

University Senate Minutes

March 1, 2022

3:45pm – 5:00pm, ZOOM

- Chairperson Piper called the March 1, 2022 meeting of the University Senate to order at 3:45pm
- Minutes from the February 1, 2022 meeting were **APPROVED**
- Agenda items for the March 1, 2022 meeting were **APPROVED with the following additions:**
 - The Capital Spending Plan from the University Development and Finance Committee
 - The Grades and Quality Points policy from the Academic Committee

Reports and Announcements

A. President's Report:

- Spring (I'm not allowed to call it freeze) enrollment headcount was 8338 - 8 above our CPP target. Students are taking slightly fewer credits, so we are below the FTE target. Great work by all who put in so much effort to get students enrolled for spring. Further data analysis will help inform what else we need to help students succeed.
- Governor Wolf's proposed budget includes: a \$75M increase in base appropriation to the system (on top of the current \$477M); \$150M in one-time funds to support system redesign and other initiatives, e.g., student success, workforce development, and diversity, equity, and inclusion; the Nellie Bly scholarship program for students to attend State System universities. If you have a chance to indicate your support to friends and legislators, please do. These are historic investments in the state system and IUP.
- The Tuition Affordability Plan is moving more quickly than we had originally hoped. The IUP Council of Trustees approved at a special meeting on February 18 and the Board of Governors will consider the proposal on the afternoon of March 2 at a special meeting starting at 4:30pm. The recommendation put forward would move to the BOG standard for in-state undergraduate students. Twelve to 18 credits in a semester will cost the same - \$7,716 per year at today's rate. At 15 credits per semester for the year, that's a tuition savings of \$1,834 or almost 20%. Thanks again to Vice Presidents Fitzsimons and McCarthy and the Student Affordability Plan work group.
- COVID protocols: The COVID committee has been examining the newest CDC guidance and local conditions, as they have done throughout the pandemic. The group is meeting tomorrow (Wednesday) morning and I will act promptly on any recommendations they provide. We should be getting out an update tomorrow sometime.

B. Provost's Report:

- We are celebrating IUP's reclassification by the National Center for Postsecondary Research as an R2 high-research activity institution. This is the ranking as part of the 2021 Carnegie Classification. Only two other public universities in Pennsylvania have received this classification and 99 public institutions nationwide. This classification is a result of the number of doctoral degrees that we confer, and research expenditures of about \$11 million. This category, doctoral

research – high research activity, acknowledges the balance of our research activity with our commitment to student success. Thank you to Dean Creely and her team for working hard to manage and submit the data for this classification.

- April 4 through 8 is Research Week, with the Scholars Forum taking place on Wednesday, April 6. The deadline for submissions is this Friday, March 4. Please encourage participation.
- The Department of English and their graduate programs have organized a vigil of support to take place this evening at 5:00 p.m. This vigil is to support peace in our world and to show solidarity with the people of Ukraine. We do have some students who are from this region. This event will be held in person in Leonard Hall, room 225 as well as via zoom.
- The fall pause for 2022 has been approved. The selected dates are Monday and Tuesday, October 24 and 25. The week of Thanksgiving break will be shortened to Wednesday through Friday with encouragement for faculty to consider, when appropriate, to use online activities on Monday and Tuesday of that week. This was approved only for 2022. The future dates have not yet been determined.

FOR INFORMATION:

The Provost has accepted the recommendations for curriculum actions endorsed by the IUP-APSCUF Representative Council at their February 10, 2022 meeting as follows:

From the University-Wide Undergraduate Curriculum Committee:

1. New Courses
 - ANTH 321 Forensic Archaeology Field School
 - PLSC 457 The Art of Grantwriting
2. The following program is being placed in moratorium:
 - Interdisciplinary Fine Arts, Dance Arts Track, BA
3. Variability of Delivery for the following programs:
 - Psychology Minor
 - Psychology Honors Program
 - Bachelor of Arts in Economics
 - Child Development and Family Science Minor
4. The following program revisions will be forwarded to the Council of Trustees for final approval:
 - Graphic Design and Illustration, BFA (correction from an earlier meeting)
 - Economics, BA
 - Finance, BS
 - Child Development and Family Science Minor
 - Liberal Studies Learning Skills
 - Geography and Geographic Information Science (GIS), BA
 - Geography Honors Program
 - Regional Planning, BS

C. Chair’s Report:

- Please complete the PASSHE Climate Survey.
- Good luck to the basketball teams as we hope they make it to the NCAA National Tournament.

D. Vice Chairperson’s Report:

- Nominations for SGA are open until March 29.
- SGA is having a member retreat on March 26.
- SGA is hosting a multicultural festival on April 29 from 2pm-4pm in Wallwork Plaza.
- SGA is looking to host a Q&A panel with all of the College Deans.

Standing Committee Reports

A. Rules Committee (Chair Smith-Sherwood)

- At the February 1, 2022 meeting, the proposed amendment to add the words “or designee” to the Senate Constitution following the phrase “the local AFSCME president” was presented to the Senate for a first reading. Today, it is being brought to the floor for a vote (simple majority). Pending the outcome of the vote, it will be sent for an additional ratification vote (2/3 of those senators voting) via Qualtrics.
- The proposed amendment to strike the words “of the Northpointe and Punxsutawney campuses” and replace with the words “providing instruction at other locations” is presented to the Senate for a first reading and will be brought to the floor for a vote next month. The first reading as well as a rationale for the amendment is included below under FOR INFORMATION.
- A call for nominations for Phase I of the election cycle (for at-large staff, at-large administrative, and at-large faculty, including UWUCC and UWGC) will launch following today’s meeting and extend until next Tuesday, March 8, 2022. The Phase I election will occur the week following spring break.
- If you have any question regarding your Senate term or the election cycle, please send an email to me: smithshe@iup.edu.
- The Rules Committee will meet next Tuesday, March 8, at 3:30 pm via Zoom.

FOR ACTION:

APPROVED

*poll launched and there were 96 votes in favor / 1 vote not in favor

PROPOSED AMENDMENT TO THE CONSTITUTION (FIRST READING): Insert the words “or designee” following “the local AFSCME president.”

CONSTITUTION

(Amended: 4-92/2-93/5-94/4-96/3-01/2-05/2-07/4-19)

UNIVERSITY SENATE CONSTITUTION Revised 4/2019

PURPOSE

The purpose of the University Senate is to provide a formal means through which the student body, faculty¹, staff, and the administration, working as a unified group, shall have a representative share in the governance of the university. In order to further a sense of university community on all issues of governance, the University Senate shall have a consultative role to the president and Council of Trustees that is designed to empower the University Senate with a significant voice in the governance of the university.

The University Senate shall approve all curricular matters before they are implemented. The Association of Pennsylvania State College and University Faculties (APSCUF) has delegated its contractual curricular responsibility to the University-Wide Graduate Committee and the University-Wide Undergraduate Curriculum Committee. At least two-thirds of the membership of each of these committees shall be FACULTY². These committees shall forward curricular proposals to the University Senate for approval. The University Senate shall report simultaneously its proposals to the president of the university and the president of APSCUF. As defined by the Collective Bargaining Agreement, past practice, and meet-and-discuss agreements, APSCUF shall retain its usual prerogatives with respect to curricular matters before they are submitted to the council.

The University Senate can study any issue of university governance and make recommendations to the president and the council. The president and the council, (when possible), shall provide the University Senate with an opportunity to review all policies and make recommendations prior to their implementation.

As a matter of expediency, occasionally it may be necessary for administrative personnel, during the normal exercise of their duties, to initiate or modify policies when there is insufficient time to present such matters to the University Senate for consultation. The initiators of such policies shall immediately give notification of their action to the University Senate chair and the chair of the Rules Committee. If it applies, notification shall also be given to the chair of the Senate committee within whose purview subject policy matters ordinarily fall. Such policies will automatically be included as new business on the agenda of the University Senate meeting immediately following such enactment.

Proposed amendments of the constitution shall be referred to the Rules Committee, which shall report the amendment to the University Senate for action no sooner than the regular monthly meeting immediately following the introduction or first reading of the proposed amendment. If the amendment receives a majority vote of those in attendance at this meeting, then the Rules Committee shall refer the proposed amendment in writing, with printed ballots, to the University Senate where a two-thirds affirmative vote of those voting is necessary for passage.

¹ The term faculty (as distinguished from FACULTY) is used to represent not only those members of the university staff whose duties are primarily instructional, but also members of recognized academic departments, the professional library staff, and the professional or managerial staff of the Student Cooperative Association (with the exception of its director, who is classified as an administrator).

² FACULTY is herein defined as it is in the Collective Bargaining Agreement between APSCUF, as the bargaining agent for the FACULTY, and the SSHE. FACULTY is defined as all members of the FACULTY bargaining units, union members and non-union members alike.

Nothing relating to the organization and administration of the University Senate shall be construed so as to limit the authority of the council or the president of the university with respect to the administration of the university as prescribed by law. Further, nothing in the constitution or the rules and regulations of the University Senate shall be construed so as to limit the authority of the president of the university to appoint such other councils and committees as deemed necessary to facilitate the efficient administration of the university.

COMPOSITION & ELECTIVE PROCEDURES

The University Senate shall consist of a number of faculty double the number of departments of the university, a voting administrative segment one-third the size of the faculty segment, and a student segment one-half the size of the faculty segment.

The Senate shall also include one Alumni Association representative and four representatives from the staff. Faculty, staff, and administrative members shall be employees in good standing at the time of election or appointment and during terms of service. Students must be enrolled and in good standing at the time of election or appointment and during terms of service.

Faculty is herein defined to include not only those members of the university staff whose duties are primarily instructional, but also members of recognized academic departments, the professional library staff, and the professional or managerial staff of the Student Cooperative Association (with the exception of its director, who is classified as an administrator). The faculty of the Northpointe and Punxsutawney campuses also shall be included. FACULTY is herein defined as it is in the Collective Bargaining Agreement between APSCUF, as the bargaining agent for the FACULTY, and the SSHE. FACULTY is defined as all members of the FACULTY bargaining units, union members and non-union members alike.

For the purposes of University Senate representation, the professional library staff, the managerial staff of the Student Cooperative Association, and the faculty of the Northpointe and Punxsutawney campuses shall be considered as constituting departments.

"Student," as herein used, refers to both the undergraduate and graduate student bodies.

The faculty segment of the University Senate shall consist of one member elected by and from each department of the university, two FACULTY members appointed by the president of APSCUF (one to serve as one of the co-chairs of the University-Wide Undergraduate Curriculum Committee and one to serve as one of the co-chairs of the University-Wide Graduate Committee), twenty-four FACULTY members elected at large for seats on the UWUCC and the UWGC by the FACULTY, and the remainder to be elected at large by and from the FACULTY to make the total at-large faculty segment equal to the number of senators elected by the departments.

The administrative segment shall include the university president (*non-voting senator*) and administrators/managers serving on standing committees by virtue of their offices (ex-

officio). At least half of the remaining number shall be elected by and from the administrators/managers, with the remainder to be appointed by the university president.

The student segment shall consist of undergraduate and graduate students in proportion to their FTE enrollment, but no segment shall be less than 20% of the total student contingent. Each delegation shall be elected by its representative student body. Undergraduate students shall be elected under the auspices of the recognized student association as defined in Pennsylvania State Act 1982-188. In both cases, the officiating body shall call for and accept voluntary nominations for election to the University Senate.

The staff segment shall consist of the local AFSCME president **or designee** and three representatives from the staff as elected from and by the staff.

The Alumni Association representative shall be appointed by the Alumni Executive Board.

Except where constrained by collective bargaining agreements, the Rules Committee shall exercise general jurisdiction over the manner in which elections to the University Senate are conducted, including such matters as determining the eligibility of university employees and students for University Senate membership, and establishing the rules by which elections are to be conducted. Such rules shall include provisions establishing the means by which voluntary nominations for election to the University Senate may be made to the Rules Committee, or whatever group the Rules Committee or the University Senate establishes to function as a nominating agency. The Rules Committee shall also be responsible for conducting such referendums of the various segments of the university as the University Senate shall deem necessary.

Election to the University Senate for the faculty and administrative segment shall be for a two-year term. Students may be elected to the University Senate for a term of not less than one academic year and not more than two academic years. Terms of the alumni and staff representatives shall be as designated by their respective organizations.

Any member of the University Senate properly elected or appointed to a University Senate committee is a voting member of that committee.

RATIONALE: Current Senate by-laws permit the participation of designees in Senate and/or on Senate standing committees for several *ex-officio* positions, including Provost and VP for Academic Affairs, President of IUP-APSCUF, Dean of the School of Graduate Studies and Research, Associate VP for Finance, and VP for Finance and Administration. Due to work schedule, the current local AFSCME president has not been available to attend Senate meetings and has requested that a designee be permitted to attend Senate meetings instead. As this *ex-officio* position is similar to those listed above, the Rules Committee approved the proposal of this amendment to the Constitution at its December 7, 2021 meeting for a first reading by the University Senate at its February 1, 2022 meeting.

FOR INFORMATION:

PROPOSED AMENDMENT TO THE CONSTITUTION (FIRST READING): Strike the words “of the Northpointe and Punxsutawney campuses,” replace with “providing instruction at other locations.”

CONSTITUTION

(Amended: 4-92/2-93/5-94/4-96/3-01/2-05/2-07/4-19)

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The University Senate shall approve all curricular matters before they are implemented. The Association of Pennsylvania State College and University Faculties (APSCUF) has delegated its contractual curricular responsibility to the University-Wide Graduate Committee and the University-Wide Undergraduate Curriculum Committee. At least two-thirds of the membership of each of these committees shall be FACULTY⁴. These committees shall forward curricular proposals to the University Senate for approval. The University Senate shall report simultaneously its proposals to the president of the university and the president of APSCUF. As defined by the Collective Bargaining Agreement, past practice, and meet-and-discuss agreements, APSCUF shall retain its usual prerogatives with respect to curricular matters before they are submitted to the council.

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RATIONALE: There are no longer faculty hired directly to other locations where IUP courses are taught. As such, there are no “faculty of” those locations. However, Senate representation of faculty

teaching at other locations remains important. The removal of specific language identifying current campuses permits future flexibility. Additionally, it permits the inclusion of faculty providing instruction at current non-campus locations (e.g., Pittsburgh East). The Rules Committee consulted with Senator Muth, Director of Regional Campuses, regarding the current status of faculty providing instruction at locations other than Indiana and approved the proposal of these amendments to the Constitution at its February 8, 2022 meeting for a first reading by the University Senate on March 1, 2022.

B. University-Wide Undergraduate Curriculum Committee (Chair Sechrist)

- Proposals will be voted on at the APSCUF Rep Council meeting on March 10, 2022. Our next meeting is Tuesday, March 8 at 3:45pm via Zoom.

C. University-Wide Graduate Curriculum Committee (Chair Moore)

- Curriculum needs to be submitted by the end of March. Proposals will be voted on at the APSCUF Rep Council meeting on March 10, 2022. Our next meeting is Tuesday, March 8 at 3:45pm via Zoom.

D. Non-Credit Committee (Chair O'Neil)

- No report.

E. Library and Education Services Committee (Chair Chadwick)

- Our next meeting is Tuesday, March 8 at 3:45pm via Zoom.

F. Research Committee (Co-Chair Guth)

FOR INFORMATION:

**University Senate Research Committee
Meeting Minutes – February 8, 2022**

Note: The committee currently has vacancies from NSM and HHS.

There were 13 USRC Small Grant proposals for review, and the decision was made to fund 12 proposals, totaling \$30,142.

- Julie Ankrum
- Michelle Bruno
- Kristy Chunta, Megain Robb, Nashat Zuraikat, Riah Hoffman, and Michele Gerwick
- Benjamin Ford
- Jenna Hennessey
- Vida Irani
- Sudipta Majumdar
- Joseph Mannard
- Matthew Nice
- Brittany Pollard
- Margaret Reardon
- Mike Sell

- Our next meeting will be Tuesday, 3:30, March 8, 2022, via Zoom.

G. Student Affairs Committee (Chair Erwin)

- Our next meeting is Tuesday, March 8 at 3:45pm.

H. University Development and Finance Committee (Chair Drye)

FOR ACTION:

APPROVED

**Proposed Five-Year Priority Capital Spending Plan
Indiana University of Pennsylvania
FY2021-2022 Submission**

The following is the proposed five-year project funding priority order of commonwealth capital projects request for IUP:

Proposed 2022-2023

No Funding Request

Proposed 2023-2024

Culinary Building Replacement

Proposed 2024-2025

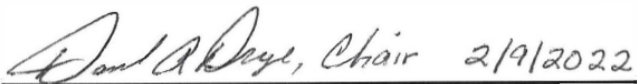
Johnson Hall Renovation

Proposed 2025-2026

Academic Building Replacement

Proposed 2026-2027

No Funding Request



Proposal Accepted and Voted on by the Development and Finance Committee

- Our next meeting is Tuesday, March 8 at 4:00pm.

I. Academic Affairs Committee (Chair Dugan)

FOR ACTION:

APPROVED

Academic Standards Policy

CURRENT

A. Purpose: The university establishes minimum standards for cumulative grade point average (CGPA) to encourage academic accomplishment and timely progress toward graduation. This policy applies to all undergraduate students.

B. Terminology

1. Academic Good Standing: Students maintaining a CGPA of at least 2.00 are in Academic Good Standing.
2. Probation: Students whose CGPA falls below the 2.00 standard are on Probation during the next semester for which they are registered.
3. Extended Probation: Students who have been authorized to continue, even though they have not achieved a 2.00 CGPA after one semester of probation, are on Extended Probation during the next semester for which they are registered.
4. Academic Recovery Plan: Students whose CGPA falls below the 2.00 standard must develop an Academic Recovery Plan for achieving Academic Good Standing.
5. Academic Recovery Hold: An Academic Recovery Hold is placed on the records of students who fail to submit an Academic Recovery Plan, preventing them from processing any registration transaction.

C. Administrative Review and Enforcement of Standards

1. Each college, regional campus, and the Department of Developmental Studies will designate an Academic Standards Officer who will be responsible for academic review and enforcement of standards.
2. An academic review is conducted at the end of each semester.
 - a. Students earning a 0.00 CGPA at the end of their first semester of enrollment will be dismissed from the university, except for students enrolled in only one course (up to four credit hours), who may be placed on probation at the discretion of the appropriate Academic Standards Officer.
 - b. Other students falling below the 2.00 CGPA standard will be placed on probation at the end of the semester. They may continue on probation for one semester. They will be required to develop and implement an Academic Recovery Plan.
 - c. Students still below the 2.00 CGPA standard after a semester of probation are subject to dismissal. The Academic Standards Officer may grant one semester of extended probation to those who (1) made progress toward Academic Good Standing while on probation or followed their approved Academic Recovery Plan, and (2) have a reasonable mathematical chance of reaching a 2.00 CGPA after one additional semester. Other probation students will be dismissed.
 - d. Students still below the 2.00 CGPA standard after a semester of extended probation will be dismissed.

- e. Students who regain Academic Good Standing but again fall below the 2.00 CGPA standard in a subsequent semester are permitted another semester of probation and, where appropriate, extended probation.
 - f. Students who fail to establish an Academic Recovery Plan prior to the beginning of registration for the next semester will incur an Academic Recovery Hold preventing registration.
 - g. Students referred by the Office of Admissions for first year study at a regional campus may transition to the Indiana Campus upon achieving 24 credits through two regular academic semesters at a 2.00 CGPA.
 - h. Students admitted through the Department of Developmental Studies remain under the direction of the Department for at least an academic year after initial enrollment and until reaching the 2.00 CGPA standard.
- D. Academic Recovery Plan: Students not meeting the 2.00 CGPA standard must design and implement a comprehensive plan leading to Academic Good Standing. The plan must be developed with and approved by the appropriate Academic Standards Officer (or designee).
- 1. Analysis: Students must identify the factors contributing to their unsatisfactory achievement.
 - 2. Planning: Plans must include a schedule of minimum grades needed to achieve Academic Good Standing.
 - 3. Commitment: Students must commit to changes in behavior necessary to achieve academic success. This might include better time management, career exploration, and the use of such support services as academic advisors, tutoring, the Writing Center, the Counseling Center, the Department of Developmental Studies workshops on study skills and related activities, and any other opportunities deemed important by the Academic Standards Officer (or designee).
 - 4. Documentation: Each plan must include an explanation of satisfactory methods of documentation. It is the student's responsibility to provide documentation supporting compliance with the agreed upon plan, if requested.
- E. Readmission
- 1. Students dismissed under this policy may not be readmitted for at least one calendar year.
 - 2. Dismissed students may, after one calendar year, apply for readmission through the Office of the Registrar.
 - a. A decision for readmission of a student in probationary or dismissed status, regardless of whether the student was dismissed by the university or the student voluntarily withdrew, is the responsibility of the Academic Standards Officer of the college the student wishes to enter. If the student is seeking admission to a new college, the officer of the new college will consult with the officer of the former college before making a decision.

The Registrar's Office will officially change the major based on the Academic Standards Officer's readmission letter to the student.

- b. A decision for readmission of a student enrolled at a regional campus at the time of dismissal or voluntary withdrawal, regardless of whether the student was dismissed by the university or the student voluntarily withdrew, is the responsibility of the Academic Standards Officer of the regional campus.
 - c. A decision for readmission of a student enrolled in the Department of Developmental Studies/Act 101 at the time of dismissal or voluntary withdrawal is the responsibility of the DVST Academic Standards Officer.
3. Those students who, in the opinion of the appropriate Academic Standards Officer, are likely to achieve academic success may be readmitted.
 4. Students may be readmitted only once under this policy. Subsequent readmission may be available under the Cancelled Semester Policy or the Fresh Start Policy.

PROPOSED

A. **Purpose:** The university establishes minimum standards for cumulative grade point average (CGPA) to encourage academic accomplishment and timely progress toward graduation. This policy applies to all undergraduate students.

B. Terminology

1. *Academic Good Standing:* Students maintaining a CGPA of at least 2.00 are in Academic Good Standing.
2. *Probation:* Students whose CGPA falls below the 2.00 standard are on Probation during the next semester for which they are registered.
3. *Extended Probation:* Students who have been authorized to continue, even though they have not achieved a 2.00 CGPA after one semester of probation, are on Extended Probation during the next semester for which they are registered.
4. *Academic Recovery Plan:* Students whose CGPA falls below the 2.00 standard must develop an Academic Recovery Plan for achieving Academic Good Standing.
5. *Academic Recovery Hold:* An Academic Recovery Hold is placed on the records of students who fail to submit an Academic Recovery Plan, preventing them from processing any registration transaction.

C. Administrative Review and Enforcement of Standards

1. Each college and regional campus will designate an Academic Standards Officer who will be responsible for academic review and enforcement of standards.
2. An academic review is conducted at the end of each semester.

- a. Students earning a 0.00 CGPA at the end of their first semester of enrollment will be dismissed from the university, except for students enrolled in only one course (up to four credit hours), who may be placed on probation at the discretion of the appropriate Academic Standards Officer.
 - b. Other students falling below the 2.00 CGPA standard will be placed on probation at the end of the semester. They may continue on probation for one semester. They will be required to develop and implement an Academic Recovery Plan.
 - c. Students still below the 2.00 CGPA standard after a semester of probation are subject to dismissal. The Academic Standards Officer may grant one semester of extended probation to those who (1) made progress toward Academic Good Standing while on probation or followed their approved Academic Recovery Plan, and (2) have a reasonable mathematical chance of reaching a 2.00 CGPA after one additional semester. Other probation students will be dismissed.
 - d. Students still below the 2.00 CGPA standard after a semester of extended probation will be dismissed.
 - e. Students who regain Academic Good Standing but again fall below the 2.00 CGPA standard in a subsequent semester are permitted another semester of probation and, where appropriate, extended probation.
 - f. Students who fail to establish an Academic Recovery Plan prior to the beginning of registration for the next semester will incur an Academic Recovery Hold preventing registration.
 - g. Students attending a regional campus may transition to the Indiana Campus upon achieving 24 credits through two regular academic semesters and a 2.00 CGPA.
 - h. Students admitted through the University College, as Exploratory majors, remain under the direction of the University College until declaring a major and reaching the 2.00 CGPA standard. All General Studies majors (AA and BA) remain with the University College throughout their undergraduate career. As for any other major, General Studies majors will be held to the standards and procedures as noted in this policy.
- D. **Academic Recovery Plan:** Students not meeting the 2.00 CGPA standard must design and implement a comprehensive plan leading to Academic Good Standing. The plan must be developed with and approved by the appropriate Academic Standards Officer (or designee).
1. **Analysis:** Students must identify the factors contributing to their unsatisfactory achievement.
 2. **Planning:** Plans must include a schedule of minimum grades needed to achieve Academic Good Standing.

3. **Commitment:** Students must commit to changes in behavior necessary to achieve academic success. This might include better time management, career exploration, and the use of such support services as academic advisors, tutoring, the Writing Center, the Counseling Center, workshops on study skills and related activities, and any other opportunities deemed important by the Academic Standards Officer (or designee).
4. **Documentation:** Each plan must include an explanation of satisfactory methods of documentation. It is the student's responsibility to provide documentation supporting compliance with the agreed upon plan, if requested.

E. Re-enrollment

1. Students dismissed under this policy may not be re-enrolled for at least one calendar year.
2. Dismissed students may, after one calendar year, apply for re-enrollment through the Office of the Registrar.
 - a. A decision for re-enrollment of a student in probationary or dismissed status, regardless of whether the student was dismissed by the university or the student voluntarily withdrew, is the responsibility of the Academic Standards Officer of the college the student wishes to enter. If the student is seeking admission to a new college, the officer of the new college will consult with the officer of the former college before making a decision. The Registrar's Office will officially change the major based on the Academic Standards Officer's readmission letter to the student.
 - b. A decision for re-enrollment of a student enrolled at a regional campus at the time of dismissal or voluntary withdrawal, regardless of whether the student was dismissed by the university or the student voluntarily withdrew, is the responsibility of the Academic Standards Officer of the regional campus.
 - c. A decision for re-enrollment of a student enrolled in the University College at the time of dismissal or voluntary withdrawal is the responsibility of the University College's Academic Standards Officer.
3. Those students who, in the opinion of the appropriate Academic Standards Officer, are likely to achieve academic success may be re-enrolled.
4. Students may be re-enrolled only once under this policy. Subsequent re-enrollment may be available under the Cancelled Semester Policy or the Fresh Start Policy.

RATIONALE

A five year review resulted in the integration of recent structures, policies and updated language into the policy.

FOR ACTION:**APPROVED****Schedule Changes (Drop/Add)****CURRENT**

From the student's initial registration time for a given semester through the end of the drop/add period, as defined by the academic calendar (www.iup.edu/academiccalendar), a student may modify his/her schedule to the extent that classes are available or permission to register for a closed or restricted section has been granted and entered into MyIUP. Each student is responsible for completing all appropriate transactions in MyIUP to ensure schedule accuracy. Note that, while the department may enter permission to register for a section, the student must complete the actual registration transaction in MyIUP.

