

**BOARD OF TRUSTEES  
FINANCE AND ADMINISTRATION COMMITTEE**

**November 21, 2025, 9:00 a.m.  
Morris University Center, Room 214**

**Agenda**

**1.0 Call to Order**

**2.0 Roll Call**

**3.0 Action Items**

**3.1 Resolution F14-25  
Approval of FY25 Efficiency Report**

Mr. Greg Ballengee, Chief Financial Officer, will present the resolution to accept the FY25 Efficiency Report.

**3.2 Resolution F15-25  
Approval of Policy 4.96, University Rehire Policy**

Ms. Malonda Johnson, Chief Operating Officer, will present Policy 4.96, University Rehire Policy, for approval.

**3.3 Resolution F16-25  
Approval of Policy 5.47, Employee, Athletics, and Student Leader Training**

Mr. Michael McPhillips, General Counsel, will present Policy 5.47, Employee, Athletics, and Student Leader Training policy, for approval, along with the related procedures.

**4.0 Information and Reports**

**4.1 Cash Reserves and Investment Portfolio Report**

Mr. Ballengee will report on cash reserves and the investment portfolio.

**4.2 Bond Brief**

Mr. Ballengee will report on various potential scenarios for University bond financing: new bond issue (no refunding), length, new bond fee, impact on Senate Bill 6 score.

**4.3 Budget Status Report**

Ms. Aimee Welch, Director of Institutional Budgeting, will provide a year-to-date budget status report.

#### **4.4 Personnel Activity Report**

Ms. Johnson will report on recent personnel activity.

#### **4.5 Presidential Wellness Initiative**

Ms. Johnson will report on the Presidential Wellness Initiative

#### **4.6 Major Projects Status Report**

Mr. Temponeras will report on major construction projects.

#### **4.7 College Credit Plus Report**

Mr. Michael Villanella, Chief Enrollment Officer, will report on the College Credit Plus program.

#### **4.8 SSU Foundation Annual Report**

Ms. Welch will present the SSU Foundation's Annual Report and Endowment Report.

### **5.0 Adjournment**

## **RESOLUTION F14-25**

### **APPROVAL OF FY25 EFFICIENCY REPORT**

WHEREAS, Ohio higher education institutions are required to annually submit an efficiency report to the Ohio Department of Higher Education (ODHE); and

WHEREAS, the report reflects Shawnee State University's continued commitment and efforts toward meeting or exceeding efficiency goals; and

WHEREAS, the University's FY25 Efficiency Report requires approval by the Board of Trustees prior to submission to ODHE no later than November 21, 2025;

THEREFORE, BE IT RESOLVED that the Board of Trustees of Shawnee State University approves the FY25 Efficiency Report.

(November 21, 2025)

## **RESOLUTION F15-25**

### **APPROVAL OF POLICY 4.96 UNIVERSITY REHIRE POLICY**

WHEREAS, Policy 4.96, University Rehire Policy, addresses the need to establish consistent, transparent, and equitable guidelines for rehiring former employees; and

WHEREAS, the policy supports the University's commitment to maintaining high standards of employment, fostering a supportive and inclusive work environment, and ensuring compliance with applicable employment laws; and

WHEREAS, the policy establishes the criteria and evaluation process that will be followed to determine a former employee's eligibility for reemployment; and

WHEREAS, Policy 4.96, University Rehire Policy, has been recommended by the President for Board of Trustees approval;

THEREFORE, BE IT RESOLVED that the Board of Trustees of Shawnee State University hereby approves Policy 4.96, University Rehire Policy.

(November 21, 2025)

# Shawnee State University

POLICY TITLE:	UNIVERSITY REHIRE POLICY
POLICY NO. :	4.96
ADMIN CODE:	3362-4-96
PAGE NO.:	1 OF 3
EFFECTIVE DATE:	11/21/2025
NEXT REVIEW DATE:	11/2030
RESPONSIBLE OFFICER:	CHIEF OPERATING OFFICER
APPROVED BY:	BOARD OF TRUSTEES

## 1.0 PURPOSE

The purpose of this policy is to establish consistent, transparent, and equitable guidelines for rehiring former employees. This policy supports the University's commitment to maintaining high standards of employment, fostering a supportive and inclusive work environment, and ensuring compliance with applicable employment laws.

## 2.0 SCOPE

This policy applies to all former University employees who seek reemployment. Union-represented employees and student workers may be subject to separate agreements, contracts, or policies.

## 3.0 ELIGIBILITY FOR REHIRE

3.1 A former employee may be considered for rehire if the following criteria are met:

3.1.1 Good Standing: The individual left the University in good standing, with no pending disciplinary actions, financial obligations, or unresolved investigations. A former employee whose employment was involuntarily terminated for wrongdoing or misconduct, or for violating University rules/policies, or who resigned in lieu of termination for such reasons, is generally ineligible unless specifically approved, as noted below.

3.1.2 Performance Record: The individual's previous performance evaluations were satisfactory or above, typically within the last three years of service.

3.1.3 The typical time lapse to rehire an applicant who has previously resigned, retired, or been terminated from their university employment will be determined as follows:

3.1.3.1 Employees who provided proper notice (at least two weeks) of their previous separation from employment: eligible after at least six (6) months.

