

University Senate Minutes

April 5, 2022

3:45pm – 5:00pm, ZOOM

- Chairperson Piper called the April 5, 2022 meeting of the University Senate to order at 3:45pm
- Minutes from the March 1, 2022 meeting were APPROVED
- Agenda items for the April 5, 2022 meeting were APPROVED

Reports and Announcements

A. President's Report:

- Thank you to everyone who participated in Chancellor Greenstein's virtual visit yesterday. He was, once again, impressed by you and IUP.
- It's a busy week at IUP. As you have probably heard, four finalists for the position of provost and vice president for academic affairs are visiting campus today, tomorrow, Thursday, and Friday. Please make time to visit with the candidates and provide your feedback. My thanks to the provost search committee, ably co-chaired by Anne Kondo and Bill Balint.
- Next week, on April 12, we will hold our second spring town hall - "Operationalizing the Strategic Plan." The town hall will be in the Great Room at the Center for Multicultural Student Leadership and Engagement in Elkin Hall over the common hour 11:30-12:30. I look forward to seeing you there.
- Also next week, April 13-14, the State System Board of Governors will be meeting in Harrisburg - but not at the Dixon University Center, which has been sold. A key topic for the board is the setting of tuition rates for next year.
- We all know this is a stressful time of the academic year and I encourage you to support each other and to be tolerant of your stressed out colleagues. Thank you for your good work and I wish you a productive (relatively) calm April.

B. Provost's Report:

- Research Week was kicked off yesterday with Women in STEM and the Research Awards. Research Week activities will continue throughout the week with the Scholars Forum and Three-Minute Thesis being held Wednesday; the IUP & IRMC event on Thursday; and on Friday, Coffee and Collaborate Session with Theresa McDevitt from the Libraries. On Friday evening, a Celebration of Philanthropy will be held. On Saturday, we will celebrate a cohort of seven distinguished alums that will be honored for their great contributions.

FOR INFORMATION:

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

From the University-Wide Undergraduate Curriculum Committee:

1. New Courses
 - BIOL 404 – Forest Ecosystem Restoration
 - ENGL 103 – Composition I Accelerated
 - EDUC 493 – ESL Field Experience
2. The following programs are being placed in moratorium:
 - Latin American Studies Minor
 - Pre-Audiology Track, Natural Science, BS
3. The following program revisions will be forwarded to the Council of Trustees for final approval:
 - Finance Minor
 - Special Education PK-12 Minor

From the University-Wide Graduate Committee:

1. New Courses
 - ANTH 521 – Forensic Archaeology Field School
 - BIOL 604 – Forest Ecosystem Restoration
 - GEOG 660 – Foundations of Unmanned Aerial Systems Science and Applications
 - GEOG 663 – Unmanned Aerial Systems for Remote Sensing and Spatial Data Acquisition
2. The following program revisions will be forwarded to the Council of Trustees for final approval:
 - Nursing, PhD (DNP to PhD Pathway)
3. The following new program will be forwarded to the Council of Trustees for final approval:
 - Unmanned Aerial Systems Science, Applications and Management Certificate (Post-Bacc)

In response to the Senate recommendation from the March 1, 2022 meeting, I accept the following:

- Undergraduate policy changes as follows:
 - Academic Standards Policy
 - Schedule Changes (Drop/Add)
 - Grades and Quality Points Policy

C. Chair's Report:

- Please submit all Committee Reports to Senate Secretary, Amber Racchini, by 4pm on Wednesday, April 20.
- We are almost at the finish line – stay strong!

- As part of our NextGen work, there is a chance that we might have Senate meetings during the summer. If issues arise, we want to be able to provide the President and the administration, the voice of the University Senate. These meetings will occur via Zoom.

D. Vice Chairperson's Report:

- 'Chat with the Deans' event was successful. We were able to generate good conversation on student centeredness, Ramadan concerns, and graduate TA-ship issues.
- Board of Student Government Presidents (BSGP) had a conference over the weekend. The meeting involved representatives from the student government associations of all the PASSHE schools.
- SGA elections are currently in the works. Members who are running for a position will have a debate session via Zoom on April 12. President Driscoll as well as students will gather to ask any questions they may have. Voting for the candidates will last from April 12 through April 17.
- SGA is partnering with MCSLE to sponsor the Leadership Awards ceremony which will take place on April 22 from 5:30pm-7:30pm in the Blue Room of Sutton Hall.

GSA Report:

- Will have their April meeting tomorrow. David Berberich, who is the Associate Director for Residence Hall Services and Student Opportunities will be joining the meeting as the guest speaker to talk about affordable housing for graduate students at IUP.

Standing Committee Reports

A. Rules Committee (Chair Smith-Sherwood)

FOR INFORMATION:

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

Having cleared the majority vote requirement on the floor of the Senate at the March 1, 2022, meeting, the proposed amendment was ratified with 98.6%, or more than two-thirds of those voting, voting in the affirmative.

FOR INFORMATION:

PROPOSED AMENDMENT TO THE CONSTITUTION (FIRST READING): Strike the word “three,” replace with “four” before “representatives from the staff as elected from and by the staff.”

The proposed amendment to strike the word “three,” replace with “four” before “representatives from the staff as elected from and by the staff” is presented to the Senate for a first reading and will be brought to the floor for a vote on April 26, 2022. The first reading as well as a rationale for the amendment is included in Appendix A.

FOR ACTION:**APPROVED**

PROPOSED AMENDMENT TO THE CONSTITUTION (SECOND READING): Strike the words “of the Northpointe and Punxsutawney campuses,” replace with “providing instruction at other locations.” At the March 1, 2022, meeting, the proposed amendment to strike the words “of the Northpointe and Punxsutawney campuses” and replace with the words “providing instruction at other locations” 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.

FOR INFORMATION:

The Phase I election is complete, and results will be distributed via email later this week. A call for nominations for Phase II of the election cycle (for standing committees) will launch Tuesday, April 12, 2022. The Phase II election will occur the following week. The Rules Committee wishes to thank Glenn Good of IT Services and Suparna Gope of the ARL for their assistance in the creation and distribution of the Qualtrics survey. Thanks, too, to Eric Barker of Marketing and Communications for his assistance with updating the MyIUP nomination screens.

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, April 12, at 3:30 pm via Zoom.

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

- Our committee had an extended meeting a week ago and an extra meeting last week. We are trying to catch up with all the proposals that have come in last couple weeks.

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

- We will be meeting after Senate today, Thursday and Tuesday to try to get through the curriculum that was sent to us. If you are still sending curriculum, we cannot guarantee that we can get to it at this stage.

D. Library and Education Services Committee (Chair Chadwick)

- Our next meeting is Tuesday, April 12 at 3:45pm via Zoom.

E. Research Committee (Co-Chair Guth)**FOR INFORMATION:****Meeting Minutes – March 8, 2022**

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

There were 7 USRC Small Grant proposals for review, and the decision was made to fund 6 proposals, totaling \$10,504.

- Jill Brady
- William Chadwick
- Terilyn Huntington

- Robert Moore
- Dawn Smith-Sherwood
- Todd Thompson

- Our next meeting will be Tuesday, April 12, 2022, 3:30PM, via Zoom.

F. Student Affairs Committee (Chair Erwin)

- Our next meeting is Tuesday, April 12 at 3:45pm via Zoom.

G. University Development and Finance Committee (Chair Drye)

- No report.

H. Academic Affairs Committee (Chair Dugan)

FOR ACTION:

APPROVED

CURRENT

Experiential Learning (approved 3.31.2015)

Internship Experiences

University-sponsored internships are often an important part of an academic program. Students may apply for an internship if they have completed 60 credits and have at least a 2.0 GPA. Forty hours of supervised internship is equivalent to one academic credit hour. A maximum of 12 credits is applicable to an undergraduate degree program from internship experiences. Internships are available at a variety of venues, such as governmental agencies, businesses, foundations, and other organizations.

Students who are interested in internships must consult with their program's academic advisor, since they may need to meet additional internship requirements specific to their program, department or college.

In all cases, an approved agreement between the university and the external organization at which the internship will be performed must be in place before the student can be enrolled for internship credit.

Cooperative Education (Co-ops)

Some departments allow students to participate in cooperative education experiences. These experiences provide students with opportunities to gain practical work experiences related to their academic programs. These experiences may be the first contact students have working in their profession, and are often offered for zero credit, and are typically unpaid.

Students may apply for co-ops if they have completed 30 credits and have at least a 2.0 GPA. They typically participate in these programs during their sophomore or junior years, often during the summer. Interested students need to consult with their academic advisors concerning the availability and requirements of co-ops within their department.

In all cases, if students decide to register for a co-op course, an approved agreement between the university and the external organization at which the co-op experience will be performed must be in place before the student can enroll in the course.

Prior Learning and Credit/Exemption Examinations (approved 3.31.2015)

There are a variety of examinations through which students may earn college credit or exemptions. Courses for which credits or exemptions are awarded by examination will not be used in the determination of grade point averages.

When a student receives credit for a course by examination, the credit will be applied to graduation requirements just as though the course had been taken. A student who passes an exemption examination will be exempt from taking that course in his/her academic program. If a student is granted exemption only (no credits) from a course, he/she may need to take another course to fulfill degree requirements.

Where examinations are not available, portfolio assessment may provide a student with the opportunity to earn university credit for college-level learning gained through work and life experience. Each department will determine the maximum number of credits to be awarded for portfolio assessment for its majors.

No more than one-half of the credits required for a student's major may be earned through any combination of examinations or portfolio assessment, nor can these credits be applied toward university residency requirements for awarding of degrees.

Advanced Placement Examinations

Courses taken by students before college admission under the Advanced Placement Program of the College Entrance Examination Board may be recognized by the award of college credit. Those who earn a score of 3, 4, or 5 in the Advanced Placement Examination may be granted credit toward the number of credits required for graduation. For questions regarding the granting of Advanced Placement examination credits, consult with Transfer Services in the Admissions Office.

CLEP Examinations

Students who have had other opportunities for instruction or who have advanced in a given field may gain credit for a course through the College Level Examination Program (CLEP) offered through University Testing Services. For questions regarding the granting of CLEP examination credits, consult with Transfer Services in the Admissions Office.

International Baccalaureate Examinations

Courses taken by students before college admission under the International Baccalaureate Program may be recognized by the award of college credit. Those who take and pass the Higher Level examination with a 4 or higher may be granted credit toward the number of credits required for graduation. For questions regarding the granting of International Baccalaureate examination credits, consult with Transfer Services in the Admissions Office.

Departmental Examinations

In some departments, students have an opportunity to gain exemption or credit through successful completion of comprehensive examinations by requesting from the academic department an exam as a substitute for completing all the usual requirements of the course.

Portfolio Assessment

Portfolio assessment may provide some students with the opportunity to present evidence of learning for evaluation by a faculty member. It is designed for those with extensive documentable knowledge from work experience, travel, independent study, or other out-of-class experiences. Through portfolio assessment, these experiences are evaluated to determine their appropriateness and applicability for university credit.

Credit awarded through portfolio assessment must conform to specific course titles in the undergraduate catalog (i.e., no credits will be awarded for general areas of knowledge), and will only be awarded for undergraduate courses. Only currently enrolled students are eligible to request portfolio assessment, and any credits awarded must be intended for use as part of a degree or certificate program.

Before portfolio assessment credits can be awarded, approval must be obtained from the chairperson of the department offering the course, the dean of the appropriate IUP college, and the director of the Office of Extended Studies. Once approved, the title of the course, the credits, and indication that credit was earned through portfolio assessment will be recorded on a student's academic record.

If a related examination is available through the College Level Examination Program (CLEP) or if a departmental examination has previously been established for the course, a portfolio assessment of those credits will not be accepted.

For information about portfolio assessment fees and instructions on how to apply for portfolio assessment, consult with the Office of Extended Studies.

PROPOSED**Experiential Learning****Internship Experiences**

University-sponsored internships are often an important part of an academic program. Students may apply for an internship if they have completed 60 credits and have at least a 2.0 GPA. Forty hours of supervised internship is equivalent to one academic credit hour. A maximum of 12 credits is applicable to an undergraduate degree program from internship experiences. Internships are available at a variety of venues, such as governmental agencies, businesses, foundations, and other organizations.

Students who are interested in internships must consult with their program's academic advisor, since they may need to meet additional internship requirements specific to their program, department or college.

In all cases, an approved agreement between the university and the external organization at which the internship will be performed must be in place before the student can be enrolled for internship credit.