PROPOSED

From the **initial** registration time for a given semester through the end of the drop/add period, as defined by the academic **calendar**, **students** may modify **their schedules** to the extent that classes are available or permission to register for a closed or restricted section has been granted and **students have been informed that they can register for the closed or restricted section**. **Students are** responsible for **confirming** in MyIUP **the accuracy and completeness of their schedules**. Note **that** while the department may **grant** permission to register for a section, **students** must complete the actual registration transaction in MyIUP.

RATIONALE

As part of a five year review, language was clarified and updated.

FOR ACTION:**APPROVED****CURRENT POLICY****Grades and Quality Points**

In the grading system, the following grades are used in reporting the standing of students at the end of each semester or session:

Grade Description Quality Points**A Excellent** 4 quality points/credit**B Good** 3 quality points/credit**C Average** 2 quality points/credit**D Passing** 1 quality point/credit**F Failing** 0 quality points/credit**P Passing** 0 quality points/credit (for credit courses only)**S Satisfactory** 0 quality points (for 0-credit courses only)**U Unsatisfactory** 0 quality points (for 0-credit courses only)**Other Designations (carrying no quality points):****AUD Audited Course**

EXM Examination**FOL Portfolio Assessment****I Incomplete**—For more information, see policy explanation.**L Late Grade/Continuing Course**—For more information, see policy explanation.**OL Other Location****Q Total Semester Withdrawal**—Used before 2002 when a student had totally and officially withdrawn from the university for a given semester**R Research in progress** (graduate thesis/dissertation only)**TR Transfer****XMT Exemption****W Withdrawal**—For more information, see policy explanation.* **Grade not reported by instructor.** No grade information was reported by the end of the normal grading period.**Grades followed by the following designations indicate the application of a policy that has amended the student's cumulative grade point average.**. **Institutional Credit** (credit counts toward enrollment status but does not count toward graduation or in GPA calculation).. **Canceled Semester** (see policy explanation)* **Fresh Start** (see policy explanation): **Extended Credit** (graduate thesis/dissertation only)**REVISED POLICY****Grades and Quality Points**

In the grading system, the following grades are used in reporting the standing of students at the end of each semester or session:

Grade Description Quality Points**A Excellent** 4 quality points/credit**B Good** 3 quality points/credit**C Average** 2 quality points/credit**D Passed** 1 quality point/credit**F Failed** 0 quality points/credit**N Non-participation Failure** 0 quality points/credit**P Passed** 0 quality points/credit (for credit courses only)**S Satisfactory** 0 quality points (for 0-credit courses only)**U Unsatisfactory** 0 quality points (for 0-credit courses only)**Other Designations (carrying no quality points):****AUD Audited Course****EXM Examination****FOL Portfolio Assessment****I Incomplete**—For more information, see policy explanation.**L Late Grade/Continuing Course**—For more information, see policy explanation.**OL Other Location****R Research in progress** (graduate thesis/dissertation only)**TR Transfer**

XMT Exemption

W Withdrawal—For more information, see policy explanation.

* **Grade not reported by instructor.** No grade information was reported by the end of the normal grading period.

Grades followed by the following designations indicate the application of a policy that has amended the student's cumulative grade point average.

. **Institutional Credit** (credit counts toward enrollment status but does not count toward graduation or in GPA calculation)

.. **Canceled Semester** (see policy explanation)

* **Fresh Start** (see policy explanation)

: **Extended Credit** (graduate thesis/dissertation only)

Rationale

This policy was reviewed as part of the five-year cycle. The only changes are language clarifications and formatting.

- Our next meeting is Tuesday, March 8 at 3:45pm.

J. Awards Committee (Chair Paul)

- Our next meeting is March 22, 2022.

Senate Representative Report**A. University Planning Council (Chair Moore)**

- The UPC is continuing to work with other units to help ensure that the strategic plan is implemented throughout the different levels of university. If anyone would like assistance, please contact me or Paula Stossel.

B. President's Athletic Advisory Committee (Chair Castle)

- No report.

C. Academic Computing Policy Advisory Committee (Senator Ford)

- Our next meeting is March 9 at 3:00pm.

D. University Budget Advisory Committee (Senator Soni)

- You already heard the good news that we are moving back to our flat fee tuition model. Hopefully it will be approved at the BOG meeting that Dr. Driscoll mentioned at the beginning of this meeting. This should bear some positive result in terms of an increase in enrollment numbers.
- There will be a deficit initially projected around \$9 million; there is some funding available to offset the deficit that is projected for next year. If the enrollment numbers improve significantly, our deficit will be smaller. The handouts from our meeting on February 2, 2022, are included in Appendix A.

March 1, 2022

20

New Business

Adjournment

- The meeting adjourned at 4:36pm.

Respectfully submitted:

Amber N. Racchini

APPENDIX A

University Budget Advisory Committee Meeting

Friday, February 4, 2022

10:30 a.m.–Noon

Join from PC, Mac, iOS or Android:

<https://iupvideo.zoom.us/j/94816718124>

Or join by phone:

+1 301 715 8592 (US Toll) or +1 312 626 6799 (US Toll)

Meeting ID: 948 1671 8124

President's Report – Dr. Driscoll – 12 minutes

- January 14th Sustainability Status and Plan Report to the Chancellor

Enrollment Report – Dr. McCarthy – 10 minutes

Housing Report – Dr. Segar – 5 minutes

September 2021 CPP Status Items – 20 minutes

- Faculty and Non-Faculty Progress Reports
- CPP Mid-year Progress Report due Feb 22, 2022

IUP Tuition Model and Pricing Workgroup Recommendations – 40 minutes

Closing Comments – 3 minutes

Next Meeting

- March 4, 2022 (10:30 a.m.–Noon)

Future Meetings

- April 7, 2022 (1:00 p.m.–2:30 p.m.)
- May 2, 2022 (1:00 p.m.–2:30 p.m.)

Adjournment



Budget Planning Calendar

Updated 2/4/2022

| Activity | Dates |
|---|--|
| | January 2022 |
| Budget Discussion | Wednesday, January 5, 2022 |
| President's Cabinet with Deans | Monday, January 10, 2022 |
| F&A VPs Check-in Call | Wednesday, January 12, 2022 |
| Sustainability Status and Plan Report to the Chancellor | Friday, January 14, 2022 |
| State System CPP Progress Update Report | Saturday, January 15, 2022 |
| <i>MLK Holiday: No Classes</i> | <i>Monday, January 17, 2022</i> |
| <i>First Day of Classes</i> | <i>Tuesday, January 18, 2022</i> |
| VPFA/CFO Meeting | Wednesday, January 19, 2022 |
| President's Cabinet with Shared Governance | Monday, January 24, 2022 |
| APSCUF/Management Pre-Meeting | Monday, January 24, 2022 |
| F&A VPs Check-in Call | Wednesday, January 26, 2022 |
| APSCUF/Management Meet & Discuss | Wednesday, January 26, 2022 |
| Tuition and Mandatory Fees Due from IUP to Chancellor | Monday, January 31, 2022 |
| | February 2022 |
| Senate | Tuesday, February 1, 2022 |
| Board of Governors Quarterly Meeting | Wednesday, February 2 and Thursday, February 3, 2022 |
| VPFA/CFO Meeting | Wednesday, February 2, 2022 |
| AFSCME Labor/Management Meeting | Thursday, February 3, 2022 |
| Finance VPs Check-in Call Prep | Thursday, February 3, 2022 |
| UBAC | Friday, February 4, 2022 |
| <i>Spring Semester Enrollment Freeze Date</i> | <i>Monday, February 7, 2022</i> |
| Senate – Development and Finance | Tuesday, February 8, 2022 |
| F&A VPs Check-in Call | Wednesday, February 9, 2022 |
| President's Cabinet with Deans | Monday, February 14, 2022 |
| SCUPA Labor/Management Meeting | Tuesday, February 15, 2022 |
| APSCUF/Management Pre-Meeting | Tuesday, February 15, 2022 |
| VPFA/CFO Meeting | Wednesday, February 16, 2022 |
| APSCUF/Management Meet & Discuss | Wednesday, February 16, 2022 |
| Budget Discussion | Thursday, February 17, 2022 |
| State System CPP Mid-year Progress Report Due | Tuesday, February 22, 2022 |
| F&A VPs Check-in Call | Wednesday, February 23, 2022 |
| FIUP Board of Directors Meeting | Friday, February 25, 2022 |
| President's Cabinet with Shared Governance | Monday, February 28, 2022 |

Budget Planning Calendar
Updated 2/4/2022

| Activity | Dates |
|--|--|
| | March 2022 |
| Senate | Tuesday, March 1, 2022 |
| VPFA/CFO Meeting | Wednesday, March 2, 2022 |
| CAO/CFO Joint Review Session for Financial Sustainability Progress | Thursday, March 3, 2022 |
| Finance VPs Check-in Call Prep | Thursday, March 3, 2022 |
| POA Labor/Management Meeting | Thursday, March 3, 2022 |
| Budget Discussion | Thursday, March 3, 2022 |
| UBAC | Friday, March 4, 2022 |
| Tentative CAO/CFO Mid-year Financial Update Review | Monday, March 7, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, March 8, 2022 |
| F&A VPs Check-in Call | Wednesday, March 9, 2022 |
| SCUPA Labor/Management Meeting | Thursday, March 10, 2022 |
| <i>Spring Break: No Classes</i> | <i>Monday, March 14, 2022 through Friday, March 18, 2022</i> |
| President's Cabinet – Deans | Monday, March 14, 2022 |
| VPFA/CFO Meeting | Wednesday, March 16, 2022 |
| March Council of Trustees Meeting | Thursday, March 17, 2022 |
| <i>Classes Resume</i> | <i>Monday, March 21, 2022</i> |
| F&A VPs Check-in Call | Wednesday, March 23, 2022 |
| President's Cabinet with Shared Governance | Monday, March 28, 2022 |
| APSCUF/Management Pre-Meeting | Tuesday, March 29, 2022 |
| Budget Discussion | Tuesday, March 29, 2022 |
| VPFA/CFO Meeting | Wednesday, March 30, 2022 |
| APSCUF/Management Meet & Discuss | Wednesday, March 30, 2022 |
| | April 2022 |
| Save the Date - Chancellor - Virtual IUP Campus Visit | Monday, April 4, 2022 |
| Senate | Tuesday, April 5, 2022 |
| F&A VPs Check-in Call | Wednesday, April 6, 2022 |
| UBAC | Thursday, April 7, 2022 |
| President's Cabinet with Deans | Monday, April 11, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, April 12, 2022 |
| Board of Governors Quarterly Meeting | Wednesday, April 13 and Thursday, April 14, 2022 |
| VPFA/CFO Meeting | Wednesday, April 13, 2022 |
| SCUPA Labor/Management Meeting | Tuesday, April 19, 2022 |
| APSCUF/Management Pre-Meeting | Tuesday, April 19, 2022 |

Budget Planning Calendar
Updated 2/4/2022

| Activity | Dates |
|---|---|
| | April 2022 (continued) |
| F&A VPs Check-in Call | Wednesday, April 20, 2022 |
| APSCUF/Management Meet & Discuss | Wednesday, April 20, 2022 |
| Budget and Accounting and Directors (BAD) Meeting | Thursday, April 21, 2022 and Friday, April 22, 2022 |
| President's Cabinet with Shared Governance | Monday, April 25, 2022 |
| Senate | Tuesday, April 26, 2022 |
| VPFA/CFO Meeting | Wednesday, April 27, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, April 27, 2022 |
| Budget Discussion | Thursday, April 28, 2022 |
| | May 2022 |
| <i>Classes End (End of Day)</i> | <i>Monday, May 2, 2022</i> |
| UBAC | Monday, May 2, 2022 |
| <i>Final Exams</i> | <i>Tuesday, May 3 through Friday, May 6, 2022</i> |
| F&A VPs Check-in Call | Wednesday, May 4, 2022 |
| May Council of Trustees Meeting | Thursday, May 5, 2022 |
| <i>Graduate Commencement for Master's and Doctoral Degrees</i> | <i>Friday, May 6, 2022</i> |
| Undergraduate Commencement for Associate's and Bachelor's Degrees | <i>Saturday, May 7, 2022</i> |
| <i>Early Summer Sessin Classes Begin</i> | <i>Monday, May 9, 2022</i> |
| President's Cabinet with Deans | Monday, May 9, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, May 10, 2022 |
| VPFA/CFO Meeting | Wednesday, May 11, 2022 |
| SCUPA Labor/Management Meeting | Tuesday, May 17, 2022 |
| F&A VPs Check-in Call | Wednesday, May 18, 2022 |
| President's Cabinet with Shared Governance | Monday, May 23, 2022 |
| VPFA/CFO Meeting | Wednesday, May 25, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, May 25, 2022 |
| <i>Early Summer Sessions Classes End</i> | <i>Friday, May 27, 2022</i> |
| <i>Memorial Day Holiday: No Classes</i> | <i>Monday, May 30, 2022</i> |
| <i>Summer Session I Classes Begin</i> | <i>Tuesday, May 31, 2022</i> |
| | June 2022 |
| F&A VPs Check-in Call | Wednesday, June 1, 2022 |
| POA Labor/Management Meeting | Thursday, June 2, 2022 |
| FIUP Board Meeting | Friday, June 3, 2022 |
| President's Cabinet with Deans | Wednesday, June 8, 2022 |

Budget Planning Calendar
Updated 2/4/2022

| Activity | Dates |
|---|--|
| | June 2022 (continued) |
| VPFA/CFO Meeting | Wednesday, June 8, 2022 |
| Budget Discussion | Thursday, June 9, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, June 14, 2022 |
| F&A VPs Check-in Call | Wednesday, June 15, 2022 |
| <i>Juneteenth: No Classes</i> | <i>Monday, June 20, 2022</i> |
| SCUPA Labor/Management Meeting | Tuesday, June 21, 2022 |
| President's Cabinet with Shared Governance | Wednesday, June 22, 2022 |
| VPFA/CFO Meeting | Wednesday, June 22, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, June 22, 2022 |
| Budget Discussion | Thursday, June 23, 2022 |
| F&A VPs Check-in Call | Wednesday, June 29, 2022 |
| | July 2022 |
| <i>Summer Session 1 Classes End</i> | <i>Friday, July 1, 2022</i> |
| <i>Independence Day Holiday: No Classes</i> | <i>Monday, July 4, 2022</i> |
| <i>Summer Session 2 Classes Begin</i> | <i>Tuesday, July 5, 2022</i> |
| VPFA/CFO Meeting | Wednesday, July 6, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, July 12, 2022 |
| Budget Discussion | Tuesday, July 12, 2022 |
| Board of Governors Quarterly Meeting | Wednesday, July 13, and Thursday, July 14, 2022 |
| President's Cabinet – Deans | Wednesday, July 13, 2022 |
| F&A VPs Check-in Call | Wednesday, July 13, 2022 |
| SCUPA Labor/Management Meeting | Tuesday, July 19, 2022 |
| VPFA/CFO Meeting | Wednesday, July 20, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, July 20, 2022 |
| President's Cabinet with Shared Governance | Wednesday, July 27, 2022 |
| F&A VPs Check-in Call | Wednesday, July 27, 2022 |
| UBAC | Thursday, July 28, 2022 |
| | August 2022 |
| VPFA/CFO Meeting | Wednesday, August 3, 2022 |
| <i>Summer Session 2 Classes End</i> | <i>Friday, August 5, 2022</i> |
| AFSCME Labor/Management Meeting | Tuesday, August 9, 2022 |
| President's Cabinet with Deans | Wednesday, August 10, 2022 |
| F&A VPs Check-in Call | Wednesday, August 10, 2022 |
| Budget Discussion | Thursday, August 11, 2022 |

Budget Planning Calendar
Updated 2/4/2022

| Activity | Dates |
|--|---|
| | August 2022 (continued) |
| SCUPA Labor/Management Meeting | Tuesday, August 16, 2022 |
| VPFA/CFO Meeting | Wednesday, August 17, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, August 17, 2022 |
| <i>Classes Begin</i> | <i>Monday August 22, 2022</i> |
| President's Cabinet with Shared Governance | Monday, August 22, 2022 |
| F&A VPs Check-in Call | Wednesday, August 24, 2022 |
| POA Labor/Management Meeting | Tuesday, August 30, 2022 |
| Budget Discussion | Tuesday, August 30, 2022 |
| VPFA/CFO Meeting | Wednesday, August 31, 2022 |
| | September 2022 |
| UBAC | Thursday, September 1, 2022 |
| <i>Labor Day: No Classes</i> | <i>Monday, September 5, 2022</i> |
| F&A VPs Check-in Call | Wednesday, September 7, 2022 |
| September Council of Trustees Meeting | Thursday, September 8, 2022 |
| President's Cabinet with Deans | Monday, September 12, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, September 13, 2022 |
| Budget Discussion | Tuesday, September 13, 2022 |
| VPFA/CFO Meeting | Wednesday, September 14, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, September 14, 2022 |
| SCUPA Labor/Management Meeting | Tuesday, September 20, 2022 |
| F&A VPs Check-in Call | Wednesday, September 21, 2022 |
| President's Cabinet with Shared Governance | Monday, September 26, 2022 |
| VPFA/CFO Meeting | Wednesday, September 28, 2022 |
| | October 2022 |
| F&A VPs Check-in Call | Wednesday, October 5, 2022 |
| UBAC | Thursday, October 6, 2022 |
| President's Cabinet with Deans | Monday, October 10, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, October 11, 2022 |
| VPFA/CFO Meeting | Wednesday, October 12, 2022 |
| Budget Discussion | Thursday, October 13, 2022 |
| SCUPA Labor/Management Meeting | Tuesday, October 18, 2022 |
| Board of Governors Quarterly Meeting | Wednesday, October 19 and Thursday, October 20, 2022 |
| F&A VPs Check-in Call | Wednesday, October 19, 2022 |
| Tentative – Fall Pause | Monday, October 24 and Tuesday, October 25, 2022 |

Budget Planning Calendar
Updated 2/4/2022

| Activity | Dates |
|--|--|
| | October 2022 (continued) |
| VPFA/CFO Meeting | Wednesday, October 26, 2022 |
| President's Cabinet with Shared Governance | Monday, October 24, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, October 26, 2022 |
| Budget Discussion | Thursday, October 27, 2022 |
| | November 2022 |
| F&A VPs Check-in Call | Wednesday, November 2, 2022 |
| UBAC | Thursday, November 3, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, November 8, 2022 |
| VPFA/CFO Meeting | Wednesday, November 9, 2022 |
| Budget Discussion | Thursday, November 10, 2022 |
| President's Cabinet with Deans | Monday, November 14, 2022 |
| SCUPA Labor/Management Meeting | Tuesday, November 15, 2022 |
| F&A VPs Check-in Call | Wednesday, November 16, 2022 |
| <i>Thanksgiving Recess No Classes</i> | <i>Monday, November 21 through Friday, November 25, 2022</i> |
| VPFA/CFO Meeting | Wednesday, November 23, 2022 |
| <i>Classes Resume</i> | <i>Monday, November 28, 2022</i> |
| President's Cabinet with Shared Governance | Monday, November 28, 2022 |
| POA Labor/Management Meeting | Tuesday, November 29, 2022 |
| F&A VPs Check-in Call | Wednesday, November 30, 2022 |
| | December 2022 |
| UBAC | Thursday, December 1, 2022 |
| <i>Classes End (End of Day)</i> | <i>Monday, December 5, 2022</i> |
| <i>Final Exams</i> | <i>Tuesday, December 6 through Friday, December 9, 2022</i> |
| Budget Discussion | Tuesday, December 6, 2022 |
| VPFA/CFO Meeting | Wednesday, December 7, 2022 |
| Finance VPs Check-in Call Prep | Wednesday, December 7, 2022 |
| December Council of Trustees Meeting | Thursday, December 8, 2022 |
| <i>Commencement</i> | <i>Saturday, December 10, 2022</i> |
| President's Cabinet with Deans | Monday, December 12, 2022 |
| AFSCME Labor/Management Meeting | Tuesday, December 13, 2022 |
| F&A VPs Check-in Call | Wednesday, December 14, 2022 |
| <i>Winter Session Classes Begin</i> | <i>Thursday, December 15, 2022</i> |
| SCUPA Labor/Management Meeting | Tuesday, December 20, 2022 |
| VPFA/CFO Meeting | Wednesday, December 21, 2022 |

Budget Planning Calendar
Updated 2/4/2022

| Activity | Dates |
|-----------------------------------|----------------------------------|
| | December 2022 (continued) |
| <i>No Classes</i> | <i>Monday, December 26, 2022</i> |
| | January 2023 |
| <i>No Classes</i> | <i>Monday, January 2, 2023</i> |
| <i>Winter Session Classes End</i> | <i>Friday, January 6, 2023</i> |
| | February 2023 |
| UBAC | Thursday, February 2, 2023 |
| | March 2023 |
| UBAC | Thursday, March 2, 2023 |
| March Council of Trustees Meeting | Thursday, March 23, 2023 |
| | April 2023 |
| UBAC | Thursday, April 6, 2023 |
| | May 2023 |
| UBAC | Tuesday, May 2, 2023 |
| May Council of Trustees Meeting | Thursday, May 4, 2023 |

Tuition Model and Pricing Recommendations



**Council of Trustees Special Workshop
February 1, 2022**

Executive Summary

- A cross-university workgroup recommends that IUP move to a flat tuition rate for all in-state undergraduate students taking 12-18 credits in a semester, starting with the fall 2022 semester.
- President's Cabinet agrees with the committee's recommendation, as does the president.

Implications for students

- Implementing a flat tuition rate at this time would reduce the cost to students and potentially make IUP more competitive in the increasingly tight market for undergraduate students.
- It may further decrease costs to students by lessening the time to graduation, with no additional cost for anything above 12 credits, up to 18.
- It will also simplify the tuition structure for families.

Executive Summary

Implications for IUP

- Implementing a flat tuition rate model will reduce IUP's tuition revenue, increasing IUP's projected deficit for several years, absent increases in enrollment (which seems likely, but not certain), significant additional expense reductions, or both.
- IUP expects that enrollment will ultimately increase above current projections due to the reduction in cost to students, but it is difficult to predict when enrollment increases will occur and to what extent.
- Potential lost revenue in year one (FY 2022-2023) can be covered through the use of one-time funds, some from COVID recovery funds or by drawing down other reserves sooner than planned.
- A flat-rate tuition model will also likely result in students taking more credits and require IUP to add course sections with no immediate revenue to offset that cost.

Executive Summary

Determining the appropriate flat rate

- A range of flat rates examined, balancing cost to students with institutional financial risk.
- Three rate levels from a rate \$1,000/year lower than the current rate to a much larger reduction that would put IUP's tuition on par with most other PASSHE universities.

| # Credits Taken per semester | Current Tuition | Proposal 1A Flat Rate Tuition 12-18 credits (\$7,716/AY) | | | Proposal 1B Flat Rate Tuition 12-18 credits (\$7,900/AY) | | | Proposal 1C Flat Rate Tuition 12-18 credits (\$8,600/AY) | |
|--|-----------------|--|--------|---|--|-----------------|---|--|--|
| | | | | Avg. cost per credit - for information only | | | Avg. cost per credit - for information only | | |
| | \$ 319 | \$ 3,858 | | \$ 3,950 | | \$ 4,300 | | | |
| 12 | \$ 7,656 | \$ 7,716 | \$ 322 | \$ 7,900 | \$ 329 | \$ 8,600 | \$ 358 | | |
| 13 | \$ 8,294 | \$ 7,716 | \$ 297 | \$ 7,900 | \$ 304 | \$ 8,600 | \$ 331 | | |
| 14 | \$ 8,932 | \$ 7,716 | \$ 276 | \$ 7,900 | \$ 282 | \$ 8,600 | \$ 307 | | |
| 15 | \$ 9,570 | \$ 7,716 | \$ 257 | \$ 7,900 | \$ 263 | \$ 8,600 | \$ 287 | | |
| 16 | \$ 10,208 | \$ 7,716 | \$ 241 | \$ 7,900 | \$ 247 | \$ 8,600 | \$ 269 | | |
| 17 | \$ 10,846 | \$ 7,716 | \$ 227 | \$ 7,900 | \$ 232 | \$ 8,600 | \$ 253 | | |
| 18 | \$ 11,484 | \$ 7,716 | \$ 214 | \$ 7,900 | \$ 219 | \$ 8,600 | \$ 239 | | |
| Estimated Annual Revenue Loss (assuming no increase in enrollment) | | (\$8,953,526) | | | (\$7,871,054) | | | (\$3,752,954) | |
| # of full-time students needed to make up lost revenue | | 1,160 | | | 996 | | | 436 | |

Executive Summary

Higher cost than per-credit model

Determining the appropriate flat rate

- A range of flat rates examined, balancing cost to students with institutional financial risk.
- Three rate levels from a rate \$1,000/year lower than the current rate to a much larger reduction that would put IUP's tuition on par with most other PASSHE universities.

| # Credits Taken per semester | Current Tuition | Proposal 1A Flat Rate Tuition 12-18 credits (\$7,716/AY) | | Proposal 1B Flat Rate Tuition 12-18 credits (\$7,900/AY) | | Proposal 1C Flat Rate Tuition 12-18 credits (\$8,600/AY) | |
|--|-----------------|--|---|--|---|--|---|
| | | | | | | | |
| | \$ 319 | \$ 3,858 | Avg. cost per credit - for information only | \$ 3,950 | Avg. cost per credit - for information only | \$ 4,300 | Avg. cost per credit - for information only |
| 12 | \$ 7,656 | \$ 7,716 | \$ 322 | \$ 7,900 | \$ 329 | \$ 8,600 | \$ 358 |
| 13 | \$ 8,294 | \$ 7,716 | \$ 297 | \$ 7,900 | \$ 304 | \$ 8,600 | \$ 331 |
| 14 | \$ 8,932 | \$ 7,716 | \$ 276 | \$ 7,900 | \$ 282 | \$ 8,600 | \$ 307 |
| 15 | \$ 9,570 | \$ 7,716 | \$ 257 | \$ 7,900 | \$ 263 | \$ 8,600 | \$ 287 |
| 16 | \$ 10,208 | \$ 7,716 | \$ 241 | \$ 7,900 | \$ 247 | \$ 8,600 | \$ 269 |
| 17 | \$ 10,846 | \$ 7,716 | \$ 227 | \$ 7,900 | \$ 232 | \$ 8,600 | \$ 253 |
| 18 | \$ 11,484 | \$ 7,716 | \$ 214 | \$ 7,900 | \$ 219 | \$ 8,600 | \$ 239 |
| Estimated Annual Revenue Loss (assuming no increase in enrollment) | | (\$8,953,526) | | (\$7,871,054) | | (\$3,752,954) | |
| # of full-time students needed to make up lost revenue | | 1,160 | | 996 | | 436 | |

Executive Summary

Debating between aggressive or more cautious price reductions

- A more aggressive price reduction will garner more attention in the market and is likely to attract additional new students, but will increase IUP's budget challenges in the short term.
 - It may also be difficult to increase tuition in the future should the hoped-for increases in enrollment not occur.
 - It may encourage students to take 15 credits per semester, decreasing their time to graduation.
- Full cost of attendance for students also includes fees, room, and board, so reducing tuition has a smaller overall impact than might be expected.
 - A \$1,000 reduction in annual tuition reduces overall cost of attendance for a student living on campus by about 4%.
- A more cautious approach will receive less attention in the market and will likely attract fewer new students, but keeps IUP's budget challenges at a more reasonable level.
 - A less aggressive starting point may afford further incremental reductions as we learn more about the impact of the change.
 - A more conservative flat rate may not have the desired student impact compared to the more aggressive options.