- 3.1.3.2 Employees who did not provide proper notice (at least two weeks) of their previous separation from employment: eligible after at least twelve (12) months.
    - 3.1.3.3 Employees terminated for cause: not eligible for rehire unless approved by the appropriate Vice President/Chief Officer and President after at least twenty-four (24) months.
  - 3.2 While it is not possible to capture every reason a person may be deemed ineligible for rehire, the following list provides some of the most common reasons:
    - o Abandonment of employment;
    - o Dishonesty;
    - o Failure to satisfactorily complete a probationary period of employment;
    - o Resignation or retirement while under investigation;
    - o Violation of University policy or procedure;
    - o Commission of an act substantially related to employment that is prohibited by law and punishable by fine or imprisonment;
    - o Resignation or retirement instead of discharge;
    - o Failure of a background check or drug test; or
    - o Loss/revocation of a credential or license for misconduct.
  - 3.3 The determination of eligibility for rehire should typically be made at the time of separation from employment and noted in the employment record. However, the failure to note ineligibility in the record does not prohibit the University from declining to hire a former employee who meets the ineligibility criteria.
  - 3.4 Re-employment of retirees must be handled according to Board of Trustees Policy 4.77 Retirement and Re-Employment of Retirees and applicable procedures.
- 4.0 APPLICATION PROCESS
- 4.1 Individuals must follow the following process to be considered for reemployment:
    - 4.1.1 Submit a new application through the University's recruitment portal.
    - 4.1.2 Provide an updated résumé/CV and any supporting documentation required by the position posting.
    - 4.1.3 Disclose prior University employment, including department and reason for separation.
- 5.0 REHIRE EVALUATION
- 5.1 The rehire evaluation process includes:
    - 5.1.1 Review of prior employment history, performance, and reason for departure.

5.1.2 Verification of references, including at least one positive reference from a former supervisor or department leader, unless obtaining such a reference is not possible.

5.1.3 Completion of standard interview and selection processes applicable to the position.

5.1.4 Re-verification of background checks, licensure, or certifications as required by university policy.

## 6.0 CONDITIONS OF REHIRE

6.1 Probationary Period: Rehired employees will serve a probationary period in accordance with university policy.

6.2 Benefits and Seniority: Previous service time will not count toward benefits or seniority, unless otherwise specified in the employment contract or university policies.

6.3 Compensation: Salary and position placement will align with current compensation standards and market-based pay ranges. Prior salary and title will not be determinative in establishing a salary and position upon rehire.

## 7.0 ONBOARDING

7.1 Orientation: Rehired employees must complete new hire orientation. Returning employees may participate in a modified program that focuses only on updates since their previous employment with the University.

7.2 Training: All mandatory compliance training (e.g., Title IX, FERPA, cybersecurity) must be completed, regardless of prior completion.

## 8.0 EXCEPTIONS

8.1 Critical Need: Exceptions to the above requirements may be approved in cases of urgent or specialized need.

8.2 Executive Approval: Exceptions must be documented and approved by the President.

## 9.0 GOVERNANCE AND REVIEW

This policy will be reviewed every five years by the Department of Human Resources to ensure alignment with best practices and compliance with applicable laws.

### History

Effective: 11/21/2025

## **RESOLUTION F16-25**

### **APPROVAL OF POLICY 5.47 EMPLOYEE, ATHLETICS, AND STUDENT LEADER TRAINING**

WHEREAS, it is essential that the University maintains a well-trained workforce and student leadership to uphold the highest level of ethics and professionalism, and to ensure compliance with federal, state, and local laws and regulations; and with University policies and procedures; and

WHEREAS, training on general subjects applicable to higher education benefit the entire campus community, whereas particular training requirements may apply to University administrators and staff who primarily serve students, including mentors and club advisors; athletics coaches and staff; student members of Greek organizations and other University-supported organizations and clubs; and student employees; and

WHEREAS, Policy 5.47, Employee, Athletics, and Student Leader Training, attached hereto and incorporated herein by reference, directs the Executive Staff and their delegates to develop, monitor, and implement training programs appropriate for the University as a whole and role-specific training to target audiences as needed; and

WHEREAS, Policy 5.47, Employee, Athletics, and Student Leader Training has been recommended by the President for Board of Trustees approval;

NOW, THEREFORE, BE IT RESOLVED that the Board of Trustees of Shawnee State University approves Policy 5.47, Employee, Athletics, and Student Leader Training.

(November 21, 2025)



# Shawnee State University

POLICY TITLE:	EMPLOYEE, ATHLETICS, AND STUDENT LEADER TRAINING
POLICY NO.:	5.47
ADMIN CODE:	3362-5-47
PAGE NO.:	1 OF 2
EFFECTIVE DATE:	11/21/2025
NEXT REVIEW DATE:	11/2030
RESPONSIBLE OFFICER:	CHIEF OPERATING OFFICER
APPROVED BY:	BOARD OF TRUSTEES

## 1.0 PURPOSE

It is essential that the University maintains a well-trained workforce and student leadership to uphold the highest level of ethics and professionalism, and to ensure compliance with federal, state, and local laws and regulations; and with University policies and procedures. Training on general subjects applicable to higher education benefit the entire campus community, whereas particular training requirements may apply to University administrators and staff who primarily serve students, including mentors and club advisors; athletics coaches and staff; student members of Greek organizations and other University-supported organizations and clubs; and student employees. This policy directs the Executive Staff and their delegates to develop, monitor, and implement training programs appropriate for the University as a whole and role-specific training to target audiences as needed.

## 2.0 DEFINITIONS

- 2.1 As used in this policy, “employees” include all full and part-time faculty and staff, adjunct faculty, student employees, and volunteers who directly work with students.
- 2.2 “Student leaders” include part-time or full-time University students with official roles such as President, Vice-President, Treasurer, or Secretary of University-supported student clubs and organizations, including Greek organizations.
- 2.3 “Student employees” include part-time or full-time University students who hold a position of employment with the University, whether work-study or otherwise.
- 2.4 “Executive Staff” includes the President, Vice Presidents, Provost, Deans, Chief Operating Officer, other Chief-level positions, and General Counsel.

