2026–2027

Business Efficiency PROGRAMS

SERVING PUBLICLY • FUNDED PRIVATELY

ASSOCIATION OF INDEPENDENT COLLEGES AND UNIVERSITIES OF PENNSYLVANIA

AICUP

ASSOCIATION OF
INDEPENDENT COLLEGES AND UNIVERSITIES OF PENNSYLVANIA
AICUP

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Evolution Sustainability Group

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WasteStrategies

Dear Colleagues,

I am pleased again to deliver our annual report on AICUP's collaborative and business efficiency programs. Within this report we share with you the success of these efforts and illustrate the measurable value offered by each. By way of an introduction, here are **AICUP's four principal functions**:

1. **Advocacy** on state and federal issues that matter to independent non-profit institutions
2. **Business efficiency programs** that enhance these institutions
3. **Research** that underlines the advantages and promotes these institutions and
4. **Communications** on all of the above.

Throughout the year, we report to you and our leadership on these functions in numerous ways—in digital, hard copy and (now) monthly oral reports, quarterly Board reports (written and oral) from me tracking a set of specific Board-approved goals, written reports from working committees and quarterly board meeting minutes. This report does not attempt to calculate savings or increased revenue from AICUP's advocacy before state and federal governments.

This Business Efficiency Program Manual outlines: 1) the range of business efficiency and research programs that AICUP sponsors for members; 2) institutional participation rates; and 3) the estimated cost-savings per institution from those programs. It is important to measure these programs over time as part of the normal performance measurement of our AICUP work. Our findings are as follows:

- **41 PROGRAMS** – In 2025, AICUP offered forty-one (41) different cost savings programs of which, 31 are vendor-driven and the remaining 10 are driven by AICUP staff activities.
- **$31.3M ANNUAL SAVINGS** – Thirty-nine (39) of these programs leveraged volume and lowered costs in a way that could be documented resulting in $31.3M of calculable savings in 2025. *(This is all independent of the value of AICUP work on protecting schools' best interest in state and federal policy matters, representing AICUP schools by membership in key state boards and commissions, etc).*
- **22:1 ROI ON FY 2025 DUES** – $27.7M of calculable 2025 savings equates to an average savings of $325,996 per AICUP member or roughly 22 times the average 2025 membership dues ($14,820). *(This is all independent of the value of AICUP work on protecting schools' best interest in state and federal policy matters, representing AICUP schools by membership in key state boards and commissions, etc).*
- **AICUP MEMBER PARTICIPATION** – Eighteen (18) of these programs provided service to 35 or more AICUP members and only seven (7) programs had participation of less than 10 AICUP members. ***All AICUP Members and Associate Members participated in at least one of these 41 programs.***
- **SEVEN (7) PROGRAM SAVINGS EXCEEDED FY 2025 DUES** – Seven (7) of these programs each provided annual 2025 savings that exceeded the total 2025 AICUP membership dues of $1,230,094. Six (6) of these seven are vendor driven

programs including: Aggregate Group Purchasing, Purchasing Card Programs, Accounts Payable Automation, Software Licensing (all software), Personal Health Advocacy, and Cengage Unlimited for Institutions. The last of these seven programs are managed by AICUP staff as services to the membership: Monthly Presidents' Updates. The FY25 AICUP Economic Impact Report documents whole other categories of savings, to the Commonwealth of Pennsylvania, to its employers and to its communities. According to the independent study, AICUP schools generate $29B in economic impact for Pennsylvania, support almost 200k jobs and represent 7% of the entire state economy (50% more than coal and natural gas).

Member Collaboration – Many of these business efficiency programs also offer member schools with the ability to collaborate with each other, and without AICUP's coordination role, these opportunities could not be developed to the necessary critical mass on a regional or state-wide level. These efficiency programs fit neatly into the following six categories:

- **Finance & Treasury**
- **Facilities & Administration**
- **Technology & Communications**
- **HR, Compliance, Consulting & Legal**
- **Student Services**
- **Research Studies & Other Activities**

It is, of course, not possible to quantify savings on all programs or activities, but our business efficiency team (Dr. Cale Nelson and Kelly Carli) did their best to quantify dollar-based savings measurements for all but three (3) of these programs. Not all colleges experienced the same level of participation or savings. Hence, the aggregate and average savings figures in this report reflect conservative assumptions. Said differently, we have not overstated the value of any one program and by doing this, we might risk understating elements of value or savings that are not obvious to us.

We remain indebted to all the good work of our leadership team for putting these materials together, and for analyzing these programs over many years of service. I am especially indebted to the outgoing Chair of the Member Service Committee, Dr. Daniel Myers, President of Misericordia University, the outgoing Chair of the Research Committee, Dr. James MacLaren, President of Lebanon Valley College, and the Committee members who have reviewed many of these efficiency and research programs.

We also wish to thank our hard-working staff members in member services, research and communications: Cale Nelson (VP of Finance & Member Services), Kelly Carli (Senior Manager of Member Services), Ron Uroda (VP of Research), and Gayle Baker (Manager of Research Studies). Finally, thanks to Nichole Duffy (VP of Government Relations), Terra Schiebold (Executive Assistant to the President), Tony Gilbert (Director of Communications) and Kyle Weber (Accounting Manager). They all do good work all year long, and I think this savings report is another example of that.

All the best,

Thomas P. Foley, J.D.
President

AICUP'S COLLABORATION SAVINGS REPORT

AICUP PROGRAM/ACTIVITY 2025	#	Program Volume (as/if applicable)	Estimated Savings or Incremental Value or Rebate (as/if applicable)	Average Program Volume per College	Average Program Savings per College
Finance, Purchasing & Treasury					
Aggregated Group Purchasing	81	$43,035,151	$5,216,218	$531,298	$64,398
Business Resilience & Organizational Readiness (2024)	6	$42,000	$42,000	$7,000	$7,000
Campus Commerce Solutions	22	$557,155,431	$202,819	$25,325,247	$9,219
Electronic Payables & Purchasing Cards – PNC	44	$173,893,298	$2,441,494	$3,952,120	$55,489
Electronic Payables & Purchasing Cards – JPMC	3	$86,963	$139,100	$28,988	$46,367
Debt Financial Advisory & Bond Program (since 1997)	46	$1,501,000,000	$3,602,400	$32,630,435	$78,313
Project & Equipment Finance	41	$63,567,370	$429,555	$1,550,424	$10,477
A/P Automation (AMP)	13	$244,302,115	$323,048	$18,792,470	$24,850
Facilities & Administration					
Energy Procurement	27	$15,893,934	$317,879	$588,664	$11,773
Environmental, Health & Safety Compliance	12	$571,341	$216,000	$47,612	$18,000
MasterConcept (AMP)	14	$584,000	$416,000	$41,714	$29,714
Technology & Communications					
Adobe Software Programs (CLP & ETLA)	54	$2,222,080	$577,741	$41,150	$10,699
Microsoft EES & Academic Select	52	$4,305,075	$731,863	$82,790	$14,074
VMware ELA	31	$1,066,327	$405,204	$34,398	$13,071
BoardEffect Secure Trustee Management Software	34	$350,000	$425,000	$10,294.12	$12,500
Hess Consortium Collective ERP	43	$0	$30,000	$0	$698
KeystoneREN	20	$395,422	$625,742	$19,771.10	$31,287
Three Rivers Optical Exchange (no data provided)	11	$0	$0	$0	$0
Data Security Software (AMP)	5	$380,000	$150,000	$76,000	$30,000
NCFTA Cyber Security Collaborative (AMP)	24	$222,000	$618,000	$9,250	$25,750

HR, Compliance & Legal					
Act 153 Compliance Program	30	$306,487	$61,297	$10,216	$2,043
Clery Center Membership	18	$53,600	$14,800	$2,978	$822
Long-Term Care Insurance	40	$2,467,415	$301,927	$61,685.38	$7,945
Personal Health Advocacy Program	38	$0	$2,929,241	$0	$77,085
Title IX Coordinator/Investigator Training	7	$25,257	$8,840	$3,608	$1,263
AICUP HealthChoice (ICHRA) (AMP)	1	$6,007,875	$1,256,000	$6,007,875	$1,256,000
PA Multiple Employer Retirement Plan (AMP)	8	$535,000,000	$765,050	$66,875,000	$95,631
University and College Insurance Consortium (AMP)	15	$2,600,000	$0	$173,333	$0
Student Services					
AICUP Student Health Insurance	15	$5,337,586	$445,109	$355,839	$29,674
AICUP Program Sharing (AMP)	15	$772,076	$66,321	$51,472	$4,421
Other AICUP Activities					
WICHE/SAN Online Distance Learning	32	$5,000	$148,736	$352	$4,648
Monthly President Updates/Webinars	84	$1,226,847	$7,551,153	$14,605	$89,895
Campus Leaders Webinar Series	71	$0	$109,200	$0	$1,538
2025 Campus Leaders Forum	56	$19,446	$17,596	$347	$314
AICUP Research Studies					
2024–25 Freshman Admissions/Student Financial Aid Survey	60	$0	$45,000	$750	$750
2024–25 Financial Analysis & Trends Survey	59	$0	$59,000	$1,000	$1,000
2025–26 Tuition & Fees Survey	72	$0	$36,000	$500	$500
2025 First Year Student Survey	6	$0	$7,800	$0	$1,300
2025 Information Management Systems Survey	62	$0	$62,000	$1,000	$1,000
2025 Students by Legislative District Study	80	$0	$40,000	$500	$500
2024 AICUP Economic Impact Study	80	$0	$800,000	$0	$10,000
TOTALS	(1)	**$2,918,591,981**	**$31,312,085**	**$138,538,215**	
	(2)	**$1,417,591,981**	**$27,709,685**	**$105,907,781**	**$325,996**

(1) Includes all years of program volume for bond program (2) Only includes program volume and savings for 2025

AICUP's Mission – Endorsement of Business Efficiencies

AICUP continues to operate under a mission statement establishing when/if a program proposal is to be Board-endorsed. This mission statement directs AICUP:

- To design participatory programs of shared service delivery or group-based procurement that leverage the consumer strength of the AICUP membership, thereby reducing price for services and goods.
- To exercise market influence as an aggregation of consumers with like needs and similar circumstance in such a way as to encourage service and product suppliers to recognize the status of private higher education as a significant market worthy of preferred marketing coverage, pricing and service delivery.
- To promote programs of collaboration that, absent the AICUP's coordination role, would not be developed to the necessary critical mass on a regional or state-wide level.
- To avoid duplication of efforts with our member colleges by identifying unique and strategic opportunities that are best suited for a state-level association and not otherwise performed by individual or groups of member colleges on a regular basis.

As a byproduct of a good program, AICUP occasionally develops programs that produce income which defray AICUP administrative expenses while providing greater value to the participating membership. In order to fulfill this mission, we have developed a three-tier model of partnership for the benefit of our members. Those partnerships begin with companies joining the Corporate Affiliate program. Over time, AICUP hopes to encourage interested Corporate Affiliates to increase their role in AICUP with the Member Preferred Program (AMP) status. This may lead to AICUP Board Endorsement after volume participation yields further enhancements. The following pages provide a description of each of these tiers.

AICUP Corporate Affiliate Program

The AICUP Corporate Affiliate Program is made up of high-quality companies that demonstrate support for independent, nonprofit higher education through financial contributions to AICUP, by offering solutions that meet member needs, and through an established presence in Pennsylvania.

Most affiliates are domiciled in or maintain an office in Pennsylvania; participation is by invitation only and companies must provide services to at least one AICUP member before becoming eligible. Out-of-state companies may join by providing three references from AICUP member institutions. AICUP's due diligence consists of a completed application and a virtual or in-person interview with staff.

Corporate Affiliates are encouraged to share information about training and educational opportunities that would benefit member campuses. Many affiliates already offer formal training programs or ad hoc client-acquisition events; when submitted in a timely manner, these offerings can be promoted in AICUP's monthly eNewsletter, *The Spotlight*. Affiliates interested in collaborating on timely programming may also submit proposals online for the ongoing AICUP Campus Leaders Webinar Series.

The program currently includes more than 80 corporate affiliates, each contributing to AICUP's mission of supporting independent higher education across the Keystone State.

For more information on the Corporate Affiliate program, contact Kelly Carli at carli@aicup.org.

AICUP Member Preferred Programs

The purpose of the AICUP Member Preferred Program (AMP) is to provide Corporate Affiliates with an opportunity to offer pricing discounts and/or service enhancements to AICUP members without requiring volume, leverage or aggregation that is necessary for an AICUP Endorsed Program.

Corporate Affiliates, through AMP, are able to submit unsolicited pricing or preferred service programs to the AICUP Member Services Committee for consideration.

The organic propagation of preferred pricing and terms for AICUP members will over time serve the AICUP membership well when services are not easily aggregated across the large geography of the Commonwealth. Multiple service providers within the same field of business can be accommodated without a winner takes all endorsement through an RFP.