Executive Summary

Recommendation

Either proposal 1A or 1B

- Both proposals place a priority on students' affordability and ability to complete their degree in a timely fashion by taking additional credit hours at a flat rate amount.
- Both proposals also place IUP in a better competitive position in pricing with peer institutions and achieve the goal of being simple and easier to understand for students and parents.

Timing

- IUP must submit a draft proposal to the Office of the Chancellor by February 2, 2022.
- After review by the OOC, IUP Council of Trustee's would take formal action on the final proposal at its March 2022 meeting, and the Board of Governor's would take final action at their April 2022 meeting.
- If approved, the new pricing would be implemented for the fall 2022 semester.



Proposal Details

Recommended Proposals

Proposal 1A

- A flat-rate pricing of \$7,716 for students enrolled in 12-18 credits (the standard rate for PASSHE schools), with students assessed at \$319/credit for any credits below 12 and above 18 credits.

Proposal 1B

- A flat-rate pricing at a level above \$7,716 but lower than our original recommendations for students enrolled in 12-18 credits, with students assessed at \$319/credit for any credits below 12 and above 18 credits.
 - \$7,900 was used with the rationale that bringing the cost below \$8,000 would be more attractive to students and prospective students.

Price Model 1A - flat-rate pricing of \$7,716

Projected Revenue Impact - Fall Semester Only Full-time, In-State UG Only

| | |
|---|----------------------|
| Fall 2021 Headcount - Students taking 12-18 credits | 5,883 |
| Flat Rate | \$ 3,858 |
| Revenue from Credits 12-18 at flat rate | \$ 22,696,614 |
| Total Revenue Using Flat Rate | \$ 22,696,614 |
| Current Projected Fall 2021 Revenue | \$ 27,173,377 |
| Change in Fall Revenue with Flat Rate | (4,476,763) |
| Estimated Impact to Annual Revenue | (8,953,526) |

Using fall freeze headcount for full-time UG In-State students

Price Model 1B - flat-rate pricing of \$7,900

Projected Revenue Impact - Fall Semester Only Full-time, In-State UG Only

| | |
|---|----------------------|
| Fall 2021 Headcount - Students taking 12-18 credits | 5,883 |
| Flat Rate | \$ 3,950 |
| Revenue from Credits 12-18 at flat rate | \$ 23,237,850 |
| Total Revenue Using Flat Rate | \$ 23,237,850 |
| Current Projected Fall 2021 Revenue | \$ 27,173,377 |
| Change in Fall Revenue with Flat Rate | (3,935,527) |
| Estimated Impact to Annual Revenue | (7,871,054) |

Using fall freeze headcount for full-time UG In-State students

Price Comparisons to PASSHE Schools

Current Price

| CURRENT TUITION PRICE: Per-credit pricing at \$319/cr. (\$9,570/AY if 15 credits/term) | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|--|---------------------------|---------------------------------|------------------|-------------------|--------------------------------|--|--------------|--------------------------------------|-----------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Costs | Avg UG Student Total Costs | Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$4,325 | \$1,854 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$4,190 | \$1,854 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$3,708 | \$1,854 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$2,630 | \$1,854 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$3,375 | \$1,282 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$5,250 | \$1,854 | \$746 | \$2,290 | \$360 |
| Indiana (CURRENT PRICING) | \$9,570 | \$3,574 | \$8,950 | \$3,620 | \$25,714 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$3,822 | \$1,854 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$4,468 | \$1,854 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$2,614 | \$1,854 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | \$1,178 | \$0 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | \$1,118 | \$0 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$4,939 | \$1,854 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$6,519 | \$1,854 | \$867 | \$3,156 | \$642 |
| (with IUP) | \$8,154 | \$3,154 | \$7,336 | \$3,631 | \$22,276 | | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | | | | | |

Note: Rates are calculated at 30 credits per year.

Price Comparisons to PASSHE Schools

Proposal 1A

| PROPOSAL 1A: Flat Rate Tuition 12-18 credits (\$7,716/AY) | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|---|---------------------------|---------------------------------|------------------|-------------------|--------------------------------|--|--------------|--------------------------------------|-----------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Costs | Avg UG Student Total Costs | Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$2,471 | \$0 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$2,336 | \$0 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$1,854 | \$0 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$776 | \$0 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$1,521 | -\$572 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$3,396 | \$0 | \$746 | \$2,290 | \$360 |
| Indiana (PROPOSAL 1A) | \$7,716 | \$3,574 | \$8,950 | \$3,620 | \$23,860 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$1,968 | \$0 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$2,614 | \$0 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$760 | \$0 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | -\$676 | -\$1,854 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | -\$736 | -\$1,854 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$3,085 | \$0 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$4,665 | \$0 | \$867 | \$3,156 | \$642 |
| System Average (with IUP) | \$8,022 | \$3,154 | \$7,336 | \$3,631 | \$22,143 | | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | | | | | |

Note: Rates are calculated at 30 credits per year.

Price Comparisons to PASSHE Schools

Proposal 1B

| PROPOSAL 1B: Flat Rate Tuition 12-18 credits (\$7,900/AY) | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|---|---------------------------|---------------------------------|------------------|-------------------|--------------------------------|--|--------------|--------------------------------------|------------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Costs | Avg UG Student Total Costs | Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$2,655 | \$184 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$2,520 | \$184 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$2,038 | \$184 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$960 | \$184 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$1,705 | -\$388 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$3,580 | \$184 | \$746 | \$2,290 | \$360 |
| Indiana (PROPOSAL 1B) | \$7,900 | \$3,574 | \$8,950 | \$3,620 | \$24,044 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$2,152 | \$184 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$2,798 | \$184 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$944 | \$184 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | -\$492 | -\$1,670 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | -\$552 | -\$1,670 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$3,269 | \$184 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$4,849 | \$184 | \$867 | \$3,156 | \$642 |
| System Average (with IUP) | \$8,035 | \$3,154 | \$7,336 | \$3,631 | \$22,156 | | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | | | | | |

Note: Rates are calculated at 30 credits per year.

Price Comparisons to PASSHE Schools

Proposal 1C

| POINT OF COMPARISON: \$8,600/AY tuition | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|--|---------------------------|---------------------------------|------------------|-------------------|--------------------------------------|---|------------------|--------------------------------------|-----------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Total Costs | Avg UG Student Total Costs | Avg Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$3,355 | \$884 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$3,220 | \$884 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$2,738 | \$884 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$1,660 | \$884 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$2,405 | \$312 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$4,280 | \$884 | \$746 | \$2,290 | \$360 |
| Indiana | \$8,600 | \$3,574 | \$8,950 | \$3,620 | \$24,744 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$2,852 | \$884 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$3,498 | \$884 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$1,644 | \$884 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | \$208 | -\$970 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | \$148 | -\$970 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$3,969 | \$884 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$5,549 | \$884 | \$867 | \$3,156 | \$642 |
| System Average (with IUP) | \$8,154 | \$3,154 | \$7,336 | \$3,631 | \$22,206 | \$2,538 | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | \$2,733 | | | | |



IUP's Sustainability Status and Plan

January 14, 2022

Executive Summary: At IUP, we are following a consistent plan for overcoming the challenges to our financial sustainability, caused in major part, by inadequate levels of state appropriation, significant population declines within the region leading to a large, continuing enrollment decline, and the added challenges of the COVID-19 pandemic. The plan is based on a detailed analysis of financial and enrollment data resulting in decisions made on realistic projections, rather than hope. In our September 2020 CPP, we intentionally set aggressively high targets for workforce reduction and conservative enrollment and revenue projections to allow leadership and the university community to understand and come to grips with the magnitude of the sustainability challenge. In some sense, the university is now being criticized for not achieving those high workforce reduction targets in one year, despite the remarkable progress made in bringing IUP's financials closer to sustainability in an unprecedentedly short time.

IUP's overall plan, under which efforts continue, started with significant and painful—but necessary—workforce (and hence expense) reductions, starting at the beginning of the 2019-20 fiscal year. In FY 2019-20 and FY 2020-21, workforce was reduced by more than 25 percent, reducing net expenses by more than \$31 million. Enrollment projections fell somewhat short of the conservative projections, apparently because of impact from the ongoing pandemic (particularly reducing international enrollment) and increased competition for students in a declining market. In that declining market, IUP's sticker price for attendance became a more prominent reason for new students to not attend and for continuing students to reduce their credit load (and hence reduce student FTE).

While making significant reductions in workforce, we also initiated INSPIRE, an intense and expedited review of our academic programs. This work identified 34 programs for redesign, moratorium, or elimination. The thought processes and criteria of INSPIRE were enhanced to help drive a significant academic restructuring called IUP NextGen, which eliminated an academic college and several academic departments, realigned IUP's academic program array to better match student and employer demand and to better align with IUP's strategic direction, and to accelerate program redesign.

IUP's September 13, 2021 CPP rigorously showed actual workforce and expense reductions, and not hoped for, or future reductions. These actual workforce reductions were admittedly less than the initial aggressive targets, raising concern by a few reviewers. If IUP had declared its work done at that point, the concern would certainly be justified. However, we continue to work on the remaining challenges with numerous additional efforts to increase enrollment and revenue, to reduce student cost of attendance, and to further reduce workforce and other expenses.

In the four months since IUP submitted its September 13, 2021 CPP, we have continued to work on student retention and persistence and new student recruiting, with the goal of increasing revenue. We have also continued to work on reducing workforce and making additional expense reductions. This ongoing work is already showing results, reducing the projected FY 2022-23 E&G budget deficit by more

than \$3.3 million. The 2022-23 fiscal year should show improvement on all four sustainability policy metrics. We continue the work and have other initiatives in progress that should continue to bear fruit as we whittle away at IUP's remaining financial challenges.

Our January 2022 projections show that FY 2021-22 will finish slightly below our fall 2021 projections for enrollment and revenue. However, because of hard work by the IUP team, January 2022 projections for spring headcount enrollment are higher than projected. Additionally, early enrollment and revenue projections for FY 2022-23 are higher than what was projected in the fall. We have continued to reduce workforce and are already showing an additional net reduction of 15.7 employee FTE for fall 2022. Some of those reductions are due to furloughs and retirements of unrepresented employees. The majority of the reduction is due to retirement of faculty. A modest amount of these savings will be realized in the current fiscal year, but the full benefits are not seen until FY 2022-23. It is important to note that these are documented reductions, and we expect additional workforce and expense reductions as we continue our work.

IUP continues its work on program array, with a target of maintaining a total of 63 undergraduate degree programs. This is a decrease of 12 programs from the current total of 75 and well below the 70 recommended by the CAO's analysis. Additional continuing efforts to increase enrollment and reduce expenses are documented in the more detailed report that follows this executive summary.

The biggest challenges we face are in the auxiliary budget. On IUP's ledger, the biggest challenge is covering debt for dining construction that, in hindsight, should have been curtailed earlier. Exceptional work has been done to reduce operating expenses and provide meal plans at a reasonable cost to students. The dining debt makes it impossible to balance the dining budget in our current circumstances. One-time debt relief for IUP-held dining debt is almost certainly needed. IUP also has master leases for two of the four phases of housing owned by the Foundation for IUP. Those payments will become more manageable as we go forward but will continue to need careful attention. Finally, not on IUP's ledger, are the two additional phases of housing owned by the Foundation. The Foundation is in negotiations with representatives of the bond holders in the hopes of restructuring the debt. If such a restructuring can occur, IUP will have more flexibility to manage its overall housing portfolio.

IUP certainly still has sustainability work to do. We have already completed the largest and most painful part of the work and are continuing to chip away at the shortfalls by increasing enrollment and revenue and right sizing our workforce and expenses. This has been, and remains, a top priority and I am confident we will continue to make appropriate progress, recognizing that these are challenging and uncertain times in which we can't predict the future with complete accuracy.

Sincerely,

Michael A. Driscoll, President

Introduction: This report will summarize information, as of January 2022, regarding IUP's progress towards the CPP document submitted by IUP to the Office of the Chancellor on September 13, 2021.

IUP has undertaken substantial work during the past several years toward financial sustainability, with a combination of strategies around areas including enrollment, workforce, and other key strategies. The last two years were difficult for the university community. Several actions were taken to substantially decrease our workforce in all categories in a short period of time. These two-year strategies culminated in reducing the IUP structural deficit to an estimated \$12 million for the E&G fund and \$8 million for the auxiliary fund.

We acknowledged when we submitted the September 13, 2021 CPP that we still had more work to do. We want to be cautious and mindful of further reductions that would be made, ensuring that they are aligned with our priority of student success and do not harm our instructional priorities. We targeted a reduction of 10 non-represented positions with an estimated salary and benefit savings of \$1.5 million, additional savings through attrition of \$1.6 million, and using approximately \$6.19 million in one-time reserve funds to balance the budget while other analyses could be conducted, and discussions surrounding additional strategies could take place in FY 2021-22 and beyond.

In the next sections of this document, we will discuss the current status and projections for enrollment, updates to our projected tuition and fee revenues as a result of enrollment, other revenues, workforce reductions progress, expenses as a result of those workforce reductions, and other expense reductions. We will summarize our current status regarding the additional approaches underway to support our strategic plan and to bridge the gap between our revenue and expenses to achieve a balanced budget, as well as where we see continued challenges.

Enrollment

Table A-1 summarizes the headcount information, and Table A-2 recaps fall and annualized FTE enrollment for undergraduate and graduate students. The enrollment projections have been updated since the September 13, 2021 CPP and a new update (January 2022 projections) has been included. The enrollment projections are current as of the first week of January 2022. Classes begin January 18 and the spring enrollment freeze date is February 7.

Spring headcount 2022 enrollment is expected to exceed the projected enrollment used in the September 13, 2021 CPP. Fall-to-spring retention for the fall 2021 freshman cohort has been higher than the fall 2020 cohort and it is on track to exceed the anticipated fall-to-spring retention rate. Undergraduate, continuing-student enrollment is also ahead of last spring, with a higher percentage of fall 2021 continuing students registered for spring 2022 than at this time last year. This group is expected to exceed the projected fall-to-spring persistence in the September 13, 2021 CPP. In total, undergraduate registration is at a higher percentage toward our January 2022 projections than a year ago, and it also exceeds the average percent registered toward the final enrollment of the last three years.

Graduate headcount enrollment for spring 2021 is also trending ahead of last year, compared to the percentage of students projected in our September 13, 2021 CPP who are registered, versus the percent registered toward the final enrollment last spring. Like the undergraduates, they are ahead, even when comparing the average of the prior three years' registration percent toward spring final enrollment.

Clock-hour registration information in the January 2022 projections is at the level anticipated for spring 2022.

Examples of activities to encourage students to register for spring include: communication to students and families, engagement by the staff and faculty guides with our new students, outreach by our assistant/associate deans, review of financial holds or missing financial aid documents and contact to students to remedy issues and/or identify assistance with the outstanding balances, and outreach by our residence life staff to students living on campus.

Completed freshman applications for fall 2022 have been ahead of fall 2021 applications at the same point in time for most of the admissions cycle. Comparing fall 2021 completed applications to the past three years, we have been ahead of fall 2018 for most of the cycle, but behind fall 2020 and 2019. It is important to note that fall 2018 had the strongest fall freshman enrollment of the four years. The number of students admitted has also risen from last year for most of the cycle. Quality is being maintained: Our admitted students' average high school GPA is approximately the same as last year.

Deposits for new freshmen have been very strong, being ahead of the last four fall semesters. The average high school GPA for deposited students is slightly higher than fall 2021. It also exceeds the high school GPA for deposited students in three of the past four years.

Financial aid notifications were sent to freshmen earlier this academic year, in time to reach families by the Thanksgiving holiday. Merit scholarship offers were also increased by \$1,000 per level and an additional \$1,000 scholarship has been offered to students who live on-campus. We are seeing a strong response to these offers, with a yield rate from admitted to deposited at a higher level than last year, as well as higher than the same period in fall 2019 and 2018.

Completed transfer applications and admitted transfer students for fall 2022 are down slightly from last year; however, students are depositing at a higher rate (more than 100 percent higher). While it is early in the transfer cycle, this is encouraging. Like freshmen, transfer students are responding well to the merit and housing scholarship offers.

Fall graduate applications are slightly ahead of last year and the number of students who have confirmed their attendance is about even. Communications about financing graduate school are being created and the admissions team is collaborating with the School of Graduate Studies and Research to refine recruiting and admission strategies.

Overall, our headcount enrollment for spring is encouraging. Looking forward to the fall 2022, while still early, the activities and initiatives in support of new student recruitment are showing positive outcomes thus far.

Revenue - Educational and General

Tuition and fee revenue has been updated for revised enrollment projections in the January 2022 projections, as shown in Table B. January 2022 projected tuition revenue is anticipated to be lower than projected in the September 13, 2021 CPP. This is due to the actual fall 2021 headcount and credit hours being lower than projected as shown in Table B.

Spring headcount is projected to be higher than in the September 13, 2021 CPP; however, the average student credit hours taken has been trending lower, resulting in fewer overall credit hours projected in

spring. Since the revenue is based on credit-hour production, this results in lower revenue. Actual winter enrollment and revenue are not yet finalized, so tuition revenue is based on the winter projections. It is anticipated that winter actuals will exceed January 2022 projections, and this will be adjusted for the February mid-year progress report. After the September 13, 2021 CPP was submitted, we utilized actual fall freeze information to make projections for the year and the total projected tuition revenue had decreased by \$896,000. This January 2022 projection is now expected to be a bit better (\$452 million shortfall vs. \$896 million shortfall), as indicated in Table C.

Other Revenue Updates: Additional one-time revenue of \$626,000, which was not included in the September 13, 2021 CPP, has been included in this report as part of the Targeted University Incentive Funds to support selected universities that are experiencing one-time costs associated with implementing sustainability measures.

The one-time federal Coronavirus State and Local Fiscal Recovery Funds (CSFRF) of \$1.8 million were not directly accounted for in either the September 13, 2021 CPP or the January 2022 projections. The funds will be used as part of student success initiatives and will have off-setting expenses. The one-time funds and the associated expenses—as well as any changes in enrollment resulting from these student success initiatives—have not been accounted for yet but are anticipated to be included in the February Mid-Year Progress Report.

Personnel Expenditures: Table D-1 shows the workforce table that is used as a template for the February mid-year progress report, but with data updated through the first week of January for the January 2022 projections. It will be updated further for the mid-year progress report. Table D-2 provides a comparison of the positions by employee group and progress made since the September 13, 2021 CPP. It shows that progress has been made since that September 13, 2021 submittal. These are actual, booked reductions, not hoped for, or possible, reductions.

January 2022 projections include the same salary and benefit assumptions as the September 13, 2021 CPP. The September 13, 2021 CPP also included savings of \$1.5 million from the elimination of 10 non-represented positions. The January 2022 projections include the actual savings from 13 identified non-represented positions, which surpass the initial target in the September 13, 2021 CPP. January 2022 projections have exceeded that target set for non-represented workforce reductions by three positions and by an additional estimated \$144,000 in salary and benefits savings.

We do anticipate a revised position description will be developed in the unit of one of the vacancies and will be included as a new position as that work gets completed and approved. You can see an updated workforce table in Table D-2, which shows that we are exceeding our prior projection with net workforce reductions of approximately 16 FTE.

Due to mid-year separations, the salary and benefit savings will be realized only partially in FY 2021-22. The total estimated salary and benefit savings from these full non-represented position eliminations is 13 FTE and \$1.7 million during the next two years and beyond. Comparisons show we are overstaffed in this employee group when compared to state system average and two other universities of comparable student enrollment. Discussions continue regarding organizational structure and other changes that can be made to further reduce these numbers.

The January 2022 projections include salary and benefits savings from 17 additional faculty separations received after the September 13, 2021 CPP was submitted. One of these positions was deemed to be in a critical area and will be filled in FY 2022-23. The other 16 faculty positions will be eliminated, resulting in an additional \$2.7 million in savings.

Other confirmed faculty and non-faculty separations have resulted in adjusted personnel budgets. The impact of the extended Enhanced Sick Leave Payout (ESLP) is captured in January 2022 projections.

Temporary Faculty: The FY 2021-22 annualized FTE for temporary faculty is 30.55, which includes the actual FTE appointed for fall and full academic year hires, plus the approved FTE for spring-only temporary hires. Although these temporary hires have been approved, as temporary faculty hiring needs are continuously being reviewed, the actual temporary faculty FTE appointed may result in being lower than what was approved, which is typical of each semester.

The temporary faculty for FY 2022-23 is budgeted at 23.375 FTE, which reflects what is shown in September 13, 2021 CPP and is based on the approved temporary faculty pool amount. Although this has been included in the January 2022 projections, there have been no official decisions made yet on temporary faculty hires for FY 2022-23.

Turnover and Attrition: The September 13, 2021 CPP included \$1.6 million in salary and benefit savings resulting from workforce attrition and normal turnover. Because the actual attrition to date is included in the January 2022 personnel projections, this rate has been reduced from 1.2 percent to 0.6 percent to more accurately reflect the savings that may be realized in the second half of the year.

Operating Expenditures: The operating expenses were reduced by 50 percent for last fiscal year and the reduction was made permanent for FY 2021-22. This reduction was large. Because of uncertainties, we had built in a \$600,000 operating expense contingency for emergency situations in case operational funds were needed due to the reduction. This contingency was built into September 13, 2021 CPP but was removed in January 2022 projections based on our current spending patterns, helping to balance the budget as is shown in our new projections.

The sale/transfer of the Northpointe property is on track, as projected. A conservative estimate for operational savings were included in FY 2022-23 (\$50,000) for the January 2022 projections. The estimated operational savings, which includes maintenance, utilities, custodial, and other expenses, will be analyzed, and we expect it will increase for the February mid-year progress report.

Revenue - Auxiliary

This section summarizes the status of IUP's auxiliary budget, with Table E outlining the auxiliary revenues and changes to the auxiliary structural deficit.

Revenue: Housing and Dining revenues were updated for FY 2021-22 based on year-to-date actuals, resulting in more positive revenue projections. FY 2022-23 auxiliary revenue projections were updated based on various changes and occupancy.

Expenditures: Auxiliary expenditure projections were reviewed and compared with year-to-date actuals. No significant adjustments were made to expense projections, as significant reductions in expenses were already made in the previous years and operations are very lean.

Items of note for auxiliary component include the following:

- a) We had a lower conversion of residential to voluntary meal plans in FY 2021-22 as a result of fewer sophomore and junior students living on campus with residential meal plans in FY 2020-21 compared to FY 2019-20. The decreased number was largely due to Covid.
- b) IUP removed all dining operations from the Punxsutawney campus, which reduced revenue and expenses. Ultimately, the move was net positive as this component was operating with deficit numbers due to low enrollment.
- c) Housing occupancy was higher for fall 2021 compared to fall 2020. The number of continuing students living on campus in fall 2021 increased by 98 percent compared to fall 2020.

Expenses have remained flat in the January 2022 projections compared to the September 13, 2021 CPP, because much work was done to lower expenses in the auxiliary over the last year and was reflected in the September 13, 2021 CPP.

IUP Key Strategies and Initiatives

At the beginning of the process toward sustainability, the most important strategies and initiatives were discussed and implemented based on IUP's new strategic plan and which would get the largest results toward financial sustainability. Some initiatives and strategies resulted in immediate results, while others are ongoing, still being implemented, with results to be known during the next few years. The following next section discusses key IUP initiatives that are in process.

Strategic Enrollment Plan: Student success is a significant piece of our Strategic Enrollment Plan to help with retention and persistence.

The plan is in the process of implementation. The primary focus of SEP is student success and transformation by helping students continue their educations at the academic level they seek; tapping in to known, vibrant markets; offering and promoting a culture of belonging, respect, and support; delivering the resources to facilitate students' progress towards their degrees; addressing affordability; and providing lifelong tools for students' futures. The SEP also proposes strategies for demonstrating the value of IUP to a broader audience, using an integrated and coordinated effort, including the building of partnerships that strengthen IUP's visibility and reach and provide opportunities for our students.

Because IUP is in the process of implementing significant strategic plans, including our strategic plan and IUP Next Gen, it is the intention that SEP will act as a complementary document to those plans and be integrated where appropriate.

Addressing Affordability: A workgroup led by the vice presidents of Administration and Finance and Enrollment Management has been charged with reviewing and analyzing the existing per-credit tuition model and associated fees and making any recommendations for proposed changes. The group is comprised of faculty and staff members who also sit on the University Budget Advisory Committee (UBAC) and a student member. The targeted completion of the initial work is mid-January.

A subcommittee of the SEP has also been asked to review the costs of housing and dining and will provide recommendations to reduce these costs to students. This subcommittee will collaborate with the tuition model workgroup to ensure a complete look at the cost of attendance at IUP.

New Partnerships: Recognizing the importance of dual-enrollment for high school students (i.e., taking college courses while in high school), IUP has been working with Indiana Area School District (IASD) to build a program for its students to take IUP courses. The program will identify areas of interest for students and provide them a structured plan of courses to take at IUP. IASD will give these courses the academic weight typically assigned to Advanced Placement courses to encourage students to take advantage of the opportunity. Similarly, a collaboration with the Punxsutawney School District is being developed for IUP courses to be taught at our Punxsutawney campus. We will continue to explore opportunities with other school districts.

IUP has an agreement with Westmoreland County Community College to offer dual admission to WCCC students who meet certain requirements. This creates a seamless transition from WCCC to IUP with no additional admission application required and provides WCCC students the opportunity to use IUP housing and/or dining. We are currently in the final phases of a similar agreement with Penn Highlands Community College and have had a couple of other Pennsylvania community colleges show similar interest.

Crimson Scholars Circle: Prior to the start of the fall 2021 semester, IUP welcomed the first class of Crimson Scholars to campus for a week-long immersion experience. Students in the group have opportunities that provide support, both academically and socially, to help them be successful at IUP and after graduation. They network with alumni, have the guidance of a student mentor, and receive a \$1,000 scholarship to help defray their educational costs. The additional costs of the program are covered by a generous gift from an anonymous donor. Outcomes and assessment of this program will be used to further refine our overall work with retention and persistence overall but especially to help close the retention and persistence gaps of our African American and Latinx students.

Foundation Housing Refinance: Ongoing confidential discussions are in place to restructure/refinance a portion of the foundation's housing debt.

Auxiliary Debt: Dining services bond debt (an approximately \$2.9 million annual payment) is the highest component of IUP's auxiliary debt and it strongly contributes toward the auxiliary structural deficit. IUP would be supportive of any efforts made at the system level to assist the university with our IUP-owned debt to assist the auxiliary budget.

Additional workforce reductions: The most significant workforce reductions were done in the first two years of the financial sustainability planning, with more than 25 percent of the workforce being reduced. Plans were put in place for additional workforce reductions (such as the target of 10 non-represented employee reductions and additional \$1.6 through attrition) in the September 13, 2021 CPP, which are being implemented.