Cooperative Education (Co-ops)

Some departments allow students to participate in cooperative education experiences. These experiences provide students with opportunities to gain practical work experiences related to their academic programs. These experiences may be the first contact students have working in their profession, and are often offered for zero credit, and are typically unpaid.

Students may apply for co-ops if they have completed 30 credits and have at least a 2.0 GPA. They typically participate in these programs during their sophomore or junior years, often during the summer. Interested students need to consult with their academic advisors concerning the availability and requirements of co-ops within their department.

In all cases, if students decide to register for a co-op course, an approved agreement between the university and the external organization at which the co-op experience will be performed must be in place before the student can enroll in the course.

Prior Learning and Credit/Exemption Examinations

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When a student receives credit for a course by examination, the credit will be applied to graduation requirements just as though the course had been taken. A student who passes an exemption examination will be exempt from taking that course in his/her academic program. If a student is granted exemption only (no credits) from a course, he/she may need to take another course to fulfill degree requirements.

Where examinations are not available, portfolio assessment may provide a student with the opportunity to earn university credit for college-level learning gained through work and life experience. Each department will determine the maximum number of credits to be awarded for portfolio assessment for its majors.

No more than one-half of the credits required for a student's major may be earned through any combination of examinations or portfolio assessment, nor can these credits be applied toward university residency requirements for awarding of degrees.

Advanced Placement Examinations

Courses taken by students before college admission under the Advanced Placement Program of the College Board may be recognized by the award of college credit. Those who earn a score of 3, 4, or 5 in the Advanced Placement Examination **will receive academic credit. The student's department and academic college will decide if and how the credit can be applied to the degree program. For questions regarding the granting of Advanced Placement credits, consult with the transfer counselors in the Undergraduate Admissions office.**

CLEP Examinations

Students who have had other opportunities for instruction or who have advanced in a given field may gain credit for a course through the College Level Examination Program (CLEP) offered through the College Board. Those who earn a qualifying score on the CLEP exam will receive academic credit. The student's department and academic college will decide if and how the credit can be applied to the degree program. For questions regarding the granting of CLEP exam credits, consult with the transfer counselors in the Undergraduate Admissions office.

International Baccalaureate Examinations

Courses taken by students before college admission under the International Baccalaureate Program may be recognized by the award of college credit. Those who earn a 4 or higher on a IB Higher Level (HL) exam will receive academic credit. The student's department and academic college will decide if and how the credit can be applied to the degree program. For questions regarding the granting of IB HL exam credits, consult with the transfer counselors in the Undergraduate Admissions office.

Departmental Examinations

In some departments, students have an opportunity to gain exemption or credit through successful completion of comprehensive examinations by requesting from the academic department an exam as a substitute for completing all the usual requirements of the course.

Portfolio Assessment

Portfolio assessment may provide some students with the opportunity to present evidence of learning for evaluation by a faculty member. It is designed for those with extensive documentable knowledge from work experience, travel, individual studies, or other out-of-class experiences. Through portfolio assessment, these experiences are evaluated to determine their appropriateness and applicability for university credit.

Credit awarded through portfolio assessment must conform to specific course titles in the undergraduate catalog (i.e., no credits will be awarded for general areas of knowledge) and will only be awarded for undergraduate courses. ~~Only~~ All IUP applicants and active students currently enrolled students are eligible to request portfolio assessment, and any credits awarded must be intended for use as part of a degree or certificate program. (For IUP applicants, credits will be awarded only after matriculation.)

Before portfolio assessment credits can be awarded, approval must be obtained from the chairperson of the department offering the course, the dean of the appropriate IUP college, and the Office of Admissions. Once approved, the title of the course, the credits, and indication that credit was earned through portfolio assessment will be recorded on a student's academic record.

If a related examination is available through the College Level Examination Program (CLEP) or if a departmental examination has previously been established for the course, a portfolio assessment of those credits will not be accepted.

For information about portfolio assessment fees and instructions on how to apply for portfolio assessment, please see the visiting and non-degree students link on the Office of Admissions website.

Rationale: Reviewed as part of a cyclic review, the policy was updated to more clearly represent the processes currently employed in each of the many components available to reflect and receive credit for learning outside of the traditional classroom.

FOR ACTION:
CURRENT

APPROVED

Re-enrollment/Readmission Policy (approved 4.3.2018)

1. For Students in Academic Good Standing

- a. Previously matriculated undergraduate students who have registered for classes in at least one of the two previous regular academic semesters can re-enroll for courses by contacting their department for advising and an alternate PIN number.
- b. Undergraduate students who have withdrawn from the university voluntarily or who have not been enrolled in the previous two or more regular academic semesters must submit an online application for re-enrollment. Applications may be submitted up to one week prior to the start of the semester for which the student wishes to return. After processing the application, the student will be sent information regarding registration.

2. For Students Not in Academic Good Standing

Students not in academic good standing (regardless of whether the student was dismissed by the university or voluntarily withdrew) must submit an online application for re-enrollment consideration. Applications may be submitted up to two weeks prior to the start of the semester for which the student wishes to return. An Academic Standards Officer will review the application and make a decision on the student's eligibility to return. If approved, the student will be sent information regarding registration.

If the student is seeking admission to a new college, the Academic Standards Officer of the new college will consult the Academic Standards Officer of the former college before making a decision.

3. For Students Who Have Been Involuntarily Withdrawn from the University

Please see IUP's Involuntary Withdrawal Policy and its readmission process for information.

4. Procedures

- a. To return to the university, log into MyIUP and select "Academics." You will find "Apply for Re-enrollment to IUP" in the "Academic Record" portlet. Complete and submit the form. If you don't have a MyIUP account, claim your account to get MyIUP access. (Note: If you last attended prior to fall 2000, complete a paper Application for Re-enrollment: www.iup.edu/registrar/forms.) For more information on IUP's re-enrollment/readmission procedures, please access the Registrar's website at: www.iup.edu/registrar/policies/readmission-procedures/
- b. Separate from the re-enrollment/readmission process, a returning student may be required to address outstanding holds of any kind before being allowed to register for classes.

- c. Some programs may have enrollment restrictions that affect re-entry. Check with the dean's office of the college housing the major.
- d. Applications for students seeking to change their major will be forwarded to the Academic Standards Officer of the college of the requested major. A change of major request will be initiated on the student's behalf. If approved, the Office of the Registrar will officially change the major while reactivating the student account for registration.
- e. Students who want to be considered for financial aid must complete the Free Application for Federal Student Aid (FAFSA) to determine their financial aid eligibility. Eligibility will be based on financial need, as determined by the FAFSA, and on prior academic record.
- f. Returning students who have not been enrolled for two years or more may petition their college dean for application of the Cancelled Semester Policy, which provides for cancellation from the cumulative record of the effects of one semester below a GPA of 2.0. Students who have been separated from the university for two consecutive calendar years may petition their college dean to return under the Fresh Start Policy. Students must pay fees and attend classes before a designated semester will be cancelled or the Fresh Start Policy will take effect. Details regarding these policies can also be found in the Academic Policies section in the Undergraduate Catalog.

PROPOSED

Re-enrollment/Readmission Policy

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If the student is seeking admission to a new college, the Academic Standards Officer of the new college will consult the Academic Standards Officer of the former college before making a decision.

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Please see IUP's Involuntary Withdrawal Policy and its readmission process for information.

4. Additional Information

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- c. Some programs may have enrollment restrictions that affect re-entry. Check with the dean's office of the college housing the major.
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- f. Returning students who have not been enrolled for two years or more may petition their college dean for application of the Cancelled Semester Policy, which provides for cancellation from the cumulative record of the effects of one semester below a GPA of 2.0. Students who have been separated from the university for two consecutive calendar years may petition their college dean to return under the Fresh Start Policy. Students must pay fees and attend classes before a designated semester will be cancelled or the Fresh Start Policy will take effect. Details regarding these policies can also be found in the Academic Policies section in the Undergraduate Catalog.
- g. A student whose education is interrupted by two or more calendar years will be governed by the requirements in effect at the time of re-enrollment to the university. The re-enrollment may carry specific requirements/substitutions necessary to provide for program integrity.

- h. **The applicability of course work completed more than 10 years before the degree date is subject to review by the dean or designee for evaluation on a course-by-course basis.**

Rationale: Reviewed to ensure that current procedures and requirements are accurately reflected and that appropriate timeline references were included, as they were referenced in other related policies.

I. Awards Committee (Chair Paul)

- o Thank you to the committee for the diligent work. We will announce the Senate Award winners at our next Senate meeting on April 26, 2022.

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

FOR INFORMATION:

Criminal Justice Training Center

Zoom meeting Tuesday, March 29, 2022 at 9:00 am

Attendees: Tess O'Neil, Chair, Members: Lynn Pike, Marcy Rearick, Rich Muth.

Excused: Thomas Barnes

Interviewees: Dennis Marsili and Marcia Cole

New Clock Hour Program—Lethal Weapons Training

The Lethal Weapons Training program is a non-degree certificate program offered through the IUP Criminal Justice Training Center specifically designed to satisfy the requirements for the PA Act 235: Lethal Weapons Training. The curriculum is regulated by the Pennsylvania State Police and meets certification requirements that extend for a period five years, followed by re-certification refresher courses to stay current. Successful students are certified to carry a firearm and other weapons as a private security guard.

The forty-hour Lethal Weapons Training Program is designed for retired law enforcement officers and security personnel and includes academics, skills, and weapons training. Admission requires attendees to pass psychological, physical, and eye exams, criminal background checks, various clearances, and obtain a letter of approval from the state to attend the initial Act 235 Lethal Weapons Training and subsequent refreshers.

The program is only offered face-to-face with the initial forty-hour certification being held over a period of one week. The eight and a half-hour refresher course is held in a single day.

Students will receive a certificate upon passing the program. A course representing the PA Act 235: Lethal Weapons Training program will appear on the student's IUP clock hour transcript which will serve as official confirmation of completion.

The admission application fee for each course is \$30, plus \$400 for the initial full course and \$200 for each refresher course. An agreement between IUP and the Geo-Group, Inc. has been established with the first training being held in January and a refresher in February 2022.

More details outlining the program's curriculum, fees, and required clearances will be outlined on the IUP Criminal Justice webpage <https://www.iup.edu/crimjustice/>.

Senate Representative Report

A. University Planning Council (Chair Moore)

- Please attend the next Town Hall, on April 12 at 11:30am to learn about "Operationalizing the Strategic Plan."

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

- No report.

C. Academic Computing Policy Advisory Committee (Senator Ford)

- Our next meeting is April 13 at 3:00pm.

D. University Budget Advisory Committee (Senator Soni)

- See Appendix B.
- Dr. Driscoll noted that the numbers in the presentation material presented in Appendix B do not include anything related to the change in the tuition model. These numbers are from the MID year CPP report, which was submitted in February before the tuition model was put in place.

New Business

Adjournment

- The meeting adjourned at 4:40pm.

Respectfully submitted:

Amber N. Racchini

**APPENDIX A
RULES COMMITTEE
CHAIR SMITH-SHERWOOD**

FOR INFORMATION:

PROPOSED AMENDMENT TO THE CONSTITUTION (FIRST READING): Strike the word “**three**,” replace with “**four**” before “representatives from the staff as elected from and by the staff.”

CONSTITUTION

(Amended: 4-92/2-93/5-94/4-96/3-01/2-05/2-07/4-19/3-22)

UNIVERSITY SENATE CONSTITUTION Revised 3/2022

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.

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.

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.

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~~ four 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: According to the University Senate Bylaws, there are Standing Committee positions for up to five (5) Staff senators, but currently, according to the Constitution, only four (4) Staff senators may serve the University Senate. The Rules Committee regularly receives a request from the Non-Credit Instruction Committee for a Staff senator to serve on that committee, but no additional Staff senator has been available. Until the most recent Phase I election, the number of staff nominees to University Senate has far exceeded the number of available positions. There has been staff interest in participating in shared governance, but a reduced opportunity to do so. The Rules Committee seeks to begin the process of right sizing the staff complement to the University Senate by at least permitting the number of Staff senators as there are potential seats available on Standing Committees. The Rules Committee approved the proposal of this amendment to the Constitution at its March 8, 2022, meeting for a first reading by the University Senate on April 5, 2022.

