REPORT OF A FOCUSED VISIT

Assurance Section

To
University of Toledo
Toledo, Ohio

September 25-26, 2006

Higher Learning Commission
A Commission of the North Central Association of Colleges and Schools

EVALUATION TEAM

Dr. Robert L. Reid, Provost and Professor of History Emeritus, University of Southern Indiana, Evansville, IN 47712, Chairperson

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I. CONTEXT AND NATURE OF VISIT

A. Purpose of Visit – This visit focused on the request of the University of Toledo (UT) to continue accreditation while merging with the Medical University of Ohio (MUO).

B. Accreditation Status – Founded in 1872, UT received initial accreditation from the Higher Learning Commission of the North Central Association in 1922 and has received continuous accreditation since. The university became a state institution in 1967 and is accredited through the doctoral level. The last comprehensive evaluation occurred in 2002; a focused visit was held in 2004 related to distance delivery of degree and certificate programs, and another focused visit in 2005 looked at strategic planning and assessment issues.

C. Organizational Context – The new University of Toledo was created by the merger of UT and MUO effective July 1, 2006. This focus visit is a continuation of the review process by the Higher Learning Commission which approved the merger through the Institutional Actions Committee on July 12, 2006.

D. Unique Aspects of Visit – The team visited the two campuses of the new UT, which are located within three miles of each other. While differing in architectural style, both sites are excellent facilities conducive to student learning and faculty research and scholarship.

E. Interactions with Organizational Constituencies – The team met with the following:

Lloyd Jacobs, President
Robert Sheehan, Interim Provost & Executive Vice President, Academic Affairs
Jeffrey Gold, Executive Vice President & Provost for Health Affairs; Dean, College of Medicine
Daniel Morissette, Senior Vice President, Finance & Strategy
Penny Poplin Gosetti, Executive Assistant to the President
Dawn Rhodes, Vice President, Finance
Vernon Snyder, Vice President, Institutional Advancement
Kaye Patten Wallace, Vice President, Student Affairs
William McMillen, Vice President, Government Relations
Lauri Cooper, General Counsel & Vice President, Health Science Campus
Sandra Drabich, General Counsel & Vice President, Main Campus
Kelly Andrews, Associate Athletic Director
Carter Wilson, Chair, Faculty Senate, Main Campus
Lawrence Elmer, Chair, Faculty Senate, Health Science Campus
John Gaboury, Dean, University Libraries
Thomas Gutteridge, Dean, College of Business Administration
Nagi-Naganathan, Dean, College of Engineering
Douglas Ray, Dean, College of Law
Jerome Sullivan, Dean, College of Health Science & Human Service
F. Approvals Obtained — The merger was recommended by unanimous approval of
the Ohio Board of Regents to the Ohio legislature where it was passed
unanimously by the House of Representatives and the Senate. It was signed into
law by the Governor on March 31, 2006. Higher Learning Commission approval
of the merger followed on July 12, 2006.

G. Principal Documents, Materials, and Web Pages Reviewed

1) Request for Change Proposal, June 1, 2006
2) Report “Merging two great institutions: Creating the Future”, September 12,
   2006
3) Ohio Board of Trustees Resolution, December 3, 2005
4) UT Board Merger Resolution
5) MUO Board Merger Resolution
6) UT General Catalog 2006-2008
7) MUO Bulletin and Handbook of the Graduate Student Catalog 2005-2006
8) An Act (SUB HB No. 478) enacted by the Ohio General Assembly and signed
    by Governor Taft, March 31, 2006
9) Analysis of Debt / Borrowing Capacity
10) Reports of the Transition Work Groups
11) Report of Comprehensive Visit to UT April 15-17, 2002
12) Report of Focused Visit to UT April 25-26, 2006
13) Statement of Affiliation Status(SAS) and Organizational Profile(OP) July 12,
    2006
15) Extensive documentation at the merger web-site:
    http://utmuomerg@utoledo.edu
A. Statement of Focus
Institutional Change request to review progress on the merger of UT and MUO into the new University of Toledo