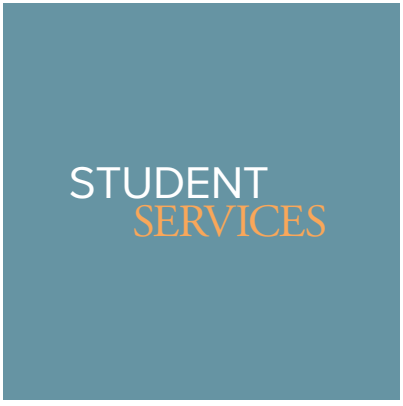
Learn more about AMP by contacting Cale Nelson at nelson@aicup.org or 717-232-8649, ext. 241.

AICUP Board-Endorsed Business Efficiency Programs

Programs in this brochure labeled as AICUP Endorsed Programs were carefully reviewed by the Association's staff, its AICUP Member Services Committee and finally endorsed by the AICUP Board of Directors (see pp. 78 – 80).

Often times, these programs are the result of lengthy RFP processes, extensive reference checks, multiple focus group meetings, company profile reviews and/or an AMP program. The program administrators listed in this section have licensed the AICUP trade name and trademark to advertise their program to AICUP members. As such, the words and logo, "AICUP Endorsed" are used to describe these programs.

The next six sections outline the Business Efficiency programs, their descriptions, outcomes and participation statistics, and contact information. Additionally, you will find the AICUP Corporate Affiliates within that category.



Notes

FINANCE, PURCHASING & TREASURY

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Business Continuity & Organizational Readiness

Kuali Ready is a cloud-based SaaS solution designed to help organizations in higher education quickly build and maintain business continuity plans. It provides a ready-to-go framework for new customers, allowing them to quickly set up and customize continuity plans to fit their institution's needs.

Enhance Campus Resilience with Kuali Ready! Kuali Ready is a cloud-based, IT-approved software designed specifically for higher education institutions, aimed at minimizing risks associated with everyday adverse events on campuses. This all-hazards solution facilitates business and academic continuity planning through intuitive reporting, custom design, and identification of critical functions.

Outcomes:
AICUP Member Participants: 6
Program Volume: $35k

Unique Program Features:

- **No-Code & User-Friendly Design:** With a drag-and-drop interface, non-technical users can easily create and manage plans without needing IT support.
- **Customizable Workflows:** Every plan has an attached workflow, ensuring a structured approach to approval, updates, and execution.
- **Built-In Guidance:** For users unfamiliar with business continuity concepts, Kuali Ready provides step-by-step guidance and explanations of key terms.
- **API Integrations:** Institutions can connect Kuali Ready with existing systems (HR, finance, student databases) for real-time data synchronization and automation.
- **SaaS Convenience:** As a cloud-based solution, Kuali Ready requires no on-premise installation, making it easy to deploy and scale.

With its **flexibility, automation, and accessibility**, Kuali Ready helps institutions streamline continuity planning and prepare for unexpected disruptions—without the need for deep technical expertise.

Contact: Stephen Sanchez, steve.sanchez@kuali.co or 508-514-5981

Campus Commerce Solutions

Nelnet Campus Commerce is a leading provider of campus payment and commerce solutions, partnering with higher education institutions across the country to streamline and modernize their student financial operations. Our comprehensive suite of products—including payment processing, tuition payment plans (semester, international and past due/long term), Storefront and commerce management, and Refund disbursement—integrates seamlessly with major student information systems to reduce administrative burden and improve the student experience. We are committed to building long-term partnerships with our clients, delivering not just technology, but the strategic support and expertise institutions need to meet their unique campus commerce goals. Nelnet Campus Commerce is proud to be a member of the AICUP community and to serve the institutions that make up this valued network.

Outcomes:
AICUP Member Participants: 23
Payment Processed 2025: $557M
Payment Plans Managed 2025: 19,184

Unique Program Features:
- Dedicated school support
- Multi-lingual student call center - domestically located
- Proven partnerships and stability
- Certified partner with all major ERP (on-prem and cloud)
- Security and Compliance PCI-DSS Level I Certified
- Solutions built around clients' needs and feedback

Contact: Laurie Holbrook Doyon, Laurie.Holbrook@nelnet.net or 207-329-8029

Debt Management & Bond Program

Through this Program, AICUP members have had all aspects of their debt portfolio managed by the program's highly experienced team including the national Higher Education Practice Group of Stifel. Most key individual team members employed by the program's participating firms have worked with the program since its inception in 1997, saving AICUP members both time and costs of issuance.

Outcomes:
AICUP Member Participants: 46
Dollar Volume Since 1997: Over $1.41B
Estimated Savings (in 2025): $15k

Unique Program Features:
- Savings of University finance staff time and transaction costs
- Efficient professional team with standardized base documents
- Program commitment of not-to-exceed fees
- Program discounts related to fees

Contact: Ken Porembka, porembkak@stifel.com or 412-923-5926

Electronic Payables & Purchasing Cards Program

PNC's Electronic Payables & Purchasing Cards program offers AICUP members a suite of services that creates a "real purchasing power" amongst its members. It begins with the power of leveraging an electronic payables channel to offer virtual card payments to your suppliers, while also enabling your team to take advantage of making purchases using traditional commercial cards and purchasing cards to pay for services and products purchased. PNC's program offers a great opportunity to drive value through your own unique procure-to-pay process while also offering the opportunity to achieve higher rebate tiers which helps to maximize your own school's revenue share (rebate) incentive. The aggregation of spend across the AICUP members results in an increased revenue share benefit, year after year, for each member school. Growing the AICUP member base will help ensure the continued success of this program!

Outcomes:
AICUP Member Participants: 44
Volume: $173.9M
Average Volume per College: $3.9M
Average Savings per College: $55.5k

Unique Program Features:
- Ability to benefit from the spend of all participating members to achieve a higher rebate tier
- Rebate paid on dollar one
- Rebates paid to the schools quarterly

Contact: Christie McCloskey, christie.mccloskey@pnc.com or 212-551-7557

Project & Equipment Finance

First American is a specialty lender, ultimately owned by RBC, that works exclusively with CFOs and CIOs at over 650 higher education institutions to finance capital projects and equipment on campus. The three main areas include: IT assets, building infrastructure and renovations, and ERP software projects.

Outcomes:
AICUP Member Participants: 41
Total Program Volume: $63.5M
Average Savings per College: $10.5k

Unique Program Features:
- IT equipment leasing
- Facilities renovations and deferred maintenance project financing
- ERP software implementation financing

Contact: Matt Rankin, matt.rankin@faef.com or 585-643-3459

Accounts Payable Automation

Corpay (as successor to Paymerang) provides streamlined invoice and payment automation platforms that bring business offices into the modern age. One of the major challenges hindering business offices, especially in higher education, is manual, paper-based accounting processes. Around 84% of the typical AR/AP practitioner's day is spent on manual tasks, which are time-consuming and highly inefficient. Corpay's holistic solution streamlines the procure-to-pay process. It saves teams thousands of hours annually, allowing accounting teams to focus on more student-facing activities and projects while exploring new ways to run their schools more strategically and profitably.

As a procure-to-pay automation provider, Corpay understands higher education business offices are busier than ever and need more time to focus on student needs. Implementing Corpay's automation solutions take less than 10 hours and works with various ERPs, including Banner, Colleague, Jenzabar, Great Plains, Workday, Oracle, and Blackbaud. Along with that, Corpay provides white-glove customer service, unlike similar providers. More than 100 U.S.-based customer representatives can answer inquiries from vendors and business office teams, typically within 2 hours or less, guaranteeing that your organization's staff doesn't take the brunt of obligations slowing them down.

Outcomes:
AICUP Member Participants: 15
Program Volume: $244.3M
Average Rebate per College: $24,850

Contact: Cody Emmert, Cody.Emmert@corpay.com or 540-894-6730

Aggregated Group Purchasing

NEW!

AICUP institutions are mission-driven, student-focused, and deeply committed to 'always better' stewardship. But now, independent colleges and universities face real and mounting pressure. That's where E&I comes in. They understand the immense financial pressure and resource constraints you face every day. They know procurement is an essential function, but it can't always be a top priority for everyone on campus. For more than 90 years, and as former procurement officers, we've helped more than 6,500 education institutions, like yours, with best-in-class contracts, strategies, and solutions custom-developed for the unique needs of education. We can help you!

E&I is the only member-owned, non-profit procurement cooperative focused exclusively on education—a provider whose interests fully align with ours and shares our unwavering commitment to member success and educational outcomes.

Unique Program Features:

- Education-focused expertise and industry partnerships
- Broad portfolio of competitively solicited contracts with industry-leading suppliers
- Analytics-driven sourcing solutions to optimize your education dollars
- Proven track record simplifying procurement and driving measurable cost savings

Contact: Jon Kokos, jkokos@eandi.org or 631-630-8316

AICUP CORPORATE AFFILIATES

Baker Tilly – is a national full-service advisory and accounting firm serving colleges, universities, academic medical centers, and research institutions. They provide assurance, tax, internal audit, and consulting services—covering risk management, research compliance, cybersecurity, talent management, cost reduction, fraud, construction and other strategic and operational needs—and currently work with more than 400 institutions nationwide.

Contact: Pam Amado-Demagajes, Pam.Amado@bakertilly.com or 206-302-6339

CliftonLarsonAllen – exists to create opportunities for our clients, our people, and our communities through industry-focused wealth advisory, digital, audit, tax, consulting and outsourcing services. With more than 8,500 people operating from nearly 130 locations across the country, including offices in King of Prussia, Pittsburgh and Bethlehem, we promise to know you and help you.

Contact: Sara Doyle, sara.doyle@CLAConnect.com or 267-419-1653

Core Education PBC – is a public benefit corporation on a mission to transform higher education's business model. As a long–term, mission–critical strategic partner to colleges and universities, Core leverages scale to drive operational efficiency, technology modernization, market and capital expansion, and financial resiliency. It currently supports just under seven institutions with a combined budget of over $3.5 billion, working closely with presidents, boards, and campus leaders to enhance institutional prosperity.

Contact: Mariah Sheridan, msheridan@core.edu or 904-252-5361

Cornerstone Advisors Asset Management – is a Registered Investment Advisor located in Bethlehem, Pennsylvania. They provide full-service investment consulting and OCIO services to middle-market institutional clients, including colleges, universities, and other not-for-profit clients. They combine consistency of fiduciary process and flexibility of implementation to create tailored solutions for each client. Cornerstone has a deep and experienced team—since 2016, they were named a Best Place to Work in Money Management by Pensions & Investments.

Contact: Malcolm L. Cowen, scowen@cornerstone-companies.com or 610-694-0900

Corpay – our A/P payment automation frees higher education from repetitive manual tasks, reduces fraud, and eliminates compliance risks. ***Corpay is the member preferred program (AMP) provider of the AICUP A/P Automation Program.***

Contact: Cody Emmert, Cody.Emmert@corpay.com or 540-894-6730

E&I Cooperative Services (E&I) – is the only member-owned, non-profit procurement cooperative focused exclusively on education. E&I delivers unsurpassed value and an exceptional experience to its members through a broad portfolio of competitively solicited contracts with industry-leading suppliers and a range of innovative sourcing solutions. The Cooperative empowers its members to make informed, analytics-driven decisions to capture more spend and optimize their education dollars. ***E&I is the member preferred program (AMP) provider of the AICUP Aggregated Group Purchasing Program.***

Contact: Jon Kokos, jkokos@eandi.org or 631-630-8316

First American Education Finance – is a financial services company dedicated to serving the needs of the education community. We provide customized solutions to help schools deliver the best education possible to their students. Our unique financing solutions help over 500 schools nationwide solve challenges from complex campus projects to equipment management—all through a simple and transparent experience. ***FAEF is the endorsed program provider of the AICUP Project & Equipment Finance Program.***

Contact: Matt Rankin, matthew.rankin@faef.com or 585-643-3459

FNB Corporation – headquartered in Pittsburgh, Pennsylvania, is a diversified financial services company operating in seven states and the District of Columbia. The company has total assets of more than $50 billion and more than 350 banking offices throughout Pennsylvania, Ohio, Maryland, West Virginia, North Carolina, South Carolina, Washington, D.C. and Virginia. FNB provides a full range of commercial and consumer banking services including Treasury management and University Banking solutions designed to meet the needs in the Higher Education.

Contact: Deborah Finnegan, finnegand@fnb-corp.com or 412-613-6549

Forvis Mazars – an independent member of Forvis Mazars Global, is one of the largest U.S. accounting firms with 7,000 professionals delivering assurance, tax, and consulting services nationwide and internationally. Serving hundreds of educational institutions—from small private colleges to large public universities—the firm emphasizes deep industry expertise and ongoing collaboration, providing reliable communication and practical guidance to help schools meet their goals.

Contact: Adam Smith, adam.smith@us.forvismazars.com or 260-460-4047

FSL Public Finance – is an independent financial advisory firm serving colleges, universities, and municipal issuers across the Commonwealth and Mid−Atlantic region. Founded in 2001, FSL provides debt-related consulting and advisory services, intentionally avoiding underwriting or principal roles to ensure client-focused advice. The firm is a NAIPFA member and is registered with the MSRB and SEC.