APPENDIX B
UNIVERSITY BUDGET ADVISORY COMMITTEE
SENATOR SONI
University Budget Advisory Committee Minutes
February 4, 2022

Attendees: Dr. Yaw Asamoah, Dr. Prashanth Bharadwaj, Mr. Bill Balint, Ms. Valerie Baroni, Dr. Matt Baumer, Mr. Craig Bickley, Ms. Mistie Blazavich, Mr. Bill Buttz, Mrs. Jodie Cadile, Dr. Joshua Castle, Mr. Greg Cessna, Dr. David Chambers, Ms. Koga Chilume, Ms. Amy Cook, Mr. Melvin Cornell, Dr. Hilliary Creely, Mr. Chip Dotts, Dr. Michael Driscoll, Dr. Debra Fitzsimons, Dr. Ben Ford, Dr. Erika Frenzel, Mrs. Erin Fritz Wood, Dr. Sylvia Gaiko, Ms. Elise Glenn, Mr. Patrick Greene, Mr. Noah Gentle for Shagufta Haque, Dr. Steven Hovan, Dr. John Kilmarx, Mr. Chris Kitas, Mr. Noah Gentle for Mr. Steven Lomax, Dr. Lara Luetkehans, Mr. David Maudie, Dr. Patti McCarthy, Mrs. Lorie McDowell, Dr. R. Scott Moore, Mr. Richard Muth, Mr. Chris Noah, Ms. Khatmeh Osseiran-Hanna, Mr. Sam Phillips, Dr. David Piper, Dr. Sue Rieg, Dr. Curtis Scheib, Dr. Tom Segar, Ann Sesti, Dr. Ramesh Soni, Ms. Amanda Stein, Ms. Paula Stossel, Ms. Ruffina Winters, Ms. Tressa Wright

Absent: Ms. Lisa Baker, Ms. Marcey Barna, Mr. Alex Daum, Mr. Mark Dellett, Ms. Elizabeth Houser, Mr. David Laughead, Mr. Jeremy Pettis, Mr. Michael Porada

- I. Mr. Balint welcomed everyone to the February 2022 UBAC meeting.

Mr. Balint recognized new member Dr. Prashanth Bharadwaj, Interim Dean of Eberly College of Business.

Mr. Balint called the UBAC meeting to order.

- II. Dr. Fitzsimons noted the University Budget Advisory Committee minutes from the November 30, 2021, meeting will be available for approval at the next UBAC meeting.

- III. Dr. Fitzsimons asked Dr. Driscoll for the President's Report.

Dr. Driscoll noted the Governor will release the budget proposal to the Commonwealth early next week. The details are still unknown. Dr. Driscoll reminded the group that the Board of Governors (BOG) requested a significant increase in appropriation, an additional \$73M bringing the total request from \$477M to \$550M. Hopefully, the Governor will include at least part of that request.

The BOG received information on the plan investment for one-time funds being allocated to the System from COVID recovery funds. These one-time funds, approximately \$2.5M – \$3M, are to be used in three categories:

- Student Success
- Diversity, Equity, and Inclusion Efforts
- Workforce Development Efforts

The BOG also received a briefing from the group that is developing the new appropriation allocation formula. Dr. Driscoll is chairing this group. The current allocation formula has not been used effectively for the last four or five years. The dollars need to follow the students. The group has work to do and will present more information to the BOG at their April meeting. The goal is to have the new allocation formula ready and in place for the July BOG meeting. The information is available for viewing online on BOG meeting site.

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Dr. Driscoll shared an email between himself and the Chancellor, as well as the document - IUP's Sustainability Status and Plan, January 14, 2022. These will both be available in the shared folder on the X-drive for today's UBAC meeting.

Dr. Driscoll noted three presidents were asked to submit additional information outside the normal CPP process. This was to be submitted to the Chancellor by January 15. IUP submitted the information on January 14, how we are addressing the financial challenges. Dr. Driscoll noted the team has done great work on developing the plan for IUP to move forward.

Dr. Driscoll shared the following regarding IUP's Sustainability Status and Plan:

- IUP is following a consistent plan based on a detailed analysis of financial and enrollment data
- IUP made significant and painful – but necessary – workforce and expense reductions
- IUP initiated INSPIRE, an intense and expedited review of our academic programs
- The restructuring of Academic Affairs under NexGen
- September 13, 2021, CPP showed actual workforce and expense reductions that were recognized by most reviewers. There is still work to be done
- IUP has continued to work on student retention and persistence, new student recruiting, and all four sustainability policy metrics during this period
- Auxiliary Budget
 - Dining debt is the most challenging and needs additional assistance
 - Master leases with Foundation for IUP for phases I and IV – debt has been restructured and more manageable, payments are currenting paying the debt
 - Phases 2 & 3 are still with Foundation for IUP and not on IUP's books

Dr. Driscoll noted the entire Sustainability Status and Plan information is in the shared folder on the X-drive for everyone to read in its entirety.

IV. Enrollment Report – Dr. Patti McCarthy

Dr. McCarthy shared the enrollment progress towards the spring 2022 CPP. Dr. McCarthy noted these numbers are as of February 3, 2022. The numbers will be final February 8, 2022, spring 2022 freeze date. The overall differences from CPP to today's actuals in all residency categories are:

- Headcount = up +6
- Credit Hours = down -1,600.00
- FTE = down -119.47

Dr. McCarthy reviewed the spring 2022 headcount registration as of February 3, 2022:

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- Undergraduate
 - Spring 2022 = 6,365
 - Spring 2021 = 6,996
 - Difference = -631
 - Difference from Spring 2022 CPP = -2
- Graduate
 - Spring 2022 = 1,784
 - Spring 2021 = 1,876
 - Difference = -92
 - Difference from Spring 2022 CPP = +8
- Total
 - Spring 2022 = 8,149
 - Spring 2021 = 8,872
 - Difference = -723
 - Difference from Spring 22 CPP = +6

Dr. McCarthy shared the spring 2022 clock hour headcount registration as of February 3, 2022.

- Spring 2022 = 169
- Spring 2021 = 263
- Difference = -94

Dr. McCarthy noted that spring 2021 culinary registration were during COVID times and classes had to be shifted to allow for social distancing, therefore they had a higher enrollment in spring 2021 than they may have had otherwise.

Dr. McCarthy reviewed the undergraduate retention and persistence to spring 2022. Dr. McCarthy noted the retention numbers for fall 2021 to spring 2022 as of February 3, 2022, is 85.80%, compared to last year's percentage of 87.85%. IUP is -2.05 ppt behind this same time last year. The spring 2022 retention used in the CPP is 86.07%, resulting in a -0.27% difference to CPP. This equates to needing four more students to meet goal. Dr. McCarthy shared the persistence information. The continuing undergraduate persistence to spring 2022 is 86.28% compared to last year's percentage of 85.92%. IUP is +0.36 ppt ahead of this same time last year. The spring 2022 persistence used in the CPP is 85.86%, resulting in a +0.42% difference to CPP. This equates to 22 students ahead of goal.

Dr. McCarthy shared the percent of full-time enrollment by headcount as of February 3, 2022:

- Graduate
 - 30.27% of grad students are registered full time at this point, compared to 33.10% last year and this same point in time (-2.83 ppt).
- Undergraduate
 - 87.64% of undergraduate students are registered full time at this point, compared to 87.84% last year at this point in time (-0.20 ppt).

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Dr. McCarthy shared the average spring credit hours for which students are registered by level and full-time/part-time enrollment. Overall average:

- Graduate
 - Overall average credits registered for spring 2022 = 5.58, down -0.36 overall from last spring at the same point in time.
- Undergraduate
 - Overall average credits registered for spring 2022 = 13.29, down -0.14 overall from last spring at the same point in time.

Dr. McCarthy noted that having fewer full-time students pulls the FTE down and makes that ratio of headcount to FTE not one-to-one. It is important to encourage students to register as full-time students.

Dr. McCarthy shared a chart showing the undergraduate spring 2022 registration trend. Dr. McCarthy noted that everyone did a remarkable job working with students to help them get registered. The chart shows the percentage of total registration for spring 2022 and indicates that students registered earlier in the cycle. Dr. McCarthy noted that establishing a communication plan using various media, along with the outreach from staff and faculty across campus, supported this earlier registration.

Dr. McCarthy shared the fall 2022 new student admissions: Freshman and Transfer students as of February 3, 2022; and Graduate and Culinary students as of January 28, 2022. Dr. McCarthy noted that there were more new Freshman starting in the spring, transfer students are even.

For new student enrollment in fall 2022 compared to fall 2021:

- Freshman
 - Cumulative Completed = down -285, -3.90%
 - Admitted = down 409, -5.92%
 - Net Deposits/Confirmed = down -11, -1.53%
 - Yield Admit to Net Deposits = up +0.49 ppt
- Transfers
 - Cumulative Completed = down -6, -3.61%
 - Admitted = down -15, -12.61%
 - Net Deposits/Confirmed = up +13, +54.17%
 - Yield Admit to Net Deposits = up +15.41 ppt
- Graduate
 - Cumulative Completed = down -77, -13.63%
 - Admitted = down -28, -11.20%
 - Net Deposits/Confirmed = up +1, +2.44%
 - Yield Admit to Net Deposits = up 2.52 ppt
- Culinary
 - Cumulative Completed = down -18, -7.29%
 - Admitted = down -24, -12.18%
 - Net Deposits/Confirmed = down -24, -31.17%
 - Yield Admit to Net Deposits = down -8.45 ppt

Dr. McCarthy noted that the renewable, merit scholarships being offered are resulting in students depositing at a higher rate. Dr. McCarthy noted that a new Culinary recruiter has been hired.

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Dr. McCarthy shared the fall 2022 freshman market share noting that Johnstown and Pittsburgh continue to be up in market share of applications, admits, and net deposits.

Number of HS Grads	Market Share Fall 2022 to	Difference in Market Share FY22 to FY21 to Date		
		DMA	Applications	Admits
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	Pittsburgh DMA	+1.05	+0.86	+0.10
20,398	All other PA DMA	-0.59	-0.66	+0.02
125,026	Total PA	+0.18	+0.22	-0.01

Dr. McCarthy shared the impact of market share on enrollment comparing this year's actual fall 2022 enrollment to what the numbers would be using last year's market share at this time last year:

- Applications
 - Philadelphia DMA = down -210
 - Harrisburg DMA = down -144
 - Johnstown DMA = up +5
 - Pittsburgh DMA = up +264
 - All other PA DMA = down -121
 - Total = down -206
- Net Deposits
 - Philadelphia DMA = down -21
 - Harrisburg DMA = down -14
 - Johnstown DMA = Level at 0
 - Pittsburgh DMA = up +24
 - All other PA DMA = down -5
 - Total = down -16

V. Housing Report – Dr. Segar

Dr. Segar reviewed the spring 2022 housing report summary as of January 31, 2022. Dr. Segar noted the housing occupancy on the Indiana Campus is 2,033 students compared to 1,530 at this time last year. This is all suite-style housing, there are no students in Whitmyre this year. There is an increase of 108 new first-year and transfer students coming in for the spring 2022 semester compared to 87 for spring 2021. Dr. Segar noted there are currently 77 continuing students that have spring housing reserved, but do not have class schedules. They are working to resolve any issues preventing students from registering. The loss of students from fall 2021 to spring 2022 equates to a decrease of -10.5%. This compares to the average decrease for FY2018-19 and FY2019-20 of -12.5%. Dr. Segar noted the current housing occupancy on the Punxsutawney Campus for spring 2022 is 50. This is a decrease of 11 students from the end of the fall 2021 semester.

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Dr. Segar reviewed the fall 2022 housing report summary as of January 31, 2022. Dr. Segar noted there are currently 1,042 applications for the fall 2022 semester on the Indiana Campus. To date, comparing fall 2022 to fall 2021, applications are up by 119. On the Punxsutawney Campus, there are currently six applications. To date comparing fall 2022 to fall 2021, applications are up by one.

Dr. Segar noted:

- Continuing student year-to-year date comparison:
 - As of January 31, 2022, 665 continuing students have signed up for the 2022-23 academic year
 - As of February 1, 2021, 591 continuing students had signed up for the 2021-2022 academic years for a difference between 2022 and 2021 up +74.
- New student year-to-year date comparison: and point-in-process comparison (process opened on the same dates for new students):
 - As of January 31, 2022, 377 new students have signed up for the 2022-23 academic year.
 - As of February 1, 2021, 332 new students had signed up for the 2021-22 academic year for a difference between 2021 and 2020 of +45.
- Continuing student point-in-process comparison as of week 18 of housing sign up:
 - 665 continuing students have signed up for housing for the 2022-23 academic year
 - 584 continuing students had signed up for housing for the 2021-22 academic year resulting in a difference of +81.