## 3.0 TRAINING

- 3.1 The Executive Staff will commit to developing and providing training in such a manner that employees and student leaders understand their obligations and responsibilities in accordance with legal and University requirements.

- 3.2 Training of employees will begin with new employee orientation which will be provided as soon as feasible after the start of employment. New employee orientation will cover the most significant issues of university employment, including ethics, Title IX, confidentiality of student information, information security, fraud reporting, payroll, and financial accountability. After new employee orientation, employee training will be ongoing on issues that affect employees as a whole and specific roles. Training of student leaders will begin before or as soon as possible after the start of a leadership role. Employees and student leaders will be required to complete renewal training on a regular and ongoing basis as assigned. Training programs discussed in this section will be added, changed, or removed as it is deemed appropriate or necessary.
- 3.3 Department managers are responsible for ensuring that employees within their work unit complete required training.
- 3.4 Completion of training is considered a work requirement. Time that an employee spends on university-wide training, role-specific training, or specialized training will be deemed work time.
- 3.5 Employees who fail to follow this policy may be subject to disciplinary action as set forth in University policies and procedures or a collective bargaining agreement, as applicable.

#### 4.0 PROCEDURES

The President is authorized to enact procedures to address specific training requirements and to further carry out the purposes of this policy.

#### History

Effective: 11/21/2025

Applicable Procedures: Procedure 5.47:1 Athletic Department Staff and Administration Annual Required Training  
Procedure 5.47:2 Onboarding & Recurring Training for All Employees  
Procedure 5.47:3 Student Organization Training

## INFORMATION ONLY

PROCEDURE TITLE:	ATHLETIC DEPARTMENT STAFF AND ADMINISTRATION ANNUAL REQUIRED TRAINING
PROCEDURE NO.:	5.47:1
RELATED POLICY:	5.47
PAGE NO.:	1 OF 2
RESPONSIBLE ADMINISTRATOR:	ATHLETIC DIRECTOR
EFFECTIVE DATE:	11/21/2025
NEXT REVIEW DATE:	11/2030
APPROVED BY:	PRESIDENT

### 1.0 PURPOSE

To ensure the continued health, safety, and well-being of our student-athletes and campus community, the Department of Athletics conducts mandatory annual training for all athletic staff and administrators. These sessions are designed to promote best practices in safety, compliance, and student support.

### 2.0 TRAINING PROGRAMS

The following training programs will be completed by all athletic staff and administrators in accordance with institutional and intercollegiate governing body expectations:

- SSU Compliance and Department Best Practices – yearly (Athletic Director (AD))
- Concussion in Sports – yearly (online) (certification required)
- Cardiopulmonary Resuscitation (CPR), First Aid, and Automated External Defibrillator (AED) Training – every two years (Athletic Training/Red Cross) (certification required)
- Budgetary Best Practices – yearly (Athletic Director/Associate AD/Director of Procurement)
- Sudden Cardiac Arrest – yearly (online) (certification required)
- Working with Minors – yearly (online)
- Campus Safety – yearly (SSU Staff)
- Student Mental Health and Suicide Prevention – yearly (Mothers Against Drunk Driving (MADD)/Bear Care)
- Athletic Compliance – yearly (Assistant AD of Compliance/Associate AD)

### 3.0 INFORMATION

Detailed information regarding each required training—including delivery methods, timelines, and certification procedures—can be found in the Athletics Operations Manual as well as the Compliance Manual. Additional best practices and guidance can also be found in the Student-Athlete Handbook. These trainings are a vital component of our

commitment to maintaining a safe, supportive, and compliant environment for all members of the Shawnee State University Athletics community.

History

Effective: 11/21/2025

Reference Documents:

Shawnee State Compliance Manual

Shawnee State University Athletic Department Operations Manual

Shawnee State University Student-Athlete Handbook

## INFORMATION ONLY

PROCEDURE TITLE:	ONBOARDING & RECURRING TRAINING FOR ALL EMPLOYEES
PROCEDURE NO.:	5.47:2
RELATED POLICY:	5.47
PAGE NO.:	1 OF 4
RESPONSIBLE ADMINISTRATOR:	DIRECTOR OF HUMAN RESOURCES
EFFECTIVE DATE:	11/21/2025
NEXT REVIEW DATE:	11/2030
APPROVED BY:	PRESIDENT

### 1.0 INTRODUCTION & PURPOSE

Shawnee State University is committed to offering training courses that clarify expectations and responsibilities for all employees, uphold the highest standards of professionalism, ethics, and regulatory compliance, and establish risk management practices. This procedure serves to amplify and implement Policy 5.47, Employee, Athletics, and Student Leader Training, approved by the Board of Trustees.

### 2.0 SCOPE

- 2.1 This procedure outlines the compliance and professional conduct training required upon hire and on an ongoing basis, specialized training for those who work directly with students, and foundational workplace training for student employees. Job-specific training not covered by this procedure will be coordinated by Human Resources and/or managers and required as needed.
- 2.2 This procedure applies to all university employees, including temporary, intermittent, and student employees.
- 2.3 Training requirements will vary by role; temporary, intermittent, and student employees may be excluded from select courses, as determined by Human Resources.