Contact: Rebecca Delia, rebecca.delia@fslpf.com or 717-399-6629

Fulton Bank (Fulton Innovation Institute) – Founded in 1882, Fulton Bank is a regional financial institution and part of Fulton Financial Corporation, a financial services holding company with more than $30 billion in assets. Serving communities across five states, Fulton offers a full range of banking and financial services. The Fulton Innovation Institute fosters collaboration between higher education and industry through experiential learning, applied research, and innovation-focused projects. Together, they provide opportunities for students and faculty to address real-world business challenges and explore emerging technologies.

Contact: Amanda Burton, aburton@fultonbank.com or 717-333-3237

Janney Montgomery Scott LLC – based in Philadelphia, provides nationwide financial advisory services to higher education and nonprofit institutions through its Higher Education Not-for-Profit Advisory (HENFP) Group. Acting as a fiduciary, the HENFP Group supports capital planning, debt portfolio management, credit analytics, and strategy and management work, with specialized expertise in municipal transaction advisory, internal bank frameworks, and rating–agency strategy and modeling.

Contact: Erin Ortiz, eortiz@janney.com or 215-962-0600

M&T Bank – and its affiliates offer a full range of financial services for colleges and universities, including treasury management, procurement cards, investment management, custody, trustee services, credit, derivatives, and insurance. Its Investment Banking Group handles bond underwriting, Wilmington Trust provides institutional investment, custody and specialized trust services, and M&T Insurance Agency delivers property & casualty, D&O, and group health coverage plus coverage-due-diligence.

Contact: Mark Cohen, mcohen1@mtb.com or 302-651-1357

Nelnet Campus Commerce – provides innovative, education-focused technologies and services to more than 1,300 campuses across the country. Our comprehensive suite of solutions give staff and students secure, real-time access to the information they need to streamline payment processes and achieve their educational goals. But we are more than just a vendor. We work closely with each of our clients to build the trust and experience necessary to create a true partnership. This consultative approach enables us to enhance our services and innovate our products to bring real value to our partners today, tomorrow, and beyond. ***Nelnet is the endorsed program provider of the AICUP Campus Commerce Solutions Program.***

Contact: Laurie Holbrook, Laurie.Holbrook@nelnet.net or 207-329-8029

PNC Financial Services Group – is a financial institution which offers a full array of financial services. Through its partnership with Vizient, PNC is the preferred provider P-card services offering a very competitive program to AICUP members. ***PNC is the endorsed program provider of the AICUP Electronic Payables & Purchasing Cards Program.***

Contact: Christie M. McCloskey, christie.mccloskey@pnc.com or 212-551-7557

S&P Global Ratings – a division of S&P Global Inc. (NYSE: SPGI), is the world's leading provider of credit ratings. For more than 60 years, our public finance team has provided credit ratings, analyses and market insights for a diverse range of public sector and not-for-profit entities. We currently rate more than 430 U.S. public and private colleges and universities.

Contact: Anthony Ivancich, anthony.ivancich@spglobal.com or 212-438-5060

Stevens & Lee – ranked among the 250 largest U.S. law firms, serves as counsel to colleges and universities across Pennsylvania. The firm advises on higher education finance, government affairs, development and planned giving, education law, student affairs, labor and employment, employee benefits, litigation, real estate, mergers and exigency matters. With professionals who have served as trustees, senior campus executives, and faculty, Stevens & Lee combines deep higher–education experience with a multidisciplinary platform.

Contact: Jennifer Nevins, jennifer.nevins@stevenslee.com or 610-478-2243

Stifel – provides independent financial advisory or underwriting services for 508 higher education issues exceeding $19 billion. ***Stifel is the endorsed program provider of the AICUP Debt Financial Advisory & Bond Program.***

Contact: Ken Porembka, porembkak@stifel.com or 412-923-5926

Synario –(in partnership with PFM Solutions) is a cloud-based long-range financial planning platform for CFOs, finance teams, and boards. It offers scenario and sensitivity testing for enrollment, discounting, funding, debt, capital, and staffing, plus dashboards and real-time displays that link financial plans to strategic plans.

Contact: Marc Pitcher, PitcherM@synario.com or 215-557-1267

Notes

FACILITIES & ADMINISTRATION

AICUP'S COLLABORATION SAVINGS REPORT

AICUP PROGRAM/ACTIVITY 2025	#	Program Volume (as/if applicable)	Estimated Savings or Incremental Value or Rebate (as/if applicable)	Average Program Volume per College	Average Program Savings per College
Facilities & Administration					
Energy Procurement	27	$15,893,934	$317,879	$588,664	$11,773
Environmental, Health & Safety Compliance	12	$571,341	$216,000	$47,612	$18,000
MasterConcept (AMP)	14	$584,000	$416,000	$41,714	$29,714

Energy Management & Procurement

For over eight decades, electricity was generated, transmitted, distributed, sold, and bought in the same manner. This all changed in December 1996 when Pennsylvania passed a law, which, among other requirements, provided customers the option of competitively buying their electric supply needs. To assist AICUP and its members in sorting through the issues created by retail deregulation, AICUP contracts with Constellation and Evolution Sustainability Group (ESG). Member colleges are priced individually to ensure that one does not subsidize another. By participating in the program, AICUP members can be assured of getting excellent rates, stability over a longer term, best practices decision-making and many other value-added products (e.g. Green Power).

Outcomes:
AICUP Member Participants: 27
Dollar Volume for 1st 12 Months of Current Contracts: $15.9M
Average Savings per College $10,536

Contacts: Blaire Miller, blaire.miller@constellation.com or 443-610-6259 or Chuck Hurchalla, churchalla@evolutionsg.com or 610-329-8288

Environmental, Health & Safety Compliance

WasteStrategies provides a variety of services to AICUP member schools designed specifically to support your Facilities, Environmental Health and Safety, and Risk Management departments including:

- EHS Staffing
- Outsourced Safety and Asset Inspections
- Policy Review, Development and Deployment
- Onsite Training and Certifications
- Hazardous Waste Collection and Disposal

Outcomes:
AICUP Member Participants: 12
Total Volume: $571k
Estimated Savings: 30%
Average Savings per Member: $18k

Contact: Adam Waligora, awaligora@wastestrategies.com or 443-510-5513

Natural Gas Procurement

NEW!

AICUP has long supported member institutions through its collaborative electricity procurement program—but energy management extends beyond electricity alone. Recent volatility in natural gas markets has made procurement more complex, with rising uncertainty and pressure on institutional budgets. This program provides members with access to market intelligence, competitive supplier pricing, and greater transparency. Unlike many third-party arrangements, this program features a fully transparent broker fee—often up to 50% lower than what institutions may currently be paying.

Contact: Chuck Hurchalla, churchalla@evolutionsg.com or 877-280-4655

MasterConcept Plan™

AICUP member schools face a consistent challenge in reconciling needs for campus facilities planning, design and construction, with the availability of funding, early in the project lifecycle. The MasterConcept Planning Process aligns and connects these projects with their institutional mission, allowing schools to go beyond just meeting the need, by also using their capital projects to help fulfill their institutional mission and build their unique brand of education, for the monies that are available. To meet these challenges, Kimmel Bogrette has developed the MasterConcept Plan™.

Outcomes:
AICUP Member Program Participants: 14
Program Volume: $584k
Estimated Savings: $416k

Unique Program Features:

- 5 phases that expeditiously: identifies the need and goals, understands the constraints, develops an experiential program, creates a compelling design solution and confirms that the project cost of fits the budget
- Matches need with available budget without sacrificing innovation and design excellence
- Supports forward-thinking facilities planning, that maximizes the use of financial resources to be the roadmap for future campus improvements
- This approach is the only fixed-cost planning and design tool in the industry, offered at a discounted rate for AICUP members schools
- ½ of program fees are credited toward the project's design and construction documentation if Kimmel Bogrette is retained to implement the design from the MasterConcept planning project

Contact: Buck Collins, bcollins@kimmelarch.com or 610-834-7805

Breslin Architects – with over 60 years' experience, Breslin Architects delivers award–winning, durable, and sustainable campus architecture. The firm has completed 32 major projects at seven AICUP institutions and provides full architectural services—design through construction, master planning, and interior design—emphasizing creative exploration, interdisciplinary collaboration, pedagogy-sensitive solutions, energy efficiency, and occupant well-being.

Contact: Stephen Behrens, SteveBehrens@BreslinArchitects.com or 610-437-9626

Benchmark Construction Company – since 1985, Benchmark Construction has built on core values to deliver innovative, client-focused construction and services that uplift communities. Committed to integrity, leadership, and collaboration, the company pursues sustainable, high-quality projects that align with clients' visions.

Contact: Matt Witteman, mwittemann@benchmarkgc.com or 215-872-3503

The Butz Family of Companies – (Alvin H. Butz, Shoemaker Construction, and Alexander Building Construction) is a full-service construction management and design/build firm serving Pennsylvania, New Jersey, and northern Delaware. With extensive experience across healthcare, higher education, corporate, manufacturing, sports, government, K–12, and retail projects, the firm emphasizes safety, quality, value, and customer satisfaction. Its scale and experience enable efficient purchasing, strong subcontractor partnerships, and reliable delivery of complex projects through teamwork and continuous improvement.

Contact: Mitch Hanna, mitch.hanna@butz.com or 610-395-6871

Cintas – is an industry leader supplying uniform programs, entrance and logo mats, restroom and floor-care products, first aid and safety supplies, fire protection services, and industrial carpet/tile cleaning. Serving over one million businesses, Cintas helps customers maintain clean, safe, and professional facilities and "Get Ready" for the workday.

Contact: Tom Best, BestT@Cintas.com or 570-687-7766

Constellation – assists AICUP members with managing energy costs in new and powerful ways to achieve budget certainty, cost savings and financial protection with a full range of integrated energy solutions. ***Constellation is the endorsed co-provider of the AICUP Energy Management & Procurement program.***

Contact: Blaire Miller, blaire.miller@constellation.com or 855-836-2658

Crabtree, Rohrbaugh & Associates – is a full-service architectural, interior design, and planning firm specializing in educational architecture, founded in 1984 and headquartered in Mechanicsburg, PA, with 80+ staff and four offices nationwide. The firm serves many Pennsylvania colleges and AICUP members, delivering student housing, dining, labs, lecture halls, student centers, master plans, athletic facilities, and a dedicated Higher Education Studio that translates emerging teaching–learning models into dynamic campus environments.

Contact: Tracy Rohrbaugh, trohrbaugh@cra-architects.com or 717-458-0272

Derck & Edson – Since 1940, we've supported higher education nationwide with planning, design, and implementation services—master planning, feasibility studies, athletic facilities, architecture, landscape architecture, civil engineering, site design, circulation solutions, GIS, construction observation, and identity enhancement—delivering impactful, lasting results that enhance campuses.

Contact: Jane Lawler Smith, jsmith@derckandedson.com or 717-626-2054

Evolution Sustainability Group – is a complete package of energy and sustainability expertise bundled across our sister companies. Evolution's customers enjoy a positive impact on the bottom line by leveraging a comprehensive suite of energy and sustainability services that mitigate risk, enhance stakeholder/asset value, and provide a foundation to increase corporate citizenship and sustainable practices. ***ESG is an endorsed co-provider of the AICUP Energy Management & Procurement and the Natural Gas Procurement programs.***

Contact: Chuck Hurchalla, churchalla@evolutionsg.com or 877-280-4655

Johnson Controls – Performance Infrastructure Higher Ed team specializes in creating funding opportunities for your most pressing infrastructure requirements by applying technology that will reduce your current operational spending.

Contact: Paul Pinkston, paul.pinkston@jci.com or 920-362-6817

Kimmel Architecture, Inc – is a full-service design firm specializing in Master Planning, Architecture, Interior Design and Site Planning for Mission Driven Institutions. To date, we have worked with 35 AICUP members to further their Missions with projects that build their individual brands and attract the students they desire most. Our mission is to provide "Extraordinary Solutions for Ordinary Budgets" and it is our commitment to deliver something wonderful to your school, no matter how limited your funding might be. ***Kimmel Architecture, Inc. is the provider of the AICUP Member Preferred Program (AMP) MasterConcept Plan™.***

Contact: Buck Collins, bcollins@kimmelarch.com or 610-834-7805

MBP – is a nationally recognized construction management firm, MBP delivers complex building and infrastructure projects with services in project management, program consulting, project controls, risk management, commissioning, facility performance, and dispute resolution. With deep technical expertise and an innovation-focused culture, MBP serves higher education, K–12, healthcare, government, and transportation markets.

Contact: Gerry Timothy, gtimothy@mbpce.com or 215-840-6680

McClure Company – for more than 70 years Pennsylvania-based McClure Company has delivered engineering, construction, modernization, and building-system services. With expertise across mechanical, electrical, plumbing, process, and building automation systems, McClure manages full lifecycle needs to reduce rework, find efficiencies, and meet budget and schedule goals.

Contact: Ally Long, allylong@mcclureco.com or 717-232-9743 x2070

Murray Associates Architects, P.C. – with 90+ years of award-winning architectural and interior design experience, we deliver projects from concept through implementation and space management, including many for AICUP members. Our hands-on principals create welcoming, future-ready spaces that reflect each client's unique needs and evolving pedagogical models.