Further workforce reductions, beyond what has already significantly been done, will still be necessary to close the gap between revenue and expenses. Discussions between the president's cabinet and the budget discussion workgroup are ongoing to ensure that this last portion is done in a mindful way. Organizational structure, data such as system-wide and university comparisons, and other data will be used to further reduce workforce as needed to align the revenues and expenses and eliminate the structural deficit. This work will be ongoing throughout the remainder of this fiscal and through next fiscal year.

Concept of Summer hours being changed to 4 /10-hour days, consolidation of space/buildings for use in the summer, and permanently reducing building and land footprints: Utility and operational savings that can be achieved by reducing the work week to 4 10-hour days in the summer months, along with consolidating usage of buildings in the summer for instruction is being analyzed.

In addition, other recommendations regarding IUP's footprint are being explored to determine if there are opportunities for public-private partnerships, ability to further consolidate spaces, take account the telecommuting of some of the employees, and if any land/or buildings can be taken offline.

R2 classification: IUP's Carnegie Classification as an R2 institution (doctoral university—high research activity) provides a return in several ways. This classification recognizes excellence in research and graduate education as a cornerstone of our identity and enhances IUP's reputation, relevance, and value to current and prospective students, donors, and granting agencies.

University Advancement: IUP's Division of University Advancement has been making progress over the past several years. Tables F and G outline the Total Raised Contributions FY 2020 vs FY2021 and the Total Raised Contributions FY 2021, Nov 30 Year to date vs FY 2022, Nov 30 Year to date.

IUP has a proud tradition of philanthropy, the impact of which is most readily felt through the most recent comprehensive campaign for IUP: Imagine Unlimited. Encouraged by breaking records of raising \$81.36 million and finishing more than six months early and with an upward trajectory of alumni, community and external partners stepping up as demonstrated in dollars raised year to date, planning has begun for IUP's next comprehensive campaign to support the advancement of our strategic plan and IUP NextGen. Together we will harness our collective resources to seize opportunities for our students, the health and benefit of our region, our commonwealth, and our world.

Program Array, Scheduling: IUP's Division of Academic Affairs has begun a systematic review of our programs with initial focus on undergraduate programs graduating fewer than 15 students per year. Future phases will include graduate programs. IUP was well positioned for this review because of prior work completed through the INSPIRE process and the IUP NextGen restructuring. The review began with an accounting of 75 undergraduate programs, while the recommended maximum number of programs is 70 for our enrollment. IUP aims to maintain a total of 63 undergraduate program.

The Provost's Office and the academic deans have worked hard toward developing a student-centered, efficient schedule. Continuing work focuses on curricular efficiencies, for example, sharing more courses across departments and colleges, developing delivery formats and rotations to support serving multiple programs, and leveraging expertise of faculty.

IUP's NextGen Coordinating Councils have completed their work to propose significant changes in how IUP meets its strategic goals. Two clusters of recommendations that will lead to a significant change in our curriculum, both in terms of efficiency, while meeting our strategic goals of student-centeredness and DEI, are a reframing of the liberal studies curriculum and recommendations for creating a more cohesive approach to supporting student success.

Other strategies including a review of designated funds, reduction in AWE's: There is a variety of additional analyses in process with some workgroups that will result in further expense reductions. Some of the areas being reviewed include the thousands of designated accounts, reducing faculty alternative workload equivalents, and planning the instructional class schedule to be more efficient.

A joint workgroup comprised of Management and IUP-APSCUF members were charged with developing consistent, shared principles for faculty workload, specifically alternative workload equivalents, in alignment with IUP's mission, strategic priorities, enrollment realities, and financial sustainability. The application of these principles includes alternative workload equivalents in support of doctoral education, program/center coordination, and other assignments not already outlined in Article 23 of the APSCUF collective bargaining agreement.

The work is being conducted this spring, and some of it will carry forward into next fiscal year. It is anticipated as results of the analyses are presented and reviewed, that recommendations on further expense reductions will be implemented.

Bottom Line: The September 13, 2021 CPP was submitted with a balanced budget in FY 2021-22 through various permanent and one-time strategies, including the use of one-time reserves. The January 2022 projections used for this report result in a projected shortfall of \$890,000 for FY 2021-22 and a better outlook for FY 2022-23, improving the financial situation overall for the two-year period.

Higher enrollment, credit-hour projections and reduced personnel costs in FY 2022-23 have decreased the systemic budget shortfall that was projected from \$12 million in the September 13, 2021 CPP to \$9 million in the January 2022 projections, as shown in Table D-3. The projection for total unrestricted net assets is also expected to improve over this two-year period through FY 2022-23.

The last two years of hard work that we put in to get IUP closer to being financially sustainable were tough. Many of the actions taken were painful. The workforce reductions were not easy decisions and impacts were felt on a university-wide basis. We have gotten much closer to where we need to be. Significant work is underway across the university engaging a variety of committees, workgroups, and constituencies to further reduce the gap between revenues and expenses, but, more importantly, to support the new strategic planning priorities, focus on student success, and bring IUP to financial sustainability while being cautious and mindful of where and how future reductions can be made. Although we have not yet crossed the finish line, we are confident we emerge as a stronger institution and be financially healthier with a balanced budget, improved financial indicators, increases to student retention, and staffing levels based on an appropriate size for our enrollment and program array.

Exhibits

Table A-1 Enrollment

| Total Fall Headcount | FY2021-22 | FY2022-23 | FY2023-24 |
|---------------------------------|------------------|------------------|------------------|
| September 4, 2020 CPP | 9,648 | 9,737 | |
| September 13, 2021 CPP | 9,358 | 9,412 | 9,555 |
| January 2022 Projections | 9,308 | 9,590 | 9,613 |

Table A-2 (Enrollment table that will be updated for Feb Mid-Year Report)

| | FY 2019-20 | FY 2020-21 | % Change from Prior Year | Original FY 2021-22 Projections* | % Change from Prior Year | Revised FY 2021-22 Projections | % Change from Prior Year | Original FY 2022-23 Projections* | % Change from Prior Year | Revised FY 2022-23 Projections | % Change from Prior Year |
|---|-----------------|-----------------|--------------------------------|--|--------------------------------|--------------------------------------|--------------------------------|--|--------------------------------|--------------------------------------|--------------------------------|
| Fall FTE Enrollment | | | | | | | | | | | |
| Clock Hour | 336.19 | 228.85 | -31.9% | 251.48 | 9.9% | 257.20 | 12.4% | 251.48 | 0.0% | 251.48 | -2.2% |
| Undergraduate (excludes clock hour) | 7,620.01 | 7,052.80 | -7.4% | 6,433.84 | -8.8% | 6,300.80 | -10.7% | 6,389.54 | -0.7% | 6,389.54 | 1.4% |
| Graduate | 1,058.89 | 982.88 | -7.2% | 956.60 | -2.7% | 989.00 | 0.6% | 1,004.49 | 5.0% | 1,004.49 | 1.6% |
| Total Fall FTE Enrollment (w/out clock hour) | 8,678.90 | 8,035.68 | -7.4% | 7,390.44 | -8.0% | 7,289.80 | -9.3% | 7,394.03 | 0.0% | 7,394.03 | 1.4% |
| Annualized FTE Enrollment | | | | | | | | | | | |
| Undergraduate (includes clock hour) | 8,094.03 | 7,589.39 | -6.2% | 6,991.44 | -7.9% | 6,338.07 | -16.5% | 6,949.76 | -0.6% | 6,548.76 | 3.3% |
| Graduate | 1,321.97 | 1,306.38 | -1.2% | 1,270.29 | -2.8% | 1,244.84 | -4.7% | 1,333.71 | 5.0% | 1,333.71 | 7.1% |
| Total Annualized FTE Enrollment | 9,416.00 | 8,895.77 | -5.5% | 8,261.73 | -7.1% | 7,582.91 | -14.8% | 8,283.47 | 0.3% | 7,882.46 | 4.0% |

*Submitted September 2021

Table B Tuition Revenue

| | FY2021-22 | FY2022-23 |
|--|------------------|------------------|
| September 13, 2021 CPP: Tuition Revenue | 81,077,338 | 82,735,550 |
| January 2022 Projections : Tuition Revenue | 80,624,832 | 83,983,549 |
| Change in Tuition Revenue | (452,506) | 1,247,999 |

Table C Tuition Revenue Changes

| | FY2021-22 |
|---|------------------|
| September 13, 2021 CPP: Tuition Revenue | 81,077,338 |
| Fall 2021 Freeze: Tuition Revenue | 80,180,786 |
| Change in Tuition Revenue | (896,552) |
| September 13, 2021 CPP: Tuition Revenue | 81,077,338 |
| January 2022 Projections: Tuition Revenue | 80,624,832 |
| Change in Tuition Revenue | (452,506) |

Table D-1 (Workforce table that will be updated for February Mid-year Report)

| | FY 2019-20 Actuals | FY 2020-21 Actuals | % Change from Prior Year | Original FY 2021-22 Projections* | % Change from Prior Year | Revised FY 2021-22 Projections | % Change from Prior Year | Original FY 2022-23 Projections* | % Change from Prior Year | Revised FY 2022-23 Projections | % Change from Prior Year |
|--|-----------------------|-----------------------|--------------------------------------|--|--------------------------------------|--------------------------------------|--------------------------------------|--|--------------------------------------|--------------------------------------|--------------------------------------|
| Fall FTE Faculty , net of shared faculty | 585.02 | 522.80 | -10.6% | 430.12 | -17.7% | 427.10 | -18.3% | 425.88 | -1.0% | 409.88 | -4.0% |
| Annualized Unrestricted FTE Faculty , net of turnover | 589.39 | 529.39 | -10.2% | 432.86 | -18.2% | 438.93 | -17.1% | 428.67 | -1.0% | 415.37 | -5.4% |
| Annualized Unrestricted FTE Nonfaculty , net of turnover | 673.70 | 598.88 | -11.1% | 538.75 | -10.0% | 538.76 | -10.0% | 538.73 | 0.0% | 542.19 | 0.6% |
| Fall FTE Student/Fall FTE Faculty Ratio | 14.8 | 15.4 | | 17.2 | | 17.1 | | 17.4 | | 18.0 | |

*Submitted September 2021

Table D-2 Workforce: Budgeted Annualized FTE Employees, E&G Only

Budgeted Annualized FTE Employees (Include all permanent and temporary employees)

| E&G Only | FY2021-22 | | | FY2022-23 | | |
|-----------------------|--|--------------------------|------------|--|--------------------------|---------------|
| | Sept. 2021 CPP | Jan. 2022 Projections | Variance | Sept. 2021 CPP | Jan. 2022 Projections | Variance |
| Faculty | 438.12 | 441.58 | 3.5 | 433.88 | 417.88 | (16.0) |
| AFSCME | 264.34 | 267.01 | 2.7 | 264.25 | 269.73 | 5.5 |
| Nonrepresented | 147.31 | 147.11 | (0.2) | 147.33 | 144.24 | (3.1) |
| SCUPA | 55 | 52.48 | (2.5) | 54.92 | 54.48 | (0.4) |
| Other | 57.93 | 54.83 | (3.1) | 57.94 | 56.29 | (1.7) |
| | Total Change in E&G Workforce | | | Total Change in E&G Workforce | | |
| | | | 0.3 | | | (15.7) |

Table D-3 (E & G) Summary of Changes to Structural Deficit and UNA

| | FY2021-22 | FY2022-23 |
|--|-------------|--------------|
| September 13, 2021 CPP: E&G Structural Deficit | (6,194,654) | (12,183,800) |
| January 2022 Projections: E&G Structural Deficit | (7,083,831) | (8,839,085) |
| Change in E&G Structural Deficit | (889,177) | 3,344,715 |

| | FY2021-22 | FY2022-23 |
|---|------------|------------|
| September 13, 2021 CPP: Total Unrestricted Net Assets | 62,327,169 | 42,520,984 |
| January 2022 Projections: Total Unrestricted Net Assets | 62,131,321 | 46,463,630 |
| Change in Total Unrestricted Net Assets | (195,847) | 3,942,646 |

Total unrestricted Net Assets (E&G and Auxiliary)

Table D-4 Summary of Workforce Progress Since July 1, 2019

| | FY2018- 19 Actual Unrestricted Annualized FTE | FY2021-22 Projected Unrestricted Annualized FTE | FTE Change | % FTE Change | Estimated Salary and Benefits Savings |
|---|--|--|-----------------------|-------------------------|--|
| September 13, 2021 CPP Faculty | 607.16 | 432.86 | (174.30) | -28.71% | (16,690,464) |
| September 13, 2021 CPP Non-Faculty | 699.02 | 538.75 | (160.27) | -22.93% | (14,620,259) |
| Total September 13, 2021 CPP | 1306.18 | 971.61 | (334.57) | 25.61% | (31,310,723) |
| January 2022 Projections Faculty | 607.16 | 438.93 | (168.23) | -27.71% | (15,676,667) |
| January 2022 Projections Non-Faculty | 699.02 | 538.76 | (160.26) | -22.93% | (13,914,019) |
| Total January 2022 Projections | 1306.18 | 977.69 | (328.49) | 25.15% | (29,590,686) |
| Difference - September 13 2021 CPP to January 2022 Projections | 0 | 6.08 | 6.08 | -0.47% | 1,720,037 |

In the comparison of Sept. 2021 CPP to Jan. 2022 projections, the difference in FTE for each bargaining unit is consistent with the related change in salary and benefits. For the non-represented group, in the Sept. 2021 CPP, a target of 10 reductions was included in the FTE and budget. FTE increased for FY2021-22 for the faculty and AFSCME bargaining units, and decreased in all other units. In addition, due to the ESLP incentive, leave payouts increased between these 2 versions in the faculty, non-represented and SCUPA bargaining units by over \$1.6M. In the Sept. 2021 CPP also included 1.2% attrition in both FTE and expenditures, Jan. 2022 projections have been reduced to 0.6%.

| | FY2018- 19 Actual Unrestricted Annualized FTE | FY2022-23 Projected Unrestricted Annualized FTE | FTE Change | % FTE Change | Estimated Salary and Benefits Savings |
|---|--|--|-----------------------|-------------------------|--|
| September 13, 2021 CPP Faculty | 607.16 | 428.67 | (178.49) | -29.40% | (14,666,358) |
| September 13, 2021 CPP Non-Faculty | 699.02 | 538.73 | (160.29) | -22.93% | (14,773,713) |
| Total September 13, 2021 CPP | 1306.18 | 967.4 | (338.78) | 25.94% | (29,440,071) |
| January 2022 Projections Faculty | 607.16 | 415.37 | (191.79) | -31.59% | (16,524,116) |
| January 2022 Projections Non-Faculty | 699.02 | 542.19 | (156.83) | -22.44% | (14,714,805) |
| Total January 2022 Projections | 1306.18 | 957.56 | (348.62) | 26.69% | (31,238,921) |
| Difference - September 13 2021 CPP to January 2022 Projections | 0 | (9.84) | (9.84) | 0.75% | (1,798,850) |

In the comparison of Sept. 2021 CPP to Jan. 2022 projections, the difference in FTE for each bargaining unit is consistent with the related change in salary and benefits. For the non-represented group, in the Sept. 2021 CPP, a target of 10 reductions was included in the FTE and budget, and an additional decrease of 3 FTE in the Jan. 2022 projections has been included in FY2022-23. FTE increased for FY2022-23 for the AFSCME bargaining unit, but decreased in all other units. In addition, the budget for leave payouts returned to the normal budget levels.

Table E (Auxiliary)

| | FY2021-22 | FY2022-23 |
|--|------------------|------------------|
| September 13, 2021 CPP: Projected Aux Revenue | 19,227,463 | 20,453,789 |
| January 2022 Projections: Projected Aux Revenue | 19,920,837 | 21,247,567 |
| Change in Aux Revenue | 693,374 | 793,778 |
| | FY2021-22 | FY2022-23 |
| September 13, 2021 CPP: Auxiliary Structural Deficit | (8,108,156) | (7,622,385) |
| January 2022 Projections: Auxiliary Structural Deficit | (7,414,782) | (6,828,607) |
| Change in Auxiliary Structural Deficit | 693,374 | 793,778 |

Table F: Total Raised Contributions FY `20 vs FY`21

| Totals | Fiscal Year 2020 | | | Fiscal Year 2021 | | |
|--------------------------|---------------------|--------------|--------------|---------------------|--------------|---------------|
| | Amount | Donors | Donations | Amount | Donors | Donations |
| <i>Grand Totals</i> | <i>\$10,181,680</i> | <i>6,080</i> | <i>9,319</i> | <i>\$14,298,408</i> | <i>5,078</i> | <i>11,424</i> |
| <i>- Annual Fund</i> | <i>\$2,177,192</i> | <i>5,624</i> | <i>8,536</i> | <i>\$1,252,898</i> | <i>4,390</i> | <i>10,275</i> |
| <i>- Non-Annual Fund</i> | <i>\$8,004,488</i> | <i>610</i> | <i>796</i> | <i>\$13,045,511</i> | <i>895</i> | <i>1,170</i> |

Table G: Total Raised Contributions FY 21 Nov 30 YTD vs FY 22 Nov 30 YTD

| Totals | Fiscal Year 2021 YTD | | | Fiscal Year 2022 YTD | | |
|--------------------------|----------------------|--------------|--------------|----------------------|--------------|--------------|
| | Amount | Donors | Donations | Amount | Donors | Donations |
| <i>Grand Totals</i> | <i>\$1,758,829</i> | <i>2,370</i> | <i>4,571</i> | <i>\$3,937,889</i> | <i>2,263</i> | <i>4,259</i> |
| <i>- Annual Fund</i> | <i>\$431,996</i> | <i>2,131</i> | <i>4,252</i> | <i>\$452,747</i> | <i>1,440</i> | <i>3,153</i> |
| <i>- Non-Annual Fund</i> | <i>\$1,326,833</i> | <i>263</i> | <i>324</i> | <i>\$3,485,141</i> | <i>912</i> | <i>1,116</i> |

Enrollment Management Update

UBAC

2/4/22

Progress towards the Spring 2022 CPP:

| 2/3/2022 | CPP V8 (Spring) | | | Today's Actuals | | | Difference CPP to Today's Actuals | | |
|-----------------------|-----------------|--------------|----------|-----------------|--------------|----------|-----------------------------------|--------------|----------|
| | Headcount | Credit Hours | FTE | Headcount | Credit Hours | FTE | Headcount | Credit Hours | FTE |
| UG In state | 6,023 | 80,770.00 | 5,384.67 | 6,010 | 79,554.00 | 5,324.24 | (13) | (1,216.00) | (60.43) |
| UG Out of state | 264 | 3,623.00 | 241.53 | 259 | 3,484.00 | 233.33 | (5) | (139.00) | (8.20) |
| UG Int'l | 80 | 1,045.00 | 69.67 | 96 | 1,228.00 | 83.00 | 16 | 183.00 | 13.33 |
| GR in state | 1,259 | 7,872.00 | 656.00 | 1,249 | 7,912.00 | 633.58 | (10) | 40.00 | (22.42) |
| GR Out of state/int'l | 517 | 2,856.00 | 238.00 | 535 | 2,388.00 | 196.25 | 18 | (468.00) | (41.75) |
| Total UG/GR | 8,143 | 96,166.00 | 6,589.87 | 8,149 | 94,566.00 | 6,470.40 | 6 | (1,600.00) | (119.47) |

Spring 2022 Undergraduate and Graduate Headcount Registration:

| 2/3/2022 | Spring 2022: Registered (new and continuing) | | | |
|---------------|--|-------------|------------|-------------------------------|
| | Spring 2022 | Spring 2021 | Difference | Difference from Spring 22 CPP |
| Undergraduate | 6365 | 6996 | (631) | (2) |
| Graduate | 1784 | 1876 | (92) | 8 |
| TOTAL UG+GR | 8,149 | 8,872 | (723) | 6 |

Spring 2022 Clock Hour Headcount Registration:

| Spring 22 Registrations by Program (Clock Hour) | | | |
|---|-------------------------|-------------|------------|
| 2/3/2022 | Registered (Clock Hour) | | |
| | Spring 2022 | Spring 2021 | Difference |
| ALI--Provisional | 1 | 2 | (1) |
| ALI | 2 | 11 | (9) |
| Baking & Pastry | 28 | 42 | (14) |
| Criminal Justice | 41 | 45 | (4) |
| Culinary Arts | 37 | 80 | (43) |
| EMT | 18 | 25 | (7) |
| Paramedic | 36 | 53 | (17) |
| Officer | 6 | 5 | 1 |
| TOTAL | 169 | 263 | (94) |

Undergraduate Retention and Persistence to Spring 2022:

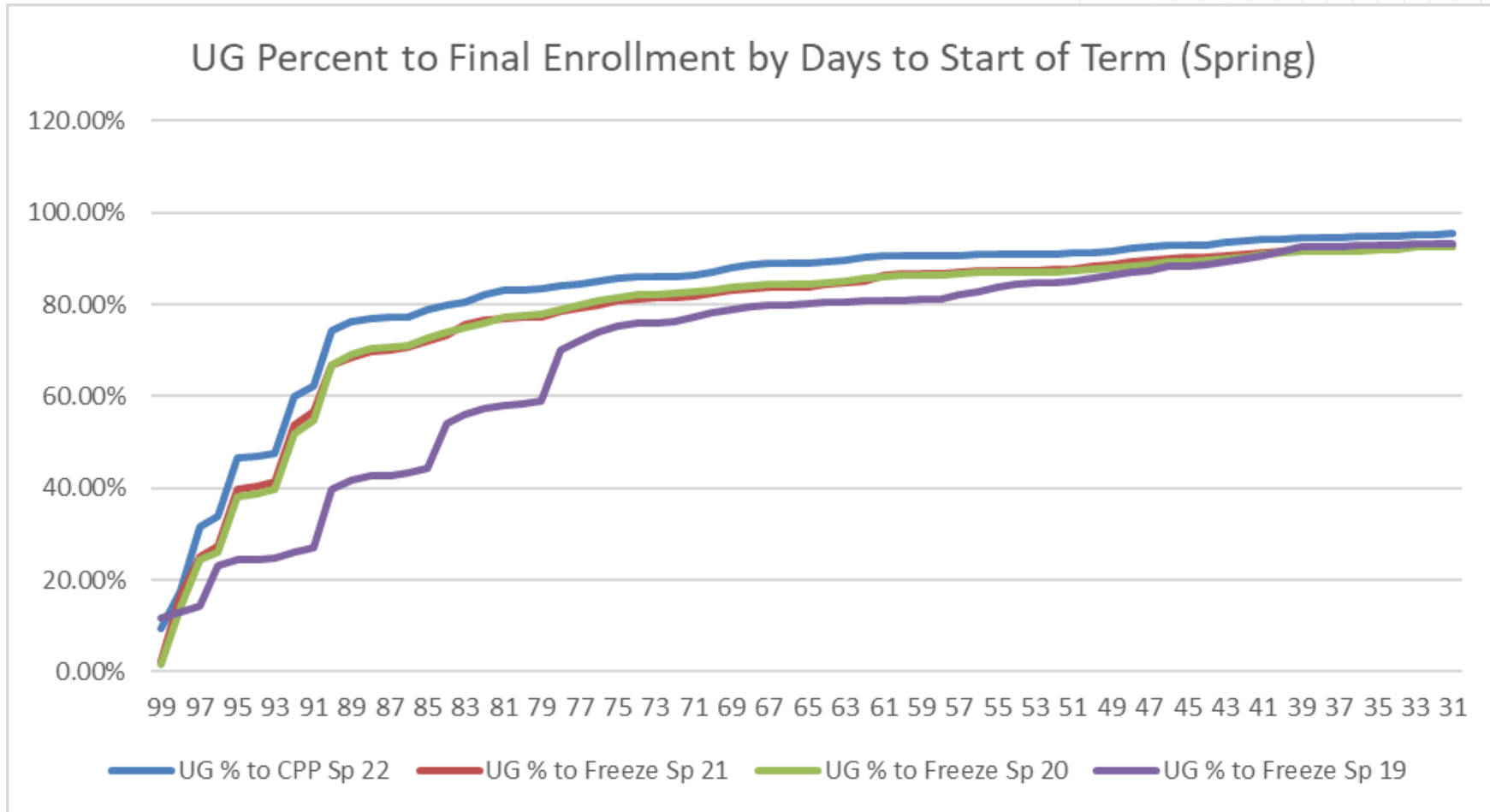
| 2/3/2022 | Spring 22 CPP/Actual Spring 2021 Freeze | Retention as of report Date | Difference to CPP | Add'l students needed to meet Spring 22 CPP/final Spring 21 Freeze |
|--|---|--------------------------------|----------------------|--|
| Retention for Fall 21 cohort to Spring 22 | 86.07% | 85.80% | (0.27) | 4 |
| Retention for Fall 20 cohort to Spring 21 | 87.85% | 87.85% | 0.00 | 0 |
| Ppt Difference | | -2.05 | | |
| Cont. UG Persistence to Spr 22 | 85.86% | 86.28% | 0.42 | -22 |
| Cont. UG Persistence to Spr 21 | 85.88% | 85.92% | 0.04 | -2 |
| Ppt Difference | | 0.36 | | |

Percent of Full-Time Enrollment and Average Credit Hours for Spring 2022

| 2/3/2022 | FT/PT Registration by Headcount | | | | | | |
|---|---------------------------------|------------------------|------------------------|---------------------|---------------------|----------|--|
| Level | Full Time/Part Time | Registered Spring 2022 | Registered Spring 2021 | % FT/PT Spring 2022 | % FT/PT Spring 2021 | PPT Diff | Registration Diff Spring 2022 if at Spring 2021 Proportion |
| Graduate (33.1% FT at spring 20 freeze) | Full-Time | 540 | 621 | 30.27% | 33.10% | (2.83) | 51 |
| | Part-Time | 1244 | 1255 | 69.73% | 66.90% | 2.83 | (51) |
| Undergraduate (87.41% FT at spring 20 freeze) | Full-Time | 5578 | 6145 | 87.64% | 87.84% | (0.20) | 13 |
| | Part-Time | 787 | 851 | 12.36% | 12.16% | 0.20 | (13) |

| Average Spring Credit Hours by Level and Full-Time/Part-Time Enrollment as of 2/3/2022 | | | | | | |
|--|-----------|-----------|-------|-----------|-----------|-------|
| | UG | | | Grad | | |
| | Spring 22 | Spring 21 | Diff | Spring 22 | Spring 21 | Diff |
| Full Time | 14.39 | 14.48 | -0.09 | 10.21 | 9.97 | 0.24 |
| Part Time | 5.54 | 5.79 | -0.25 | 3.57 | 3.94 | -0.37 |
| Average | 13.29 | 13.43 | -0.14 | 5.58 | 5.94 | -0.36 |

Undergraduate Registration Trend (Spring)



Fall 2022 New Student Admissions


| 2/3/2022 | Cumulative Completed | | | | Admitted | | | | Net Deposits/Confirmed | | | | Yield Admit to Net Deposits | | |
|--|----------------------|---------|--------------|------|----------|---------|--------------|------|------------------------|---------|--------------|------|-----------------------------|---------|-----------------|
| Student Type | Fall 22 | Fall 21 | Percent Diff | Diff | Fall 22 | Fall 21 | Percent Diff | Diff | Fall 22 | Fall 21 | Percent Diff | Diff | Fall 22 | Fall 21 | Percent PT Diff |
| Freshmen | 7018 | 7303 | -3.90% | -285 | 6497 | 6906 | -5.92% | -409 | 707 | 718 | -1.53% | -11 | 10.88% | 10.40% | 0.49 |
| Transfers | 160 | 166 | -3.61% | -6 | 104 | 119 | -12.61% | -15 | 37 | 24 | 54.17% | 13 | 35.58% | 20.17% | 15.41 |
| Culinary | 229 | 247 | -7.29% | -18 | 173 | 197 | -12.18% | -24 | 53 | 77 | -31.17% | -24 | 30.64% | 39.09% | -8.45 |
| Graduate | 488 | 565 | -13.63% | -77 | 222 | 250 | -11.20% | -28 | 42 | 41 | 2.44% | 1 | 18.92% | 16.40% | 2.52 |
| <i>Note: As of 1/28/21 for grad and Culinary</i> | | | | | | | | | | | | | | | |

Fall 2022 Freshman Market Share

| Number of HS Grads | Difference in Market Share F22 to F21 to Date | | | |
|--------------------|---|--------------|--------|--------------|
| | DMA | Applications | Admits | Net Deposits |
| 52,005 | Philly DMA | -0.40 | -0.46 | -0.04 |
| 21,063 | Harrisburg DMA | -0.69 | -0.56 | -0.07 |
| 6,389 | Johnstown DMA | 0.07 | 0.31 | 0.001 |
| 25,171 | Pgh DMA | 1.05 | 0.86 | 0.10 |
| 20,398 | All other PA DMAs | -0.59 | -0.66 | -0.02 |
| 125,026 | Total PA | -0.18 | -0.22 | -0.01 |

Fall 2022 Freshman Market Share

| IMPACT OF MARKET SHARE ON ENROLLMENT | | | | | | | |
|--------------------------------------|--------------|---------------------|------------------|------------|---------------------|------------------|------------|
| 2/3/2022 | | Applications | | | Net Deposits | | |
| Estimated HS Grads Spring 2022 | DMA | At last year's rate | Actual Fall 2022 | Difference | At last year's rate | Actual Fall 2022 | Difference |
| 52,005 | Philadelphia | 2319 | 2109 | -210 | 88 | 67 | -21 |
| 21,063 | Harrisburg | 946 | 802 | -144 | 84 | 70 | -14 |
| 6,389 | Johnstown | 840 | 845 | 5 | 133 | 133 | 0 |
| 25,171 | Pittsburgh | 2527 | 2791 | 264 | 300 | 324 | 24 |
| 20,398 | All other PA | 1063 | 942 | -121 | 86 | 81 | -5 |
| 125,026 | TOTAL | 7695 | 7489 | -206 | 691 | 675 | -16 |

From: Michael Driscoll driscoll@iup.edu 
Subject: Re: Follow-up to Oct. 8 directive
Date: January 14, 2022 at 11:58 AM
To: Dan Greenstein DGreenstein@passhe.edu



Dear Chancellor Greenstein:

Please find attached IUP's response to your requirement in your October 27, 2022 email to me.