### 3.0 ONBOARDING & RECURRING TRAINING

The university will provide compliance and professional conduct training to employees according to the tables below:

#### **Compliance Training**

Training Topics	Due (Based on Date of Hire or Assignment Date)	Frequency	Responsible Administrator/ Format
Auditor of State Fraud Training	30 Days	Every 4yrs	Controller/Online

State of Ohio Ethics	30 Days	Annual	General Counsel/ In-Person & Online
Campus Safety & Active Response	30 Days	Annual	Director of Public Safety/ In-Person
Clery Act for Campus Security Authorities (CSAs)	90 Days	Every 2yrs	Director of Public Safety/ In-Person
Cybersecurity: Data Privacy and Safe Computing	30 Days	Annual	Director of IT Operations/ In-Person & Online
Cybersecurity: Responding to Data Breaches	90 Days	Once	Director of IT Operations/ Online
Cybersecurity: Data Classification and Handling	90 Days	Once	Director of IT Operations/ Online
FERPA (Family Educational Rights and Privacy Act)	30 Days	Annual	Registrar/Online
Title IX Compliance (Education Amendments of 1972)	30 Days	Annual	Assistant General Counsel/ In-Person & Online
Ohio Public Records	30 Days	Once	Assistant General Counsel/ In-Person
Americans with Disability Act (ADA)	30 Days	Once	Director of Human Resources/ In-Person & Online
Racial, Religious, and Ethnic Harassment and Intimidation (CAMPUS Act)	30 Days	Once	Assistant General Counsel/ In-Person & Online

Note: Requirement is based on role - temporary, intermittent, and student employees may be excluded, as determined by Human Resources

### **Professional Conduct Training**

<b>Training Topics</b>	<b>Due (Based on Date of Hire or Assignment Date)</b>	<b>Frequency</b>	<b>Responsible Administrator/ Format</b>
The Evolution of Customer Service in Higher Ed & How to be Student Ready	60	Every 2yrs	Director of Human Resources/ Online
“Bear Minimum” Performance Expectations	60	Every 2yrs	Director of Human Resources/ In-Person
Communicating Across Cultures	60	Every 2yrs	Director of Human Resources/ In-Person
Conflict De-escalation & Civility	60	Every 2yrs	Director of Human Resources/ In-Person
Managing Difficult Conversations	60	Every 2yrs	Director of Human Resources/ In-Person
Conflict Resolution Refresher	60	Every 4yrs	Director of Human Resources/ In-Person

Note: Requirement is based on role - temporary, intermittent, and student employees may be excluded, as determined by Human Resources

#### 4.0 TRAINING FOR INDIVIDUALS SUPERVISING STUDENTS OR PRIMARILY SERVING STUDENTS

The university will provide specialized training to individuals who supervise students or serve in student-facing roles. The training will be offered according to the following table:

<b>Training Topics</b>	<b>Due (Based on Date of Hire or Assignment Date)</b>	<b>Frequency</b>	<b>Responsible Administrator/Format</b>
Leadership in Higher Ed	30	Every 2yrs	Director of Human Resources/ Online
Boundary Setting & Professional Conduct	30	Every 2yrs	Director of Human Resources/ In-Person
Minors on Campus	30	Every 2yrs	Director of Human Resources/ In-Person
Anti-Hazing	30	Annual	Director of Student Engagement/ Online

#### 5.0 TRAINING FOR STUDENT EMPLOYEES

The university will provide student employees with foundational workplace training according to the following table:

<b>Training Topics</b>	<b>Due (Based on Date of Hire or Assignment Date)</b>	<b>Frequency</b>	<b>Responsible Administrator/ Format</b>
Workplace Professionalism 101 (Includes "Bear Minimum" Performance Expectations)	30	Once	Associate Director of Career Services/ In-Person or Online
Teamwork	30	Once	Associate Director of Career Services/ In-Person or Online
Customer Service & Professional Language	30	Once	Associate Director of Career Services/ In-Person or Online
Communicating Across Cultures	60	Once	Director of Human Resources/ In-Person
Problem-Solving & Escalation	60	Once	Director of Human Resources/ In-Person
Conflict De-escalation & Civility	60	Once	Director of Human Resources/ In-Person
Managing Difficult Conversations	60	Once	Director of Human Resources/ In-Person

#### 6.0 ROLES & RESPONSIBILITIES

6.1 Managers are responsible for ensuring all employees within his/her unit attend and complete all required training.

6.2 Human Resources will collaborate with responsible administrators to implement training and monitor institutional compliance with this procedure.

## 7.0 CONDITION OF EMPLOYMENT

Completion of required training is considered part of an employee's performance.

Employees who fail to follow this procedure may be subject to a range of disciplinary action, up to and including termination, in accordance with employment contracts or collective bargaining unit agreements.

### History

Effective: 11/21/2025



## INFORMATION ONLY

PROCEDURE TITLE:	STUDENT ORGANIZATION TRAINING
PROCEDURE NO.:	5.47:3
RELATED POLICY:	5.47
PAGE NO.:	1 OF 4
RESPONSIBLE ADMINISTRATOR(S):	DEAN OF STUDENTS
EFFECTIVE DATE:	11/21/2025
NEXT REVIEW DATE:	11/2030
APPROVED BY:	PRESIDENT

### 1.0 INTRODUCTION & PURPOSE

Shawnee State University is committed to offering training courses that clarify expectations and responsibilities for all members of student clubs and organizations, members of fraternity and sorority life, and all advisors to these groups. These trainings will uphold the highest standards of professionalism, ethics, and regulatory compliance, and establish risk management practices. This procedure serves to amplify and implement Policy 4.57, Employee, Athletics, and Student Leader Training, approved by the Board of Trustees.