Contact: Benedict Dubbs, bdubbs@murrayassoc.com or 717-234-2581

Old Colony Group, LLC – is a full-service environmental firm specializing in hazardous waste management and regulatory compliance for educational institutions. Our experienced team handles campus-sensitive work—lab packs, maintenance chemical disposal, universal waste, lab relocation and demolition, regulatory compliance and training, and acid-neutralization system cleaning. Old Colony currently serves 12+ AICUP members and has worked on over 30 campuses in the past 20 years.

Contact: Matt Farrell, matt@labpack.com or 908-923-4006

Quandel Enterprises, LLC – engages early in the preconstruction process with planning, budgeting, scheduling, energy evaluations and coordination of all team members as well as manage the construction, turnover and occupancy of projects.

Contact: Rob Strickler, rstrickler@quandel.com or 717-657-0909

RLPS Architects – for over 70 years, RLPS Architects has created innovative and inspiring spaces to live and learn for educational institutions. From our offices in Lancaster and Pittsburgh, Pennsylvania, we provide architecture, master planning and interior design services, designing spaces to support and enhance the diverse needs of campus life. RLPS values the client relationships we have built over the years and our team remains passionate about providing innovative spaces that stimulate learning, inspire faculty growth and serve the community of each institution.

Contact: Sarah Rine, srine@rlps.com or 717-560-9501

SitelogIQ – is a national provider of facility improvement and energy-efficiency solutions—HVAC, solar, EV charging, water conservation, LED lighting, and controls—offering design, engineering, and construction management. With 20+ offices nationwide (four in the Commonwealth), SitelogIQ has completed 11,000+ projects totaling $10 billion in construction value and $1 billion in energy savings.

Contact: Joe Martino, joe.martino@sitelogiq.com or 717-238-5737

Stewart & Tate Construction – is a third-generation, family-run firm based in York, PA, with 90+ years of experience delivering quality craftsmanship and dependable results. Known for long-standing client relationships, the company emphasizes integrity, personalized service, and attention to detail. As a trusted partner in construction, we strive to grow and adapt in an ever-evolving industry—one project and relationship at a time.

Contact: Christina McCullough, cmccullough@stewartandtate.com or 717-873-9895

Wagman Construction – offers a wide array of services, including development, preconstruction, construction management, and design-build delivery. Our seasoned team is comprised of staff focused on protecting your budget and project quality, solving problems proactively, executing aggressive schedules, and placing uncompromised attention on the safety and security of your facility, employees, and visitors.

Contact: Amy Young, amyyoung@wagman.com or 717-571-8613

WasteStrategies, LLC – home of the AuditPRO automated inspection platform, is your one stop for comprehensive Environmental Health and Safety solutions. Waste and ComplianceStrategies is also a full service environmental management company providing AICUP Members with EHS Staffing, Hazardous Waste Collection and Disposal, Mock Safety Audits, and EPA/OSHA/NFPA Training and Compliance Programs. ***We are the endorsed program provider of the AICUP Environmental, Health & Safety Compliance Program.***

Contact: Adam Waligora, awaligora@wastestrategies.com or 443-510-5513

Wohlsen Construction – founded in 1890, Wohlsen provides preconstruction, construction management, general contracting, design-build, sustainable, and VDC/BIM services. Wohlsen is a trusted partner to colleges and universities across the Mid-Atlantic region. Our expertise spans all aspects of campus life—from academic buildings and residence halls to athletic centers and student spaces—helping academic institutions expand, innovate, and enhance the student experience.

Contact: Dan Przywara, dprzywara@wohlsen.com or 443-838-5617

TECHNOLOGY & COMMUNICATIONS

AICUP'S COLLABORATION SAVINGS REPORT

AICUP PROGRAM/ACTIVITY 2025	#	Program Volume (as/if applicable)	Estimated Savings or Incremental Value or Rebate (as/if applicable)	Average Program Volume per College	Average Program Savings per College
Technology & Communications					
Adobe Software Programs (CLP & ETLA)	54	$2,222,080	$577,741	$41,150	$10,699
Microsoft EES & Academic Select	52	$4,305,075	$731,863	$82,790	$14,074
VMware ELA	31	$1,066,327	$405,204	$34,398	$13,071
BoardEffect Secure Trustee Management Software	34	$350,000	$425,000	$10,294.12	$12,500
Hess Consortium Collective ERP	43	$0	$30,000	$0	$698
KeystoneREN	20	$395,422	$625,742	$19,771.10	$31,287
Three Rivers Optical Exchange (no data provided)	11	$0	$0	$0	$0
Data Security Software (AMP)	5	$380,000	$150,000	$76,000	$30,000
NCFTA Cyber Security Collaborative (AMP)	24	$222,000	$618,000	$9,250	$25,750

AICUP Software Programs from JourneyEd

AICUP software programs enable member organizations to obtain software products and services they already use at significant discounts and better terms than standard academic programs offered elsewhere. Key vendor partnerships include programs with Microsoft, Adobe and VMWare. AICUP's board-endorsed reseller, JourneyEd, provides exceptional service and is the vendor relations manager for these key contracts.

Unique Program Features:

- JourneyEd agreements offer significant cost savings by leveraging the total size of the membership with our most important vendor partners.
- JourneyEd agreements are specific to the needs of the member colleges. Because they only operate in the EDU market, JourneyEd is able to effectively work within a school's budget and process.
- AICUP's partnerships with key software vendors are strong both due to the size of the agreements and specific insight JourneyEd offers by working with so many AICUP members.

Outcomes:

Adobe Contractual License Program & Enterprise Term Licensing
AICUP Member Participants: 54

Microsoft Academic Select & Microsoft EES* Agreements
AICUP Member Participants: 52

VMware ELA Software License
AICUP Member Participants: 31

Overall Participation
AICUP Member Participants: 61
Total Spend for 2025: $7.6M
Total Savings for 2025: 1.7M

Contact: Jason Watson, jwatson@journeyed.com or 800-876-3507, x7111

BoardEffect – A Secure Board and Trustee Management Solution

BoardEffect, a Diligent brand, is a board management solution specifically designed to assist higher education boards enable quicker preparation, better collaboration, easy review of board materials, and much more through a secure and user-friendly interface. With over 15 years in the boardroom business, BoardEffect is the industry leader with 5,000 customers (and counting!), 400,000+ platform users and a 97% retention rate. 30% of BoardEffect's clients fall in the education industry—ranging from small private colleges to large research institutions. BoardEffect users report improved engagement, better document management, streamlined processes such as budget planning, decision-making, new member onboarding, and more.

Outcomes:
AICUP Member Participants: 34
Program Savings per College: Approximately $12.5k

Contact: Alisa Girardi, agirardi@diligent.com or 646-968-6850

KeystoneREN

KeystoneREN, the statewide research and education network in Pennsylvania, provides network-based research and education connectivity and technology services to higher education, K12, healthcare, libraries, public media, museums, government, and non-profit organizations. The Keystone Initiative for Network Based Education and Research (KINBER), a Pennsylvania based nonprofit organization, is committed to working with communities, governments, businesses, schools and nonprofits to advance digital equity and inclusion. KINBER believes that advancing digital equity and inclusion creates more opportunities and improves the quality of life for all. AICUP members are represented on the KeystoneREN/KINBER board and participate in the governance, strategic planning, and overall guidance for the organization.

Outcomes:

AICUP Member Participants: 20
AICUP Member Participants in PA Science DMZ: 4
AICUP Members Participating in KINBER MOR Leadership: 11

Unique Program Features:

- Over $3M in federal NSF grant funding received by AICUP members through partnership and collaboration with KeystoneREN and KINBER.
- Provides no-cost NSF grant consulting and proposal submission support to AICUP members.
- Supports Campus Cyberinfrastructure enhancements on campus, including participation in statewide PA Science DMZ with other colleges and universities.
- Ability to leverage KeystoneREN and national R&E infrastructure for significant savings on cloud transport.
- Keystone Member Exchange service provides direct connectivity between connected campuses.
- Authorized buyers able to leverage competitively bid commodity internet services as Quilt members through KeystoneREN.

Contact: Jennifer Oxenford, joxenford@keystoneren.org or 717-963-7490

Three Rivers Optical Exchange (3ROX)

3ROX is a regional network operated by the Pittsburgh Supercomputing Center at Carnegie Mellon University. 3ROX offers network connectivity (commodity Internet and research/education networks such as Internet2) to schools, libraries and higher education and reduces transit costs through rich peering and caching with content distribution networks. 3ROX offers security as a service, focusing on vulnerability scanning and intrusion detection. 3ROX understands higher ed needs and can respond quickly to short-term changes in connectivity.

Outcomes:
AICUP Member Participants: 10

Unique Program Features:

- Commodity Internet Traffic offloaded to peering and caching services: 65 to 95% of individual member's total traffic was offloaded to 3ROX peering and caching service reducing member's commodity Internet bandwidth needs.
- 3ROX receives on average five requests per year to temporarily suspend a member's Internet bandwidth cap (for free) to accommodate special events or evaluate bandwidth needs.
- 3ROX members can access special discounts on hardware, software, and services through applicable affiliate purchasing programs.
- 3ROX supports the full suite of Internet2 services and utilizes in-house Network Performance Engineers to diagnose and provide suggestions for mitigation or correction of performance issues for members.

Contact: Ken Goodwin, Goodwin@psc.edu or 412-268-4960

AICUP AgilityPR Solutions Platform

NEW!

Every story your institution tells, and every story told about it, deserves to be seen, tracked, and understood. The Agility Platform gives member schools access to Agility PR Solutions' enterprise-grade PR platform, turning scattered mentions and manual searches into one clear view of your institution's presence in the world. Schools can participate two ways, both at preferred AICUP member pricing.

Two Options:

- **Group Option (The AICUP Package):** AICUP manages a shared group of participating schools, with preferred tier pricing set by group size. The package is a fixed bundle of Media Monitoring (track mentions of your institution across online, print, and broadcast) and Media Relations (search a working journalist database and build targeted pitch lists by beat). Best for institutions that want the core essentials at the lowest entry point, with nothing to configure.
- **Standalone Option (Build Your Own):** Institutions contract directly with Agility on a 1:1 basis and choose their own configuration, at preferred member pricing scoped to what they select. Start with Media Monitoring, Media Relations, or both. Then, add any of Newswire (distribute announcements to the outlets and wires that carry them), Social Listening (follow conversation about your campus beyond news coverage), or Media Intelligence (analyst-built reports for boards, cabinets, and donors). Best for schools that need only one piece, or more than the package covers.

Unique Program Features:

- Two ways in – Take the packaged bundle or scope your own configuration; preferred member pricing applies either way
- Tiered Group Pricing – Schools joining through AICUP's group receive rates set by group participation
- Tailored Setup – Standalone participants work one-on-one with an Agility specialist to configure the platform around their specific goals
- Onboarding & Training – Guided setup and unlimited training are included with every configuration, so offices get value quickly

Contact: Leeah Kim, leeah.kim@agilitypr.com or 866-545-3745, x1294

AICUP Data Security Software Program

The AICUP Data Security Software Program is being offered by software reseller, ePlus. This program allows AICUP Members to purchase market-leading data and cyber security software solutions at considerable price discounts. The three participating software vendors are market leaders in their respective fields and they include Rubrik (backup services), SentinelOne (EDR/MDR) and Zscaler (Security Cloud). Through ePlus, AICUP Members are offered these three company's solutions directly through ePlus or through one of two Pennsylvania's Intermediate Units (see below). Significant cost savings are found by leveraging the statewide Intermediate Unit buying network. Savings up to 50% or more are achieved within this leveraged group program. ePlus is a recognized reseller of these software applications and has been working in the Pennsylvania education market for over 25 years with a significant understanding of the unique needs of college budgets and campus operations.

Unique Program Features:

Managed Backup as a Service – Powered by Rubrik through the Chester County IU

- Backup Services: (24/7 Management - Implementation and Onboarding - Troubleshooting and restoring data backups - Air-gapped, Immutable, Access-Controlled - Ransomware Monitoring - Wasabi Cloud Copy)

EDR/MDR – Powered directly by SentinelOne

- Singularity Complete (Threat Hunting - Vulnerability Monitoring - Device Control - 1-Click response for kill, quarantine, remediate and rollback)
- Singularity Ranger (Device Discovery on Network, Live Asset Inventory, Device Isolation, S1 Agent Deployment, Vulnerability Management)
- Vigilance MDR (24/7/365 Alert Monitoring, Triaging & Remediation, 24/7/365 Managed Threat Hunting, 24/7 SOC Team, Alerts and Reporting)

Security Cloud – Powered by Zscaler through Chester County IU

- Managed Internet Cybersecurity services (Full SSL/TLS Inspection, Advanced Threat Protection, Privacy Compliance, Bandwidth Optimization, Advanced Cloud Firewall, Cloud Sandbox, URL & Cloud App control)
- Managed Always-on VPN

Outcomes:

AICUP Member Participants: 5
Average Program Volume per College: $76k
Average Savings per College: $30k

Contact: Brandon Holmes, BHolmes@EPLUS.com or 484-358-6410

Amplify AI Platform

NEW!