Sincerely,
Michael A Driscoll, President, IUP



2022-01-14 IUP
Respo...-27.pdf

On Oct 27, 2021, at 9:16 AM, Greenstein, Daniel <DGreenstein@passhe.edu> wrote:

Dear President Driscoll:

As outlined in my October 8th 2021 financial sustainability directives letter, several level 2 and 3 universities are not making adequate progress toward meeting the balanced budget and headcount projections originally established in the September 2020 CPP submissions. As part of that letter you are required to inform me no later than January 15, 2022 as to how you will address the continuing financial challenges specifically around low enrolled programs at IUP as a continuing part of your NextGen effort.

As you undertake your analysis, please know that we are happy to make available to you the resources of a peer university consulting team should you deem that helpful to your efforts.

Thank you for your continued leadership and service to the State System during these challenging times.

My best,

Dan Greenstein
Chancellor

The information in this email may contain confidential and/or privileged material and is intended only for the person or entity to whom it is addressed. However, please note that the Pennsylvania State System of Higher Education is a public agency and that this email may be subject to a valid Right-to-Know Law request. If information in this email constitutes a "record" of this agency it will be provided to the public if requested and the content is not exempt under the Pennsylvania Right-to-Know Law or protected under attorney-client or any other privilege. There should be no expectation of confidentiality or privacy in this or other communications with PASSHE, unless specifically authorized by law. If you receive this message in error, please send a reply email to the sender and delete the material from any and all computers. Unintended transmissions shall not constitute waiver of the attorney-client or any other privilege.



IUP's Sustainability Status and Plan

January 14, 2022

Executive Summary: At IUP, we are following a consistent plan for overcoming the challenges to our financial sustainability, caused in major part, by inadequate levels of state appropriation, significant population declines within the region leading to a large, continuing enrollment decline, and the added challenges of the COVID-19 pandemic. The plan is based on a detailed analysis of financial and enrollment data resulting in decisions made on realistic projections, rather than hope. In our September 2020 CPP, we intentionally set aggressively high targets for workforce reduction and conservative enrollment and revenue projections to allow leadership and the university community to understand and come to grips with the magnitude of the sustainability challenge. In some sense, the university is now being criticized for not achieving those high workforce reduction targets in one year, despite the remarkable progress made in bringing IUP's financials closer to sustainability in an unprecedentedly short time.

IUP's overall plan, under which efforts continue, started with significant and painful—but necessary—workforce (and hence expense) reductions, starting at the beginning of the 2019-20 fiscal year. In FY 2019-20 and FY 2020-21, workforce was reduced by more than 25 percent, reducing net expenses by more than \$31 million. Enrollment projections fell somewhat short of the conservative projections, apparently because of impact from the ongoing pandemic (particularly reducing international enrollment) and increased competition for students in a declining market. In that declining market, IUP's sticker price for attendance became a more prominent reason for new students to not attend and for continuing students to reduce their credit load (and hence reduce student FTE).

While making significant reductions in workforce, we also initiated INSPIRE, an intense and expedited review of our academic programs. This work identified 34 programs for redesign, moratorium, or elimination. The thought processes and criteria of INSPIRE were enhanced to help drive a significant academic restructuring called IUP NextGen, which eliminated an academic college and several academic departments, realigned IUP's academic program array to better match student and employer demand and to better align with IUP's strategic direction, and to accelerate program redesign.

IUP's September 13, 2021 CPP rigorously showed actual workforce and expense reductions, and not hoped for, or future reductions. These actual workforce reductions were admittedly less than the initial aggressive targets, raising concern by a few reviewers. If IUP had declared its work done at that point, the concern would certainly be justified. However, we continue to work on the remaining challenges with numerous additional efforts to increase enrollment and revenue, to reduce student cost of attendance, and to further reduce workforce and other expenses.

In the four months since IUP submitted its September 13, 2021 CPP, we have continued to work on student retention and persistence and new student recruiting, with the goal of increasing revenue. We have also continued to work on reducing workforce and making additional expense reductions. This ongoing work is already showing results, reducing the projected FY 2022-23 E&G budget deficit by more

than \$3.3 million. The 2022-23 fiscal year should show improvement on all four sustainability policy metrics. We continue the work and have other initiatives in progress that should continue to bear fruit as we whittle away at IUP's remaining financial challenges.

Our January 2022 projections show that FY 2021-22 will finish slightly below our fall 2021 projections for enrollment and revenue. However, because of hard work by the IUP team, January 2022 projections for spring headcount enrollment are higher than projected. Additionally, early enrollment and revenue projections for FY 2022-23 are higher than what was projected in the fall. We have continued to reduce workforce and are already showing an additional net reduction of 15.7 employee FTE for fall 2022. Some of those reductions are due to furloughs and retirements of unrepresented employees. The majority of the reduction is due to retirement of faculty. A modest amount of these savings will be realized in the current fiscal year, but the full benefits are not seen until FY 2022-23. It is important to note that these are documented reductions, and we expect additional workforce and expense reductions as we continue our work.

IUP continues its work on program array, with a target of maintaining a total of 63 undergraduate degree programs. This is a decrease of 12 programs from the current total of 75 and well below the 70 recommended by the CAO's analysis. Additional continuing efforts to increase enrollment and reduce expenses are documented in the more detailed report that follows this executive summary.

The biggest challenges we face are in the auxiliary budget. On IUP's ledger, the biggest challenge is covering debt for dining construction that, in hindsight, should have been curtailed earlier. Exceptional work has been done to reduce operating expenses and provide meal plans at a reasonable cost to students. The dining debt makes it impossible to balance the dining budget in our current circumstances. One-time debt relief for IUP-held dining debt is almost certainly needed. IUP also has master leases for two of the four phases of housing owned by the Foundation for IUP. Those payments will become more manageable as we go forward but will continue to need careful attention. Finally, not on IUP's ledger, are the two additional phases of housing owned by the Foundation. The Foundation is in negotiations with representatives of the bond holders in the hopes of restructuring the debt. If such a restructuring can occur, IUP will have more flexibility to manage its overall housing portfolio.

IUP certainly still has sustainability work to do. We have already completed the largest and most painful part of the work and are continuing to chip away at the shortfalls by increasing enrollment and revenue and right sizing our workforce and expenses. This has been, and remains, a top priority and I am confident we will continue to make appropriate progress, recognizing that these are challenging and uncertain times in which we can't predict the future with complete accuracy.

Sincerely,

Michael A. Driscoll, President

Introduction: This report will summarize information, as of January 2022, regarding IUP’s progress towards the CPP document submitted by IUP to the Office of the Chancellor on September 13, 2021.

IUP has undertaken substantial work during the past several years toward financial sustainability, with a combination of strategies around areas including enrollment, workforce, and other key strategies. The last two years were difficult for the university community. Several actions were taken to substantially decrease our workforce in all categories in a short period of time. These two-year strategies culminated in reducing the IUP structural deficit to an estimated \$12 million for the E&G fund and \$8 million for the auxiliary fund.

We acknowledged when we submitted the September 13, 2021 CPP that we still had more work to do. We want to be cautious and mindful of further reductions that would be made, ensuring that they are aligned with our priority of student success and do not harm our instructional priorities. We targeted a reduction of 10 non-represented positions with an estimated salary and benefit savings of \$1.5 million, additional savings through attrition of \$1.6 million, and using approximately \$6.19 million in one-time reserve funds to balance the budget while other analyses could be conducted, and discussions surrounding additional strategies could take place in FY 2021-22 and beyond.

In the next sections of this document, we will discuss the current status and projections for enrollment, updates to our projected tuition and fee revenues as a result of enrollment, other revenues, workforce reductions progress, expenses as a result of those workforce reductions, and other expense reductions. We will summarize our current status regarding the additional approaches underway to support our strategic plan and to bridge the gap between our revenue and expenses to achieve a balanced budget, as well as where we see continued challenges.

Enrollment

Table A-1 summarizes the headcount information, and Table A-2 recaps fall and annualized FTE enrollment for undergraduate and graduate students. The enrollment projections have been updated since the September 13, 2021 CPP and a new update (January 2022 projections) has been included. The enrollment projections are current as of the first week of January 2022. Classes begin January 18 and the spring enrollment freeze date is February 7.

Spring headcount 2022 enrollment is expected to exceed the projected enrollment used in the September 13, 2021 CPP. Fall-to-spring retention for the fall 2021 freshman cohort has been higher than the fall 2020 cohort and it is on track to exceed the anticipated fall-to-spring retention rate. Undergraduate, continuing-student enrollment is also ahead of last spring, with a higher percentage of fall 2021 continuing students registered for spring 2022 than at this time last year. This group is expected to exceed the projected fall-to-spring persistence in the September 13, 2021 CPP. In total, undergraduate registration is at a higher percentage toward our January 2022 projections than a year ago, and it also exceeds the average percent registered toward the final enrollment of the last three years.

Graduate headcount enrollment for spring 2021 is also trending ahead of last year, compared to the percentage of students projected in our September 13, 2021 CPP who are registered, versus the percent registered toward the final enrollment last spring. Like the undergraduates, they are ahead, even when comparing the average of the prior three years’ registration percent toward spring final enrollment.

Clock-hour registration information in the January 2022 projections is at the level anticipated for spring 2022.

Examples of activities to encourage students to register for spring include: communication to students and families, engagement by the staff and faculty guides with our new students, outreach by our assistant/associate deans, review of financial holds or missing financial aid documents and contact to students to remedy issues and/or identify assistance with the outstanding balances, and outreach by our residence life staff to students living on campus.

Completed freshman applications for fall 2022 have been ahead of fall 2021 applications at the same point in time for most of the admissions cycle. Comparing fall 2021 completed applications to the past three years, we have been ahead of fall 2018 for most of the cycle, but behind fall 2020 and 2019. It is important to note that fall 2018 had the strongest fall freshman enrollment of the four years. The number of students admitted has also risen from last year for most of the cycle. Quality is being maintained: Our admitted students' average high school GPA is approximately the same as last year.

Deposits for new freshmen have been very strong, being ahead of the last four fall semesters. The average high school GPA for deposited students is slightly higher than fall 2021. It also exceeds the high school GPA for deposited students in three of the past four years.

Financial aid notifications were sent to freshmen earlier this academic year, in time to reach families by the Thanksgiving holiday. Merit scholarship offers were also increased by \$1,000 per level and an additional \$1,000 scholarship has been offered to students who live on-campus. We are seeing a strong response to these offers, with a yield rate from admitted to deposited at a higher level than last year, as well as higher than the same period in fall 2019 and 2018.

Completed transfer applications and admitted transfer students for fall 2022 are down slightly from last year; however, students are depositing at a higher rate (more than 100 percent higher). While it is early in the transfer cycle, this is encouraging. Like freshmen, transfer students are responding well to the merit and housing scholarship offers.

Fall graduate applications are slightly ahead of last year and the number of students who have confirmed their attendance is about even. Communications about financing graduate school are being created and the admissions team is collaborating with the School of Graduate Studies and Research to refine recruiting and admission strategies.

Overall, our headcount enrollment for spring is encouraging. Looking forward to the fall 2022, while still early, the activities and initiatives in support of new student recruitment are showing positive outcomes thus far.

Revenue - Educational and General

Tuition and fee revenue has been updated for revised enrollment projections in the January 2022 projections, as shown in Table B. January 2022 projected tuition revenue is anticipated to be lower than projected in the September 13, 2021 CPP. This is due to the actual fall 2021 headcount and credit hours being lower than projected as shown in Table B.

Spring headcount is projected to be higher than in the September 13, 2021 CPP; however, the average student credit hours taken has been trending lower, resulting in fewer overall credit hours projected in

spring. Since the revenue is based on credit-hour production, this results in lower revenue. Actual winter enrollment and revenue are not yet finalized, so tuition revenue is based on the winter projections. It is anticipated that winter actuals will exceed January 2022 projections, and this will be adjusted for the February mid-year progress report. After the September 13, 2021 CPP was submitted, we utilized actual fall freeze information to make projections for the year and the total projected tuition revenue had decreased by \$896,000. This January 2022 projection is now expected to be a bit better (\$452 million shortfall vs. \$896 million shortfall), as indicated in Table C.

Other Revenue Updates: Additional one-time revenue of \$626,000, which was not included in the September 13, 2021 CPP, has been included in this report as part of the Targeted University Incentive Funds to support selected universities that are experiencing one-time costs associated with implementing sustainability measures.

The one-time federal Coronavirus State and Local Fiscal Recovery Funds (CSFRF) of \$1.8 million were not directly accounted for in either the September 13, 2021 CPP or the January 2022 projections. The funds will be used as part of student success initiatives and will have off-setting expenses. The one-time funds and the associated expenses—as well as any changes in enrollment resulting from these student success initiatives—have not been accounted for yet but are anticipated to be included in the February Mid-Year Progress Report.

Personnel Expenditures: Table D-1 shows the workforce table that is used as a template for the February mid-year progress report, but with data updated through the first week of January for the January 2022 projections. It will be updated further for the mid-year progress report. Table D-2 provides a comparison of the positions by employee group and progress made since the September 13, 2021 CPP. It shows that progress has been made since that September 13, 2021 submittal. These are actual, booked reductions, not hoped for, or possible, reductions.

January 2022 projections include the same salary and benefit assumptions as the September 13, 2021 CPP. The September 13, 2021 CPP also included savings of \$1.5 million from the elimination of 10 non-represented positions. The January 2022 projections include the actual savings from 13 identified non-represented positions, which surpass the initial target in the September 13, 2021 CPP. January 2022 projections have exceeded that target set for non-represented workforce reductions by three positions and by an additional estimated \$144,000 in salary and benefits savings.

We do anticipate a revised position description will be developed in the unit of one of the vacancies and will be included as a new position as that work gets completed and approved. You can see an updated workforce table in Table D-2, which shows that we are exceeding our prior projection with net workforce reductions of approximately 16 FTE.

Due to mid-year separations, the salary and benefit savings will be realized only partially in FY 2021-22. The total estimated salary and benefit savings from these full non-represented position eliminations is 13 FTE and \$1.7 million during the next two years and beyond. Comparisons show we are overstaffed in this employee group when compared to state system average and two other universities of comparable student enrollment. Discussions continue regarding organizational structure and other changes that can be made to further reduce these numbers.

The January 2022 projections include salary and benefits savings from 17 additional faculty separations received after the September 13, 2021 CPP was submitted. One of these positions was deemed to be in a critical area and will be filled in FY 2022-23. The other 16 faculty positions will be eliminated, resulting in an additional \$2.7 million in savings.

Other confirmed faculty and non-faculty separations have resulted in adjusted personnel budgets. The impact of the extended Enhanced Sick Leave Payout (ESLP) is captured in January 2022 projections.

Temporary Faculty: The FY 2021-22 annualized FTE for temporary faculty is 30.55, which includes the actual FTE appointed for fall and full academic year hires, plus the approved FTE for spring-only temporary hires. Although these temporary hires have been approved, as temporary faculty hiring needs are continuously being reviewed, the actual temporary faculty FTE appointed may result in being lower than what was approved, which is typical of each semester.

The temporary faculty for FY 2022-23 is budgeted at 23.375 FTE, which reflects what is shown in September 13, 2021 CPP and is based on the approved temporary faculty pool amount. Although this has been included in the January 2022 projections, there have been no official decisions made yet on temporary faculty hires for FY 2022-23.

Turnover and Attrition: The September 13, 2021 CPP included \$1.6 million in salary and benefit savings resulting from workforce attrition and normal turnover. Because the actual attrition to date is included in the January 2022 personnel projections, this rate has been reduced from 1.2 percent to 0.6 percent to more accurately reflect the savings that may be realized in the second half of the year.

Operating Expenditures: The operating expenses were reduced by 50 percent for last fiscal year and the reduction was made permanent for FY 2021-22. This reduction was large. Because of uncertainties, we had built in a \$600,000 operating expense contingency for emergency situations in case operational funds were needed due to the reduction. This contingency was built into September 13, 2021 CPP but was removed in January 2022 projections based on our current spending patterns, helping to balance the budget as is shown in our new projections.

The sale/transfer of the Northpointe property is on track, as projected. A conservative estimate for operational savings were included in FY 2022-23 (\$50,000) for the January 2022 projections. The estimated operational savings, which includes maintenance, utilities, custodial, and other expenses, will be analyzed, and we expect it will increase for the February mid-year progress report.

Revenue - Auxiliary

This section summarizes the status of IUP's auxiliary budget, with Table E outlining the auxiliary revenues and changes to the auxiliary structural deficit.

Revenue: Housing and Dining revenues were updated for FY 2021-22 based on year-to-date actuals, resulting in more positive revenue projections. FY 2022-23 auxiliary revenue projections were updated based on various changes and occupancy.

Expenditures: Auxiliary expenditure projections were reviewed and compared with year-to-date actuals. No significant adjustments were made to expense projections, as significant reductions in expenses were already made in the previous years and operations are very lean.

Items of note for auxiliary component include the following:

- a) We had a lower conversion of residential to voluntary meal plans in FY 2021-22 as a result of fewer sophomore and junior students living on campus with residential meal plans in FY 2020-21 compared to FY 2019-20. The decreased number was largely due to Covid.
- b) IUP removed all dining operations from the Punxsutawney campus, which reduced revenue and expenses. Ultimately, the move was net positive as this component was operating with deficit numbers due to low enrollment.
- c) Housing occupancy was higher for fall 2021 compared to fall 2020. The number of continuing students living on campus in fall 2021 increased by 98 percent compared to fall 2020.

Expenses have remained flat in the January 2022 projections compared to the September 13, 2021 CPP, because much work was done to lower expenses in the auxiliary over the last year and was reflected in the September 13, 2021 CPP.

IUP Key Strategies and Initiatives

At the beginning of the process toward sustainability, the most important strategies and initiatives were discussed and implemented based on IUP's new strategic plan and which would get the largest results toward financial sustainability. Some initiatives and strategies resulted in immediate results, while others are ongoing, still being implemented, with results to be known during the next few years. The following next section discusses key IUP initiatives that are in process.

Strategic Enrollment Plan: Student success is a significant piece of our Strategic Enrollment Plan to help with retention and persistence.

The plan is in the process of implementation. The primary focus of SEP is student success and transformation by helping students continue their educations at the academic level they seek; tapping in to known, vibrant markets; offering and promoting a culture of belonging, respect, and support; delivering the resources to facilitate students' progress towards their degrees; addressing affordability; and providing lifelong tools for students' futures. The SEP also proposes strategies for demonstrating the value of IUP to a broader audience, using an integrated and coordinated effort, including the building of partnerships that strengthen IUP's visibility and reach and provide opportunities for our students.

Because IUP is in the process of implementing significant strategic plans, including our strategic plan and IUP Next Gen, it is the intention that SEP will act as a complementary document to those plans and be integrated where appropriate.

Addressing Affordability: A workgroup led by the vice presidents of Administration and Finance and Enrollment Management has been charged with reviewing and analyzing the existing per-credit tuition model and associated fees and making any recommendations for proposed changes. The group is comprised of faculty and staff members who also sit on the University Budget Advisory Committee (UBAC) and a student member. The targeted completion of the initial work is mid-January.

A subcommittee of the SEP has also been asked to review the costs of housing and dining and will provide recommendations to reduce these costs to students. This subcommittee will collaborate with the tuition model workgroup to ensure a complete look at the cost of attendance at IUP.

New Partnerships: Recognizing the importance of dual-enrollment for high school students (i.e., taking college courses while in high school), IUP has been working with Indiana Area School District (IASD) to build a program for its students to take IUP courses. The program will identify areas of interest for students and provide them a structured plan of courses to take at IUP. IASD will give these courses the academic weight typically assigned to Advanced Placement courses to encourage students to take advantage of the opportunity. Similarly, a collaboration with the Punxsutawney School District is being developed for IUP courses to be taught at our Punxsutawney campus. We will continue to explore opportunities with other school districts.

IUP has an agreement with Westmoreland County Community College to offer dual admission to WCCC students who meet certain requirements. This creates a seamless transition from WCCC to IUP with no additional admission application required and provides WCCC students the opportunity to use IUP housing and/or dining. We are currently in the final phases of a similar agreement with Penn Highlands Community College and have had a couple of other Pennsylvania community colleges show similar interest.

Crimson Scholars Circle: Prior to the start of the fall 2021 semester, IUP welcomed the first class of Crimson Scholars to campus for a week-long immersion experience. Students in the group have opportunities that provide support, both academically and socially, to help them be successful at IUP and after graduation. They network with alumni, have the guidance of a student mentor, and receive a \$1,000 scholarship to help defray their educational costs. The additional costs of the program are covered by a generous gift from an anonymous donor. Outcomes and assessment of this program will be used to further refine our overall work with retention and persistence overall but especially to help close the retention and persistence gaps of our African American and Latinx students.

Foundation Housing Refinance: Ongoing confidential discussions are in place to restructure/refinance a portion of the foundation's housing debt.

Auxiliary Debt: Dining services bond debt (an approximately \$2.9 million annual payment) is the highest component of IUP's auxiliary debt and it strongly contributes toward the auxiliary structural deficit. IUP would be supportive of any efforts made at the system level to assist the university with our IUP-owned debt to assist the auxiliary budget.

Additional workforce reductions: The most significant workforce reductions were done in the first two years of the financial sustainability planning, with more than 25 percent of the workforce being reduced. Plans were put in place for additional workforce reductions (such as the target of 10 non-represented employee reductions and additional \$1.6 through attrition) in the September 13, 2021 CPP, which are being implemented.

Further workforce reductions, beyond what has already significantly been done, will still be necessary to close the gap between revenue and expenses. Discussions between the president's cabinet and the budget discussion workgroup are ongoing to ensure that this last portion is done in a mindful way. Organizational structure, data such as system-wide and university comparisons, and other data will be used to further reduce workforce as needed to align the revenues and expenses and eliminate the structural deficit. This work will be ongoing throughout the remainder of this fiscal and through next fiscal year.

Concept of Summer hours being changed to 4 /10-hour days, consolidation of space/buildings for use in the summer, and permanently reducing building and land footprints: Utility and operational savings that can be achieved by reducing the work week to 4 10-hour days in the summer months, along with consolidating usage of buildings in the summer for instruction is being analyzed.

In addition, other recommendations regarding IUP's footprint are being explored to determine if there are opportunities for public-private partnerships, ability to further consolidate spaces, take account the telecommuting of some of the employees, and if any land/or buildings can be taken offline.

R2 classification: IUP's Carnegie Classification as an R2 institution (doctoral university—high research activity) provides a return in several ways. This classification recognizes excellence in research and graduate education as a cornerstone of our identity and enhances IUP's reputation, relevance, and value to current and prospective students, donors, and granting agencies.

University Advancement: IUP's Division of University Advancement has been making progress over the past several years. Tables F and G outline the Total Raised Contributions FY 2020 vs FY2021 and the Total Raised Contributions FY 2021, Nov 30 Year to date vs FY 2022, Nov 30 Year to date.

IUP has a proud tradition of philanthropy, the impact of which is most readily felt through the most recent comprehensive campaign for IUP: Imagine Unlimited. Encouraged by breaking records of raising \$81.36 million and finishing more than six months early and with an upward trajectory of alumni, community and external partners stepping up as demonstrated in dollars raised year to date, planning has begun for IUP's next comprehensive campaign to support the advancement of our strategic plan and IUP NextGen. Together we will harness our collective resources to seize opportunities for our students, the health and benefit of our region, our commonwealth, and our world.

Program Array, Scheduling: IUP's Division of Academic Affairs has begun a systematic review of our programs with initial focus on undergraduate programs graduating fewer than 15 students per year. Future phases will include graduate programs. IUP was well positioned for this review because of prior work completed through the INSPIRE process and the IUP NextGen restructuring. The review began with an accounting of 75 undergraduate programs, while the recommended maximum number of programs is 70 for our enrollment. IUP aims to maintain a total of 63 undergraduate program.