### 2.0 SCOPE

- 2.1 This procedure outlines the compliance and professional conduct training required for all employees serving as advisors to student clubs or organizations, members of student clubs or organizations, and members of fraternity and sororities at Shawnee State University.
- 2.2 This procedure applies to all university employees who are eligible to serve as advisors to student clubs and organizations, all student members and prospective members of recognized student clubs, organizations, fraternities, and sororities, and anyone who is employed by, volunteers with, or has direct contact with student members of such organizations.
- 2.3 Training requirements will vary by role.

### 3.0 STUDENT PARTICIPANTS

- 3.1 All student organizations, clubs, sororities, and fraternities must operate in accordance with Shawnee State University policies, procedures, and the Student Conduct Code.
- 3.2 All club officers must be currently enrolled Shawnee State students with good standing as defined in the Student Club/Organization Guidelines.
- 3.3 All club, fraternity, and sorority members must be currently enrolled Shawnee State students.

#### 4.0 REQUIRED & RECURRING TRAINING

The university will provide compliance and professional conduct training to employees according to the tables below:

##### **Compliance Training for Club Advisors**

<b>Training Topics</b>	<b>Frequency</b>	<b>Responsible Administrator/ Format</b>
Anti-Hazing & Hazing Prevention	Initial upon assuming role, annually thereafter	Director of Student Engagement/Online
Finance Training	Initial upon assuming role, annually thereafter	Student Affairs Specialist
Advisor and Leadership Training Workshop	Initial upon assuming role, annually thereafter	Director of Student Engagement
Advisor and Student Club or Organization Guidelines	Upon assuming role, annually thereafter	Director of Student Engagement
Student Engagement Tracking Software Training	Upon assuming role, annually thereafter	Director of Student Engagement
Title IX Compliance (Education Amendments of 1972)	Annual	Assistant General Counsel/In-person & Online
Protecting Minors on Campus	Annual	Assistant General Counsel/ In-person

##### **Compliance Training for Student Club and Organization Leaders (President, Vice-President, Secretary, Treasurer, and Student Government Association Liaison) and Members**

<b>Training Topics</b>	<b>Role in Club or Organization</b>	<b>Frequency</b>	<b>Responsible Administrator/ Format</b>
Anti-Hazing & Hazing Prevention	All	Annual	Director of Student Engagement
Treasurer Training	Treasurer	Initial upon assuming role, annually thereafter	Student Affairs Specialist

Student Engagement Tracking Software Training	All Leaders	Initial upon assuming role, annually thereafter	Director of Student Engagement
Student Club or Organization Guidelines	All Leaders	Upon assuming role, annually thereafter	Director of Student Engagement
Workplace Professionalism 101 (Includes “Bear Minimum” Performance Expectations)	All	Upon appointment and every 2 years thereafter	Associate Director of Career Services/ In-Person or Online
Title IX Compliance (Education Amendments of 1972)	All	Annual	Assistant General Counsel/ In-Person & Online
Protecting Minors on Campus	All Leaders	Annual	Assistant General Counsel/In Person

### **Compliance Training for Fraternity and Sorority Life Members**

<b>Training Topics</b>	<b>Role in Fraternity or Sorority</b>	<b>Frequency</b>	<b>Responsible Administrator/ Format</b>
Anti-Hazing & Hazing Prevention	All	Annual	Director of Student Engagement/Online
Treasurer Training	Treasurer	Initial upon assuming role, annually thereafter	Student Affairs Specialist
Student Engagement Tracking Software Training	All Leaders	Annual	Director of Student Engagement
Workplace Professionalism 101 (Includes “Bear Minimum” Performance Expectations)	All	Upon appointment and every 2 years thereafter	Associate Director of Career Services/ In-Person or Online

New Member Education Classes	All new members	Once upon appointment, Bi-Annually	FSL by Chapter
Fraternity and Sorority Life Risk Management Guidelines	All	Bi-annually	Assistant Director of Student Life
Standards of Fraternity and Sorority Life Guidelines	All	Bi-annually	Assistant Director of Student Life
Title IX Compliance (Education Amendments of 1972)	All	Annual	Assistant General Counsel/In-person & Online
Protecting Minors on Campus	All Leaders	Annual	Director of Human Resources/ Assistant General Counsel/ In-person & Online

## 5.0 ROLES & RESPONSIBILITIES

5.1 Club advisors are responsible for ensuring all student leaders and members within their club or organization unit attend and complete all required training.

5.2 The Dean of Students will monitor institutional compliance with this procedure.

## 6.0 CONDITION OF PARTICIPATION

Student and Advisor participation in the student clubs and organizations and fraternity and sorority life is contingent upon completion of required training.

### History

Effective: 11/21/2025

Relevant Policy and Procedures: Policy 5.47

<https://www.shawnee.edu/sites/default/files/documents/Policy-3-25-Anti-Hazing-Policy.pdf>

<https://www.shawnee.edu/sites/default/files/documents/policy-5-01.pdf>

<https://www.shawnee.edu/sites/default/files/documents/Procedure-3-25-1-Anti-Hazing-Procedure.pdf>

Reference Documents: <https://www.shawnee.edu/sites/default/files/documents/Advisor-Manual.pdf>

<https://www.shawnee.edu/sites/default/files/documents/Student-Organizations-Guidelines.pdf>