This platform provide members with access to Amplify, a hosted generative AI platform designed to help AICUP members use AI securely, effectively and affordably. Amplify gives your institution secure, enterprise-grade access to the world's leading AI models—including GPT-4, Claude, and 20+ others—all through one powerful platform designed from Vanderbilt University.

Unique Program Features:

- **Flexible Month-to-Month Growth** – Your organization can learn and expand usage at your own pace.
- **Cost Effective** – One platform replaces multiple individual subscriptions.
- **Scalable Options** – Institutions may transition into a dedicated Amplify instance for their campus if desired.
- **Support to Scale** – CR8 provides onboarding and training at no additional cost, helping ensure successful adoption.
- **Security & Guardrails** – Hosted environment with built-in data governance, compliance tools, continuous updates, and monitoring. Amplify does not train the underlying AI models on your data.
- **Sustainability & Expertise** – Backed by an experienced enterprise software leadership team and validated by early higher education adopters.
- **Community & Collaboration** – Monthly webinars plus opportunities to share assistants and conversations with fellow AICUP members.

Contact: Kasie Joseph, kasie@cr8.io

Hess Consortium Collective ERP Program

The AICUP Member Services Committee has approved the HESS Consortium Collective Program as an AICUP Member Preferred (AMP) Program. This program is a growing subgroup of independent, non-profit colleges and universities that are interested in moving together to a common, modern, integrated and affordable cloud-native enterprise system solution using a fully solicited contract vehicle(s) for software, implementation, and ongoing support services. As well as developing a shared archive of resources to ease migration and implementation costs creating a network of institutions to both share staff expertise and other resources to lower operational overhead costs and increase efficiencies.

Outcomes:
AICUP Participating Members: 51

Unique Program Features:

- "Most Favored Nations" pricing for Oracle Cloud for Higher Education
- "Most Favored Nations" pricing for licensing, support and implementation from Drivestream (5-year and 10-year options for licensing and support subscription)
- A network of 476 HESS Collective private colleges and universities working in community around a single enterprise system platform- Oracle Cloud
- Peer institution resource sharing for continuing support through the HESS Collective ASSIST- closed-community discussion site

Contact: Keith Fowlkes, keith.fowlkes@hessconsortium.org or 859-516-3571

NCFTA Cyber Security Collaborative

AICUP and the National Cyber-Forensics & Training Alliance (NCFTA) have worked together to provide AICUP members with assistance in the development of shared high-level cyber security initiatives to protect campus infrastructure. Expanding on this very successful collaboration with NCFTA and ten (10) initial Western PA AICUP members, the collaborative has expanded. NCFTA is a Pennsylvania based 501(c)3 not-for-profit corporation that facilitates collaboration between private sector industries and law enforcement to effectively identify and address complex cyber related threats.

Outcomes:
AICUP Member Participants: 24
Savings per Member: $25.8k

Unique Program Features:

- The NCFTA policy specialist assists schools in reviewing their cyber security self-assessment and initially developing required policies leveraging common frameworks to identify gaps.
- The NCFTA analyst leverages a common mitigation framework of policies as agreed upon by the group, based on findings.
- Provides access to NCFTA Malware Program daily intel feeds to assist in identifying and mitigating threats of both a technical and non-technical nature
- Provides technical guidance in many operational spaces to include; troubleshooting, scripting, firewalls, process control, networking, backups, Azure, cloud computing, technical writing, and more.
- Coordinates access (when necessary or requested) to embedded domestic and international law enforcement partners.
- Provides alerting for compromised AICUP Members owned credentials from the Internet Fraud Alert (IFA) system.
- Conducts cyber incident Tabletop exercises on select campuses.

Contact: Tara Trickett, ttrickett@ncfta.net

Nutanix for AICUP Institutions

NEW!

In collaboration with the AICUP Member Services Committee and AMP provider ePlus, this new program features a cost-effective alternative for AICUP member institutions. Through reseller ePlus, Nutanix is providing consortia–level pricing that includes five core licenses:

- NCI Pro
- FLOW Add On
- Advanced Replication Add On
- NCM Pro
- NCP Pro

Implementation, services, and enablement will be delivered jointly by Nutanix and ePlus to ensure a seamless deployment and ongoing support.

Contact: Edison Villamar, edison.villamar@nutanix.com or 717-203-9315

Workday for Small Institutions

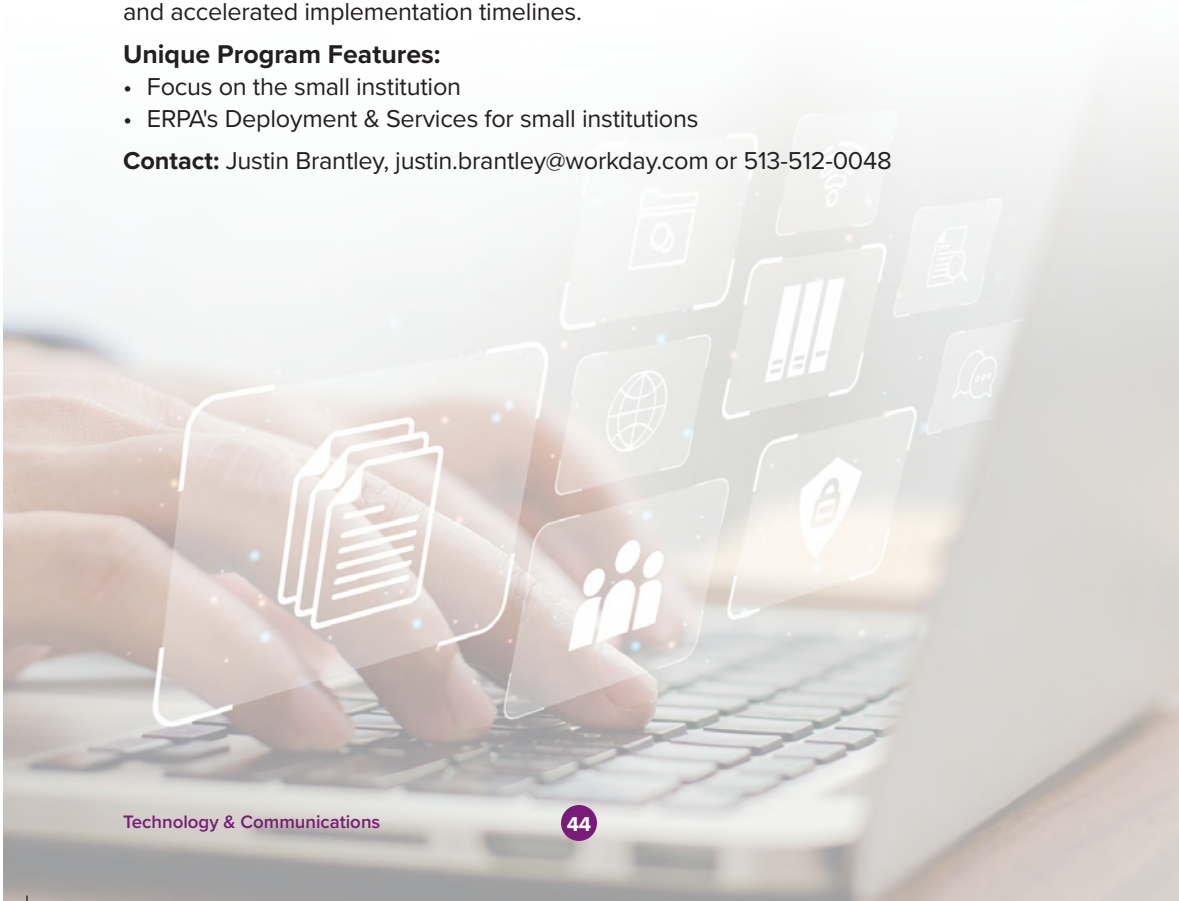
NEW!

To better support smaller colleges and universities, Workday, working with AICUP, has introduced a program specifically designed to address common challenges such as financial constraints, limited resources, and accelerated implementation timelines.

Unique Program Features:

- Focus on the small institution
- ERPA's Deployment & Services for small institutions

Contact: Justin Brantley, justin.brantley@workday.com or 513-512-0048



Abnormal AI Inc. – colleges and universities are frequent targets of cyberattacks, with email as the primary entry point. Abnormal AI is a cloud email security platform that uses behavioral AI to learn normal campus communication and automatically block sophisticated phishing and fraud—without rules, tuning, or a dedicated security team—protecting the people who power higher education.

Contact: Sam Weisbuch, sweisbuch@abnormal.ai or 201-403-0798

Agility PR Solutions – offers a comprehensive PR platform that enables organizations to establish meaningful media relations, track brand coverage, derive valuable insights, and produce actionable reports. Our platform combines powerful AI technology with purpose-built workflows for media outreach, media monitoring, social listening, and media intelligence, helping you simplify and strengthen every stage of your communications lifecycle. ***AgilityPR is the AICUP Member Preferred (AMP) provider of the AgilityPR Solutions Platform.***

Contact: Leeah Kim, leeah.kim@agilitypr.com or 866-545-3745, x1294

Amplify – is Hosted Gen AI platform that connects data to the right models for each use case and supports 20+ top-tier LLMs including the latest versions of Chat GPT and Claude. You now have access to intuitive interfaces that put advanced AI capabilities in your hands—no technical expertise required. CR8 is available for onboarding + training which is included with your AICUP instance so adoption doesn't stall. Hosted environment, data governance and compliance built-in, with continuous updates and monitoring. Amplify does not train the models. ***Amplify is the AICUP Member Preferred (AMP) provider of the Amplify AI Platform.***

Contact: Kasie Joseph, Kasie@cr8.io or 512-585-2512

Appspace – unifies physical and digital campus experiences for colleges and universities, helping them connect students, faculty, and staff, manage spaces, and streamline resource booking. Used by thousands of organizations (including 200+ healthcare providers), Appspace replaces multiple point solutions with a single platform that simplifies communication and campus navigation.

Contact: George Bechtloff, george.bechtloff@appspace.com or 442-364-5200

Aspect Consulting, Inc – provides low cost/high quality higher education functional and technical support across the entire campus ecosystem; specializing in Academic ERP/CRM/LMS systems.

Contact: Chris Bressi, cbressi@aspect-consulting.com or 610-783-0600 ext.130

BoardEffect – more than 2,000 leading organizations and over 180,000 users rely on BoardEffect to manage board-related information online and advance the work of their boards. ***BoardEffect is the endorsed program provider of the BoardEffect Secure Trustee Management Software.***

Contact: Alisa Cano, acano@diligent.com or 646-968-6850

Boldyn Networks for Higher Education – is a leader in network infrastructure for higher education, serving 400+ campuses with more than 25 years of sector experience. The company delivers campus-grade WiFi, comprehensive cellular coverage (towers, small cells, and DAS), and private networks that support academic, residential, and administrative operations. By combining best-in-class design, deployment, and managed services, Boldyn helps institutions modernize connectivity, improve the student and faculty experience, and enable future-ready campus technologies.

Contact: John O'Brien, john.obrien@boldyn.com or 919-423-5623

Core Education PBC – is a public benefit corporation on a mission to transform higher education's business model. As a long-term, mission-critical strategic partner to colleges and universities, Core leverages scale to drive operational efficiency, technology modernization, market and capital expansion, and financial resiliency. It currently supports just under seven institutions with a combined budget of over $3.5 billion, working closely with presidents, boards, and campus leaders to enhance institutional prosperity.

Contact: Mariah Sheridan, msheridan@core.edu or 904-252-5361

DegreeSight – is an AI powered platform that simplifies transfer credit evaluation for colleges and universities. It reads transcripts, suggests course equivalencies, and shows students how their credits apply to degree requirements in minutes. Schools reduce manual workload, improve accuracy, and give students clear, fast answers that increase enrollment and yield. DegreeSight integrates with SIS, CRM, and degree audit systems, providing automation, transparency, and a better experience for both staff and students.

Contact: Cody Bennett, cody.bennett@degreesight.com or 512-312-8843

Ellucian – created out of a passion for education and a vision for technology, Jenzabar offers disruptive, innovative software solutions and services that empower students' success and help higher education institutions meet the demands of the modern student. Over 1,400 higher educational campuses harness Jenzabar solutions for improved performance across campus and a more personalized and connected experience for the student.

Contact: Tom Lavin, Tom.Lavin@ellucian.com or 610-930-3652

ePlus Technology, Inc. – delivers end-to-end IT solutions—cloud and data center, security, collaboration, networking, AI, digital transformation, managed/professional services, and financing—helping organizations design and implement technology that maximizes ROI. With 30+ years of experience and a dedicated SLED practice, ePlus understands public-sector contracts and grant compliance to support education, state, and local customers. ***ePlus is one of the AICUP Member Preferred (AMP) providers of the Data Security Software and Nutanix for AICUP Institutions.***

Contact: Brandon Holmes, bholmes@eplus.com or 484-358-6410

Jenzabar Inc – unlock the next wave of higher education software with Jenzabar One, a flexible, unified-cloud ready platform, exclusive to higher education.