The Provost's Office and the academic deans have worked hard toward developing a student-centered, efficient schedule. Continuing work focuses on curricular efficiencies, for example, sharing more courses across departments and colleges, developing delivery formats and rotations to support serving multiple programs, and leveraging expertise of faculty.

IUP's NextGen Coordinating Councils have completed their work to propose significant changes in how IUP meets its strategic goals. Two clusters of recommendations that will lead to a significant change in our curriculum, both in terms of efficiency, while meeting our strategic goals of student-centeredness and DEI, are a reframing of the liberal studies curriculum and recommendations for creating a more cohesive approach to supporting student success.

Other strategies including a review of designated funds, reduction in AWE's: There is a variety of additional analyses in process with some workgroups that will result in further expense reductions. Some of the areas being reviewed include the thousands of designated accounts, reducing faculty alternative workload equivalents, and planning the instructional class schedule to be more efficient.

A joint workgroup comprised of Management and IUP-APSCUF members were charged with developing consistent, shared principles for faculty workload, specifically alternative workload equivalents, in alignment with IUP's mission, strategic priorities, enrollment realities, and financial sustainability. The application of these principles includes alternative workload equivalents in support of doctoral education, program/center coordination, and other assignments not already outlined in Article 23 of the APSCUF collective bargaining agreement.

The work is being conducted this spring, and some of it will carry forward into next fiscal year. It is anticipated as results of the analyses are presented and reviewed, that recommendations on further expense reductions will be implemented.

Bottom Line: The September 13, 2021 CPP was submitted with a balanced budget in FY 2021-22 through various permanent and one-time strategies, including the use of one-time reserves. The January 2022 projections used for this report result in a projected shortfall of \$890,000 for FY 2021-22 and a better outlook for FY 2022-23, improving the financial situation overall for the two-year period.

Higher enrollment, credit-hour projections and reduced personnel costs in FY 2022-23 have decreased the systemic budget shortfall that was projected from \$12 million in the September 13, 2021 CPP to \$9 million in the January 2022 projections, as shown in Table D-3. The projection for total unrestricted net assets is also expected to improve over this two-year period through FY 2022-23.

The last two years of hard work that we put in to get IUP closer to being financially sustainable were tough. Many of the actions taken were painful. The workforce reductions were not easy decisions and impacts were felt on a university-wide basis. We have gotten much closer to where we need to be. Significant work is underway across the university engaging a variety of committees, workgroups, and constituencies to further reduce the gap between revenues and expenses, but, more importantly, to support the new strategic planning priorities, focus on student success, and bring IUP to financial sustainability while being cautious and mindful of where and how future reductions can be made. Although we have not yet crossed the finish line, we are confident we emerge as a stronger institution and be financially healthier with a balanced budget, improved financial indicators, increases to student retention, and staffing levels based on an appropriate size for our enrollment and program array.

Exhibits

Table A-1 Enrollment

| Total Fall Headcount | FY2021-22 | FY2022-23 | FY2023-24 |
|---------------------------------|------------------|------------------|------------------|
| September 4, 2020 CPP | 9,648 | 9,737 | |
| September 13, 2021 CPP | 9,358 | 9,412 | 9,555 |
| January 2022 Projections | 9,308 | 9,590 | 9,613 |

Table A-2 (Enrollment table that will be updated for Feb Mid-Year Report)

| | FY 2019-20 | FY 2020-21 | % Change from Prior Year | Original FY 2021-22 Projections* | % Change from Prior Year | Revised FY 2021-22 Projections | % Change from Prior Year | Original FY 2022-23 Projections* | % Change from Prior Year | Revised FY 2022-23 Projections | % Change from Prior Year |
|---|-----------------|-----------------|--------------------------------|--|--------------------------------|--------------------------------------|--------------------------------|--|--------------------------------|--------------------------------------|--------------------------------|
| Fall FTE Enrollment | | | | | | | | | | | |
| Clock Hour | 336.19 | 228.85 | -31.9% | 251.48 | 9.9% | 257.20 | 12.4% | 251.48 | 0.0% | 251.48 | -2.2% |
| Undergraduate (excludes clock hour) | 7,620.01 | 7,052.80 | -7.4% | 6,433.84 | -8.8% | 6,300.80 | -10.7% | 6,389.54 | -0.7% | 6,389.54 | 1.4% |
| Graduate | 1,058.89 | 982.88 | -7.2% | 956.60 | -2.7% | 989.00 | 0.6% | 1,004.49 | 5.0% | 1,004.49 | 1.6% |
| Total Fall FTE Enrollment (w/out clock hour) | 8,678.90 | 8,035.68 | -7.4% | 7,390.44 | -8.0% | 7,289.80 | -9.3% | 7,394.03 | 0.0% | 7,394.03 | 1.4% |
| Annualized FTE Enrollment | | | | | | | | | | | |
| Undergraduate (includes clock hour) | 8,094.03 | 7,589.39 | -6.2% | 6,991.44 | -7.9% | 6,338.07 | -16.5% | 6,949.76 | -0.6% | 6,548.76 | 3.3% |
| Graduate | 1,321.97 | 1,306.38 | -1.2% | 1,270.29 | -2.8% | 1,244.84 | -4.7% | 1,333.71 | 5.0% | 1,333.71 | 7.1% |
| Total Annualized FTE Enrollment | 9,416.00 | 8,895.77 | -5.5% | 8,261.73 | -7.1% | 7,582.91 | -14.8% | 8,283.47 | 0.3% | 7,882.46 | 4.0% |

*Submitted September 2021

Table B Tuition Revenue

| | FY2021-22 | FY2022-23 |
|--|------------------|------------------|
| September 13, 2021 CPP: Tuition Revenue | 81,077,338 | 82,735,550 |
| January 2022 Projections : Tuition Revenue | 80,624,832 | 83,983,549 |
| Change in Tuition Revenue | (452,506) | 1,247,999 |

Table C Tuition Revenue Changes

| | FY2021-22 |
|---|------------------|
| September 13, 2021 CPP: Tuition Revenue | 81,077,338 |
| Fall 2021 Freeze: Tuition Revenue | 80,180,786 |
| Change in Tuition Revenue | (896,552) |
| September 13, 2021 CPP: Tuition Revenue | 81,077,338 |
| January 2022 Projections: Tuition Revenue | 80,624,832 |
| Change in Tuition Revenue | (452,506) |

Table D-1 (Workforce table that will be updated for February Mid-year Report)

| | FY 2019-20 Actuals | FY 2020-21 Actuals | % Change from Prior Year | Original FY 2021-22 Projections* | % Change from Prior Year | Revised FY 2021-22 Projections | % Change from Prior Year | Original FY 2022-23 Projections* | % Change from Prior Year | Revised FY 2022-23 Projections | % Change from Prior Year |
|--|-----------------------|-----------------------|--------------------------------------|--|--------------------------------------|--------------------------------------|--------------------------------------|--|--------------------------------------|--------------------------------------|--------------------------------------|
| Fall FTE Faculty , net of shared faculty | 585.02 | 522.80 | -10.6% | 430.12 | -17.7% | 427.10 | -18.3% | 425.88 | -1.0% | 409.88 | -4.0% |
| Annualized Unrestricted FTE Faculty , net of turnover | 589.39 | 529.39 | -10.2% | 432.86 | -18.2% | 438.93 | -17.1% | 428.67 | -1.0% | 415.37 | -5.4% |
| Annualized Unrestricted FTE Nonfaculty , net of turnover | 673.70 | 598.88 | -11.1% | 538.75 | -10.0% | 538.76 | -10.0% | 538.73 | 0.0% | 542.19 | 0.6% |
| Fall FTE Student/Fall FTE Faculty Ratio | 14.8 | 15.4 | | 17.2 | | 17.1 | | 17.4 | | 18.0 | |

*Submitted September 2021

Table D-2 Workforce: Budgeted Annualized FTE Employees, E&G Only

Budgeted Annualized FTE Employees (Include all permanent and temporary employees)

| E&G Only | FY2021-22 | | | FY2022-23 | | |
|-----------------------|--|--------------------------|----------|--|--------------------------|----------|
| | Sept. 2021 CPP | Jan. 2022 Projections | Variance | Sept. 2021 CPP | Jan. 2022 Projections | Variance |
| Faculty | 438.12 | 441.58 | 3.5 | 433.88 | 417.88 | (16.0) |
| AFSCME | 264.34 | 267.01 | 2.7 | 264.25 | 269.73 | 5.5 |
| Nonrepresented | 147.31 | 147.11 | (0.2) | 147.33 | 144.24 | (3.1) |
| SCUPA | 55 | 52.48 | (2.5) | 54.92 | 54.48 | (0.4) |
| Other | 57.93 | 54.83 | (3.1) | 57.94 | 56.29 | (1.7) |
| | Total Change in E&G Workforce | | | Total Change in E&G Workforce | | |
| | 0.3 | | | (15.7) | | |

Table D-3 (E & G) Summary of Changes to Structural Deficit and UNA

| | FY2021-22 | FY2022-23 |
|--|-------------|--------------|
| September 13, 2021 CPP: E&G Structural Deficit | (6,194,654) | (12,183,800) |
| January 2022 Projections: E&G Structural Deficit | (7,083,831) | (8,839,085) |
| Change in E&G Structural Deficit | (889,177) | 3,344,715 |

| | FY2021-22 | FY2022-23 |
|---|------------|------------|
| September 13, 2021 CPP: Total Unrestricted Net Assets | 62,327,169 | 42,520,984 |
| January 2022 Projections: Total Unrestricted Net Assets | 62,131,321 | 46,463,630 |
| Change in Total Unrestricted Net Assets | (195,847) | 3,942,646 |

Total unrestricted Net Assets (E&G and Auxiliary)

Table D-4 Summary of Workforce Progress Since July 1, 2019

| | FY2018- 19 Actual Unrestricted Annualized FTE | FY2021-22 Projected Unrestricted Annualized FTE | FTE Change | % FTE Change | Estimated Salary and Benefits Savings |
|---|--|--|-----------------------|-------------------------|--|
| September 13, 2021 CPP Faculty | 607.16 | 432.86 | (174.30) | -28.71% | (16,690,464) |
| September 13, 2021 CPP Non-Faculty | 699.02 | 538.75 | (160.27) | -22.93% | (14,620,259) |
| Total September 13, 2021 CPP | 1306.18 | 971.61 | (334.57) | 25.61% | (31,310,723) |
| January 2022 Projections Faculty | 607.16 | 438.93 | (168.23) | -27.71% | (15,676,667) |
| January 2022 Projections Non-Faculty | 699.02 | 538.76 | (160.26) | -22.93% | (13,914,019) |
| Total January 2022 Projections | 1306.18 | 977.69 | (328.49) | 25.15% | (29,590,686) |
| Difference - September 13 2021 CPP to January 2022 Projections | 0 | 6.08 | 6.08 | -0.47% | 1,720,037 |

In the comparison of Sept. 2021 CPP to Jan. 2022 projections, the difference in FTE for each bargaining unit is consistent with the related change in salary and benefits. For the non-represented group, in the Sept. 2021 CPP, a target of 10 reductions was included in the FTE and budget. FTE increased for FY2021-22 for the faculty and AFSCME bargaining units, and decreased in all other units. In addition, due to the ESLP incentive, leave payouts increased between these 2 versions in the faculty, non-represented and SCUPA bargaining units by over \$1.6M. In the Sept. 2021 CPP also included 1.2% attrition in both FTE and expenditures, Jan. 2022 projections have been reduced to 0.6%.

| | FY2018- 19 Actual Unrestricted Annualized FTE | FY2022-23 Projected Unrestricted Annualized FTE | FTE Change | % FTE Change | Estimated Salary and Benefits Savings |
|---|--|--|-----------------------|-------------------------|--|
| September 13, 2021 CPP Faculty | 607.16 | 428.67 | (178.49) | -29.40% | (14,666,358) |
| September 13, 2021 CPP Non-Faculty | 699.02 | 538.73 | (160.29) | -22.93% | (14,773,713) |
| Total September 13, 2021 CPP | 1306.18 | 967.4 | (338.78) | 25.94% | (29,440,071) |
| January 2022 Projections Faculty | 607.16 | 415.37 | (191.79) | -31.59% | (16,524,116) |
| January 2022 Projections Non-Faculty | 699.02 | 542.19 | (156.83) | -22.44% | (14,714,805) |
| Total January 2022 Projections | 1306.18 | 957.56 | (348.62) | 26.69% | (31,238,921) |
| Difference - September 13 2021 CPP to January 2022 Projections | 0 | (9.84) | (9.84) | 0.75% | (1,798,850) |

In the comparison of Sept. 2021 CPP to Jan. 2022 projections, the difference in FTE for each bargaining unit is consistent with the related change in salary and benefits. For the non-represented group, in the Sept. 2021 CPP, a target of 10 reductions was included in the FTE and budget, and an additional decrease of 3 FTE in the Jan. 2022 projections has been included in FY2022-23. FTE increased for FY2022-23 for the AFSCME bargaining unit, but decreased in all other units. In addition, the budget for leave payouts returned to the normal budget levels.

Table E (Auxiliary)

| | FY2021-22 | FY2022-23 |
|--|------------------|------------------|
| September 13, 2021 CPP: Projected Aux Revenue | 19,227,463 | 20,453,789 |
| January 2022 Projections: Projected Aux Revenue | 19,920,837 | 21,247,567 |
| Change in Aux Revenue | 693,374 | 793,778 |
| | FY2021-22 | FY2022-23 |
| September 13, 2021 CPP: Auxiliary Structural Deficit | (8,108,156) | (7,622,385) |
| January 2022 Projections: Auxiliary Structural Deficit | (7,414,782) | (6,828,607) |
| Change in Auxiliary Structural Deficit | 693,374 | 793,778 |

Table F: Total Raised Contributions FY `20 vs FY`21

| Totals | Fiscal Year 2020 | | | Fiscal Year 2021 | | |
|--------------------------|---------------------|--------------|--------------|---------------------|--------------|---------------|
| | Amount | Donors | Donations | Amount | Donors | Donations |
| <i>Grand Totals</i> | <i>\$10,181,680</i> | <i>6,080</i> | <i>9,319</i> | <i>\$14,298,408</i> | <i>5,078</i> | <i>11,424</i> |
| <i>- Annual Fund</i> | <i>\$2,177,192</i> | <i>5,624</i> | <i>8,536</i> | <i>\$1,252,898</i> | <i>4,390</i> | <i>10,275</i> |
| <i>- Non-Annual Fund</i> | <i>\$8,004,488</i> | <i>610</i> | <i>796</i> | <i>\$13,045,511</i> | <i>895</i> | <i>1,170</i> |

Table G: Total Raised Contributions FY 21 Nov 30 YTD vs FY 22 Nov 30 YTD

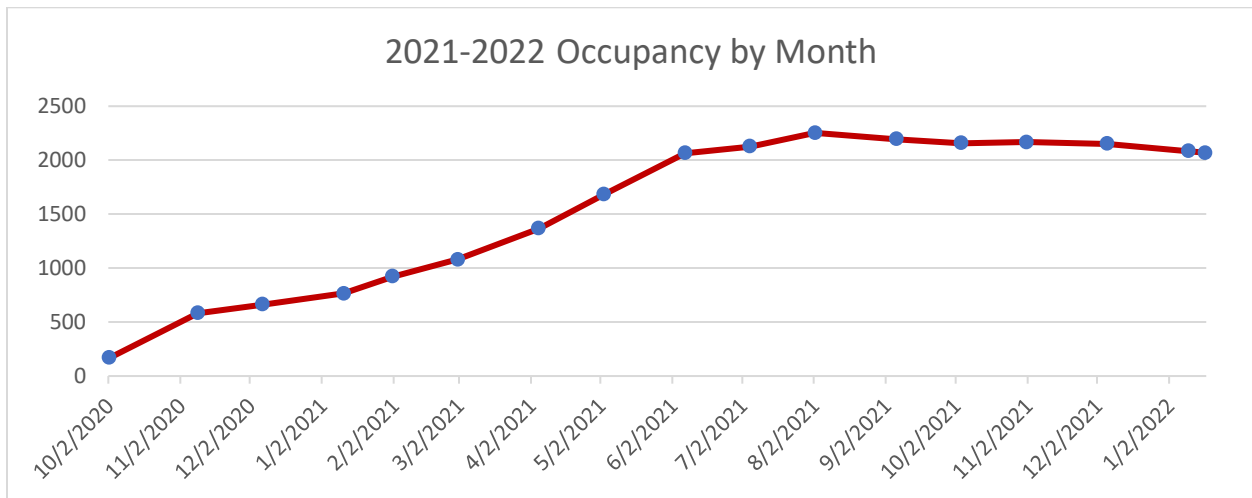
| Totals | Fiscal Year 2021 YTD | | | Fiscal Year 2022 YTD | | |
|--------------------------|----------------------|--------------|--------------|----------------------|--------------|--------------|
| | Amount | Donors | Donations | Amount | Donors | Donations |
| <i>Grand Totals</i> | <i>\$1,758,829</i> | <i>2,370</i> | <i>4,571</i> | <i>\$3,937,889</i> | <i>2,263</i> | <i>4,259</i> |
| <i>- Annual Fund</i> | <i>\$431,996</i> | <i>2,131</i> | <i>4,252</i> | <i>\$452,747</i> | <i>1,440</i> | <i>3,153</i> |
| <i>- Non-Annual Fund</i> | <i>\$1,326,833</i> | <i>263</i> | <i>324</i> | <i>\$3,485,141</i> | <i>912</i> | <i>1,116</i> |

Spring 2022 Housing Report Summary As of January 31, 2022

Housing occupancy on the Indiana Campus for the Spring 2022 is currently at 2033 compared to 1530 in Spring 2021. This accounts for an increase of 108 new first-year and transfer students coming in for the Spring 2022 semester compared to 87 new first-year and transfers for Spring 2021. The total number of continuing students lost from Fall to Spring is currently 227 (-10.5%).

There are currently 77 continuing students that have Spring housing reserved, but do not have class schedules. These students were emailed January 7, 2022 requesting that they respond with their plans for the Spring 2022 semester. They were emailed again January 27, 2022 with instructions to obtain a class schedule, or they would need to vacate their space by January 31, 2022.

Continuing student housing occupancy from Fall to Spring decreased an average of 12.5% for 2018-2019 and 2019-2020. The Fall to Spring occupancy decreased 27.6% for 2020-2021. This change was largely by students deciding to complete their studies at home for the Spring 2021 semester. This year's decrease is currently 10.5% and is anticipated to increase over the next month.



Punxsutawney Campus

Housing occupancy on the Punxsutawney Campus for the Spring 2022 campus is at 50. This accounts for a decrease of 11 students from the end of the Fall 2021 semester.

**Fall 2022 Housing Report Summary
As of January 31, 2022**

| Suites | | |
|--|--|--|
| Change in Housing Applications between January 24, 2022 and January 31, 2022 | | |
| Last Report: January 24, 2022 | This Week: January 31, 2022 | Change |
| Total Students: 1014 New Students: 352 Continuing Students: 662 | Total Students: 1042 New Students: 377 Continuing Students: 665 | Total Change: +28 New Students: +25 Continuing Students: +3 |
| Percent of Occupied Designed Capacity: 28.74% Total Designed Capacity: 3528 | Percent of Occupied Designed Capacity: 29.54% | Occupied Designed Capacity: Gain/Loss: +0.80% |
| Percent of Occupied Socially Distanced Capacity: 39.15% Total Utilizable Capacity: 2590 | Percent of Occupied Socially Distanced Capacity: 40.23% | Occupied Socially Distanced Capacity Gain/Loss: +1.08% |

| University-Owned | | |
|--|--|---|
| Punxsutawney Living Center | | |
| Last Week: January 24, 2021 | This Week: January 31, 2022 | Change |
| Total Students: 6 Occupied: 3.03% Total Capacity: 198 | Total Students: 6 Occupied: 3.03% | Total Change: 0 Gain/Loss: 0.00% |

| Suites Year-to-Year Application Comparison | |
|---|-------------------------------------|
| Total Fall 2022 as of January 31, 2022: 1042 | Fall 2022 vs Fall 2021: +119 |
| Total Fall 2021 as of February 1, 2021: 923 | Fall 2022 vs Fall 2020: +167 |
| Total Fall 2020 as of January 30, 2020: 875 | |

| University-Owned Year-to-Year Application Comparison | |
|--|-----------------------------------|
| Year-to-Year Comparison: Punxsutawney | Fall 2022 vs Fall 2021: +1 |
| Total Fall 2022 as of January 31, 2022: 6 | Fall 2022 vs Fall 2020: +6 |
| Total Fall 2021 as of February 1, 2021: 5 | |
| Total Fall 2020 as of January 30, 2020: 0 | |

| | | |
|--------------------------------|---|---------------------------------------|
| Grand Total Application | As of 1/31/22: 1048 – Fall 2022 | As of 2/01/21: 928 – Fall 2021 |
| | To Date Fall 2022 v Fall 2021 Grand Total Comparison: +120 | |

1. Since Housing begins housing sign-ups at different points in the semester, there are two main comparisons used to compare data across years. A year-to-year date comparison looks at similar dates between the years, while a point-in-process comparison looks at the week of the process between years.

- a. Continuing Student Year-to-Year Date Comparison: As of January 31, 665 continuing students have signed up for the 2022-2023 academic year. As of February 1, 2021, 591 continuing students had signed up for the 2021-2022 academic year **for a difference between 2022 and 2021 of +74.**

**Fall 2022 Housing Report Summary
As of January 31, 2022**

- b. New Student Year-to-Year Date and Point-in-Process Comparison (process opened on the same dates for new students): As of January 31, 377 new students have signed up for the 2022-2023 academic year. As of February 1, 2021, 332 new students had signed up for the 2021-2022 academic year **for a difference between 2021 and 2020 of +45.**
 - c. Continuing Student Point-in-Process Comparison: As of week 18 of housing sign ups, 665 continuing students have signed up for housing for the 2022-2023 academic year. Comparatively, during 2021-2022 housing sign ups, 584 continuing students had signed up for housing **for a difference of +81.**
2. Trends among new and continuing students who have contracted to live on campus for 2022-23 are as follows:
- Nursing (114), Criminology (71), Biology (61), and Psychology (60) are the most common majors, followed closely by majors in Computer Science, Health and Human Services majors, Management, and Natural Science—each with 35-42 students who contracted.
 - 89 are members of the Cook Honors College
 - 749 identify as female
 - 664 live more than 50 miles from IUP
 - 385 live fewer than 50 miles from IUP



Tuition Model and Pricing Workgroup Recommendation

Executive Summary

After careful analysis and review, a cross-university workgroup recommends that IUPUI implements a flat tuition rate for all in-state undergraduate students taking 12-18 credits in a semester, starting with the fall 2022 semester. President's Cabinet agrees with the committee's recommendation, as does the president.

Implications for students - Implementing a flat tuition rate would reduce the overall cost for full time students. It may also further decrease costs to students by lessening the time to graduation if students increase their credit loads to take advantage of the flat rate pricing, since the cost for up to and including 18 credits would be equal to the cost of 12 credits. Finally, it provides an easier-to-understand tuition model for both parents and students.

Implications for IUPUI - Implementing a flat tuition rate model will reduce IUPUI's tuition revenue and increase IUPUI's projected deficit for several years, absent increases in enrollment (which seems likely, but not certain), significant additional expense reductions, or both. IUPUI expects that enrollment will ultimately increase above current projections due to the reduction in cost to students, but it is difficult to predict when enrollment increases will occur and to what extent. The projected revenue reductions represent a very conservative or worst-case estimate. Potential lost revenue in year one (FY 2022-2023) can be covered through the use of one-time funds, some from COVID recovery funds or by drawing down other reserves sooner than planned. A flat-rate tuition model will also likely result in students taking more credits and require IUPUI to add course sections with no immediate revenue to offset that cost. Students taking 15 credits instead of 12 will increase IUPUI's student FTE (but not tuition revenue), which will likely increase IUPUI's projected share of the state appropriation from PASSHE.

Determining the appropriate flat rate - The committee examined a range of flat rates, balancing cost to students with institutional financial risk. The following table summarizes key data at three rate levels from a rate \$1,000/year lower than the current rate to a much larger reduction that would put IUPUI's tuition on par with most other PASSHE universities.

| # Credits Taken per semester | Current Tuition | Proposal 1A Flat Rate Tuition 12-18 credits (\$7,716/AY) | | Proposal 1B Flat Rate Tuition 12-18 credits (\$7,900/AY) | | Proposal 1C Flat Rate Tuition 12-18 credits (\$8,600/AY) | |
|--|-----------------|--|---|--|---|--|---|
| | | | Avg. cost per credit - for information only | | Avg. cost per credit - for information only | | Avg. cost per credit - for information only |
| | \$ 319 | \$ 3,858 | | \$ 3,950 | | \$ 4,300 | |
| 12 | \$ 7,656 | \$ 7,716 | \$ 322 | \$ 7,900 | \$ 329 | \$ 8,600 | \$ 358 |
| 13 | \$ 8,294 | \$ 7,716 | \$ 297 | \$ 7,900 | \$ 304 | \$ 8,600 | \$ 331 |
| 14 | \$ 8,932 | \$ 7,716 | \$ 276 | \$ 7,900 | \$ 282 | \$ 8,600 | \$ 307 |
| 15 | \$ 9,570 | \$ 7,716 | \$ 257 | \$ 7,900 | \$ 263 | \$ 8,600 | \$ 287 |
| 16 | \$ 10,208 | \$ 7,716 | \$ 241 | \$ 7,900 | \$ 247 | \$ 8,600 | \$ 269 |
| 17 | \$ 10,846 | \$ 7,716 | \$ 227 | \$ 7,900 | \$ 232 | \$ 8,600 | \$ 253 |
| 18 | \$ 11,484 | \$ 7,716 | \$ 214 | \$ 7,900 | \$ 219 | \$ 8,600 | \$ 239 |
| Estimated Annual Revenue Loss (assuming no increase in enrollment) | | (\$8,953,526) | | (\$7,871,054) | | (\$3,752,954) | |
| # of full-time students needed to make up lost revenue | | 1,160 | | 996 | | 436 | |

The workgroup and President’s Cabinet have debated the merits of higher, more aggressive price reductions versus lower, more cautious reductions. A more aggressive price reduction will garner more attention in the market and is likely to attract additional new students, but will increase IUP’s budget challenges in the short term. It may also be difficult to increase tuition in the future should the hoped-for increases in enrollment not occur.

A more cautious approach will receive less attention in the market and will likely attract fewer new students, but keeps IUP’s budget challenges at a more reasonable level. With a less aggressive starting point, it may be possible to further reduce the flat rate incrementally as we learn more about the impact of the change. However, this more conservative flat rate may not have the desired student impact compared to the more aggressive options.

Note that the full cost of attendance for students also includes fees, room, and board, so reducing tuition has a smaller overall impact than might be expected. A \$1,000 reduction in annual tuition, for example, reduces overall cost of attendance for a student living on campus by about 4%.

Committee Recommendation – Either proposal 1A or 1B. Both proposals place a priority on students’ affordability and ability to complete their degree in a timely fashion by taking additional credit hours at a flat rate amount. Both proposals also place IUP in a better competitive position in pricing with peer institutions and achieve the goal of being simple and easier to understand for students and parents.