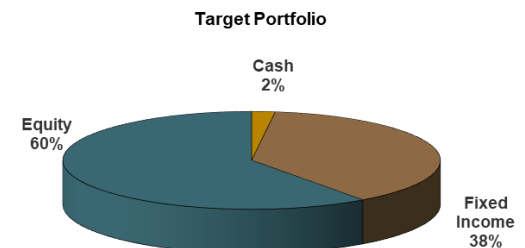
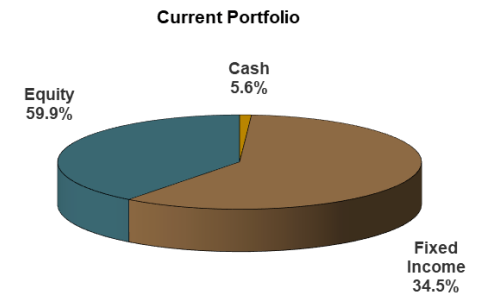
<https://www.shawnee.edu/sites/default/files/documents/Student-Conduct-Code.pdf>

# Shawnee State University

## Asset Allocation – As of October 31, 2025



Asset Class	Market Value	% of Assets	Target %
<b>Cash Equivalents</b>			
TIAA Trust Cash Deposit Account	\$869,919	5.6%	
<b>Total Cash Equivalents</b>	<b>\$869,919</b>	<b>5.6%</b>	<b>2.0%</b>
<b>Fixed Income</b>			
Fixed Income Separately Managed Account	\$3,673,382	23.7%	
PGIM High Yield Fund	\$222,191	1.4%	
iShares Broad USD Investment Grade Corporate Bond ETF	\$195,704	1.3%	
Vanguard Intermediate-Term Bond Index	\$310,857	2.0%	
VanEck J. P. Morgan EM Local Currency Bond ETF	\$266,141	1.7%	
PIMCO International Bond Fund	\$370,953	2.4%	
DFA Inflation Protected SEC Fund	\$159,279	1.0%	
PIMCO 1-5 Year U.S. TIPS Index Exchange Traded Fund	\$147,611	1.0%	
<b>Total Fixed Income</b>	<b>\$5,346,118</b>	<b>34.5%</b>	<b>38.0%</b>
<b>Domestic Equity</b>			
TIAA-CREF Large Cap Growth Index Fund	\$3,918,123	25.3%	
TIAA-CREF Large Cap Value Index Fund	\$2,579,880	16.6%	
iShares Russell Mid-Cap Growth ETF	\$349,937	2.3%	
iShares Russell Mid Cap Value ETF	\$304,012	2.0%	
iShares Russell 2000 Growth ETF	\$253,970	1.6%	
iShares Russell 2000 Value ETF	\$228,143	1.5%	
<b>Total Domestic Equity</b>	<b>\$7,634,065</b>	<b>49.2%</b>	<b>50.0%</b>
<b>International Equity</b>			
iShares Core MSCI EAFE ETF	\$625,351	4.0%	
iShares MSCI International Quality Factor ETF	\$418,097	2.7%	
Goldman Sachs International Small Cap	\$126,693	0.8%	
iShares Core MSCI Emerging Markets ETF	\$496,596	3.2%	
<b>Total International Equity</b>	<b>\$1,666,737</b>	<b>10.7%</b>	<b>10.0%</b>
<b>Total Equity</b>	<b>\$9,300,802</b>	<b>59.9%</b>	<b>60.0%</b>
<b>Total Portfolio Market Value</b>	<b>\$15,516,839</b>	<b>100.0%</b>	<b>100.0%</b>



## CASH AND INVESTMENT SUMMARY

	Market Value	Market Value	Market Value
	as of	as of	as of
Asset Class/Security	October 31, 2025	June 30, 2025	June 30, 2024
OPERATING CASH:			
U.S. Bank	\$ 6,794,398	\$ 9,506,251	\$ 7,648,535
Total Operating Cash Balance	\$ 6,794,398	\$ 9,506,251	\$ 7,648,535
LIQUID POOL INVESTMENT PORTFOLIO:			
STAROhio	\$ 3,333,362	\$ 3,284,408	\$ 1,216,621
Total Liquid Investment Pool Balance	\$ 3,333,362	\$ 3,284,408	\$ 1,216,621
TIAA DIVERSIFIED INVESTMENT POOL SUMMARY:			
Cash Equivalents:	\$ 1,115,028	\$ 1,957,959	\$ 1,809,159
% of Total TIAA Portfolio	7.2%	13.5%	16.2%
Fixed Income Holdings:			
Fixed Income Managed Acct (US and Agency Securities)	\$ 3,963,310	\$ 2,687,099	\$ 2,161,706
DFA Inflation Protected Securities Portfolio	\$ 159,279	\$ 127,390	\$ 123,610
iShares MBS ETF	\$ -	\$ 1,015,702	\$ 993,201
PGIM High Yield Fund	\$ 220,879	\$ 180,711	\$ 247,998
PIMCO 1-5 Year U.S. TIPS Index ETF	\$ 147,611	\$ 146,901	\$ 126,518
VanEck J.P.Morgan EM Local Currency Bond ETF	\$ 266,141	\$ 194,435	\$ 143,750
Vanguard Intermediate Term Bond Fund	\$ 309,781	\$ 281,192	\$ 404,670
Total Fixed Income	\$ 5,067,002	\$ 4,633,430	\$ 4,201,452
% of Total TIAA Portfolio	32.7%	31.9%	37.5%
Domestic Equity Holdings:			
iShares Russell 2000 Growth ETF	\$ 253,970	\$ 214,681	\$ 136,253
iShares Russell 2000 Value ETF	\$ 228,143	\$ 198,304	\$ 129,912
iShares Russell Mid-Cap Growth ETF	\$ 349,937	\$ 341,708	\$ 228,756
iShares Russell Mid Cap Value ETF	\$ 304,012	\$ 290,576	\$ 221,075
TIAA-CREF Large Cap Growth Index Fund	\$ 3,918,123	\$ 3,360,954	\$ 2,057,838
TIAA-CREF Large Cap Value Index Fund	\$ 2,579,880	\$ 2,263,366	\$ 1,689,018
Total Domestic Equity	\$ 7,634,065	\$ 6,669,589	\$ 4,462,852
% of Total TIAA Portfolio	49.3%	45.9%	39.9%
International Equity Holdings:			
Goldman Sachs Intl Small Cap Insights Fund	\$ 126,693	\$ 70,741	
iShares Core MSCI EAFE ETF	\$ 625,351	\$ 457,136	\$ 211,455
iShares Core MSCI Emerging ETF	\$ 496,596	\$ 340,190	\$ 180,878
iShares MSCI International Quality Factor ETF	\$ 418,097	\$ 405,706	\$ 299,006
Total International Equity	\$ 1,666,737	\$ 1,273,773	\$ 715,687
% of Total TIAA Portfolio	10.8%	8.8%	6.4%
Total Equity	\$ 9,300,802	\$ 7,943,362	\$ 5,178,538
% of Total TIAA Portfolio	60.1%	54.7%	46.3%
TOTAL TIAA DIVERSIFIED POOL PORTFOLIO MARKET VALUE	\$ 15,482,832	\$ 14,534,751	\$ 11,189,149
	100.0%	100.0%	100.0%
TOTAL CASH AND INVESTMENTS BALANCE	\$ 25,610,592	\$ 27,325,411	\$ 20,054,305
	TOTAL TIAA PORTFOLIO	TOTAL TIAA PORTFOLIO	
Value as of June 30, 2025	\$ 14,534,751	\$ 11,189,149	\$ 8,233,135
Value as of October 31, 2025	\$ 15,482,832	\$ 14,534,751	\$ 11,189,149
Diff \$	\$ 948,081	\$ 3,345,602	\$ 2,956,014
Diff %	6.32%	26.01%	30.44%
		10.46%	9.84%
		Without \$2M Cash Addition to Portfolio during FY25	Without \$2M Cash Addition to Portfolio during FY24