Contact: Nicole Stewart, Nicole.Stewart@jenzabar.com or 908-216-0453

JourneyEd – provides AICUP members with contractual pricing for commonly used software products from vendors such as Microsoft, Adobe, and VMware. JourneyEd can also help you with any of your other technology needs including but not limited to laptop/desktop and security vendors. ***JourneyEd is the endorsed program provider of the AICUP Software Programs.***

Contact: Jason Watson, jwatson@journeyed.com or 469-461-7889

Rubrik – is a cybersecurity company focused on securing data with its Zero Trust Data Security™ approach. The Rubrik Security Cloud uses machine learning to deliver unified cyber resilience—automating policy enforcement, protecting sensitive data, providing threat analytics and response, and orchestrating rapid recovery across enterprise, cloud, and SaaS environments. ***Rubrik is one of the AICUP Member Preferred (AMP) providers of the Data Security Software Program.***

Contact: Laura Cook, aura.cook@rubrik.com or 703-994-6334

SentinelOne – is a cybersecurity leader offering an AI-powered platform for autonomous endpoint protection that prevents, detects, and responds to threats across endpoints, cloud, network, and identity environments. Recognized in the Gartner Magic Quadrant, SentinelOne is trusted globally and emphasizes partnerships and customer success to help organizations secure critical assets efficiently. ***SentinelOne is one of the AICUP Member Preferred (AMP) providers of the Data Security Software Program.***

Contact: Hannah Mein, hannah.mein@sentinelone.com or 215-262-1749

Workday Higher Education – continues to expand its presence in higher education, with over 580 institutions leveraging its platform and more than 90 now live on Workday Student. 13 AICUP schools are already part of the growing Workday community. To better support smaller colleges and universities, Workday has introduced new programs specifically designed to address common challenges such as financial constraints, limited resources, and accelerated implementation timelines. ***Workday is the AICUP Member Preferred (AMP) provider of the Workday for Small Institutions.***

Contact: Justin Brantley, justin.brantley@workday.com or 513-512-0048

Zscaler – provides a cloud-native, zero-trust security platform that replaces legacy appliances to secure universities' remote, hybrid, and BYOD environments. It delivers scalable access control, real-time traffic analysis and threat detection to protect sensitive data while simplifying policy enforcement and compliance. ***Zscaler is one of the AICUP Member Preferred (AMP) providers of the Data Security Software Program.***

Contact: Dan Clarke, dclarke@zscaler.com or 570-220-3140

HR, COMPLIANCE & LEGAL

AICUP'S COLLABORATION SAVINGS REPORT

AICUP PROGRAM/ACTIVITY 2025	#	Program Volume (as/if applicable)	Estimated Savings or Incremental Value or Rebate (as/if applicable)	Average Program Volume per College	Average Program Savings per College
HR, Compliance & Legal					
Act 153 Compliance Program	30	$306,487	$61,297	$10,216	$2,043
Clery Center Membership	18	$53,600	$14,800	$2,978	$822
Long-Term Care Insurance	40	$2,467,415	$301,927	$61,685.38	$7,945
Personal Health Advocacy Program	38	$0	$2,929,241	$0	$77,085
Title IX Coordinator/ Investigator Training	7	$25,257	$8,840	$3,608	$1,263
AICUP HealthChoice (ICHRA) (AMP)	1	$6,007,875	$1,256,000	$6,007,875	$1,256,000
PA Multiple Employer Retirement Plan (AMP)	8	$535,000,000	$765,050	$66,875,000	$95,631
University and College Insurance Consortium (AMP)	15	$2,600,000	$0	$173,333	$0

Act 153 Compliance Program

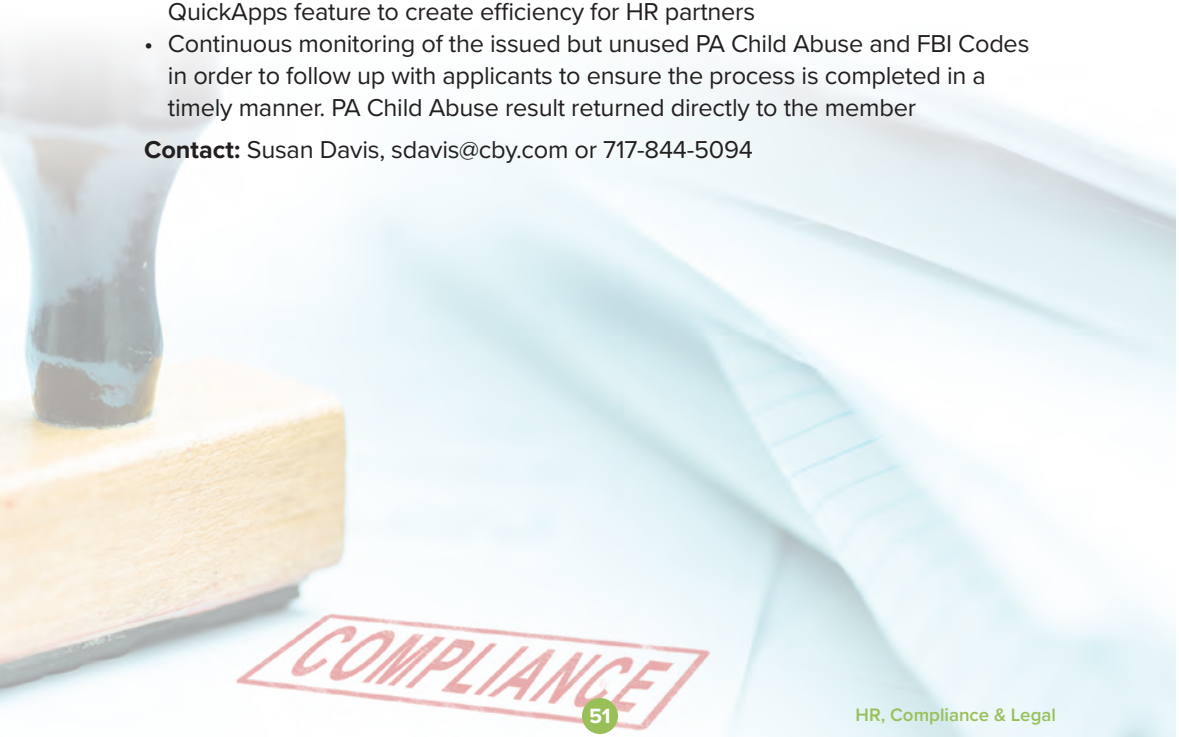
CBY Professional Services makes it easy for you to complete any level of employee, student, or volunteer background screening. Among a diverse portfolio of background screening options, CBY Professional Services provides the mandated employment background checks consisting of PA State Police, PA Child Abuse and FBI clearances in accordance with the PA Dept. of General Services to keep the member institutions in compliance with Act 153. CBY provides ongoing customer service to monitor the entire process acting as an extension of you HR department to ensure the process is completed by treating this as a professional service and not merely selling it as a product. CBY should not be considered a vendor, but a partner to AICUP members. CBY also has the capacity to serve in critical support functions and back-office services by acting in the space of CFO, CEO, HRO, Leadership Development for teams and D.O.T Compliance.

Outcomes:
AICUP Member Participants: 30
Volume: $307k
Dollars Saved: $61.2k
Clearances Ordered: 5,642

Unique Program Features:

- Competitive Pricing for PA State Police, Child Abuse and FBI Clearances with discounts to members
- Streamlined process of applicant-initiated background screens through QuickApps feature to create efficiency for HR partners
- Continuous monitoring of the issued but unused PA Child Abuse and FBI Codes in order to follow up with applicants to ensure the process is completed in a timely manner. PA Child Abuse result returned directly to the member

Contact: Susan Davis, sdavis@cby.com or 717-844-5094



Clery Center Membership Program

Clery Center offers two types of membership: Institutional and Individual. Both Membership tiers connect campus safety professionals with ready-to-use materials, resources, and strategies to help guide them through understanding and implementing the provisions of the Clery Act. Clery Center guides institutions and individuals to exemplify the spirit of the law with a proactive commitment to campus safety. Institutional Membership provides an annual security report review, free training and workshops, discounted Training On Request and Policy & Procedure Audits, all the benefits of Individual Membership, and more. Individual Membership provides discounted workshops and trainings, member-exclusive webinars and Q&A sessions, access to our private Member Portal resources and discussion forum, unlimited technical assistance and support, and more.

Outcomes:

AICUP Member Participants: 18
Program Volume: $53.6k
Estimated Savings: $3k

Unique Program Features:

- Supplying unlimited technical assistance and expertise around Clery Act compliance
- Free and discounted virtual and in-person Clery Act training
- Access to a private Member Portal with a discussion forum for networking and an archive of resources

Contact: Cheryl Levy, clevy@clerycenter.org or 484-584-4217

Long-Term Care Insurance

The Long-Term Care (LTC) Insurance Program has been an AICUP Board-endorsed program since 2006. Mike VanGavree, the founder of the original program remains actively involved, and has aligned with The Voluntary Benefits Shop (The VB Shop) to provide this best-in-class program to the member institutions.

Outcomes:
AICUP Member Participants: 40

Unique Program Features:

- What makes this so attractive as an employee benefit? Employers say that sponsoring a group LTC insurance plan shows concern about workers' welfare, helps to build morale and loyalty, and helps to retain qualified, highly skilled employees.

LTCI coverage can be appealing to employees for several reasons:

- **Favorable underwriting.** Insurers streamline underwriting for group plans. Individuals who try to obtain an LTCI product must undergo a health evaluation ,and many are deemed uninsurable as a result. Our Group plan offers Guaranteed Issuance.
- **Gender equality.** In the individual markets, insurers typically charge higher premiums for women than men—sometimes double and triple the cost of a male! On average, women live longer than men and thus potentially require more care or longer periods of assistance. Policies obtained through our program are gender neutral.
- **Convenience.** Simply put, it's easier to buy LTCI through an employer's plan than it is to engage with an insurer on your own. We've already done the due diligence for you in vetting providers, negotiating premiums, underwriting concessions, participation limits, and can also provide group meetings and/or personal consultations that can help employees make long-term care decisions.
- **Flexibility.** Premiums of policies can be payroll deduction or direct billed. This is an employer decision.
- **No sales pressure!** As salaried employees of our firm, we take a consultative approach and educate your employees as to why they should consider a policy with no commissioned agent pressure.

Contact: Bill Spiro, bspiro@thevbshop.com or 443-760-4258

Personal Health Advocacy Program

Health Advocate makes it easier to take control of your health by personalizing and simplifying the experience. Using a combination of hands-on help, a powerful technology platform and data analytics, they can help people get the care they need, when they need it. Their Health care experts are trained to listen and ask questions to determine the full extent of the help a member needs. Picking up the phone or using their personalized app, members can reach them for help 24/7. The result? Greater engagement, improved health outcomes, reduced absenteeism, lower healthcare costs, and most importantly: An easier healthcare experience that works for everyone. Health Advocate is a complete wellbeing company with state of the art customized wellness programs, mental health coverage nationwide 24/7 and the ability to share with clients the gaps in care at the individual level and the results each quarter in closing gaps in care and improving health care compliance overall.

Outcomes:
AICUP Member Participants: 38

Value to Employer:
- Increases employee productivity and retention
- Eases burden on HR staff, reduces claims costs, grievances and appeals
- Assists in increasing overall engagement and closing gaps in care
- Provides a place for employees and their families including parents and parents-in-law to get health care help—both clinical and administrative

Value to Consumer:
- Saves time and money; reduces stress and frustration
- Improves health outcomes and increases engagement in health
- Makes navigating health care issues much easier and hassle free
- Get valuable assistance for your immediate family as well as parents and parents-in-law

Contact: Suzanne Starker, sstarker@healthadvocate.com or 215-880-6364

Title IX Coordinator/Investigator Training

D. Stafford & Associates offers a series of intensive training classes for Title IX Coordinators and for Investigators who are responsible for conducting and overseeing Title IX compliance and sexual misconduct investigations on campus. Attendees learn how to manage cases and/or how to investigate a sexual misconduct/harassment complaint from start to finish with emphasis on complying with the Clery Act and the Title IX regulations distributed by the Department of Education's Office for Civil Rights. DSA also offers courses for Behavioral Intervention/ Assessment Teams. All courses include opportunities for discussion and participation in case studies and practical exercises. In 2024, DSA provided a 2-day Title IX Coordinator/Investigator class in conjunction with the AICUP Campus Leaders Forum.

Unique Program Features:

- AICUP Discount: 35%
- Taught by practitioners who are currently employed by or have worked on campuses in human resource management, student affairs, and campus safety.
- Expert instruction in an easy to understand format
- Instructors can speak about laws for civil rights and criminal investigations.

DSA offered a webinar in conjunction with AICUP on June 24, 2024 for all members regarding the Title IX regulations that were released in May of 2024 and 110 members attended that session. DSA also conducted a session at the AICUP Conference in November of 2024: *Title IX for Non-Title Coordinators: What to Know and What to Say (and Most Importantly What Not to Say!*

Contact: Dolores Stafford, dolores@dstaffordandassociates.com or 302-344-5809

AICUP Health Choice

NEW!