Timing - IUP must submit a draft proposal to the Office of the Chancellor by February 2, 2022. After review by the OOC, IUP Council of Trustee’s would take formal action on the final proposal at its March 2022 meeting, and the Board of Governor’s would take final action at their April 2022 meeting. If approved, the new pricing would be implemented for the fall 2022 semester.



Tuition Model and Pricing Workgroup – Summary Report of Recommendations

(Proposal to be Submitted to System Office by January 31, 2022 (extension date of Feb. 2, 2022), for March COT and for April BOG)

Overview: The Tuition Model and Pricing Workgroup, which is co-chaired by the vice presidents of Administration and Finance and Enrollment Management, was charged with reviewing and analyzing the existing per-credit tuition model for Pennsylvania, undergraduate students and to provide recommendations, if any, for proposed changes. The workgroup needed to take into consideration the university's financial status and balance the impact the recommendation would have on both students and university revenues. Keeping the student's interest at the core of any changes to the tuition model was a primary goal. At this point, the group reviewed tuition only. It is anticipated that we will continue our work with the overall cost of attendance at IUP and will be thoroughly reviewing student fees, housing costs and dining costs over the next few months.

A summary of those recommendations is below. If approved, the proposed tuition change will take effect for fall 2022 semester and marketing the new plan would need to be done expeditiously.

The workgroup is comprised of the following members:

Co-Chairs:

Debra Fitzsimons, Vice President for Administration and Finance
Patricia McCarthy, Vice President for Enrollment Management

Members:

Bill Balint, Chief Information Officer
Matthew Baumer, Chair/Professor, Music
David Chambers, IUP-APSCUF Vice President, Chair/Associate Professor, Political Science

Amy Cook, Assistant Dean, Eberly College of Business

Noah Gentle, Student, Chief Justice of SGA, and member of the University Senate Committee for Academic Affairs

Shawn Jones, Associate Director of Undergraduate Admissions

David Piper, Senate Chair and Chair/Professor, Employment Relations and Health Services Administration

Resources to the workgroup:

Bill Buttz, Associate Vice President for Finance

Jodie Cadile, Budget Director

Chris Kitas, Executive Director of Institutional Research Planning & Assessment

Paula Stossel, Associate Vice President for Enrollment

Background:

The tuition model and pricing workgroup convened their first meeting late in the fall semester, on November 17, 2021, and continued meeting eight additional times through the end of January 2022 to examine, investigate, and analyze information regarding: tuition models at IUP, both current and historical, enrollment trends for our undergraduate students, a pricing study conducted by RNL, our current discounting/scholarship strategies, and the impact of various tuition scenarios on revenue. Invited guests to our meetings included our Marketing and Communications team, to discuss our university marketing strategy as it pertains to pricing and our RNL pricing survey consultant.

After reviewing pricing of the other system schools and our price-point in the market (see appendix), initial scenarios that were investigated included continuing our per-credit pricing structure but lowering the cost by a \$1,000 and \$2,000 amount and a flat-rate structure for 12-15 credits (anything below 12 or over 15 would be assessed at a per-credit rate). We also discussed, but chose not to pursue, the pros and cons of a new pricing model that would be effective for a new incoming class while current, upper class students would continue with the pricing structure that was effective when they entered IUP.

In an effort to ensure considered proposals would be impactful enough, we invited RNL to present their price sensitivity study that was conducted in early 2020. Recommendations included an estimated net price for in state students of approximately \$8,000 to \$8,500 per academic year for optimal net tuition revenue and enrollment. It was determined through the study that we do not have a high level of price sensitivity with families. The workgroup also discussed that the current tuition and fee structure is not easy for prospective students and their parents to understand and that current students cannot understand their student bill, particularly when adding and dropping classes. Institutional Research and Enrollment Management provided data to show various charts with trends related to reductions of student credit hours taken for full time students and part time students over time. The workgroup agreed that a new proposed model could incentivize students to take more credits so that progress can be made towards graduation in a shortened time period and there was a desire to review options for such models.

Recognizing we currently award renewable merit scholarships to incoming students at the time of admission that range from \$2,000 to \$5,000, we began our analysis at a level of approximately a \$1000 tuition reduction. Currently, a student who is enrolled for 15 credits/semester is charged \$9,570 for tuition and \$3,574/semester fees (total \$13,144). Our average scholarship award for incoming students for fall 2022 is approximately \$3,800. With a cost of tuition and fees of \$13,144 less a \$3,800 average scholarship, the net price is \$9,344. A \$1,000 reduction in tuition would bring our net price to the approximate level that was recommended by RNL. While it is understood that we are only to be reviewing

tuition for our recommendation, fees should be considered in this calculation since some schools either have significantly lower or no fees above the tuition.

A total of five final scenarios were reviewed by the workgroup:

1. Per-credit pricing for students enrolled in 12.01+ credits that was equivalent to a 10% discount. This model brought the tuition for 15 credits per semester to \$8,610/academic year.
2. Per-credit pricing for students enrolled in 12-18 credits that was equivalent to a 10% discount. This model brought the tuition for 15 credits per semester to \$8,610/academic year.
3. A flat-rate pricing for students enrolled in 12.01-18 credits, with students assessed at \$319/credit for any credits above 18 and a per credit pricing for students taking 1-11.999 credits. This model brought the tuition for 15 credits per semester to \$8,610/academic year.
4. A flat-rate pricing for students enrolled in 12-18 credits, with students assessed at \$319/credit for any credits above 18 and a per credit pricing for students taking 1-11.999 credits. This model brought the tuition for 15 credits per semester to \$8,600/academic year.
5. A flat-rate pricing for students enrolled in 12-15 credits, with students assessed at \$319/credit for any credits above 15 and a per credit pricing for students taking 1-11.999 credits. This model brought the tuition for 15 credits per semester to \$8,600/academic year.

The group discussed the pros and cons of each scenario and came to a consensus to recommend bringing #1 and #4 forward for consideration.

After further consultation and discussion with the President's cabinet, it was decided that additional scenarios with further cost savings for students should be considered.

It was also decided that the two scenarios being forwarded to the Council of Trustees for consideration would fall somewhere between the more conservative model of \$8600 flat-rate (for students enrolled in 12-18 credits) pricing model outlined in #4 above the flat-rate pricing model of \$7716 for students taking 12-18 credits which is the standard rate for PASSHE schools.

The workgroup recommends the following two models be considered:

- 1A. A flat-rate pricing of \$7,716 for students enrolled in 12-18 credits (the standard rate for PASSHE schools), with students assessed at \$319/credit for any credits below 12 and above 18 credits.
- 1B. A flat-rate pricing at a level above \$7,716 but lower than our original recommendations for students enrolled in 12-18 credits, with students assessed at \$319/credit for any credits below 12 and above 18 credits. The tuition level of \$7,900 was used for this scenario with the rationale that bringing the cost below \$8,000 would be more attractive to students and prospective students.

Summary of Recommendations:

Pricing Proposal 1A: Students enrolled in 12 - 18 credits will be assessed tuition at a flat rate of \$3,858/semester or \$7,716 annually (compared to \$9570 annual tuition currently for a full-time student at 15 credits per semester). This rate is consistent with other State System Universities that charge a flat tuition rate.

Benefits of Proposal 1A:

- In general, this proposal places a priority on students' affordability and ability to complete their degree in a timely fashion by taking additional credit hours at a flat rate amount. It also achieves the goal of being simple and easier to understand for students and parents. It places IUP in a better competitive position in pricing with peer institutions.

- Student Affordability: Students who normally enroll in 15 credits/semester would have a tuition savings of \$1,854 per year.
- Ease of understanding costs: Students and parents will know their tuition rate if they are full time, regardless of whether they know exactly how many credits in which they plan to enroll. This will be especially beneficial for marketing and recruitment.
- Reduces student billing confusion: When students adjust their schedules during a given semester (staying within 12 to 18 credits), their tuition charges will not continually be adjusted. This may be especially impactful for students adding courses after being billed since they will not receive a tuition increase if they stay within the credit levels of 12 to 18.
- Flat-rate pricing is consistent with other pricing structures: Most of our competitor institutions assess tuition at a flat rate for full-time enrollment.
- A more competitive price position: Our published full-time tuition rate would be only \$7,716 per year for a full-time student taking 15 credits, which is consistent with other system schools charging a flat rate.
- Encourages students to enroll in a higher credit load each semester: The tuition is the same for 12 credits or 18 credits so students will not have to register for a credit load based solely on the price. Historical data shows (from IR) that the percentage of students taking 15 or more credits declined after the implementation of the per-credit tuition model. Enrolling in a higher credit load also supports the following:
 - Reduced student debt: Students taking advantage of a higher credit load will be able to theoretically graduate in less time, saving the cost of, not only tuition, but the other associated educational costs that would be incurred during additional semesters.
 - Faster time to entry into the workforce or graduate school.

Challenges of Proposal 1A:

- The potential revenue loss calculation for purposes of this simulation is \$8.9 million, without taking into account potential student enrollment, credit hour (and FTE) changes which would offset a portion of this amount.

Financial Impact: Based on fall 2021 freeze data for full-time, in-state, undergraduates this proposal, assuming for the basis of this estimate to be conservative that there is no change in enrollment when making this calculation, is estimated to generate a revenue loss of \$8.9 million for the AY.

This potential revenue loss equates to 1,160 full-time students that would be needed to break even when compared to the revenue generated by our current per-credit model. No increase in enrollment is assumed in this calculation to be conservative. However, the workgroup does believe that student behavior patterns will be positive for enrollment growth both for existing students (taking more credits) and for potential students who may be comparing IUP tuition rates and packages with other schools. Institutional research data does show that the number of average and total student credit hours has decreased since the existing per credit model has been put in place and the workgroup anticipates that the flat rate model will reverse this trend.

It is anticipated that students will positively respond to this tuition model change by taking additional credit hours (therefore, increased FTE) and ultimately graduate in a shorter time period than our current students are graduating. There is potential additional appropriations revenue and other revenues associated with increased student FTE but that cannot be estimated at this time. For year one, there are one-time funds from HEERF claims that can be used to support the first year of this tuition model change of approximately \$5 million. Enrollment management will be addressing the balance between student scholarship awards with this tuition reduction and it is anticipated that there can be a small portion of the offset of the tuition reduction made to the centralized scholarship account. It is believed that for year one (FY 2022-2023), that the one-time revenue losses can be covered through one-time resources.

However, it is important to have strong and focused marketing of this tuition reduction, so the university can get as much increased enrollment and credit hours as possible to off-set the potential revenue reduction. By having the one-time funding used to cover the potential losses in year one, it gives the university time to plan for strategies to incorporating this tuition reduction into the CPP and financial sustainability plan.

**Projected Revenue Impact - Fall Semester Only
Full-time, In-State UG Only**

| | |
|---|----------------------|
| Fall 2021 Headcount - Students taking 12-18 credits | 5,883 |
| Flat Rate | \$ 3,858 |
| Revenue from Credits 12-18 at flat rate | \$ 22,696,614 |
| Total Revenue Using Flat Rate | \$ 22,696,614 |
| Current Projected Fall 2021 Revenue | \$ 27,173,377 |
| Change in Fall Revenue with Flat Rate | (4,476,763) |
| Estimated Impact to Annual Revenue | (8,953,526) |

Using fall freeze headcount for full-time UG In-State students

Pricing Proposal 1B: Students enrolled in 12 - 18 credits will be assessed tuition at a flat rate of \$3,950/semester or \$7,900 annually (compared to \$9570 annual tuition currently for a full-time student at 15 credits per semester).

Benefits of Proposal 1B:

- In general, this proposal places a high priority on students’ affordability and ability to complete their degree in a timely fashion by taking additional credit hours at a flat rate amount. It also achieves the goal of being simple and easier to understand for students and parents. It places IUP in a better competitive position in pricing with peer institutions, although it is not as good of a competitive position as Proposal 1A.
- Student Affordability: Students who normally would enroll in 15 credits/semester would have a tuition savings of \$1,670 per year.
- Ease of understanding costs: Students and parents will know their tuition rate if they are full time, regardless of whether they know exactly how many credits in which they plan to enroll. This will be especially beneficial for marketing and recruitment.
- Reduces student billing confusion: When students adjust their schedules during a given semester (staying within 12 to 18 credits), their tuition charges will not continually be adjusted. This may be especially impactful for students adding courses after being billed since they will not receive a tuition increase if they stay within the credit levels of 12 to 18.
- Flat-rate pricing is consistent with other pricing structures: Most of our competitor institutions assess tuition at a flat rate for full-time enrollment.
- A more competitive price position: Our published full-time tuition rate would be only \$7,900 per year for a full-time student taking 15 credits, which is only \$184 more than other PASSHE schools who are charging the standard tuition amount.

- Encourages students to enroll in a higher credit load each semester: The tuition is the same for 12 credits or 18 credits so students will not have to register for a credit load based solely on the price. Historical data shows (from IR) that the percentage of students taking 15 or more credits declined after the implementation of the per-credit tuition model. Enrolling in a higher credit load also supports the following:
 - Reduced student debt: Students taking advantage of a higher credit load will be able to theoretically graduate in less time, saving the cost of, not only tuition, but the other associated educational costs that would be incurred during additional semesters.
 - Faster time to entry into the workforce or graduate school.

Challenges with Proposal 1B:

- The revenue loss calculation for purposes of this simulation is \$7.8 million, without taking into account potential student enrollment, credit hour (and FTE) changes which would offset a portion of this amount.
- Continues to be at a higher tuition level than other PASSHE institutions.

Financial Impact: Based on fall 2021 freeze data for full-time, in-state, undergraduates this proposal is estimated to generate a potential revenue loss of \$7.8 million for the AY. This potential revenue loss equates to 996 full-time students that would be needed to break even when compared to the revenue generated by our current per-credit model. This amount is approximately \$1 million less than the potential revenue loss for Proposal 1A.

It is anticipated that students will positively respond to this tuition model change by taking additional credit hours (therefore, increased FTE) and ultimately graduate in a shorter time period than our current students are graduating. There is potential additional appropriations revenue and other revenues associated with increased student FTE but that cannot be estimated at this time. For year one, there are one-time funds from HEERF claims that can be used to support the first year of this tuition model change of approximately \$5 million. Enrollment management will be addressing the balance between student scholarship awards with this tuition reduction and it is anticipated that there can be a small portion of the offset of the tuition reduction made to the centralized scholarship account. It is believed that for year one (FY 2022-2023), that the one-time potential revenue losses can be covered through one-time resources. However, it is important to have strong and focused marketing of this tuition reduction, so the university can get as much increased enrollment and credit hours as possible to offset the potential revenue reduction. By having the one-time funding used to cover the potential losses in year one, it gives the university time to plan for strategies to incorporating this tuition reduction into the CPP and financial sustainability plan.

**Projected Revenue Impact - Fall Semester Only
Full-time, In-State UG Only**

| | |
|---|----------------------|
| Fall 2021 Headcount - Students taking 12-18 credits | 5,883 |
| Flat Rate | \$ 3,950 |
| Revenue from Credits 12-18 at flat rate | \$ 23,237,850 |
| Total Revenue Using Flat Rate | \$ 23,237,850 |
| Current Projected Fall 2021 Revenue | \$ 27,173,377 |
| Change in Fall Revenue with Flat Rate | (3,935,527) |
| Estimated Impact to Annual Revenue | (7,871,054) |

Using fall freeze headcount for full-time UG In-State students

Given time constraints with the deadline for submitting tuition proposals to the Office of the Chancellor, this proposal addresses in-state undergraduate student tuition. The RNL consultants will be refreshing their pricing study for IUP, and the data will be forthcoming from that pricing study over the next several months. This change would be folded into the RNL work and considered in the updated study.

Additionally, the workgroup recommends that we continue this important work and review out-of-state tuition model, student fees, graduate tuition, and housing costs to take into consideration student affordability with the total cost of attendance at IUP.

Appendices

Appendix A: Tuition Model Comparison:

| # Credits Taken per semester | Current Tuition | Proposal 1A Flat Rate Tuition 12-18 credits (\$7,716/AY) | | Proposal 1B Flat Rate Tuition 12-18 credits (\$7,900/AY) | |
|--|-----------------|--|--------|--|--------|
| | | | | Avg. cost per credit - for information only | |
| | \$ 319 | \$ 3,858 | | \$ 3,950 | |
| 12 | \$ 7,656 | \$ 7,716 | \$ 322 | \$ 7,900 | \$ 329 |
| 13 | \$ 8,294 | \$ 7,716 | \$ 297 | \$ 7,900 | \$ 304 |
| 14 | \$ 8,932 | \$ 7,716 | \$ 276 | \$ 7,900 | \$ 282 |
| 15 | \$ 9,570 | \$ 7,716 | \$ 257 | \$ 7,900 | \$ 263 |
| 16 | \$ 10,208 | \$ 7,716 | \$ 241 | \$ 7,900 | \$ 247 |
| 17 | \$ 10,846 | \$ 7,716 | \$ 227 | \$ 7,900 | \$ 232 |
| 18 | \$ 11,484 | \$ 7,716 | \$ 214 | \$ 7,900 | \$ 219 |
| Estimated Annual Revenue Loss (assuming no increase in enrollment) | | (\$8,953,526) | | (\$7,871,054) | |
| # of full-time students needed to make up lost revenue | | 1,160 | | 996 | |

Appendix B: A comparison of total direct costs at PASSHE Schools (green fill designates costs where IUP is less expensive than the comparison school) at our current tuition rate, proposals 1A and 1B, and a tuition scenario and the corresponding revenue impact that was considered by the workgroup (\$8,600 flat rate).

| CURRENT TUITION PRICE: Per-credit pricing at \$319/cr. (\$9,570/AY if 15 credits/term) | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|---|---------------------------|---------------------------------|------------------|-------------------|--------------------------------|---|--------------|--------------------------------------|------------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Costs | Avg UG Student Total Costs | Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$4,325 | \$1,854 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$4,190 | \$1,854 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$3,708 | \$1,854 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$2,630 | \$1,854 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$3,375 | \$1,282 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$5,250 | \$1,854 | \$746 | \$2,290 | \$360 |
| Indiana (CURRENT PRICING) | \$9,570 | \$3,574 | \$8,950 | \$3,620 | \$25,714 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$3,822 | \$1,854 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$4,468 | \$1,854 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$2,614 | \$1,854 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | \$1,178 | \$0 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | \$1,118 | \$0 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$4,939 | \$1,854 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$6,519 | \$1,854 | \$867 | \$3,156 | \$642 |
| (with IUP) | \$8,154 | \$3,154 | \$7,336 | \$3,631 | \$22,276 | | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | | | | | |

Note: Rates are calculated at 30 credits per year.

| PROPOSAL 1A: Flat Rate Tuition 12-18 credits (\$7,716/AY) | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|--|---------------------------|---------------------------------|------------------|-------------------|--------------------------------|---|--------------|--------------------------------------|------------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Costs | Avg UG Student Total Costs | Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$2,471 | \$0 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$2,336 | \$0 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$1,854 | \$0 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$776 | \$0 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$1,521 | -\$572 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$3,396 | \$0 | \$746 | \$2,290 | \$360 |
| Indiana (PROPOSAL 1A) | \$7,716 | \$3,574 | \$8,950 | \$3,620 | \$23,860 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$1,968 | \$0 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$2,614 | \$0 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$760 | \$0 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | -\$676 | -\$1,854 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | -\$736 | -\$1,854 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$3,085 | \$0 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$4,665 | \$0 | \$867 | \$3,156 | \$642 |
| System Average (with IUP) | \$8,022 | \$3,154 | \$7,336 | \$3,631 | \$22,143 | | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | | | | | |

Note: Rates are calculated at 30 credits per year.

| PROPOSAL 1B: Flat Rate Tuition 12-18 credits (\$7,900/AY) | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|--|---------------------------|---------------------------------|------------------|-------------------|--------------------------------|---|--------------|--------------------------------------|------------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Costs | Avg UG Student Total Costs | Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$2,655 | \$184 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$2,520 | \$184 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$2,038 | \$184 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$960 | \$184 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$1,705 | -\$388 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$3,580 | \$184 | \$746 | \$2,290 | \$360 |
| Indiana (PROPOSAL 1B) | \$7,900 | \$3,574 | \$8,950 | \$3,620 | \$24,044 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$2,152 | \$184 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$2,798 | \$184 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$944 | \$184 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | -\$492 | -\$1,670 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | -\$552 | -\$1,670 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$3,269 | \$184 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$4,849 | \$184 | \$867 | \$3,156 | \$642 |
| System Average (with IUP) | \$8,035 | \$3,154 | \$7,336 | \$3,631 | \$22,156 | | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | | | | | |

Note: Rates are calculated at 30 credits per year.

For comparison, the work group considered a pricing at \$8,600/academic year. Below is the comparison at other PASSHE schools at this price point and the projected revenue impact.

| POINT OF COMPARISON: \$8,600/AY tuition | | | | | | Difference: IUP Compared to Other PASSHE Schools | | | | |
|--|---------------------------|---------------------------------|------------------|-------------------|--------------------------------------|---|------------------|--------------------------------------|------------|------------|
| University | Average Undergrad Tuition | Total Average UG Mandatory Fees | Most Common Room | Most Common Board | Total Average UG Student Total Costs | Avg UG Student Total Costs | Avg Tuition Only | Total Avg UG Mandatory and Tech Fees | Room Only | Board Only |
| Bloomsburg | \$7,716 | \$3,267 | \$7,108 | \$3,298 | \$21,389 | \$3,355 | \$884 | \$307 | \$1,842 | \$322 |
| California | \$7,716 | \$3,392 | \$6,822 | \$3,594 | \$21,524 | \$3,220 | \$884 | \$182 | \$2,128 | \$26 |
| Cheyney | \$7,716 | \$3,188 | \$7,148 | \$3,954 | \$22,006 | \$2,738 | \$884 | \$386 | \$1,802 | -\$334 |
| Clarion | \$7,716 | \$3,457 | \$7,570 | \$4,340 | \$23,083 | \$1,660 | \$884 | \$116 | \$1,380 | -\$720 |
| East Stroudsburg | \$8,288 | \$2,971 | \$8,000 | \$3,080 | \$22,339 | \$2,405 | \$312 | \$603 | \$950 | \$540 |
| Edinboro | \$7,716 | \$2,827 | \$6,660 | \$3,260 | \$20,463 | \$4,280 | \$884 | \$746 | \$2,290 | \$360 |
| Indiana | \$8,600 | \$3,574 | \$8,950 | \$3,620 | \$24,744 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Kutztown | \$7,716 | \$3,346 | \$6,740 | \$4,090 | \$21,892 | \$2,852 | \$884 | \$228 | \$2,210 | -\$470 |
| Lock Haven | \$7,716 | \$3,162 | \$6,540 | \$3,828 | \$21,246 | \$3,498 | \$884 | \$412 | \$2,410 | -\$208 |
| Mansfield | \$7,716 | \$2,966 | \$8,750 | \$3,668 | \$23,100 | \$1,644 | \$884 | \$608 | \$200 | -\$48 |
| Millersville | \$9,570 | \$2,686 | \$8,080 | \$4,200 | \$24,536 | \$208 | -\$970 | \$888 | \$870 | -\$580 |
| Shippensburg | \$9,570 | \$3,824 | \$7,670 | \$3,532 | \$24,596 | \$148 | -\$970 | -\$250 | \$1,280 | \$88 |
| Slippery Rock | \$7,716 | \$2,791 | \$6,876 | \$3,392 | \$20,775 | \$3,969 | \$884 | \$783 | \$2,074 | \$228 |
| West Chester | \$7,716 | \$2,707 | \$5,794 | \$2,978 | \$19,195 | \$5,549 | \$884 | \$867 | \$3,156 | \$642 |
| System Average (with IUP) | \$8,154 | \$3,154 | \$7,336 | \$3,631 | \$22,206 | \$2,538 | | | | |
| System Average (without IUP) : | \$8,045 | \$3,122 | \$7,212 | \$3,632 | \$22,011 | \$2,733 | | | | |

**Projected Revenue Impact - Fall Semester Only
Full-time, In-State UG Only**

| | |
|---|----------------------|
| Fall 2021 Headcount - Students taking 12-18 credits | 5,883 |
| Flat Rate | \$ 4,300 |
| Revenue from Credits 12-18 at flat rate | \$ 25,296,900 |
| Total Revenue Using Flat Rate | \$ 25,296,900 |
| Current Projected Fall 2021 Revenue | \$ 27,173,377 |
| Change in Fall Revenue with Flat Rate | (1,876,477) |
| Estimated Impact to Annual Revenue | (3,752,954) |

Using fall freeze headcount for full-time UG In-State students

Appendix C: IUP gross direct costs compared to non-PASSHE competitor schools.

| University Tuition, fees, room, and board | | | | Difference: IUP Compared to Other Schools | | |
|---|----------------------------------|-----------------|--------------------------------|---|---------------------|-------------------------------|
| University | Average Undergrad Tuition & Fees | Room/Board | Total Average UG Student Costs | Avg UG Student Total Costs | Tuition & Fees Only | IUP Diff: Room and Board Only |
| IUP (CURRENT PRICING) | \$13,144 | \$12,570 | \$25,714 | | | |
| Penn State-Main | \$18,898 | \$12,318 | \$31,216 | -\$5,502 | -\$5,754 | \$252 |
| Penn State-Regional | \$15,586 | \$12,318 | \$27,904 | -\$2,190 | -\$2,442 | \$252 |
| University of Pgh-Main* | \$20,362 | \$12,044 | \$32,406 | -\$6,692 | -\$7,218 | \$526 |
| University of Pgh-Johnstown* | \$14,352 | \$11,140 | \$25,492 | \$222 | -\$1,208 | \$1,430 |
| Duquesne University | \$43,526 | \$14,144 | \$57,670 | -\$31,956 | -\$30,382 | -\$1,574 |
| Robert Morris University | \$32,770 | \$12,320 | \$45,090 | -\$19,376 | -\$19,626 | \$250 |
| West Virginia University (in state) | \$9,144 | \$11,254 | \$20,398 | \$5,316 | \$4,000 | \$1,316 |
| West Virginia University(out of state) | \$26,824 | \$11,254 | \$38,078 | -\$12,364 | -\$13,680 | \$1,316 |
| *College of Arts and Sciences | | | | | | |

Appendix D: IPEDS Calculated Average Net Price 2009-10 to 2019-20:

As a state system, our net price is greater than public institutions in Delaware, Maryland, New Jersey, New York, Ohio, and West Virginia (bordering states). IUP is has the fourth highest net price in 2019-20 (most recent data from IPEDS) compared to the other PASSHE schools.