## FY26 Operating Budget Status

Report Date 11.04.2025

	FY26 Budget	Q1 Actuals	Q2 Actuals	Q3 Actuals	Q4 Actuals	YTD Actuals	% of Budget
<b>Revenue</b>							
Tuition & Student Fees	\$ 30,144,207	\$ 15,566,365	\$ 95,898	\$ -	\$ -	\$ 15,662,263	52.0%
State Share of Instruction	\$ 12,979,745	\$ 3,244,938	\$ 1,081,646	\$ -	\$ -	\$ 4,326,584	33.3%
Shawnee Supplement	\$ 12,000,000	\$ -	\$ 3,000,000	\$ -	\$ -	\$ 3,000,000	25.0%
Scholarship	\$ (6,000,220)	\$ (2,968,763)	\$ (39,535)	\$ -	\$ -	\$ (3,008,298)	50.1%
Other Income	\$ 13,145,380	\$ 816,986	\$ 258,781	\$ -	\$ -	\$ 1,075,767	8.2%
Commissions	\$ 566,421	\$ 878	\$ 43,550	\$ -	\$ -	\$ 44,428	7.8%
General Fund Operating Grants	\$ 355,886	\$ 34,526	\$ -	\$ -	\$ -	\$ 34,526	9.7%
Miscellaneous Revenue	\$ 11,518,573	\$ 495,773	\$ 169,297	\$ -	\$ -	\$ 665,070	5.8%
Service Fees/Memberships	\$ 81,000	\$ 37,842	\$ 1,507	\$ -	\$ -	\$ 39,349	48.6%
Ticket Sales/Rentals	\$ 623,500	\$ 247,966	\$ 44,427	\$ -	\$ -	\$ 292,393	46.9%
Transfers In	\$ 2,500,000	\$ 90	\$ 0	\$ -	\$ -	\$ 90	0.0%
<b>Revenue Total</b>	<b>\$ 64,769,112</b>	<b>\$ 16,659,616</b>	<b>\$ 4,396,789</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 21,056,405</b>	<b>32.5%</b>
<b>Expense</b>							
Compensation	\$ 36,572,542	\$ 6,156,955	\$ 3,811,469	\$ -	\$ -	\$ 9,968,424	27.3%
Salaries	\$ 26,534,044	\$ 4,315,239	\$ 2,976,947	\$ -	\$ -	\$ 7,292,186	27.5%
Benefits	\$ 10,038,498	\$ 1,841,716	\$ 834,522	\$ -	\$ -	\$ 2,676,238	26.7%
Non-Compensation	\$ 23,224,081	\$ 5,008,299	\$ 1,505,276	\$ -	\$ -	\$ 6,513,575	28.0%
Equipment	\$ 710,109	\$ 212,616	\$ 110,345	\$ -	\$ -	\$ 322,961	45.5%
External Professional Services	\$ 1,174,390	\$ 643,141	\$ 136,766	\$ -	\$ -	\$ 779,907	66.4%
Information/Comm/Shipping	\$ 1,539,021	\$ 259,241	\$ 88,807	\$ -	\$ -	\$ 348,048	22.6%
Maintenance & Service Contracts	\$ 4,479,486	\$ 2,316,688	\$ 477,028	\$ -	\$ -	\$ 2,793,716	62.4%
Meal Plan Expense	\$ 2,174,457	\$ 217,394	\$ 204,905	\$ -	\$ -	\$ 422,299	19.4%
Miscellaneous Expense	\$ 8,265,687	\$ 449,495	\$ 81,100	\$ -	\$ -	\$ 530,595	6.4%
Supplies	\$ 2,100,372	\$ 284,927	\$ 126,916	\$ -	\$ -	\$ 411,843	19.6%
Travel	\$ 902,745	\$ 169,343	\$ 104,789	\$ -	\$ -	\$ 274,131	30.4%
Utilities	\$ 1,877,814	\$ 455,455	\$ 174,620	\$ -	\$ -	\$ 630,075	33.6%
Transfers Out	\$ 2,135,000	\$ 1,566,875	\$ -	\$ -	\$ -	\$ 1,566,875	73.4%
<b>Expense Total</b>	<b>\$ 61,931,623</b>	<b>\$ 12,732,129</b>	<b>\$ 5,316,745</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 18,048,874</b>	<b>29.1%</b>
Net Transfer to Capital Fund	\$ 1,566,875	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
<b>Net Operating Budget</b>	<b>\$1,270,614</b>	<b>\$3,927,487</b>	<b>(\$919,955)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,007,532</b>	<b>237%</b>