AICUP HealthChoice is a modern health benefits program designed exclusively for member colleges and universities. Built around the **Individual Coverage Health Reimbursement Arrangement (ICHRA)**, it gives institutions greater control over costs while providing employees with more choice and flexibility in their healthcare coverage.

Benefits for Institutions:

- Budget Control – Set predictable contributions & eliminate renewal surprises
- Simplified Administration – Less complex than managing a group health plan
- Recruitment & Retention – Offer a modern, competitive benefit

Benefits for Institutions:

- Choice & Flexibility – Select the plan that works best for them & their families
- Portability – Plans can move with them if they change jobs
- Tax Advantages – Reimbursements are tax-free, stretching healthcare dollars further

Outcomes:

AICUP Member Participants: 1
Program Volume: $6.1M
Estimated Savings: $1.26M

Unique Program Features:

- Backed by trusted industry partners
- Designed to meet the unique needs of higher education institutions

Contact: David Baily, dbaily@bailyagency.com or 724-627-6121

Pennsylvania Multiple Employer Retirement Program (MEP)

For the past four years, with the advisement of the HR Working Group, AICUP has been working with industry leading consultants to develop a new 403(b) Multiple Employer Retirement Plan (MEP). These consultants are: Millennium Advisory Services, Pentegra, PlanPilot, PRM Consulting Group and TIAA. This program helps members collaboratively administer their retirement plans in order to better comply with IRS regulations and gain cost efficiencies under the MEP. This solution is gaining traction with private colleges in other states where Virginia, Wisconsin, Indiana, Iowa, Illinois and Michigan, have all implemented MEPs for private colleges in their states. Under the MEP, colleges have reduced financial liability exposure, reduced administrative burdens, enhanced employee education, and reduced overall fees.

Outcomes:

AICUP Member Participants: 13
Plan Participants: 8.2k
Program Volume: $1B+
Average Savings per College: about 30% reduction per college (depends on assets size)

Benefits for Institutions include:

- Centralized administrative & fiduciary support, reducing HR's workload
- Delegated investment selection plus monitored & mitigated fiduciary liability
- Better financial outcomes for your employees with on-site retirement planning education
- Enhanced benefits at potentially lower costs

Benefits for Employees:

- Robust retirement plan options with more choices for responsible savings
- Best-in-class suite of investments to select from in their retirement plan
- Award-winning participant educational tools & resources from the plan's recordkeeper
- Financial consulting & support resources to help with retirement readiness

Contact: Michael Rhim, Michael.rhim@prmconsulting.com or 202-745-3721

University & College Insurance Consortium

UCIC is a Pennsylvania group self-insured workers compensation program specific to the education industry that strives to provide a stable workers compensation financing arrangement and a focus on developing collaborative loss control solutions for education-specific risk exposures. The UCIC program has existed for 24 years and has maintained a steady membership.

Outcomes:

AICUP Member Participants: 15

Workers' Compensation (WC) funding generated for 2024–25: $2.6M

Benefits of the collaborative group workers' comp (WC) program:

- Collaborate with member schools to develop proactive injury prevention and post injury management best practices
- Membership in a well-managed self-insured WC program insulates member schools from adverse commercial market trends
- Deep appreciation by the membership to work with likeminded leaders on WC solutions as opposed to being in the commercial insurance market

Unique Program Features:

- Exclusively for PA private/non-profit colleges and universities
- Program is owned by the members and managed by a 7-member board of trustees comprised of the member schools
- All members participate in the Safety Leadership Committee (SLC) which offers a collaborative platform for members to share and develop best practices focused on reducing workplace exposures. Additionally, the SLC reviews WC incident trends, formulates education specific mitigation plans for injury prevention based on identified trends, recommends enhancements to post-injury management programs and facilitates an annual conference for the membership focused on the latest WC risk management subjects.

Contact: Clint Wevodau, cwevodau@rcmd.com or 717-231-3058

Alera Group – Pittsburgh pairs national scope with hands-on local service to help employers design high-quality, affordable employee benefits. We align benefits, HR, finance, and long-term strategy to transform the client experience through collaboration, innovation, and deep local relationships.

Contact: Donald Balla, don.balla@aleragroup.com or 412-430-3070

Baily Insurance – is an independent insurance agency offering a comprehensive suite of insurance and risk management solutions through Check: Life, Health—Group Benefits, Auto, Property & Casualty, Workers Compensation, Cyber Supplemental/Employee-Paid Benefits, Individual Coverage Health Reimbursement Arrangement plans (ICHRAs). ***They are the AICUP Member Preferred (AMP) provider of HealthChoice—An ICHRA Solution.***

Contact: David Baily, dbaily@bailyagency.com or 724-627-6121

Barley Snyder – is a strategically focused, full-service Pennsylvania law firm serving businesses and individuals in all major civil-law matters. Our Higher Education Group advises colleges and universities regionally on governance, employment and benefits, real estate and land use, student rights, privacy and security, litigation, IP, financing, and campus operations.

Contact: David J. Freedman, dfreedman@barley.com or 717-399-1578

D. Stafford & Associates – offers policy reviews, investigation services and training classes for individual institutions, in addition to National Classes for Title IX Coordinators, Investigators and Decision Makers. DSA also conducts Clery Act Audits and Assessments for campus clients. Clery Act Training classes are for individual institutions and DSA offers a Clery Act Academy and an Advanced Academy for campus practitioners. Finally, DSA also offers consulting services and classes for Behavioral Intervention/Assessment Teams. ***We are the endorsed program provider of the AICUP Title IX Coordinator/Investigator Training Program.***

Contact: Dolores Stafford, dolores@dstaffordandassociates.com or 202-438-5929

Fulton Bank (Fulton Innovation Institute) – Founded in 1882, Fulton Bank is a regional financial institution and part of Fulton Financial Corporation, a financial services holding company with more than $30 billion in assets. Serving communities across five states, Fulton offers a full range of banking and financial services. The Fulton Innovation Institute fosters collaboration between higher education and industry through experiential learning, applied research, and innovation-focused projects. Together, they provide opportunities for students and faculty to address real-world business challenges and explore emerging technologies.

Contact: Amanda Burton, aburton@fultonbank.com or 717-333-3237

HTA Insurance Services – is a specialized Medicare resource dedicated to helping individuals confidently navigate their Medicare options. Through personalized consultations, educational webinars, and enrollment support, our licensed advisors provide unbiased guidance tailored to each individual's needs. We partner with employers, brokers, and organizations to educate employees and retirees on Medicare, ensuring they understand their options and make informed decisions. Our mission is to simplify the Medicare process by providing expert education, exceptional service, and ongoing support at no cost to those we serve.

Contact: Kathleen Bretzel, kbretzel@hta-insurance.com or 610-430-6650, opt. 3

HUB Investment Partners – provides objective, customized financial planning, and asset management for employees of colleges and universities, and other individuals seeking fee-only financial planning and asset management services. Our holistic approach to goals-based financial planning helps our clients develop tangible goals with a strategy in place to help make those goals a reality. With a team of highly qualified advisors holding CFP® and AIF® designations, we provide expert guidance to navigate the evolving financial landscape. ***They are one of the endorsed program providers of the PA Multiple Employer Retirement Program (MEP).***

Contact: Antonio Kitt, antonio.kitt@hubinternational.com or 804-514-2673

Klehr Harrison Harvey Branzburg – is a dynamic law firm known for aggressive, out-of-the-box problem solving and decades of experience representing higher education institutions. Our multidisciplinary team provides litigation, transactional, and business counseling—including attorneys with board experience (two currently serving as university board chairs)—to help campuses navigate complex challenges.

Contact: William Matthews, WMatthews@klehr.com or 215-569-4281

Pentegra – a leading provider of retirement plan, fiduciary outsourcing and institutional investment solutions. ***They are one of the endorsed program providers of the PA Multiple Employer Retirement Program (MEP).***

Contact: John Low, john.low@pentegra.com or 203-220-4208

PlanPilot – takes a holistic approach to defined contribution retirement plan consulting, focused on minimizing fiduciary risk for plan sponsors and their oversight teams, as well as minimizing the risk of negative participant outcomes. ***They are one of the endorsed program providers of the PA Multiple Employer Retirement Program (MEP).***

Contact: Mark Olsen, mark.olsen@planpilot.com or 312-973-4913

PRM Consulting Group – a full-service management consulting and outsourcing firm specializing in people resource management providing tailored solutions for clients at a fair price. ***They are one of the endorsed program providers of the PA Multiple Employer Retirement Program (MEP).***

Contact: Michael Rhim, Michael.rhim@prmconsulting.com or 202-745-3721

RCM&D – founded in 1885, is a leading privately held insurance advisory firm serving more education clients in the Mid-Atlantic than any other broker. We deliver tailored insurance, risk management, employee benefits, and ERM project solutions, built from decades of experience addressing the unique needs of campuses. ***We are the AICUP Member Preferred (AMP) provider of the University & College Insurance Program.***

Contact: Clint Wevodau, cwevodau@rcmd.com or 717-231-3058

Scott Healy & Associates (SH&A) – is a boutique, family-led firm (founded 1998) and a national leader in higher-education executive searches and interim placements. We've completed 650+ national searches and deliver personalized, efficient recruitment and interim solutions tailored to each institution's strategic needs.

Contact: Christopher Healy, chris@scotthealy.com or 717-585-2457

Steptoe & Johnson – their Education Team combines attorneys with college leadership and governing-board experience to advise institutions on complex legal, regulatory, and operational challenges. We provide practical, forward-looking solutions to help campuses adapt to technological change, aging infrastructure, shifting policy, and evolving business models.

Contact: Marcia DePaula, marcia.depaula@steptoe-johnson.com or 724-749-3122

Stevens & Lee – one of the 250 largest U.S. law firms, counsels colleges and universities across Pennsylvania on strategic and legal matters—from higher-education finance, government affairs, and development to student affairs, labor, benefits, litigation, and real estate. Our multidisciplinary team—many of whom have served as trustees, senior campus executives, or faculty—also advises on mergers, exigency matters, and complex institutional transactions.

Contact: Jennifer Nevins, jennifer.nevins@stevenslee.com or 610-478-2243

TCWGlobal – helps organizations navigate complex contingent workforce needs without losing the human side of work. We manage the operational heavy lifting, multi-state compliance, payroll, and worker administration, so campus HR and academic teams can focus on their core mission. Our approach is built on genuine partnership, steady execution, and deep community investment. We believe workforce management should feel reliable, transparent, and human, never transactional, never anonymous.

Contact: Sean Simkins, sean.simkins@tcwglobal.com or 858-810-3051

TIAA – was founded in 1918 to help teachers retire with confidence. That mission grew to include those in healthcare and more, creating reliable income for their futures while they work to make a difference. Together, we fight to ensure a more secure financial future for all. ***TIAA is one of the AICUP Member Preferred (AMP) providers of the PA Multiple Employer Retirement Program (MEP).***

Contact: Janet Lorden, JLorden@tiaa.org or 781-964-4183

UnitedHealthcare StudentResources – helps private colleges reduce costs and streamline administration by leveraging collective buying power to deliver comprehensive student injury and sickness insurance with dedicated support and online tools. Their suite includes enrollment materials, value-added health programs, and the Behavioral Health Student Solutions to expand counseling and mental-health resources on campus. ***UnitedHealthcare Student Resources is the endorsed program provider of the AICUP Student Health Insurance Program.***

Contact: John Maxwell, jmaxwell@uhcsr.com or 215-902-9930 or
Debbie Delli Santi, ddellisanti@uhcsr.com or 727-563-3415

UPMC Workpartners – part of UPMC's Insurance Services Division, has spent 25+ years helping employers nationwide optimize workforce health and productivity. We deliver integrated solutions—advanced analytics and BI, employee engagement (wellness, EAP, clinical support), and leave-management (FMLA, ADA/ADAAA, disability, return-to-work).

Contact: Luke Jackson, jacksonl9@WorkPartners.com or 724-683-0584

The Voluntary Benefits Shop – the Voluntary Long-Term Care (LTC) Insurance Program has been an ***AICUP Board-endorsed program*** since 2006, Mike VanGavree, the founder of the original program remains actively involved, and has aligned with The VB Shop to provide this best-in-class program to the member institutions.

Contact: Bill Spiro, bspiro@thevbshop.com or 443-760-4258

WasteStrategies, LLC – home of the AuditPRO automated inspection platform, is your one stop for comprehensive Environmental Health and Safety solutions. Waste and ComplianceStrategies is also a full-service environmental management company providing AICUP Members with *EHS Staffing, Hazardous Waste Collection and Disposal, Mock Safety Audits, and EPA/OSHA/NFPA Training and Compliance Programs. They are the endorsed program provider of the AICUP Environmental, Health & Safety Compliance Program.

