and World Report
“Is College Worth It”
by William Bennett
(Former Secretary of Education)

2012
• 102 among 1248

2013
• 77 among 1511
Payscale

- 18\textsuperscript{th} in Nation among 437 public universities
- 77\textsuperscript{th} among all universities
Washington Monthly
(Undergraduate)

• Ranked 29th among national universities for “Most Bang for the Buck”
Peace Corps

#1 in Nation for 8th year in a row
Bike Friendly University
By League of American Bicyclists
Continuous Improvement Using Lean Fiscal Year 2013 Highlights

• 25 Formal Lean Improvement Events took place
  – Many informal improvements not tracked
  – 89 formal events since 2008
• $70,560 estimated annual cost savings/containment (FY13)
• 127 new employees and students introduced to Lean
  – 600 employees and students since 2008
• The comprehensive Fiscal Year Report is available online at http://www.mtu.edu/improvement/resources/tools-templates/files/Lean_Annual_Report.pdf
UAW Certification Program

Purpose
1. Develop a Certification Program for UAW employees in cooperation with Gogebic Community College
   • Projected start date: Fall 2014
2. Enhance the skill set of UAW employees
   • A survey was sent to all UAW employees requesting feedback on skills of interest.
   • A questionnaire was sent to all UAW supervisors, Deans, Directors, and Executive Team members requesting feedback on the skills desired in clerical support.
3. Provide continued education for UAW employees

UAW Certification Committee
Catherine Burns  Amanda Cadwell
Christina Sarazin  Lori Weir
New University Safety Initiatives

- MIOSHA Inspection
- MSDS online
- Safety Training
- Emergency Response Posters
- New Occupational Safety and Health Services Web Page (mtu.edu/oshs)
Campaign

- Goal - $200M

- Final Campaign Number Unveiled on September 19
Michigan Technological University
Generations of Discovery Campaign
Funds Raised by Category
2006 - 2013

- Major & Restricted Gifts/Pledges: 23%
- Realized Planned Gifts: 5%
- Planned Gift Commitments: 5%
- Annual Fund: 3%
- Corporate Sponsored Research: 1%
- Corporations: 2%
- Foundations and Other Orgs: 20%
- Gifts-in-Kind: 41%
Advancement

Reorganization:
• Student Affairs and Advancement
• Eric Halonen – Assistant Vice President for Advancement
• Creation of the President’s Advancement Council
President’s Advancement Council

• Advice and Counsel on Advancement and Strategy

• Financial Support and Leadership

• University Advocates

• Donor Stewardship

• Identify Council Prospects

• Support Advancement Staff
Michigan Tech Fund

• Acceptance of Gifts

• Investment of Gifts

• Disbursement of Gifts and Earnings
Michigan Tech Fund
Planned Giving Registry ($137,350,630.08) - Actuarial Expectancy by Years
August 31, 2013

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yr 1</td>
<td>$3,868,888</td>
</tr>
<tr>
<td>2-5 Years</td>
<td>$12,073,196</td>
</tr>
<tr>
<td>6-10 Years</td>
<td>$40,122,643</td>
</tr>
<tr>
<td>11-15 Years</td>
<td>$19,765,277</td>
</tr>
<tr>
<td>16-20 Years</td>
<td>$27,549,440</td>
</tr>
<tr>
<td>21-25 Years</td>
<td>$12,944,957</td>
</tr>
<tr>
<td>26-30 Years</td>
<td>$9,401,111</td>
</tr>
<tr>
<td>31-35 Years</td>
<td>$4,670,501</td>
</tr>
<tr>
<td>36-40 Years</td>
<td>$3,821,421</td>
</tr>
<tr>
<td>41-60 Years</td>
<td>$3,133,196</td>
</tr>
</tbody>
</table>
Michigan Technological University
Generations of Discovery Campaign
Endowed and Non-Endowed Gifts
2006 - 2013

68%

32%

Endowed Gifts
Non-Endowed & Gifts-in-Kind
Growth in Individual Giving Attributable to Campaign
Major/Planned Gifts of $25,000 or more

Campaign Years
2006-2013
$109 Million

Preceding 25 Years
$91 Million
Thanks For All You Do!

QUESTIONS