# PERSONNEL ACTIVITY REPORT FY26

November 21, 2025

## New Hires

### ➤ **Administrative Staff**

- Ebenezer Asiaw – Assistant Director, Graduate & Online, Admissions, September 15, 2025
- Kimberly Gold – Coord., Academic Advisor & Student Support, Arts & Sciences, September 29, 2025
- Laiken Rice – Communications Content Manager, Marketing & Communications, October 13, 2025
- Jordan Love – Multimedia & Graphic Designer, Marketing & Communications, October 13, 2025
- Grace Peach-Storey – Director, Center for Life Long Learning, October 13, 2025
- Jacob Rouse – Coordinator, Grants & Sponsored Programs, October 14, 2025
- Tina Evans – Director, Student Pathway Initiatives & Online Prog., Academic Affairs, October 27, 2025

## Change of Status

### ➤ **Executive Staff**

- Kimberly Inman – Provost & Vice President of Academic & Student Affairs, November 21, 2025

### ➤ **Administrative Staff**

- Aimee Welch – Executive Director, SSU Foundation, August 25, 2025
- Kimberly Ellison – Director, Project Bear, School of Education, September 02, 2025
- Kimberly Cox – Senior Admissions Associate, Admissions, September 15, 2025
- Mikhail Smith – Coordinator, University Testing, Student Success Center, October 06, 2025
- Autumn Reffit – Assistant Director, Institutional Budgeting, October 27, 2025



# PERSONNEL ACTIVITY REPORT FY26

November 21, 2025

## Departures

### ➤ **Administrative Staff**

- James Farmer – Director, Enrollment Operations, Admissions, August 11, 2025
- Aaron Davis – Coordinator, Educational Opportunity Center, August 31, 2025
- Virginia Young – Coordinator, Academic and Student Support, Arts & Sciences, August 31, 2025
- Kathy Goins – Coordinator, Educational Opportunity Center, September 12, 2025
- Jacob Perkins – Coordinator, Grants & Sponsored Programs, September 26, 2025
- Clarissa Schauseil – Coordinator, Gov., Economic & Workforce Development, September 30, 2025
- Joshua Lawson – Program Facilitator, Kricker Innovation Hub, September 30, 2025
- Kaleb Kendall – Multimedia & Graphic Designer, Marketing and Communications, October 3, 2025
- Amber Bazler – Assist. Director, Comm. & Content Manager, Marketing & Comm., October 10, 2025
- Derrick Parker – Program Coordinator, Gov., Economic & Workforce Development, October 31, 2025
- Harmoni Stamper – Tech Prep Regional Director, Advancement & Enrollment Mgmt., October 31, 2025
- Mark Williams – Coordinator, Advancement, Development Foundation, November 15, 2025

### ➤ **Faculty**

- Kyle Vick – Professor, Social Sciences - Psychology, October 10, 2025

# CAPITAL PROJECTS STATUS REPORT

November 21, 2025

## **Campus Wayfinding Project - \$1.5M – Capital**

- Construction has begun with exterior signage foundations.
- Completion date estimated for February, 2026.

## **Roof and Infrastructure Project - \$1.25M – Capital**

- Massie Hall completed.
- Sealing/caulking of Kricker Hall and Health Sciences Building completed.
- Repairs of exterior stairs on Kricker Hall/Health Sciences Building continues (2-3 weeks).
- Rhodes Center (gym) roof to begin March, 2026.

## **Clark Memorial Library Renovation Project - \$4.5M - Capital**

- Priority items currently being determined with consideration of project budget.
- Additional funding requested via the recent Six Year Capital Plan submission.

## **Health Science Labs Renovations Project - \$9.5M – Capital/Local**

- Project budget expanded; design amendment submitted for approval at the December 1, 2025, Controlling Board meeting.
- Campus-wide space utilization study continues.

## **Esports Arena – Kricker Innovation Hub Project - \$500,000 – Capital**

- Design contract submitted for approval at the December 1, 2025, Controlling Board meeting.

## **Alumni Green ADA Ramp Project - \$500,000 - Capital**

- Project rebid October 28, 2025; construction contract to be submitted for approval at the December 1, 2025, Controlling Board meeting.

## **Spartan Athletic Complex/Softball Field - \$1.8M - Foundation**

- Softball stadium Phase 1 bid opening scheduled for November 25, 2025.

## **Advanced Manufacturing Lab - \$3.85M – ARC Grant/Local**

- Design firm selected; contract being executed.