Contact: Adam Waligora, awaligora@wastestrategies.com or 443-510-5513

STUDENT SERVICES

AICUP'S COLLABORATION SAVINGS REPORT

AICUP PROGRAM/ACTIVITY 2025	#	Program Volume (as/if applicable)	Estimated Savings or Incremental Value or Rebate (as/if applicable)	Average Program Volume per College	Average Program Savings per College
Student Services					
AICUP Student Health Insurance	15	$5,337,586	$445,109	$355,839	$29,674
AICUP Program Sharing (AMP)	15	$772,076	$66,321	$51,472	$4,421

AICUP Student Health Insurance Program

This UnitedHealthcare Student Resources program is the first of its kind to leverage the collective buying power of private colleges to reduce operating costs, improve the efficiency of internal procedures and ultimately lower the cost of delivering education. This program provides students with a superior injury and sickness insurance plan with dedicated support, plus helpful tools for administration and staff. Countless colleges and universities are benefitting from the helpful online tools and training for managing the plan, access to enrollment materials and information and suite of value-added programs to support the ongoing health and well-being of students. The new Behavioral Health Student Solutions program will help with the increased demand for college Counseling resources and increased on-campus demand for mental health issues solutions. Behavioral Health Student Solutions program directly addresses issues impacting students' emotional well-being with several layers counseling and self-help support tools

Outcomes:
Number of AICUP Member School Participants: 15
Total Annual Premium: $5.3M
Average Savings per School: 15%

Unique Program Features:

- Program provides more comprehensive coverage and benefits than a member institution can purchase on their own.
- Provides for preferred pricing based on the AICUP affiliation and our consortium pricing model.
- Provides a full suite of complementary support services and tools including a dedicated Account Manager to service the member and it's students.

Contact: John Maxwell, jmaxwell@uhcsr.com or 215-902-9930 or Debbie Delli Santi, ddellisanti@uhcsr.com or 727-563-3415

Academic Program Sharing

NEW!

This program helps colleges launch and maintain hybrid academic programs that attract and retain students. Through Rize's innovative program sharing model, institutions can quickly expand their academic portfolio without the cost and risk of building programs independently. Rize has partnered with more than 125 institutions nationwide, supporting over 30,000 students over time, through career-focused pathways in fields such as Artificial Intelligence, Cybersecurity, Digital Marketing, Public Health, and other high-demand disciplines. Beyond curriculum, Rize provides integrated enrollment marketing, student success support, and career services designed to drive measurable enrollment growth, strengthen retention, and improve student outcomes. This comprehensive approach enables institutions to innovate sustainably while maintaining academic quality and institutional identity. Rize is extending discounted subscription pricing to AICUP members, with savings of up to 25% on standard subscription fees. Discounts scale based on program adoption, providing flexibility, long-term value, and cost efficiencies for Pennsylvania's independent colleges.

Outcomes:
AICUP Member Participants: 15
Program Volume: $772k
Average Savings per College: $4.4k

Unique Program Features:
- Support Existing Program & Launch New Ones
- Flexible Modality
- Preserves Tradition While Building Tomorrow's Programs

Contact: Ella Wurth, ewurth@rize.education or 610-999-1038

Active Shooter Response Solutions – assists small and mid-sized Pennsylvania colleges with campus security assessments that support successful grant applications and practical, cost-effective safety improvements. We address threats from active shooters to domestic violence and sexual assault through policy, infrastructure changes, and scenario-based training in situational awareness, threat recognition, and de-escalation—led by an owner who is a Messiah University alumnus.

Contact: Kyle Sproles, kyle@activeshooterresponses.com or 301-678-3275

Aramark Collegiate Hospitality – is a premier provider of campus dining and hospitality, serving 275+ colleges and universities with a focus on the whole student and exceptional culinary experiences. Using data-driven insights, we create campus-specific, inclusive dining programs that blend campus identity, professional opportunity, and world-class hospitality to enhance student life and success.

Contact: Kerri Dixon, dixon-kerri@aramark.com or 215-238-7035

Honorlock – makes online proctoring simple and human, protecting academic integrity while supporting learners. Their approach balances institutional needs and student experience to deliver trustworthy, humane proctoring that promotes confidence and positive outcomes.

Contact: Peter Atsaves, patsaves@honorlock.com or 610-608-7344

LiveSafe – by Lightspeed Systems is a mobile-first campus safety platform that turns every smartphone into a personal safety tool, enabling discreet two-way reports (text, photo, video, audio) and a panic alarm that shares live location with campus police. Administrators monitor tips via a real-time dashboard; features include anonymous reporting, SafeWalk virtual escorts, mass notifications, and analytics.

Contact: Kevin Askew, kaskew@lightspeedsystems.com or 732-678-6656

Major Prep LLC – is a leadership-driven brand that empowers athletes and leaders to perform at elite levels through preparation, discipline, and purpose. We deliver premium apparel, coaching, and speaking that blend culture and performance—building a community that champions bold leadership, intentional living, and lasting legacy.

Contact: Bryan Majors, info@majorprepsupport.com or 717-623-9447

Metz Culinary Management – a Pennsylvania-based, family-driven company that collaborates with its clients to deliver restaurant-inspired hospitality and serving high-quality, natural ingredients prepared from scratch by our culinary team.

Contact: John Geronimo, johng@metzcorp.com or 724-312-6758

Parkhurst Dining – is a family-owned, boutique campus dining firm partnering with 50 independent residential colleges across a 14-state region. Headquartered in Pittsburgh, we're known for people-first hospitality, culinary excellence, and close partnerships that align with each campus's goals.

Contact: Jeff Broadhurst, jeff@parkhurstdining.com or 412-476-2460

Rize Education – helps institutions add career-focused programs through Program Sharing, enabling colleges to launch hybrid degrees in as little as one semester at a fraction of the usual cost. Partnering with a consortium of 115+ colleges, Rize supports 600+ programs to boost enrollment, improve student outcomes, and strengthen the financial sustainability of small colleges. ***Rize is the AICUP Member Preferred Program (AMP) provider of the Academic Program Sharing program.***

Contact: Ella Wurth, ewurth@rize.education or 610-999-1038

Sallie Mae – their mission is to be a trusted financial partner helping Americans reach their potential by making the dream of higher education a reality.

Contact: Keri Neidig, Keri.Neidig@salliemae.com or 610-216-2807

Sodexo – delivers comprehensive and sustainable food services, valued experiences, and facilities management solutions that drive success.

Contact: Ann Spencer, ann.spencer@sodexo.com or 484-790-3304

UnitedHealthcare Student Resources – helps private colleges reduce costs and streamline administration by leveraging collective buying power to deliver comprehensive student injury and sickness insurance with dedicated support and online tools. Their suite includes enrollment materials, value-added health programs, and the Behavioral Health Student Solutions to expand counseling and mental-health resources on campus. ***UnitedHealthcare Student Resources is the endorsed program provider of the AICUP Student Health Insurance Program.***

Contact: John Maxwell, jmaxwell@uhcsr.com or 215-902-9930 or Debbie Delli Santi, ddellisanti@uhcsr.com or 727-563-3415

RESEARCH SERVICES

EDUCATION

AICUP'S COLLABORATION SAVINGS REPORT

AICUP PROGRAM/ACTIVITY 2025	#	Program Volume (as/if applicable)	Estimated Savings or Incremental Value or Rebate (as/if applicable)	Average Program Volume per College	Average Program Savings per College
AICUP Research Studies					
2024–25 Freshman Admissions/ Student Financial Aid Survey	60	$0	$45,000	$750	$750
2024–25 Financial Analysis Trends Survey	59	$0	$59,000	$1,000	$1,000
2025–26 Tuition & Fees Survey	72	$0	$36,000	$500	$500
2025 First Year Student Survey	6	$0	$7,800	$0	$1,300
2025 Information Management Systems Survey	62	$0	$62,000	$1,000	$1,000
2025 Students by Legislative District Study	80	$0	$40,000	$500	$500
2024 AICUP Economic Impact Study	80	$0	$800,000	$0	$10,000

Research Studies

Effective higher education policy and institutional planning requires research and information sharing. Part of the mission of AICUP is to serve as a clearinghouse for data and a resource for information and assistance to its member institutions. Studies conducted by the AICUP research staff address emerging issues in higher education and highlight the contributions of Pennsylvania's independent, nonprofit colleges and universities to local communities and to the state of Pennsylvania.

Here are the standard research studies conducted:

- Freshman Admissions and Student Financial Aid (annually)
- Financial Analysis and Trends (annually)
- Tuition and Fees (annually)
- First Year Student Survey (every other year)
- Students by Legislative District (every 3 years)
- Information Management Systems Survey (every 3 years)
- Economic Impact Study (every 5 years)

The AICUP research staff also compiles the numbers used in a variety of research briefs utilized in communication and advocacy efforts by AICUP and its member schools. Ad hoc surveys are also conducted as needed to help the AICUP President and Board of Directors address issues facing the independent, nonprofit higher education sector in Pennsylvania.

AICUP Research Center Staff:
Ron Uroda, VP of Research, uroda@aicup.org or 717-232-8649, ext. 236
Gayle Baker, Manager of Research & Special Studies, baker@aicup.org or 717-232-8649, ext. 229

Notes

EVENTS & OUTREACH

The Spotlight

The Spotlight is a monthly e-newsletter produced by the AICUP Member Services staff and delivered, during the third week of each month, to almost 3,500 people on member campuses (including, among others, President, COO, CFO, Finance, IT, HR, Facilities, Enrollment Management, Purchasing, Student Affairs).

The content for this publication relies largely on submissions by members, endorsed program providers and corporate affiliates. While there is no guarantee, AICUP staff will strive to make use of most, if not all, affiliate submissions. All selected articles will include contact information of the college or affiliate as well as a link to the affiliate's landing page on the AICUP website.

For more information contact Kelly Carli at carli@aicup.org.

AICUP Campus Leaders Forum

The vision for the ACLF is to have fewer sessions and less PowerPoint presentations, allowing for more panel discussions, brainstorming and small group discussions. Information about submitting proposals and sponsorship opportunities will be available in June/July and registration will begin in September.

For more information, contact Kelly Carli.

AICUP Campus Leaders Webinar Series

AICUP is continuing to offer webinars designed to deepen engagement with our member institutions and deliver timely, practical solutions to today's campus challenges. This series will be ongoing, always adding dates and topics. This series will highlight expertise from your colleagues on other member campuses, endorsed and AMP program providers and corporate affiliates. The series will showcase programs and services specifically aligned with the needs of AICUP member schools. By creating a consistent forum for shared learning and collaboration, the series strengthens connections across our membership while providing actionable insights that support institutional effectiveness and student success.

AICUP Campus Leaders Hub

AICUP has launched a streamlined portal for webinar proposals, making it quick and easy to submit and collaborate on timely programming. AICUP Member Schools and Corporate Affiliates are encouraged to submit your idea to help shape campus-focused content.

Once a proposal is submitted, Kelly Carli will follow up to discuss your submission, explore potential dates and confirm any additional details. **Submit a proposal: https://aicup.org/aicup-aclws-submission-portal/.**

AICUP Good Citizen Scholarship Golf Outing

Each June, AICUP's foundation provides Good Citizen scholarships to students who have shown extraordinary commitment to community service and have demonstrated creativity in shaping their chosen volunteer programs. The proceeds from this golf outing add to the funds available through an endowment managed by AICUP. AICUP corporate affiliates typically invite staff from AICUP member schools to join their foursome. There are opportunities for sponsorships of foursomes, tee signs and beverage carts.

For more information, contact Kelly Carli at carli@aicup.org.

Notes

LEADERSHIP & COMMITTEES

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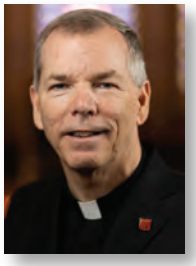
Vice Chair
Christopher Domes
(Neumann University)



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NAICU Liaison
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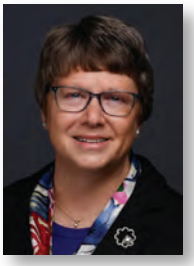

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Dan Custer (Messiah University)
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Chiaki Kotori (Lycoming College)
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Sarah Rine (RLPS Architects)
Amanda Shanaberger (Baker Tilly)
Rob Strickler (Quandel)
Clint Wevodau (RCM&D)
Amy Young (Wagman Construction)

Staff

AICUP's staff is small but mighty, handling the day-to-day operations of our Association and ensuring that all member institutions are not only being advocated for but being kept informed of the changing landscape of higher ed.

Tom Foley
President

Nichole Duffy
SVP of Government Relations

Ron Uroda
VP of Research

Cale Nelson
VP of Finance & Member Services

Tony Gilbert
Communications Director

Terra Schiebold
Executive Assistant to the President

Kelly Carli
Senior Manager of Member Services

Gayle Baker
Manager of Research & Special Studies

Kyle Weber
Accounting Manager/ Database Strategist

For more about each staff member go here on the AICUP website:
https://www.aicup.org/about-us/staff/

Notes

MEMBER INSTITUTIONS

MEMBER INSTITUTIONS

AICUP — Association of Independent Colleges and Universities of Pennsylvania

ASSOCIATION OF INDEPENDENT COLLEGES AND UNIVERSITIES OF PENNSYLVANIA

AICUP

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