Dr. Segar reviewed the trends among new and continuing students who have contracted to live on campus for academic year 2022-23.

VI. September 2021 CPP Status Items – Dr. Fitzsimons

Dr. Fitzsimons reviewed the October 1, 2021 Faculty and Non-Faculty progress reports showing the information that had been shared at the last UBAC meeting.

- Non-faculty – Remaining to target
 - 52.94 FTE
 - \$6.2M
- Faculty – Remaining to target
 - 33.8 FTE
 - \$7.6M

Dr. Fitzsimons provided an update on faculty and non-faculty workforce reductions as of January 15, 2022.

- Non-faculty – Remaining to target
 - 37.40 FTE
 - \$4.4M

Dr. Fitzsimons shared the non-faculty information by bargaining unit and division.

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- Faculty – Remaining to target
 - 14.9 FTE
 - \$4.4M

Dr. Fitzsimons noted there has been significant progress made since October 1, 2021. Most reductions were achieved by retirements resulting from the ESLP.

Dr. Fitzsimons provided an update on CPP status. Dr. Fitzsimons noted that IUP submitted the CPP report in September 2021. The mid-year progress report is due February 22, 2022. After the freeze date for spring 2022 semester, February 8, 2022, revenue can be projected, and the mid-year progress reported can be completed and submitted.

The question was raised what is planned to meet the remaining to target totals for both faculty and non-faculty. Dr. Driscoll noted in addressing the financial targets:

- The remaining workforce reduction will hopefully be achieved through attrition
- Reducing expenses

Dr. Driscoll also reiterated that Dr. McCarthy shared somewhat positive news with the possibility of growing revenue.

Dr. Fitzsimons noted that all vacancies that become available will be examined closely whether or not they will be filled.

Dr. Fitzsimons reminded the group that if anyone has questions, please reach out to her or Mrs. Cadile and they will answer any questions or review any of the material.

VII. IUP Tuition Model and Pricing Workgroup

Dr. Fitzsimons noted that the IUP Tuition Model and Pricing Workgroup was tasked with looking at the current per-credit tuition pilot model, assessing it, making any recommendations for any changes.

Dr. Driscoll expressed his appreciation to Dr. Fitzsimons and Dr. McCarthy for their leadership and to the entire workgroup for the great work they have been doing on the tuition model and pricing analysis. They have done a thorough job in a short amount of time.

Dr. Fitzsimons noted the workgroup met from November 2021 to January 2022. The workgroup reviewed a lot of data and background information, enrollment information, and considered options for recommendation. The workgroup came up with a couple recommendations and met with Cabinet to review. The workgroup then provided an information workshop for Council of Trustees to review two recommendations, one conservative and one less conservative.

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Dr. Fitzsimons shared a Tuition Model and Pricing Recommendations PowerPoint presentation.

Dr. Fitzsimons shared the 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 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. IUP's cost is higher than most PASSHE schools.
- 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 students and families, making it easier to understand.

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 (FY2022-23) 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.

Determining the appropriate flat rate

Dr. Fitzsimons asked Dr. McCarthy to share the information on 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.

Dr. McCarthy shared information showing three proposals comparing them to the current tuition. Dr. McCarthy noted Proposal 1C is for point of reference and much more conservative.

- Proposal 1A – Flat rate tuition; 12-18 credits (\$7,716/AY)

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- Tuition only based on 15 credits:
 - Current model = \$9,570
 - Proposal 1A = \$7,716
- Proposal 1B – Flat rate tuition 12-18 credits (\$7,900/AY)
 - Tuition only based on 15 credits:
 - Current model = \$9,570
 - Proposal 1B = \$7,900
- Proposal 1C – Flat rate tuition 12-18 credits (\$8,600/AY)
 - Tuition only based on 15 credits:
 - Current model = \$9,570
 - Proposal 1C = \$8,600

Dr. McCarthy shared the estimated annual revenue loss (assuming no increase in enrollment) and number of full-time students needed to make up lost revenue for each proposal:

- Proposal 1A
 - Revenue loss = -\$8,985,526
 - Students needed = 1,160
- Proposal 1B
 - Revenue loss = \$7,871,054
 - Students needed = 996
- Proposal 1C
 - Revenue loss = \$3,752,954
 - Students needed = 436

Dr. McCarthy noted that a student taking 12 or 13 credits would pay a little bit more under the new proposals compared to the current tuition model.

Dr. McCarthy discussed how this new tuition will be perceived by families. Working with MarCom on marketing strategies can bring attention back to IUP and will hopefully increase enrollment.

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.
- 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.
- Full cost of attendance for students also includes fees, room, and board, so reducing tuition has a smaller overall impact than might be expected.

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- A \$1,000 reduction in annual tuition reduces overall cost of attendance for a student living on campus by about 4%.

Dr. McCarthy noted that the workgroup will continue working on analyses and will be looking at fees next to help make IUP more affordable.

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

- Workgroup conducted an information workshop with the Council of Trustees to review recommendations
- IUP must submit a draft proposal to the Office of the Chancellor (OOC) by February 2, 2022.
- After review by the OOC, IUP Council of Trustees would take formal action on the final proposal at its March 2022 meeting, and the Board of Governors would take final action at their April 2022 meeting.
- If approved, the new pricing would be implemented for the fall 2022 semester.

Dr. McCarthy recognized the workgroup members and thanked them for all the time and work they have invested in the tuition model and pricing. There has been a lot of good work completed.

Discussion ensued regarding the recommendation for the tuition model

- Workgroup tasked with in-state undergraduate only
 - Out-of-state tuition, Graduate tuition, and Fees will also be reviewed moving forward, however, they are a different process than in-state undergraduate.
- Scholarships – how will they be handled going forward with the new model?
- Flat rate incentivizes students to take more credits. What is the impact on the budget, the CPP, or other metrics having higher FTE?
- Number of minors and double majors may increase making IUP students highly marketable; may see a change in students taking liberal studies at IUP instead of community colleges
- Focus on helping students find a path
 - Advising, Courses, Financial Aid
 - Student Success
- Competitive with other PASSHE schools – need to distinguish IUP
- Students/Families look at tuition as including everything – good to examine fee structure
- Recruiting more students
- Demographic changes

VIII. Closing Comments

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Dr. Driscoll expressed his appreciation to the Tuition Model and Pricing Workgroup for the engagement and great job. Dr. Driscoll noted there is more work to come, and he appreciates that the workgroup is willing to take on the additional steps in this process. UBAC members will need to look at balancing this risk going forward. Dr. Driscoll thanked the members for the good discussion at today's meeting.

Dr. Fitzsimons thanked everyone for all their work on UBAC. The next meeting is scheduled for March 4, 2022. The draft mid-year progress report will be completed by then. The Tuition Model and Pricing Workgroup will be moving forward addressing other issues.

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November 30, 2021

Attendees: Dr. Yaw Asamoah, Mr. Bill Balint, Ms. Valerie Baroni, Dr. Matt Baumer, Mr. Craig Bickley, Ms. Mistie Blazavich, Mr. Bill Buttz, Mrs. Jodie Cadile, Ms. Koga Chilume, Ms. Amy Cook, Mr. Melvin Cornell, Dr. Hilliary Creely, Mr. Chip Dotts, Dr. Michael Driscoll, Dr. Debra Fitzsimons, Dr. Ben Ford, Dr. Erika Frenzel, Mrs. Erin Fritz Wood, Dr. Sylvia Gaiko, Ms. Elise Glenn, Mr. Patrick Greene, Dr. Steven Hovan, Dr. John Kilmarx, Mr. Chris Kitas, Mr. David Laughead, Mr. Steven Lomax, Dr. Lara Luetkehans, Mr. David Maudie, Dr. Patti McCarthy, Mrs. Lorie McDowell, Dr. R. Scott Moore, Mr. Richard Muth, Mr. Chris Noah, Ms. Khatmeh Osseiran-Hanna, Mr. Sam Phillips, Dr. Sue Rieg, Dr. Curtis Scheib, Dr. Tom Segar, Ann Sesti, Dr. Ramesh Soni, Ms. Amanda Stein, Ms. Paula Stossel, Ms. Ruffina Winters, Ms. Tressa Wright

Excused: Dr. Joshua Castle, Mr. Greg Cessna

Absent: Ms. Lisa Baker, Ms. Marcey Barna, Dr. David Chambers, Mr. Alex Daum, Mr. Mark Dellest, Ms. Elizabeth Houser, Dr. Geoffrey Mills, Mr. Jeremy Pettis, Dr. David Piper, Mr. Michael Porada, Mr. Hamzah Sammour

- I. Mr. Balint welcomed everyone to today's UBAC meeting. Mr. Balint noted there are no new members in attendance today. Mr. Balint expressed his appreciate to the committee for the interactive and constructive dialog this semester.

Mr. Balint reviewed the procedures for the UBAC Zoom meeting. Mr. Balint called the UBAC meeting to order.

- II. The University Budget Advisory Committee minutes from the November 4, 2021 meeting were approved as presented.
- III. Dr. Fitzsimons asked Dr. Driscoll for the President's Report.

Dr. Driscoll thanked the UBAC for all the good work that is being done by the committee and the sub-committee.

Dr. Driscoll noted that we are still waiting for the payment schedule on the \$50M one-time funds from the legislature.

- IV. CPP Version 8 Submitted in September 2021

Dr. Fitzsimons shared a presentation on the sustainability progress updates which includes a timeline and report status of the CPP progress.

Dr. Fitzsimons noted the following timeline:

- December 17, 2021 – the Chancellor issues mid-year progress report instructions. This will include a template for completing reports.
- January 15, 2022 – Follow-up due to Chancellor. The following universities were selected to provide a follow-up report to the Chancellor:
 - Edinboro, Clarion, IUP, Lock Haven, and Mansfield

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- February 22, 2022 – Mid-year Sustainability Progress Report due. This is the same date the mid-year report was submitted last year. The difference with this year's mid-year report is that instead of the report including the current year only, the report will include projections for next year as well.
- March 3, 2022 (Tentative) – CAO/CFO joint meeting to review sustainability progress. Dr. Fitzsimons noted this is when IUP will receive feedback and answer any questions received from our peers and Chancellor's staff on the CPP and progress report.
- March 11 (Tentative) – Executive Leadership Group (ELG) review. The ELG consists of the Chancellor and Presidents from the System schools. The ELG will review, ask any questions, and provide feedback on the CPP and progress report.
- Mid-March through mid-April – The Board of Governors (BOG) will provide workshops and hold their quarterly meeting.

Dr. Fitzsimons noted that each of the 14 System schools were scored and identified into plan levels.

- Stable
 - No report needed
 - May need an enrollment update in spring 2022 to support Board/Legislative needs
- Plan 1
 - Select Information
 - Enrollment
 - Employee FTE
 - Summary E&G and Auxiliary projections
- Plan 2 and 3
 - Full mid-year sustainability progress template with narrative
 - IUP is in Plan 2
- Integrating universities
 - Special template to complete per Act 50
 - Submit on integrated report format
 - Include years through FY26
 - Utilize for Act 50 quarterly update

Dr. Fitzsimons asked Mrs. Cadile to provide an update on the Enhanced Sick Leave Payout (ESLP).

Mrs. Cadile shared a summary of the ESLP participation by bargaining unit and fiscal year as of November 22, 2021.

- FY2020-21 – Second window
 - FTE Savings = 1.32
 - Salary and benefits savings = \$177,968
 - ESLP Expenses = \$2.7M
- FY2021-22 – Estimating
 - FTE Savings = 48.51
 - Salary and benefits savings = \$6.7M
 - ESLP Expenses = \$2.1M
- FY2022-23 – Estimating
 - FTE Savings = 25.69

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- Salary and benefit savings = \$3.8M
- ESLP Expenses = -0-
 - There are no ESLP expenses for FY2022-23 due to participants have committed to retire by June 30, 2022, therefore payment expenses will hit in FY2021-22.
- Three Year Total
 - FTE Savings = 75.62
 - Salary and benefit savings = \$10.7M
 - ESLP Expenses = \$4.8M

Mrs. Cadile shared that the estimated payout expenses include both regular sick leave payouts and the enhanced portion. Annual leave and personal leave payouts are not included. Mrs. Cadile noted that the ESLP incentive was extended for APSCUF and AFSCME from September 30, 2021 to November 15, 2021. Mrs. Cadile stated that the associated savings reflects only the salary and benefits of the ESLP participant. It does not take into account any offset to savings for potential replacement of these positions. Mrs. Cadile shared that an analysis is in process to determine the net impact. Dr. Driscoll noted that the gross savings as positions are filled will have to be reconciled in future years.