| Pennsylvania's State System of Higher Education | | | | | | | | | | | | |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|---|
| Net Price for First-time, Full-time In-state Undergraduate Students | | | | | | | | | | | | |
| Average net Price (Cost of Attendance minus Average Grants) | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | Percentage Change from 2009-10 to 2019-20 |
| State System | \$11,956 | \$13,941 | \$14,690 | \$15,498 | \$15,598 | \$16,589 | \$16,966 | \$17,894 | \$18,226 | \$18,448 | \$18,250 | 52.6% |
| PA State Related | \$14,368 | \$15,904 | \$16,030 | \$16,564 | \$16,749 | \$17,387 | \$17,374 | \$17,907 | \$19,299 | \$19,924 | \$19,021 | 32.4% |
| PA 4 Year Private | \$21,562 | \$22,077 | \$22,941 | \$23,626 | \$23,683 | \$24,305 | \$24,508 | \$24,939 | \$25,351 | \$25,507 | \$26,064 | 20.9% |
| PA Community Colleges | \$6,214 | \$5,876 | \$6,369 | \$6,147 | \$6,117 | \$6,604 | \$6,918 | \$7,578 | \$7,484 | \$7,524 | \$8,127 | 30.8% |
| National 4 Year Public | \$10,084 | \$10,464 | \$11,199 | \$11,465 | \$11,581 | \$11,940 | \$12,126 | \$12,412 | \$12,463 | \$12,512 | \$12,780 | 26.7% |
| PA 4 Year Public | \$13,633 | \$15,364 | \$15,692 | \$16,342 | \$16,478 | \$17,211 | \$17,362 | \$17,958 | \$19,060 | \$19,238 | \$18,879 | 38.5% |
| DE 4 Year Public | \$9,706 | \$10,187 | \$10,883 | \$10,523 | \$11,558 | \$11,703 | \$11,706 | \$12,374 | \$12,459 | \$13,017 | \$14,030 | 44.5% |
| MD 4 Year Public | \$12,644 | \$13,519 | \$13,887 | \$13,905 | \$13,698 | \$14,356 | \$14,835 | \$15,858 | \$15,996 | \$16,929 | \$16,325 | 29.1% |
| NJ 4 Year Public | \$12,833 | \$13,711 | \$14,250 | \$14,035 | \$14,033 | \$15,019 | \$15,237 | \$15,876 | \$16,628 | \$17,051 | \$18,016 | 40.4% |
| NY 4 Year Public | \$10,563 | \$10,288 | \$10,889 | \$11,398 | \$11,762 | \$12,491 | \$12,015 | \$11,773 | \$11,579 | \$11,715 | \$12,375 | 17.2% |
| OH 4 Year Public | \$11,446 | \$11,649 | \$12,156 | \$11,779 | \$11,781 | \$11,456 | \$11,541 | \$11,429 | \$10,841 | \$11,378 | \$11,728 | 2.5% |
| WV 4 Year Public | \$9,138 | \$8,997 | \$9,538 | \$9,314 | \$8,999 | \$9,136 | \$9,421 | \$9,313 | \$10,203 | \$10,112 | \$10,903 | 19.3% |
| State System Universities | | | | | | | | | | | | |
| Average net Price (Cost of Attendance minus Average Grants) | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | Percentage Change from 2009-10 to 2019-20 |
| Bloomsburg | \$12,664 | \$14,727 | \$15,793 | \$16,343 | \$15,740 | \$16,031 | \$16,027 | \$16,501 | \$17,137 | \$18,075 | \$18,302 | 44.5% |
| California | \$13,880 | \$16,892 | \$16,844 | \$16,829 | \$16,890 | \$17,233 | \$17,819 | \$17,755 | \$18,780 | \$18,264 | \$19,116 | 37.7% |
| Cheyney | \$12,753 | \$11,679 | \$13,165 | \$13,516 | \$13,848 | \$15,118 | \$12,013 | \$14,485 | \$14,620 | \$8,433 | \$11,068 | -13.2% |
| Clarion | \$10,516 | \$13,152 | \$13,752 | \$14,588 | \$15,311 | \$16,530 | \$17,972 | \$18,409 | \$19,297 | \$19,769 | \$19,526 | 85.7% |
| East Stroudsburg | \$9,455 | \$12,214 | \$13,338 | \$14,437 | \$15,664 | \$16,138 | \$16,377 | \$15,402 | \$15,275 | \$18,635 | \$18,500 | 95.7% |
| Edinboro | \$11,609 | \$14,488 | \$14,007 | \$13,833 | \$13,864 | \$14,089 | \$14,323 | \$15,513 | \$15,223 | \$15,167 | \$14,170 | 22.1% |
| Indiana | \$14,193 | \$15,048 | \$16,344 | \$16,704 | \$15,956 | \$16,469 | \$17,264 | \$19,247 | \$19,646 | \$20,944 | \$20,933 | 47.5% |
| Kutztown | \$12,950 | \$13,201 | \$14,191 | \$17,009 | \$17,158 | \$18,822 | \$19,385 | \$20,278 | \$22,084 | \$22,401 | \$21,673 | 67.4% |
| Lock Haven | \$9,146 | \$12,253 | \$13,130 | \$12,958 | \$14,196 | \$14,394 | \$16,207 | \$17,191 | \$18,491 | \$19,128 | \$19,521 | 113.4% |
| Mansfield | \$12,597 | \$13,485 | \$14,824 | \$15,520 | \$14,351 | \$16,650 | \$17,080 | \$19,653 | \$18,792 | \$18,153 | \$12,010 | -4.7% |
| Millersville | \$11,595 | \$12,899 | \$14,449 | \$15,780 | \$14,418 | \$17,950 | \$18,624 | \$19,731 | \$19,481 | \$21,505 | \$21,599 | 86.3% |
| Shippensburg | \$9,976 | \$13,372 | \$14,533 | \$14,687 | \$16,714 | \$17,605 | \$18,342 | \$19,448 | \$19,635 | \$20,308 | \$21,631 | 116.8% |
| Slippery Rock | \$13,997 | \$13,710 | \$15,507 | \$15,354 | \$15,471 | \$16,021 | \$17,443 | \$17,557 | \$17,617 | \$18,144 | \$18,117 | 29.4% |
| West Chester | \$12,050 | \$18,055 | \$15,777 | \$19,407 | \$18,792 | \$19,191 | \$18,651 | \$19,348 | \$19,091 | \$19,348 | \$19,336 | 60.5% |
| System | \$11,956 | \$13,941 | \$14,690 | \$15,498 | \$15,598 | \$16,589 | \$16,966 | \$17,894 | \$18,226 | \$18,448 | \$18,250 | 52.6% |
| Source: IPEDS (data as pulled on 09/23/2021) | | | | | | | | | | | | |
| Notes: | | | | | | | | | | | | |
| For public institutions - data is for full-time, first-time, degree/certificate-seeking undergrads paying the in-state or in-district tuition rate that received federal, state, local, or institutional grants or scholarships | | | | | | | | | | | | |
| For private institutions - data is for all full-time, first-time, degree/certificate-seeking undergrads (private not-for-profit institutions and institutions reporting cost of attendance by program) that received federal, state, local, or institutional grants or scholarships | | | | | | | | | | | | |
| Room and board costs are weighted in IPEDS' calculation based on number of students reported in each housing status (on-campus, off-campus not with family, off-campus with family) | | | | | | | | | | | | |
| Cost of Attendance includes tuition, fees, room, board, books and supplies, and other expenses, as budgeted by the financial aid offices | | | | | | | | | | | | |
| Average Grants--All "free" financial aid to the student (from federal, state, local, or institutional sources); that which does not need to be repaid. Includes need-based and merit-based awards, such as Pell grants, PHEAA grants, scholarships, waivers, tuition discounts, etc. | | | | | | | | | | | | |
| System and State data are straight averages of IPEDS' calculated average net price | | | | | | | | | | | | |

Appendix E: U.S. Department of Education list of 4 year or above public institutions with the highest net prices. As the first chart indicates, IUP is listed 29 of 36 schools identified. Eight of the schools are in Pennsylvania and four, including IUP were listed among the schools with the highest net price.

U.S. Department of Education

4-year or above, public with Highest Net Prices

National Average: \$12,467

| Institution | City | State | Net Price ⁽¹⁾⁽²⁾ | Students Receiving Grant Aid ⁽³⁾ |
|---|------------------------|-----------|-----------------------------|---|
| Carolinas College of Health Sciences | Charlotte | NC | \$40,090 | 100% |
| Radford University-Carilion | Roanoke | VA | \$30,679 | 98% |
| Colorado School of Mines | Golden | CO | \$26,856 | 81% |
| Christopher Newport University | Newport News | VA | \$25,443 | 60% |
| Massachusetts College of Art and Design | Boston | MA | \$25,188 | 93% |
| Pennsylvania State University-Main Campus | University Park | PA | \$24,724 | 50% |
| University of New Hampshire-Main Campus | Durham | NH | \$24,056 | 85% |
| The College of New Jersey | Ewing | NJ | \$23,945 | 50% |
| Auburn University | Auburn | AL | \$23,562 | 63% |
| Pennsylvania College of Technology | Williamsport | PA | \$23,440 | 87% |
| University of Baltimore | Baltimore | MD | \$23,335 | 89% |
| Temple University | Philadelphia | PA | \$23,032 | 83% |
| Miami University-Oxford | Oxford | OH | \$22,989 | 72% |
| University of Massachusetts-Amherst | Amherst | MA | \$22,927 | 82% |
| Rowan University | Glassboro | NJ | \$22,805 | 65% |
| University of Pittsburgh-Pittsburgh Campus | Pittsburgh | PA | \$22,600 | 55% |
| Ohio University-Main Campus | Athens | OH | \$22,521 | 84% |
| Kutztown University of Pennsylvania | Kutztown | PA | \$22,401 | 78% |
| University of Colorado Boulder | Boulder | CO | \$22,077 | 53% |
| University of Oklahoma-Norman Campus | Norman | OK | \$21,804 | 89% |
| University of South Carolina-Columbia | Columbia | SC | \$21,787 | 91% |
| University of Mary Washington | Fredericksburg | VA | \$21,640 | 89% |
| Millersville University of Pennsylvania | Millersville | PA | \$21,505 | 61% |
| Clemson University | Clemson | SC | \$21,482 | 88% |
| Obispo | San Luis Obispo | CA | \$21,232 | 51% |
| The University of Tennessee-Knoxville | Knoxville | TN | \$21,024 | 84% |
| St. Mary's College of Maryland | St. Mary's City | MD | \$20,996 | 93% |
| Virginia Commonwealth University | Richmond | VA | \$20,968 | 68% |
| Indiana University of Pennsylvania-Main Campus | Indiana | PA | \$20,944 | 70% |
| Georgia College & State University | Milledgeville | GA | \$20,823 | 94% |
| Maine Maritime Academy | Castine | ME | \$20,728 | 67% |
| The University of Alabama | Tuscaloosa | AL | \$20,623 | 64% |
| Vermont Technical College | Randolph | VT | \$20,604 | 88% |
| Shippensburg University of Pennsylvania | Shippensburg | PA | \$20,308 | 67% |
| SUNY College of Environmental Science and Forestry | Syracuse | NY | \$20,215 | 87% |
| George Mason University | Fairfax | VA | \$20,157 | 62% |

⁽¹⁾Net Price after Scholarships and Grant Aid, 2018-19

⁽²⁾in-state/in-district students

⁽³⁾Percent of full-time beginning undergraduate students who received grant or scholarship aid from federal, state or local governments, or the institution

Note: Average net price is generated by subtracting the average amount of federal, state/local government, or institutional grant or scholarship aid from the total cost of attendance. Total cost of attendance is the sum of published tuition and required fees (lower of in-district or in-state, where applicable), books and supplies, and the weighted average for room and board and other expenses.

Average net price is for full-time beginning undergraduate students who received grant or scholarship aid from federal, state or local governments, or the institution.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), Fall 2019, Institutional Characteristics component and Winter 2019-20, Student Financial Aid component.

Appendix F: The average credit hours in which undergraduate, in-state students have enrolled has declined each year since the implementation of per-credit pricing. This reduced course load ultimately results in a decline in the calculated full-time enrollment (FTE). FTE is calculated by dividing the number of total credit hours by 15 credits and is utilized as an alternative to headcount for the measurement of overall enrollment. The headcount to FTE ratio declined from 98.77% in fall 2015 to 96.08% in fall 2021. Applying the FTE to head count ratio from fall 2015 to the head count in fall 2021, we would have had an additional 2,385.45 credits generated and a 159.03 FTE increase.

| Fall IUP Undergraduate In State Full-Time Students | | | | | |
|--|------------|--------------|----------------------|--------------|-------------------------|
| Freeze Term | Head Count | Credit Hours | Average Credit Hours | Semester FTE | FTE to Head Count Ratio |
| Fall 2010 | 10,951 | 161,060.00 | 14.71 | 10737.33 | 98.05% |
| Fall 2011 | 11,026 | 162,260.00 | 14.72 | 10817.33 | 98.11% |
| Fall 2012 | 10,993 | 161,476.50 | 14.69 | 10765.10 | 97.93% |
| Fall 2013 | 10,503 | 155,268.50 | 14.78 | 10351.23 | 98.56% |
| Fall 2014 | 10,234 | 150,996.00 | 14.75 | 10066.40 | 98.36% |
| Fall 2015 | 9,724 | 144,059.00 | 14.81 | 9603.93 | 98.77% |
| Fall 2016 | 8,949 | 131,296.50 | 14.67 | 8753.10 | 97.81% |
| Fall 2017 | 8,560 | 125,577.00 | 14.67 | 8371.80 | 97.80% |
| Fall 2018 | 7,697 | 113,079.50 | 14.69 | 7538.63 | 97.94% |
| Fall 2019 | 6,946 | 101,986.00 | 14.68 | 6799.07 | 97.88% |
| Fall 2020 | 6,517 | 94,967.00 | 14.57 | 6331.13 | 97.15% |
| Fall 2021 | 5,908 | 85,144.50 | 14.41 | 5676.30 | 96.08% |
| Implementation of per-credit tuition. | | | | | |

While we did have a decline in headcount and credit hours prior to per-credit tuition, the decline from fall 2016 to fall 2021 was significantly higher.

| Fall IUP Undergraduate In State Full-Time Students | | | |
|--|-------------------|---------------------|--------------|
| Comparison Terms | Head Count Change | Credit Hours Change | Semester FTE |
| Fall 2010 to Fall 2015 | -11.20% | -10.56% | -10.56% |
| Fall 2016 to Fall 2021 | -33.98% | -35.15% | -35.15% |

Appendix G: The percent of undergraduate, in state students who enrolled in 15 credits or more declined each year after the implementation of per-credit pricing.

| Fall Instate UG Students by Credit Category | | | | | |
|--|--|---|--|---|-----------------------|
| Fall Term | Number of Students with 12 to 14.99 Credits | Percent of Students with 12 to 14.99 Credits | Number of Students with 15+ Credits | Percent of Students with 15+ Credits | Total Students |
| 201040 | 4098 | 37.42% | 6853 | 62.58% | 10951 |
| 201140 | 3993 | 36.21% | 7033 | 63.79% | 11026 |
| 201240 | 3941 | 35.85% | 7052 | 64.15% | 10993 |
| 201340 | 3507 | 33.39% | 6996 | 66.61% | 10503 |
| 201440 | 3510 | 34.31% | 6719 | 65.69% | 10229 |
| 201540 | 3077 | 31.64% | 6647 | 68.36% | 9724 |
| 201640 | 3196 | 35.73% | 5750 | 64.27% | 8946 |
| 201740 | 3085 | 36.04% | 5475 | 63.96% | 8560 |
| 201840 | 2874 | 37.36% | 4819 | 62.64% | 7693 |
| 201940 | 2672 | 38.47% | 4274 | 61.53% | 6946 |
| 202040 | 2654 | 40.72% | 3863 | 59.28% | 6517 |
| 202140 | 2570 | 43.52% | 3335 | 56.48% | 5905 |
| Implementation of per-credit tuition | | | | | |

Appendix H: Admission funnel data for Pennsylvania new freshman and transfer students. The average yield rate from admit to enroll prior to fall 2016 was 33.7% for Pennsylvania freshmen. After and including fall 2016, the average yield from admit to enroll is 24.41% (-9.29 ppt). For transfer students, the average admit to enroll yield prior to fall 2016 was 77.17%. After and including fall 2016 the yield from admit to enroll is 68.72% (-8.45 ppt).

| Pennsylvania Freshman Admission Data | | | | | |
|--------------------------------------|------------|------------|--------|----------|-----------------------|
| | Total Apps | App Change | Admits | Enrolled | Yield Admit to Enroll |
| Fall 2013 | 9068 | | 7075 | 2496 | 35.28% |
| Fall 2014 | 9514 | 4.92% | 7709 | 2603 | 33.77% |
| Fall 2015 | 9385 | -1.36% | 7380 | 2365 | 32.05% |
| Fall 2016 | 8967 | -4.45% | 7385 | 2141 | 28.99% |
| Fall 2017 | 10928 | 21.87% | 7929 | 2242 | 28.28% |
| Fall 2018 | 10422 | -4.63% | 8002 | 1921 | 24.01% |
| Fall 2019 | 11094 | 6.45% | 8618 | 1738 | 20.17% |
| Fall 2020 | 9297 | -16.20% | 7388 | 1734 | 23.47% |
| Fall 2021 | 8780 | -5.56% | 7355 | 1586 | 21.56% |

| | | | | | |
|--------------------------------------|--|--|--|--|--|
| Implementation of per-credit tuition | | | | | |
|--------------------------------------|--|--|--|--|--|

| Pennsylvania Transfer Admission Data | | | | | |
|--------------------------------------|------------|------------|--------|----------|-----------------------|
| | Total Apps | App Change | Admits | Enrolled | Yield Admit to Enroll |
| Fall 2013 | 1233 | | 809 | 641 | 79.23% |
| Fall 2014 | 1169 | -5.19% | 754 | 570 | 75.60% |
| Fall 2015 | 1152 | -1.45% | 720 | 552 | 76.67% |
| Fall 2016 | 1008 | -12.50% | 696 | 518 | 74.43% |
| Fall 2017 | 1021 | 1.29% | 663 | 463 | 69.83% |
| Fall 2018 | 936 | -8.33% | 558 | 378 | 67.74% |
| Fall 2019 | 866 | -7.48% | 485 | 346 | 71.34% |
| Fall 2020 | 788 | -9.01% | 477 | 289 | 60.59% |
| Fall 2021 | 731 | -7.23% | 408 | 279 | 68.38% |

| | | | | | |
|--------------------------------------|--|--|--|--|--|
| Implementation of per-credit tuition | | | | | |
|--------------------------------------|--|--|--|--|--|

Faculty Workforce Reductions
Updated as of January 15, 2022 as Compared to CPP V3

| Fiscal Year | Positions Vacated and Eliminated | | Target ³ | | Remaining to Target | |
|------------------------|----------------------------------|----------------------|---------------------|----------------------|---------------------|---------------------|
| | FTE | Associated Savings | FTE | Savings | FTE | Savings |
| 2019-2020 ¹ | 17.5 | \$ 2,203,026 | 17.5 | \$ 2,203,026 | - | \$ - |
| 2020-2021 ² | 55.9 | \$ 6,504,834 | 51.6 | \$ 7,048,783 | (4.3) | \$ 543,949 |
| 2021-2022 | 91.7 ⁴ | \$ 11,820,196 | 128 ⁵ | \$ 18,592,688 | 36.3 | \$ 6,772,492 |
| 2022-2023 | 17.1 | \$ 2,964,987 | | | (17.1) | \$ (2,964,987) |
| Cumulative | 182.2 | \$ 23,493,043 | 197.1 | \$ 27,844,497 | 14.9 | \$ 4,351,454 |

Notes:

¹. No target was set for 2019-2020; Target set to actual. The 17.5 FTE includes 3 temporaries, resulting from a permanent reduction to the base temporary pool budget in FY2019-2020.

². Associated Savings for FY2020-21 Positions Vacated and Eliminated was updated with actual salary and benefits for 55.9 positions identified as of 2-25-2021. Target Associated Savings was based on V3 average salary and benefits:
Salary - \$95,633.94, Benefits - \$40,889.09

³. Target for FY2020-2021 and FY2021-2022 combined from CPP V3 was 182 FTE and \$25.7 million. CPP V3 was submitted to OOC on September 4, 2020. The Original target for FY2020-2021 was 32 FTE and \$4.22 million. Reductions have already occurred, so target set to actual.

⁴. Included in the 91.7 FTE vacating in FY2021-22 are those who have received notices of retrenchment as well as those who have submitted official notices of separation. Also included is FTE savings resulting from a permanent reduction to temporary faculty budgets. Because of mid-year separations, the notices of separation have FTE reductions reflected in multiple years, FY2020-21 (5.78 FTE) and FY2021-22 (52.24 FTE). One confirmed separation has been identified as a critical need and approved for appointment in FY2022-23. Currently the separation is included in savings progress however, the FTE will be adjusted when the appointment occurs. As we have received more details regarding actual separation dates, this report has been updated to now show the FTE and associated savings that will occur in FY2020-21, FY2021-22 and FY2022-23.

⁵. CPP V3 remaining FY2021-2022 target was 130.4. The savings with this target FTE was calculated using average salary benefits as follows: Salary - \$98,993.43, Benefits - \$43,588.47
The President has revised this target to 128. If the savings would be revised to reflect a target of 128 instead of 130.4 an additional savings of \$342,205 would need to be identified

⁶. FY2021-2022 Temp Faculty reduction is the approved plan as presented in CPP V8. The assumption is that this will be a permanent reduction. Presented is the difference with CPP V3 which adds progress to the overall workforce reductions.

⁷. The FY2021-22 FTE for positions vacated and eliminated increased by 1.9 FTE (from 161.3 to 163.3) as compared to the September summary. This was the result of additional 1.9 FTE savings from official separation notices being submitted. From October 2021 to January 2022, APSCUF FTE reductions increased by 18.9 FTE, increasing the percentage reduction in APSCUF from 26.9% to 30%

Non-Faculty Workforce Reductions
Updated as of January 15, 2022 as Compared to CPP V3

Non-Faculty Workforce Reductions - Progress as of 1-15-2022 - DRAFT

| Fiscal Year | Vacancies Removed from CPP V3 Base Workforce Prior to Target | | Positions Vacated and Eliminated | | Target | | Remaining to Target | |
|------------------------|--|---------------------|----------------------------------|---------------------------------|-------------------|----------------------|---------------------|----------------------|
| | FTE | Associated Savings | FTE | Associated Savings ³ | FTE | Savings ³ | FTE | Savings ³ |
| 2019-2020 ¹ | 0 | \$ - | 9.70 | \$ 1,153,727 | 9.70 | \$ 1,153,727 | 0.00 | \$ - |
| 2020-2021 | 63.0 ² | \$ 5,914,864 | 106.63 ⁵ | \$ 8,703,525 | 80.1 ⁴ | \$ 7,523,674 | (26.53) | \$ (1,179,851) |
| 2021-2022 | 0 | \$ - | 10.12 ⁵ | \$ 1,237,983 | 80.1 ⁴ | \$ 7,523,674 | 69.98 | \$ 6,285,691 |
| 2022-2023 | 0 | \$ - | 6.05 ⁵ | \$ 712,046 | | | (6.05) | \$ (712,046) |
| Cumulative | 63.00 | \$ 5,914,864 | 132.50 | \$ 11,807,281 | 169.90 | \$ 16,201,075 | 37.40 | \$ 4,393,794 |

Notes:

- No target was set for 2019-2020; target set to actual.
- There were 63.0 vacant positions removed from the base workforce in CPP V3 prior to the determination of the targets. These FTE do not count towards the target for FY2020-21 as submitted in CPP V3. If the vacant positions had not been removed from the base workforce, the FTE target to reach would have been higher.
- The FY2020-21, FY2021-22, and FY2022-23 Savings for Target and Remaining to Target were calculated based on average salary and benefits for each bargaining unit. The FY2020-21, FY2021-22, and FY2022-23 Positions Vacated and Eliminated To-Date savings was calculated based on actual salary and benefit savings.
- Target for FY2020-21 and FY2021-22 combined from CPP V3 was 160.2 FTE and \$15,047,347, which was submitted to OOC on September 4, 2020. The target FTE for each fiscal year, 80.1 was applied to each bargaining unit based on a weighted average of FTE for that bargaining unit as compared to total FTE for all non-faculty bargaining units.
- The FY2020-21, FY2021-22, and FY2022-23 FTE for positions vacated and eliminated was increased by 15.54 FTE (from 116.96 to 132.50) as compared to the October summary. This was updated after the vacant positions were reviewed by the respective President's Cabinet members. After review by President's Cabinet, any position that was not confirmed for elimination was not included in the 132.50 FTE of Positions Vacated and Eliminated. This position count will continue to be reviewed and updated as official retirement and separation notices are provided to HR.

Recap of Non-Faculty Target Workforce Reduction Progress as of 1-15-2022

| Total Non-Faculty Reductions since July 1, 2019 by Bargaining Unit | | | | | | |
|--|---|----------------|---|-------------------|------------------|---------------------------------|
| Bargaining Unit | 18-19 Total Bargaining Unit FTE (baseline) ⁽¹⁾ | FTE Reductions | % FTE Reduction to Total FTE by Bargaining Unit | Salary Savings | Benefits Savings | Total Salary & Benefits Savings |
| AFSCME | 391.66 | 130.15 | 33% | 5,784,061 | 4,377,871 | 10,161,933 |
| Non-Represented | 186.14 | 44.36 | 24% | 3,960,491 | 1,874,950 | 5,835,441 |
| SCUPA | 64.09 | 14.32 | 22% | 796,838 | 459,183 | 1,256,021 |
| Other | 57.13 | 6.67 | 12% | 312,614 | 156,136 | 468,751 |
| Totals | 699.02 | 195.50 | 28% | 10,854,005 | 6,868,140 | 17,722,145 |

The percentage reduction to APSCUF annualized FTE is 30.0% ⁽²⁾

1. 18-19 Total Bargaining Unit FTE (baseline) was obtained from CPP V3 and reflects the actual FY2018-19 Annualized FTE

2. The APSCUF annualized FTE was obtained from CPP V3 and reflects the actual FY2018-19 Annualized FTE.

APSCUF Annualized FTE was used to maintain consistency with the Non-Faculty FTE above even though the target Student/Faculty ratio of 19.2 is calculated using Fall FTE Faculty.

From October 2021 to January 2022, APSCUF FTE reductions increased by 18.9 FTE, increasing the percentage reduction in APSCUF from 26.9% to 30%

| Total Non-Faculty Reductions since July 1, 2019 by Division | | | | |
|---|---------------|-------------------|------------------|---------------------------------|
| Division | FTE | Salary Savings | Benefits Savings | Total Salary & Benefits Savings |
| Academic Affairs | 81.43 | 4,841,883 | 2,803,316 | 7,645,199 |
| Administration and Finance | 74.74 | 3,798,763 | 2,862,062 | 6,660,825 |
| Enrollment Management | 9.20 | 480,551 | 252,593 | 733,144 |
| Marketing and Communications | 4.00 | 241,592 | 166,907 | 408,499 |
| President's Area | 2.80 | 228,366 | 134,362 | 362,728 |
| University Advancement | 4.69 | 256,339 | 133,056 | 389,396 |
| Student Affairs | 18.64 | 1,006,511 | 515,845 | 1,522,355 |
| Totals | 195.50 | 10,854,005 | 6,868,140 | 17,722,145 |