B. Statements of Evidence
This recommendation is based on:

- The new University of Toledo has followed a carefully designed process to merge the two institutions (UT and MUO) into a single institution. The merger became effective July 1, 2006. The new UT is the third largest public university in Ohio and one of only seventeen public universities in the United States that have Colleges of Business, Education, Engineering, Law, Medicine, and Pharmacy within one institution.
- There is good evidence to indicate that the outcomes expected from the merger will be realized. These outcomes include enrollment growth, increased quality of academic programs, improved operating efficiencies, increased levels of externally funded research, and expanding opportunities for engagement with partners in the community of Toledo and the service region.
- A new mission statement together with a set of core values has been developed for approval by the Board of Trustees.
- The merger has taken place smoothly with minimal changes for students, faculty, and academic programs. The complimentary nature of degree offerings and previous experience of UT and MUO in cooperative programs eased the transition.
- Exemplary leadership from the presidents of UT and MUO contributed greatly to the entire process of merger.
- Resolutions of support were received from the boards of trustees and the faculty senates of both institutions, as well as the Toledo City Council, the Regional Growth Partnership, and employee bargaining units. On December 3, 2005, the Ohio Board of Regents unanimously adopted the merger by formal resolution.
- The Standard and Poor’s bond rating for the University of Toledo has been raised from A- to A as a consequence of the merger.
- Necessary approvals included the above resolutions of support which led to unanimous approval by both houses of the Ohio legislature. Governor Taft signed the bill creating the single, merged institutions on March 31, 2006.
- The new UT has taken seriously the two issues, Strategic Planning and Assessment, addressed in 2005 by a focused visit team. Both issues continue to receive careful study as consolidation continues and both will be addressed formally in follow-up reports to the staff of the Higher Learning Commission in the near future.
- The new UT established sixteen transition work groups and later added four more beginning in January, 2005.
- More than half of the twenty work groups had completed their work by the time of this visit. A document "Merging two great institutions: Creating the
Future," was issued on September 12, 2006. This snapshot of progress has been supplemented by exhibits detailing the membership, charges, and timelines of the work groups. Visits with chairs and members of these task forces provide ample evidence of their hard work and dedication. Additional information on the broad participatory nature of these groups can be found on the UT website under Work Groups.

- A president and senior leadership team were announced effective July 1, 2006 by the Board of Trustees.
- Financial audits have been conducted which provide evidence of the fiscal soundness of the merger. The new UT receives 29.7% of its general fund budget from the state of Ohio. Additional state funds will be sought for transition costs and for a capital project for the College of Pharmacy.
- A new participation agreement is being developed with the United States Department of Education. The agreement will be forwarded to the Higher Learning Commission when it is signed.
- Learning resources and student support services are key areas being addressed by the transition team.
- The institution has been very deliberate in providing extensive documentation for the merger and these materials are easy to access.
- The expected outcomes will be assessed in such critical areas as financial cost, savings, and Return on Investment. The impact of the merger on student recruitment retention graduation rates, and student learning outcomes will be measured and reported.

C. Recommendation of Team
The new University of Toledo was established by the merger of UT and MUO effective July 1, 2006. This focus visit affirms the approval of the merger by the Higher Learning Commission on July 12, 2006 and the continuation of the accreditation status of the University of Toledo.

D. Rationale for the Team Recommendation
Based upon a review of the request, materials submitted, and the site visit, the team finds the request to continue accreditation as the University of Toledo to be appropriate and timely.

E. Other Accreditation Issues (if applicable)
None noted.

III. STATEMENT OF AFFILIATION STATUS

Affiliation Status – No change

Nature of Organization

Legal Status – No change

Degrees Awarded – No change

Conditions of Affiliation

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Stipulation on Affiliation Status – No change

Approval of Degree Sites – Main Campus and Health Science Campus

Approval of Distance Education Degree – No change

Reports Required – No change

Summary of Commission Review – No change

Year for Next Comprehensive Evaluation – No change