Mrs. Cadile noted that 77 employees retired, however, the totals show 75.5 FTE. This difference is due to one phased retirement and 9-month position retirements.

V. Enrollment Report – Dr. Patti McCarthy

Dr. Fitzsimons asked Dr. McCarthy for an enrollment update. Dr. McCarthy noted this is a very busy time of year from an enrollment perspective.

Dr. McCarthy provided a presentation on enrollment. Dr. McCarthy reviewed the winter 2022 headcount registration by student type as of November 28, 2021. These overall numbers include new and continuing registered students.

- Winter 2022 = 1,576
- Winter 2021 = 1,414
- Difference = +162

Dr. McCarthy shared the winter 2022 headcount enrollment is 3.06 percentage points ahead of last year at this time. Dr. McCarthy noted that IUP has already exceeded winter 2021 headcount numbers. There is a really strong interest in winter enrollment this year.

Dr. McCarthy reviewed the spring 2022 headcount registration as of November 29, 2021:

- Undergraduate
 - Spring 2022 = 5,803
 - Spring 2021 = 6,148
 - Difference = -345
- Graduate
 - Spring 2022 = 1,401
 - Spring 2021 = 1,424

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- Difference = -23
- Clock Hour
 - Spring 2022 = 24
 - Spring 2021 = -0-
 - Difference - +24
- Total
 - Spring 2022 = 7,228
 - Spring 2021 = 7,572
 - Difference = -344
- Percent to CPP/Freeze
 - Spring 2022 = 88.47%
 - Spring 2021 = 85.10%
 - Difference = +3.37 ppt

Dr. McCarthy reviewed the undergraduate retention and persistence to spring 2022. Dr. McCarthy noted the retention numbers are first-time, full-time Freshman that came in fall 2021 and are registered for spring 2022. The retention as of November 29, 2021 is 84.34%, compared to last year's percentage of 80.77%. IUP is 3.57 ppt ahead of this same time last year. Dr. McCarthy shared the persistence information. These percentages do not include the fall 2021 Freshman. The continuing undergraduate fall 2021 to spring 2022 is 79.52% compared to last year's percentage of 79.73%. IUP is down -0.22 ppt compared to this same time last year. Dr. McCarthy noted persistence is slightly behind and Enrollment Management is watching this closely.

Dr. McCarthy shared the percent of full-time enrollment by headcount as of November 29, 2021:

- Graduate
 - Full-time – registered for spring 2022 = 34.48%, down -0.15 ppt from spring 2021
- Undergraduate
 - Full-time – registered for spring 2022 = 80.77%, down -0.05 ppt from spring 2021

Dr. McCarthy noted that she checked the numbers as of this morning (November 30, 2021) and the percent of undergraduate students who are full-time for spring 2022 is +0.2 ppt ahead. This fluctuates daily.

Dr. McCarthy shared the average spring credit hours for which students are registered by level and full-time/part-time enrollment. Overall average:

- Graduate
 - Overall average credits registered for spring 2022 = 6.14 credits, down -0.02 overall
- Undergraduate
 - Overall average credits registered for spring 2022 = 12.84, down -0.14 overall

Dr. McCarthy noted that both graduate and undergraduate students are registered for fewer credits overall for the spring 2022 semester compared to this time last year.

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Dr. McCarthy shared the progress towards the spring CPP noting that the difference from CPP to today's actuals is down in all residency categories for both undergraduate and graduate students. The overall differences are:

- Headcount = down -939
- Credit Hours = down -13,233.40
- FTE = down -920.33

Dr. McCarthy noted that the percentage point difference to spring 2022 CPP vs. spring 2021 to freeze as of November 29, 2021 is trending ahead overall, with only two areas trending behind this time last year: undergraduate out of state down -0.89 credit hours/-0.56 FTE and graduate out of state/international down -1.94 credit hours/-2.60 FTE. The overall differences are:

- Headcount = up +3.37 ppt
- Credit Hours = up +1.84 ppt
- FTE = up +1.79 ppt

Dr. McCarthy noted that looking at the impact of credit hours of full-time/part-time numbers, if the average credit hours were the same as this time last year, our FTE count would be 59 higher. This is a significant change.

Dr. McCarthy shared the fall 2022 new student enrollment: Freshman and Transfer students as of November 29, 2021; Graduate students as of November 23, 2021; and Culinary students as of November 19, 2021. Comparing fall 2022 to fall 2021:

- Freshman
 - Cumulative Completed = up +173, +3.63%
 - Admitted = up +85, +1.85%
 - Net Deposits/Confirmed = up +102, +48.11%
 - Yield Admit to Net Deposits = up +2.09 ppt
- Transfers
 - Cumulative Completed = down -14, -18.92%
 - Admitted = down -3, -6.12%
 - Net Deposits/Confirmed = up +9, +180.00%
 - Yield Admit to Net Deposits = up +20.23 ppt
- Clock Hour – Culinary only
 - Cumulative Completed = down -28, -14.81%
 - Admitted = down -21, -15.11%
 - Net Deposits/Confirmed = down -15, -34.88%
 - Yield Admit to Net Deposits = down -7.21 ppt
- Graduate
 - Cumulative Completed = Even with last year – no difference
 - Admitted = down -15, -10.56%
 - Net Deposits/Confirmed = down -2, -11.76%
 - Yield Admit to Net Deposits = down -0.16 ppt

Dr. McCarthy noted that the next two to three weeks are important to watch the graduate numbers.

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Dr. McCarthy noted that this year the decision was made to increase the merit scholarships by \$1,000 at each level. The top merit scholarship awards is \$5,500 for out-of-state students and \$5,000 for in-state students. Students are able to receive \$1,000 scholarship for on-campus housing. These scholarships help address the cost of attendance affecting affordability for students.

Dr. McCarthy shared demographic information relating to fall 2022 new student enrollment. Dr. McCarthy noted that market share, which declined overall from fall 2020 to fall 2021 by .13 ppt (about 161 students) is looking stronger; particularly in the Pittsburgh and Johnstown areas. Dr. McCarthy shared the following information:

Number of HS Grads	Market Share Fall 2022 to	Difference in Market Share FY22 to FY21 to Date		
		DMA	Applications	Admits
52,005	Philly DMA	-0.13	-0.06	-0.002
21,063	Harrisburg DMA	-0.51	-0.33	+0.04
6,389	Johnstown DMA	+0.82	+0.76	+0.41
25,171	Pittsburgh DMA	+1.00	+1.20	+0.19
20,398	All other PA DMA	-0.47	-0.30	+0.06
125,026	Total PA	+0.01	+0.14	+0.08

Dr. McCarthy shared the impact of market share on enrollment. Dr. McCarthy noted that in the Pittsburgh region applications have increased by +251 compared to last year resulting in +47 net deposits. This is an important region.

Dr. McCarthy noted that MarCom has begun a very targeted marketing campaign in the Philadelphia region with the intention of capturing more of that market share of applications as it has been declining over the past several years. Demographics show a high number of high school graduates in the eastern part of the state, almost as many as Pittsburgh, Harrisburg, and Johnstown combined. Dr. McCarthy noted that since launching the marketing campaign, IUP has seen growth in applications from the Philadelphia region.

VI. Spring Registration Efforts – Dr. McCarthy and Dr. Luetkehans

Dr. McCarthy discussed the concerted effort underway regarding outreach to students. This great effort involves the entire campus community in assisting students to get registered and helping IUP exceed the numbers we have historically seen. Dr. McCarthy noted that IUP has to start surpassing historical numbers by setting the bar higher and succeeding in greater numbers.

Dr. McCarthy noted that an Ad Hoc sub-committee of the university-wide retention and persistence committee has been created to ensure proper, effective communications to students regarding registration. This sub-committee will reach out to A-deans, Advisors, Student Billing, and Financial

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Aid, to make sure everyone is prepared for registration each semester. This sub-committee will provide resources to advisors and others on campus that may be talking to students about registration. This will ensure advisors and others are equipped to give students the right advice directing them to the proper area to address any issues they may have regarding registering for classes. These resources will include information such as key dates, detailed financial aid facts, how to sign up for payment plans, FASFA deadlines, etc.

Dr. McCarthy noted that there are a lot of activities happening throughout the year contacting students in various ways. Dr. McCarthy shared that it takes seven or eight times contacting students before they take action. The university has to act now to encourage and assist students to register for the spring 2022 semester while they are still on campus. Dr. McCarthy discussed communication planning and various ways messaging goes out to reach students including, but not limited to:

- E-mail
- News posts
- Postcard mailing
- IUP Now
- Campus ESP (Parent Newsletter)
- Digital displays
- Posters

Dr. McCarthy noted that Financial Aid looks at students that may be close to the dollar amount causing a financial hold on the students' accounts. Grant dollars are available to these students, allowing them to register, which then adds to the retention dollars.

Dr. Luetkehans noted that the A-Deans are critical partners in this effort. Dr. Luetkehans thanked the Deans, A-Deans, Chairs, and Advisors for their active and systematic role in this registration process. The outreach efforts are aligned with the communication plan that has been developed. Dr. Luetkehans noted there has been increased communication between A-Deans, Chairs, and Advisors with a focus on email and calling campaigns within the colleges. These campaigns begin the week of finals and continue into January. Dr. Luetkehans noted that the colleges report to her weekly providing updates. Some findings have included problems with data, tracking information on students and how to resolve issues, and new groups of students such as Study Abroad or national exchange students. Dr. Luetkehans reiterated that the university has to make sure there is good communication across campus.

Dr. Luetkehans noted that the reports she has received have included three groups.

1. Non-returners – A-Deans refer this group to Megan McCue who collects data and talks with the students before they leave IUP
2. Non-responder group – IUP tracks outreach efforts to identify issues and analyze profiles to resolve these issues
3. Responding students – solving individual problems which could include:
 - a. Students with financial issues – these are the dominant issues

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- b. Students that have not reached out and connected with their advisors
- c. Students that have everything but have just not registered yet

Dr. Leutkehans noted that there are still some struggles with data tracking, but there has been improvement. Dr. Leutkehans added that a couple of trends have been identified:

1. Increase in the number of Financial Aid appeals
2. Delayed paperwork – emails are going to junk mail

Dr. McCarthy noted that she looks at the numbers daily, and there is a lot of work being done to resolve persistence and retention issues. Dr. McCarthy noted the importance of increasing our numbers.

The question was raised whether there was student representation on this sub-committee. Ms. Stossel noted that there is limited student engagement with this cycle, however, some cycles will include more student engagement. Ms. Stossel noted the importance of including students in this process. Dr. Leutkehans noted that there are several groups that meeting regularly with students. A survey was just conducted on registration with 360 student responses. The results of this survey showed that scheduling and finding the classes that fit into student schedules was more of a concern than registering. Discussion ensued regarding student registration and issues encountered by students.

Dr. Fitzsimons thanked Dr. McCarthy and Dr. Leutkehans for the spring 2022 registration information and the good discussion.

VII. Housing Report – Dr. Tom Segar

Dr. Fitzsimons asked Dr. Segar for a housing update.

Dr. Segar reviewed the fall 2021 housing report summary as of November 29, 2021. Dr. Segar noted that the current occupancy in the suites is 2,152 students. Punxsutawney occupancy is at 61 students, a decline of one student since the last UBAC meeting.

Dr. Segar reviewed the fall 2022 housing report summary as of November 29, 2021. Dr. Segar noted that there has been a nice gain since the last UBAC meeting. Dr. Segar noted there are currently 658 applications for the suites. This is an increase of 51 students consisting of 20 new students and 31 continuing students. To date, comparing fall 2022 to fall 2021, applications are up by 46.

Dr. Segar noted:

- Since housing begins sign-ups at different points in the semester, there are two main comparisons used for data across years
 - Year-to-year comparisons – looks at similar dates between years
 - Point-in-process comparisons – looks at the week of the process between years

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- Continuing student year-to-year date comparison:
 - As of November 29, 2021, 507 continuing students have signed up for the 2022-23 academic year
 - As of November 23, 2020, 570 continuing students had signed up for the 2021-2022 academic years for a difference between 2022 and 2021 down by -63.
- New student year-to-year date comparison: and point-in-process comparison (process opened on the same dates for new students):
 - As of November 29, 2021, 151 new students have signed up for the 2022-23 academic year.
 - As of November 23, 2020, 42 new students had signed up for the 2021-22 academic year for a difference between 2021 and 2020 of +109.
- Continuing student point-in-process comparison as of week 8 of housing sign up:
 - 507 continuing students have signed up for housing for the 2022-23 academic year
 - 570 continuing students had signed up for housing for the 2021-22 academic year resulting in a difference of -63.

Dr. Segar reviewed the trends among new and continuing students who have contracted to live on campus for academic year 2022-23.

VIII. IUP Tuition Model and Pricing Workgroup

Dr. Fitzsimons shared information about the Tuition Model and Pricing Workgroup at the last UBAC meeting. At this meeting, Dr. Fitzsimons discussed the composition, charge, and timeline for recommendations. Dr. Fitzsimons asked for any volunteers for this workgroup. Since the last UBAC meeting the committee has been established and consists of:

- Members:
 - Dr. Fitzsimons, Dr. McCarthy – Co-Chairs
 - Matt Baumer, Dave Chambers, Amy Cook, Noah Gentle, Shawn Jones, Dave Piper, Bill Balint
- Resources – assist with data:
 - Bill Buttz, Jodie Cadile, Chris Kitas, and Paula Stossel

Dr. Fitzsimons noted the committee is still working on acquiring a Graduate student as a member of this workgroup.

Dr. Fitzsimons noted that the Tuition Model and Pricing Workgroup will meet weekly as practical knowing that recommendations are due the first or second week of January. The recommendations will be presented to the UBAC committee, President's Cabinet, and the President who will provide the final decision/approval. Ultimately, any recommendations approved by the President will be submitted to the Office of the Chancellor, IUP COT (via Administration and Finance Committee of COT), and the Board of Governors. The policy requires all recommendations be submitted to the Office of the Chancellor by January 31, 2022.

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Dr. McCarthy discussed the progress that has been made by the Tuition Model and Pricing Workgroup. Dr. McCarthy expressed her appreciation to the workgroup and noted that this group is very engaged. Dr. McCarthy noted that the workgroup had their first meeting November 17:

- Discussed the charge to the workgroup
- Shared historical data on enrollment and discussed any information or additional data that may be needed
- Created a shared drive for the workgroup
- Created a Resources folder

Dr. McCarthy noted that the workgroup had their second meeting on November 22:

- What can be done in our current structure to attract more students
 - Develop new programs
 - How our products are named and marketed
 - Market demand
 - Out-of-state marketing and pricing
- Ruffalo Noel Lovitz (RNL) price sensitivity analysis
 - Conducted – February 2020
 - Reviewed RNL analysis
 - Compared sticker price vs. net price
 - Scholarships vs. reduction in tuition alone

Dr. McCarthy noted that RNL has been contacted to attend the next Tuition Model and Pricing Workgroup meeting to provide details of the findings and answer any questions the workgroup may have. RNL was unable to attend this afternoon's meeting, however, a representative plans to attend the December 16 meeting.

Dr. McCarthy noted that Mrs. Cadile is working on four scenarios for the next meeting. These scenarios will provide information to help make recommendations. These scenarios include:

1. Impact of reducing annual cost of attendance (tuition) by \$1,000
2. Impact of reducing annual cost of attendance (tuition) by \$2,000
3. Impact of implementing number 1 or 2 for new Freshman only while letting the upperclassmen unchanged
4. Using per credit tuition model for 1 – 11.99 credits; flat rate for 12 – 15 credits, back to per credit for anyone registered for more than 15 credits

Dr. McCarthy noted that the workgroup will compare how these four scenarios will impact budget revenue and the ability to issue scholarships.

Dr. Baumer highlighted that scholarship offerings have increased significantly this year. IUP is discounting tuition by a much greater amount this year than in the past. Dr. Fitzsimons shared that the workgroup is working to find a balance between the level of tuition and amount of financial aid and scholarships offered. Dr. Driscoll asked if anyone is looking at how much money IUP has to receive from each student, on average, to pay the bills and run the university. This is difficult to get a real number but may be worth

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looking into. Dr. Driscoll expressed his appreciation for the good work that is being done by this workgroup.

Dr. McCarthy noted that one other affordability goal that is being looked at is housing. Dr. Segar is putting together a small group to look at the housing costs. The housing information along with the tuition and pricing data will provide a whole component of the cost of attendance for students.

IX. Draft Internal Audit Plan for FY2021-22 – Dr. Fitzsimons

Dr. Fitzsimons shared a presentation on Internal Audit FY2021-22 Plan Execution. Dr. Fitzsimons noted that there has been a pause on Internal Audits with everything else going on. Dr. Fitzsimons shared that for FY2021-22, the following five top priority internal audit projects were approved by the ELG and the Audit Committee.

- Student Experience and Retention - Audit
- Student Inclusion Practices - Advisory
- Student Wellness - Audit
- Business Continuity and Disaster Recovery (IT) - Audit
- Resource Optimization Evaluation – Advisory

Dr. Fitzsimons noted that there are two different project types:

- Audit – this is a regular audit resulting in findings. The university would be required to implement actions to correct these findings.
- Advisory – recommendations to consider but are not required. The university would remain compliant if the recommendations are not implemented.

Dr. Fitzsimons noted this is a very aggressive schedule to get these audits completed this year. Dr. Fitzsimons noted that these audits are different from the annual audit and financial statements that are completed externally each year, and also different than the NCAA audit that is conducted.

Dr. Fitzsimons shared the draft audit timeline reiterating the aggressive schedule.

Dr. Fitzsimons noted that a full scope of the audit has not been completely developed. Dr. Fitzsimons shared the next steps: November – January:

- Plan and scope audit areas, including using available data (e.g., public policies or information) to inform areas of focus and analysis
- Draft and implement Internal Audit Charter/Policy
- Receive input from Administration and Finance on Internal Audit infrastructure
 - Establish a short-term working group (charge: to provide/receive input on the overall process)

Dr. Fitzsimons noted that there will be one or two point(s) of contact at each university to streamline the work that needs to be done for these audits.

X. Closing Comments

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Dr. Driscoll expressed his appreciation to the UBAC members for their active engagement in this group. Dr. Driscoll noted that there is plenty of work going forward.

Dr. Fitzsimons wished everyone good luck with finals. Dr. Fitzsimons told all members to have a good holiday break. The next UBAC meeting is scheduled for Friday, February 4, 2022.

University Budget Advisory Committee Meeting

Friday, March 4, 2022

10:30 a.m.–Noon

Join from PC, Mac, iOS or Android:

<https://iupvideo.zoom.us/j/94008418724>

Or join by phone:

+1 312 626 6799 (US Toll) or +1 646 558 8656 (US Toll)

Meeting ID: 940 0841 8724

University Budget Advisory Committee Minutes – 2 minutes

- November 30, 2021
- February 4, 2022

President’s Report – Dr. Driscoll – 10 minutes

Enrollment Report – Dr. McCarthy – 10 minutes

Housing Report – Dr. Segar – 10 minutes

Tuition Affordability Plan – 5 minutes

Summer 2022 – 5 minutes

CPP Mid-Year Progress Report Update – 25 minutes

Tuition Model and Pricing Workgroup – Next Steps – 5 minutes

Summer Utility Savings – 10 minutes

Housing Scholarship Pilot Program – 5 minutes

Closing Comments – 3 minutes

Next Meeting

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

Future Meetings

- May 2, 2022 (1:00 p.m.-2:30 p.m.)
- July 28, 2022 (1:00 p.m.-2:30 p.m.)

Adjournment





Tuition Affordability Plan: Tuition Pricing Update

On March 2, 2022, the board of governors (BOG) approved the discontinuation of IUP’s pilot per-credit tuition model and the conversion to the standard board-approved tuition rate with the banded (flat rate) tuition structure for in-state undergraduate students who take between 12 and 18 credits in a semester, including students who attend the regional campus locations.

This new Tuition Affordability Plan will result in a reduction in the annual tuition cost for in-state undergraduate students taking 12 to 18 credits by approximately 20 percent, from \$9,570 to \$7,716. The standard rate is \$322 per credit for part-time students and for those taking over 18 credits.

In addition, per Board Policy 1999-02 A Tuition and Procedure 2011-2 (amended in 2019) Tuition and Mandatory Fees, the president has the authority to set per-credit, out-of-state, and international tuition rates in consultation with the trustees.

Table 1 below shows the current out-of-state and international per-credit rates and the new rates proposed by the president. The tuition rates would remain flat and maintain the current per-credit rates while the Tuition Model Pricing work group further analyzes the tuition structure and brings forth a recommendation.

Table 1

Current Rates Under the Per-Credit Pilot			New Rate with Discontinuation of Pilot		
	2021/2022	2021/2022 Annual Rate*		2022/2023	2022/2023 Annual Rate*
Domestic Out-of-state undergraduate (145% of in-state rate)	\$463 per credit	\$13,890	Domestic Out-of-state undergraduate (143.7% of in-state rate)	\$463 per credit	\$13,890
International Out-of-state undergraduate (250% of in-state rate)	\$798 per credit	\$23,940	International Out-of-state undergraduate (247.8% of in-state rate)	\$798 per credit	\$23,940

*Based on 30 credits

IUP has various contracts and agreements with international agencies, universities, and partners that define the costs and terms for students under those agreements. These agreements will be reviewed individually.

Comprehensive Planning Process (CPP)

Mid-Year CPP Progress Report

Submitted February 22, 2022



UBAC
3/4/2022

Executive Summary and Highlights

- We have been working towards financial sustainability since January 2020 and have made **significant** progress
- A Mid-Year CPP Progress Report was submitted to the Office of the Chancellor on February 22, 2022.
- This report showed that IUP exceeded its financial sustainability plan targets associated with expenses reductions
- Updated enrollment projections showed that headcount enrollment was mixed and credit hour actuals were lower than the projections submitted in September 2021 to the System Office.

Recap

February 22, 2021 Mid-Year CPP Progress Report provided one-year progress to targets set in the Sept. 20, 2021 (V3) version of the CPP

September 10, 2021 (CPP V8) 3-year plan; updated/changed assumptions for enrollment, appropriation levels, and personnel and benefits; contains components from V3 but also includes workbook tabs for COVID revenues and expenses, ESLP

February 22, 2022 (Mid-Year CPP Progress Report) provided mid-year progress to targets set in the Sept. 10, 2021 (V8) version of the CPP

Enrollment Management

Enrollment Projections and Revenue Impact

- Fall 2021 freeze headcount was slightly below projections; however, the average credit hours taken by students was also lower than projected, resulting in even fewer overall credit hours in spring than would have been expected with the level of decline in headcount.
- Since revenue is based on credit-hour production this resulted in lower revenue than what was projected in the September 2021 CPP.

	FY2021-22	FY2022-23
September 13, 2021 CPP: Tuition Revenue	81,077,338	82,735,550
February 2022 Mid-Year Projections : Tuition Revenue	79,721,714	81,054,109
Change in Tuition Revenue	(1,355,624)	(1,681,441)

Enrollment Information-Mid-Year CPP Progress Report

- Winter actuals exceeded the September 2021 projections by 11%, or 167 students (152 UG and 15 GR)
- Spring headcount was slightly under projections with the average credit hours lower than projected resulting in a decline in revenue
 - As of spring 2022 freeze, by headcount, we had 36 fewer students than the original spring projections of 8,188 as reported in the September 2021 CPP

Enrollment Information (continued)

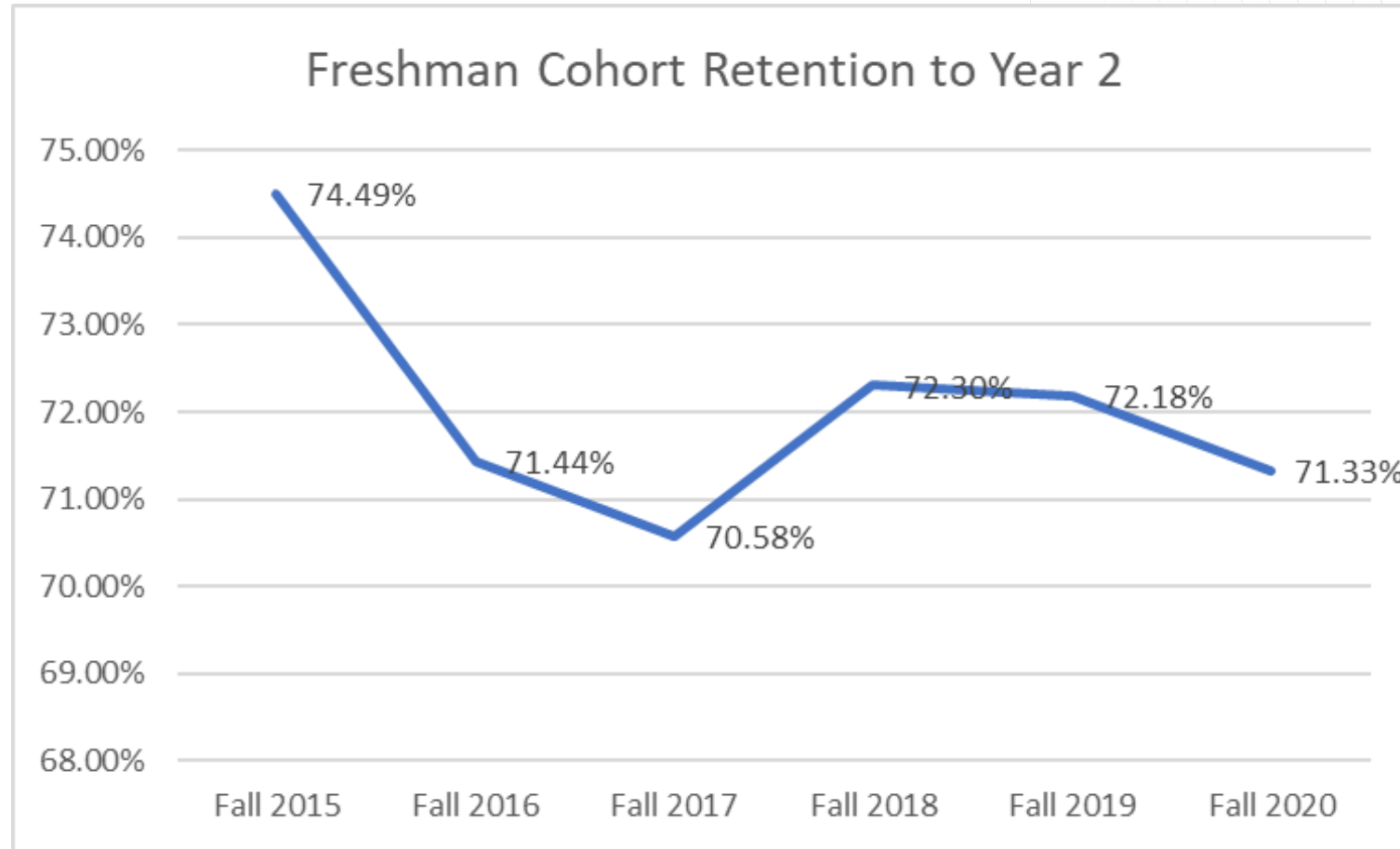
- Credit hours have been trending downward, we've seen **31%** decline in credit hours since FY2017-18

Historical Fall Credit Hours					
FY2017-18	FY2018-19	FY2019-20	FY2020-21	FY2021-22	Change from FY2017-18 to Present
155,041	139,973	126,987	117,587	106,378	-31%

Increasing Retention and Persistence as a Component of Ensuring Student Success

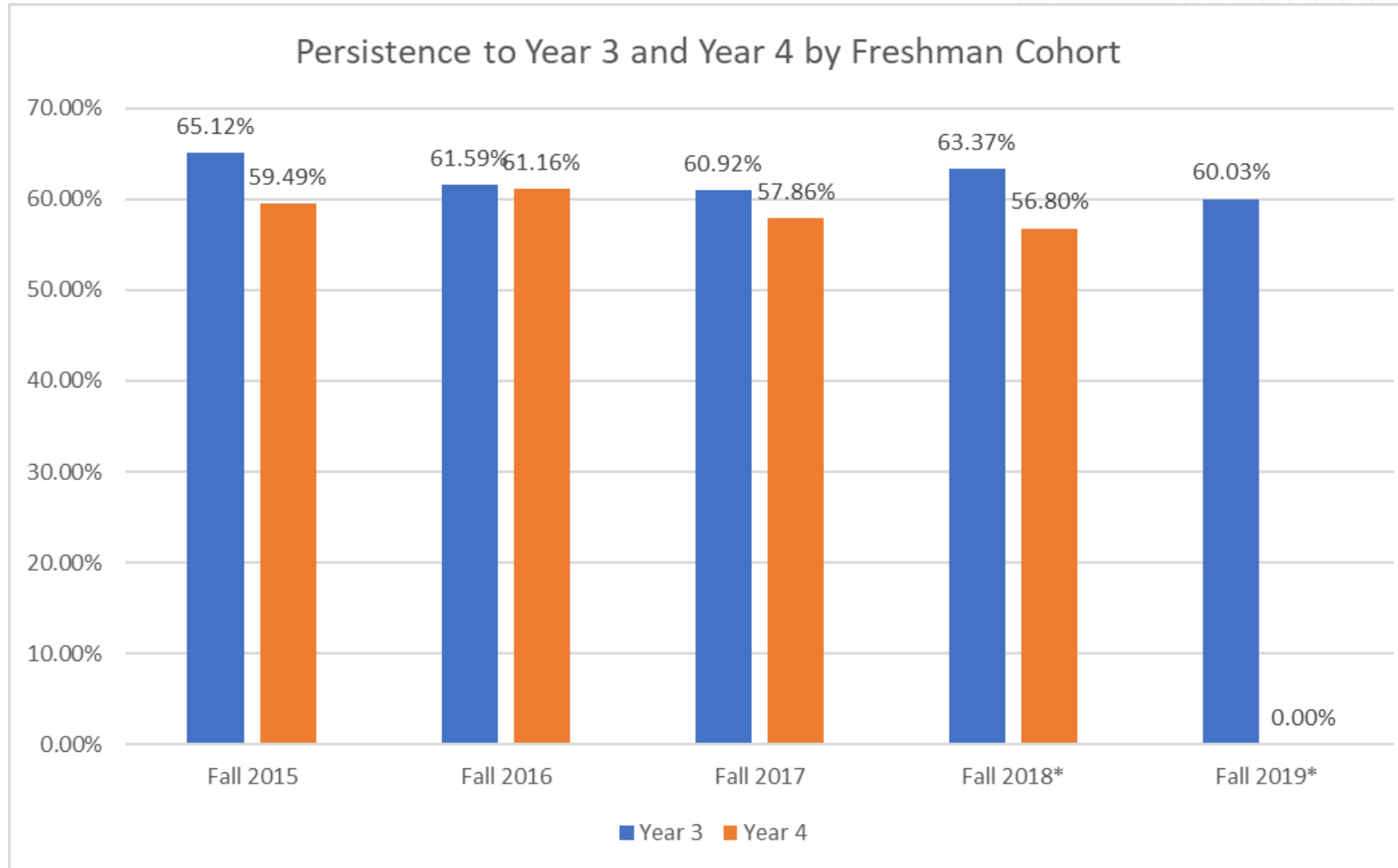
- The fall 2021 freshman retention from fall 2021 to spring 2022 was 85.8%
 - Four additional students would have put us at 86.07% for the fall 2021 cohort, which is the retention used for the CPP.
 - 86.07% is the five-year average fall to spring retention, which would have been 4 additional students retained.
 - Last year the fall 2020 cohort retained to spring 2021 at 87.85%.
- Continuing student persistence from fall 2021 to spring 2022 was 86.15%.
 - Fourteen additional continuing students persisted than if at the 85.86% persistence rate used in the CPP.
 - 85.86% is the five-year average persistence to spring for continuing students.
 - Last year the persistence from fall 2020 to spring 2021 was 85.9%.

Retention History



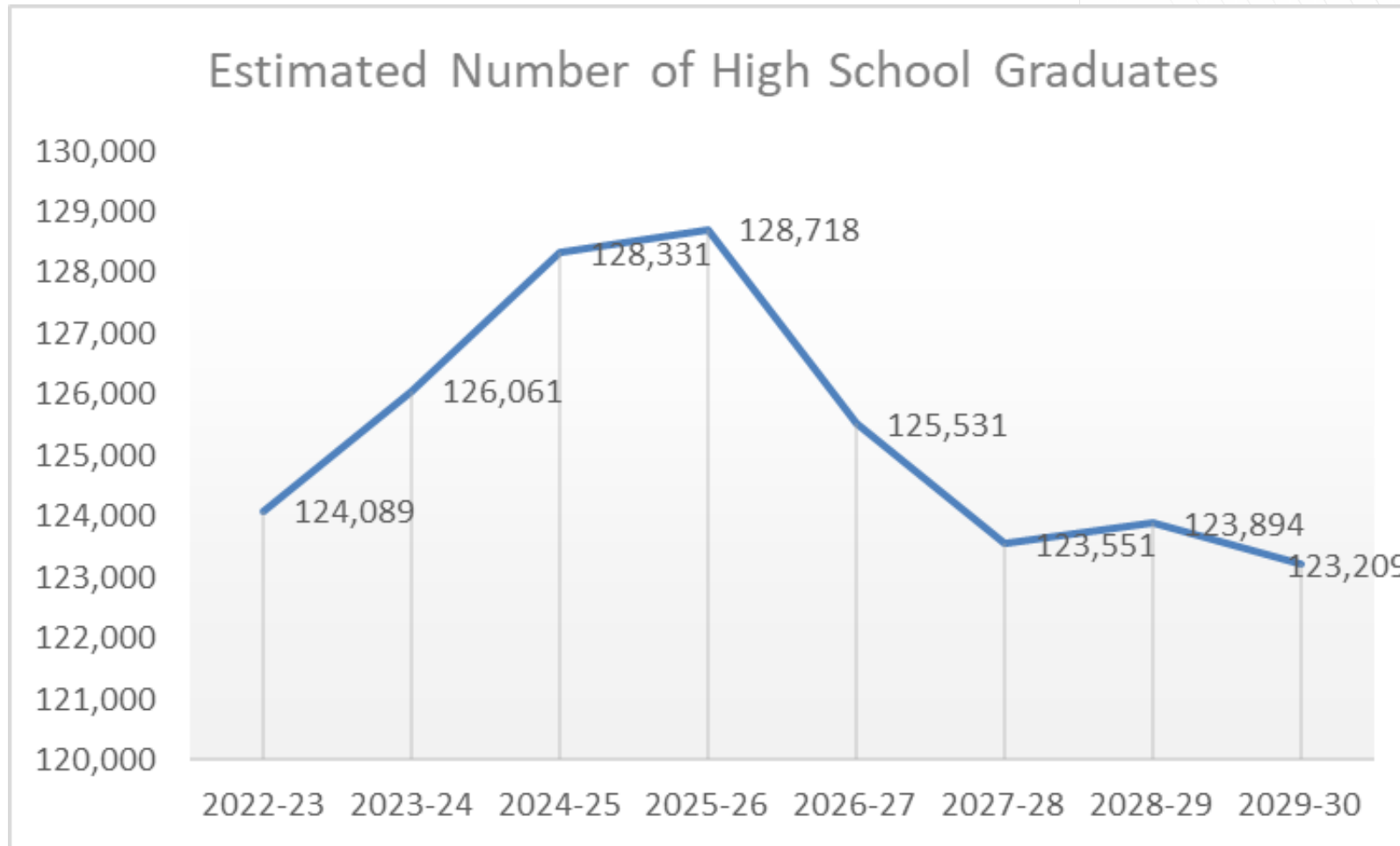
Persistence to Year 3 and Year 4 History

*Fall 2018 and Fall 2019 are preliminary.



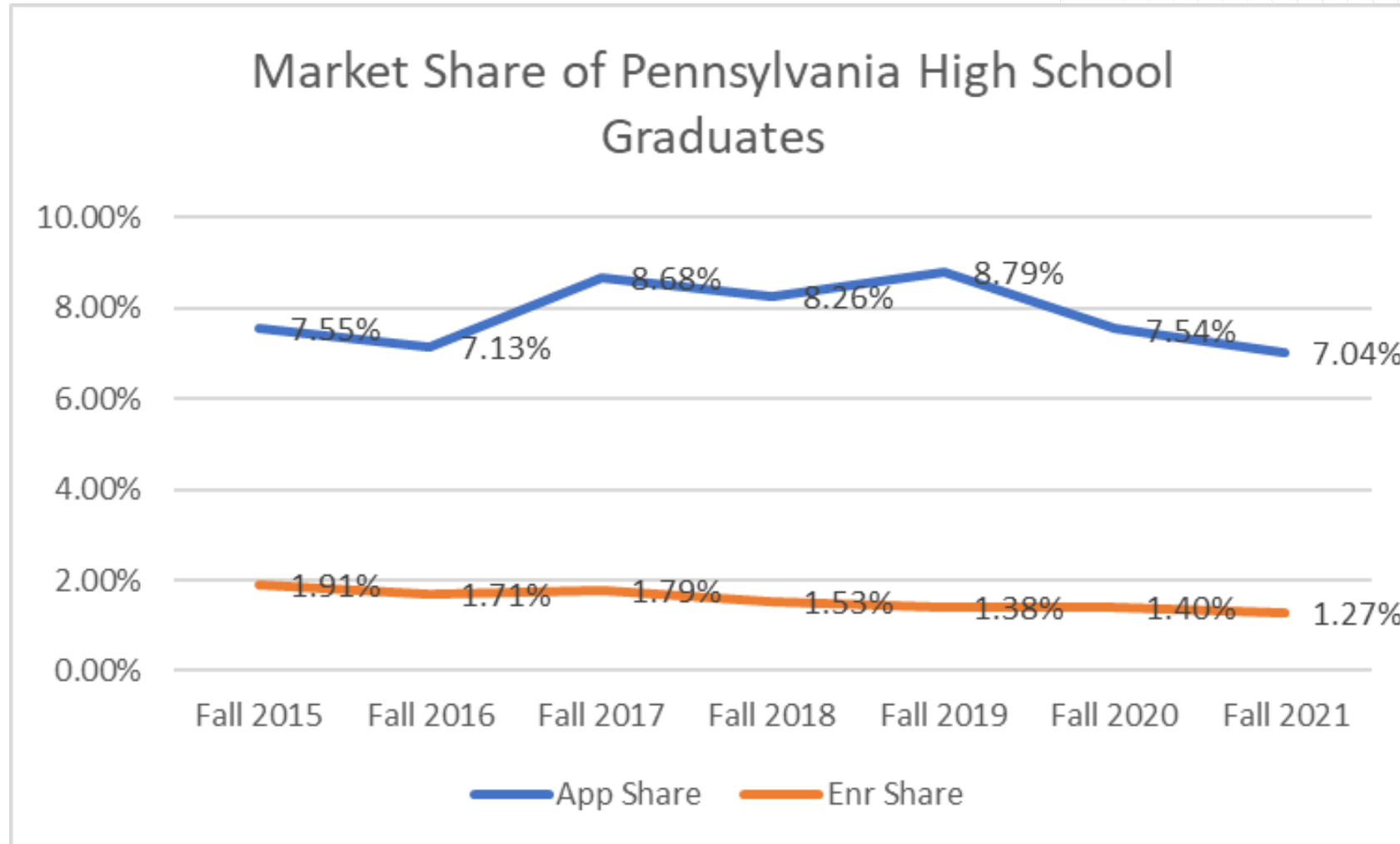
Enrollment Moving Forward

We need to keep an eye on 2025, when a demographic cliff is expected.



Enrollment Moving Forward

We also need to grow our market share of Pennsylvania high school graduates.



Enrollment Projections for 2022-23

Used spring 2022 enrollment numbers as the base of future projections.

New freshman enrollment utilized market-share data, consideration for demographic trend projections, implementation of a Latinx recruitment strategy, and the increase in merit-based scholarship awards.

The persistence rate used for continuing students for spring 2022 to fall 2022 is 68.39%.

The enrollment numbers for re-enrolled, dual enrollment, and registrar's transient students were based on historical data. Clock hour enrollment projections remained steady.

Graduate enrollment projections were reduced slightly from previous CPP version to reflect program-based projections, including programs that did not recruit during academic year 2021-22 or are not planning to recruit in 2022-23.

Assumed a slight growth in new international enrollments each year.

Did ***not*** make any assumptions of the impact of the the new pricing for undergraduate, in-state students.

2022-23 Projections

Fall 2022 Projections used in CPP Mid-Year Report (Feb 2022)	
Student Level/Type	Fall 2022
New Freshmen (UG)	1925
New Transfers (UG)	300
Upperclass Continuing (UG)	4520
Re-enrolls (UG)	140
Dual Enrollment (UG)	65
Transient (UG)	25
Grad (New and Cont)	2020
TOTAL UG + GR	8995
Hour	300
TOTAL UG + GR + CH	9295

CPP Mid-Year Progress Report Revenue and Expenses – E & G Recap

- In FY 2018-2019, E&G net assets were \$80,035,143
- FY2021-22 E&G net assets are expected to decrease to \$62,767,157
- E&G net assets are projected to drop to **\$50 million by June 30, 2023**, based on the mid-year progress report information.
- When compared to the September 2021 CPP, the E&G structural deficit for FY2021-22 increased by approximately \$1.7 million, primarily due to lower enrollment projections.
- Expense reductions were made primarily through personnel reductions, accompanying benefits, and other operating expense reductions.
- IUP has already reduced workforce by 25.69%, or 335.6 FTE and needs to continue monitoring vacancies and work towards reducing personnel and operating costs.

Cumulative Workforce Progress – as reported in Mid-year CPP Progress Report dated February 22, 2022

	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)
February 2022 Projections Faculty	607.16	431.76	(175.40)	-28.89%	(16,653,424)
February 2022 Projections Non-Faculty	699.02	538.86	(160.16)	-22.91%	(13,634,927)
Total February 2022 Projections	1306.18	970.62	(335.56)	25.69%	(30,288,351)
Difference - September 13 2021 CPP to February 2022 Projections	0	-0.99	(0.99)	0.08%	1,022,372

This chart reflects changes in FTE as reported in CPP V8 and V9b and will not tie to IUP's internal progress reporting. Some of the variances in reporting are due to CBA increases and assumptions, leave with/without pay, sabbaticals, replacement of positions

Non-Faculty Workforce Progress

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

Workforce Progress

- Overall, in all employee groups, IUP is projecting a decrease of an additional 6.8 FTE beyond what was projected in September 2021 CPP which included a reduction of 10 FTE of non-represented employees, as a target for this fiscal year.
- We are showing a further net reduction of 17.5 employee FTE for fall 2022 beyond the September 2021 CPP projection.

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

E&G Only	FY2021-22			FY2022-23		
	Sept. 2021 CPP	Feb. Mid-year 2022 Projections	Variance	Sept. 2021 CPP	Feb. Mid-year 2022 Projections	Variance
Faculty	438.12	434.37	(3.8)	433.88	417.88	(16.0)
AFSCME	264.34	267.42	3.1	264.25	269.62	5.4
Nonrepresented	147.31	146.65	(0.7)	147.33	142.85	(4.5)
SCUPA	55	51.94	(3.1)	54.92	53.48	(1.4)
Other	57.93	55.52	(2.4)	57.94	57.04	(0.9)
	Total Change in E&G Workforce			Total Change in E&G Workforce		
			(6.8)			(17.5)

Enrollment – Projections and Actuals (as of the Mid-Year CPP Progress Report dated February 22, 2022)

	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 Enrollment	Actual Freeze										
Clock Hour	336.19	228.85	-31.9%	251.48	9.9%	257.20	12.4%	251.48	0.0%	258.06	0.3%
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%	6,238.22	-1.0%
Graduate	1,058.89	982.88	-7.2%	956.60	-2.7%	989.00	0.6%	1,004.49	5.0%	1,017.25	2.9%
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%	7,255.48	-0.5%
Annualized FTE Enrollment	Projected										
Undergraduate (includes clock hour)	8,094.03	7,589.39	-6.2%	6,991.44	-7.9%	6,821.31	-10.1%	6,949.76	-0.6%	6,765.24	-0.8%
Graduate	1,321.97	1,306.38	-1.2%	1,270.29	-2.8%	1,273.83	-2.5%	1,333.71	5.0%	1,310.16	2.9%
Total Annualized FTE Enrollment	9,416.00	8,895.77	-5.5%	8,261.73	-7.1%	8,095.14	-9.0%	8,283.47	0.3%	8,075.41	-0.2%

*Submitted September 2021

Workforce – Projections and Actuals (as of the Mid-Year CPP Progress Report dated February 22, 2022)

	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%	431.76	-18.4%	428.67	-1.0%	415.37	-3.8%
Annualized Unrestricted FTE Nonfaculty , net of turnover	673.70	598.88	-11.1%	538.75	-10.0%	538.86	-10.0%	538.73	0.0%	540.45	0.3%
Fall FTE Student/Fall FTE Faculty Ratio	14.8	15.4		17.2		17.1		17.4		17.7	

*Submitted September 2021

Annual Summary Projections and Actuals (as of the Mid-Year CPP Progress Report dated February 22, 2022)

Expenditure Category	Projected Year-End Reductions/Savings	Mid-Year Actual Reductions	Revised Projected Year-End Reductions 6/30/22
Faculty Personnel	106.71 FTE \$11,089,815	110.46 FTE* \$11,491,507	110.46 FTE \$11,491,507
Non-Faculty Personnel	51.44 FTE** \$5,776,356	54.50 FTE** \$5,129,660	54.50 FTE \$5,129,660
Operating	\$2.7 million	\$3.3 million	\$3.3 million

*Faculty FTE reductions include an adjustment for approved spring temporary hires as well as budgeted reductions resulting from confirmed leave without pay situations, grant releases and sabbaticals that were not known at the time of the September CPP submittal.

Since the September 2021 CPP was submitted, we have received 17 notices of confirmed faculty separations. The majority of the savings will not be recognized until FY2022-23 and therefore not counted above. One of these positions was deemed to be in a critical area and will be filled in FY2022-23. The remaining 16 will be eliminated.

**Built into the non-faculty projections as submitted in September 2021, was a planned reduction of ten non-represented positions. To date, 13 non-represented positions have been identified; however, due to timing of mid-year separations the FTE and associated salary and benefits savings will be reflected only partially in the current fiscal year with the remainder being recognized in FY2022-23 and beyond.

Unrestricted Financials – Projections and Actuals (as of the Mid-Year CPP Progress Report dated February 22, 2022)

	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
Total E&G Budget											
Total Revenues	\$200,559,258	\$191,630,132	-4.5%	\$190,045,525	-0.8%	\$188,796,005	-1.5%	\$177,992,233	-6.3%	\$175,981,927	-6.8%
Total Expenditures and Transfers to Plant Funds	202,004,525	187,866,947	-7.0%	196,240,179	4.5%	196,662,507	4.7%	190,176,033	-3.1%	188,048,470	-4.4%
Revenues Less Expenditures/Transfers to/(from) Plant Funds	(\$1,445,267)	\$3,763,185	n/a	(\$6,194,654)	-264.6%	(\$7,866,502)	n/a	(\$12,183,800)	n/a	(\$12,066,543)	n/a
Surplus/(Deficit)--Excludes Transfers to/(from) Plant Funds	(\$809,986)	(\$3,139,702)		(\$5,769,654)		(\$7,441,502)		(\$11,433,800)		(\$11,316,543)	
Total Auxiliary Budget											
Total Revenues	\$21,942,065	\$24,303,412	10.8%	\$19,227,463	-20.9%	\$19,920,837	-18.0%	\$20,453,789	6.4%	\$21,247,567	6.7%
Total Expenditures and Transfers to Plant Funds	22,556,925	25,136,342	11.4%	27,335,663	8.7%	27,335,663	8.7%	28,076,174	2.7%	28,076,174	2.7%
Revenues Less Expenditures/Transfers to/(from) Plant Funds	(\$614,860)	(\$832,930)	n/a	(\$8,108,200)	n/a	(\$7,414,826)	n/a	(\$7,622,385)	n/a	(\$6,828,607)	n/a
Surplus/(Deficit)--Excludes Transfers to/(from) Plant Funds	(\$632,450)	(\$1,999,812)		(\$8,108,156)		(\$7,414,826)		(\$7,622,385)		(\$6,828,607)	
Total Unrestricted (E&G and Auxiliary) Budget											
Total Revenues	\$222,501,323	\$215,933,544	-3.0%	\$209,272,988	-3.1%	\$208,716,842	-3.3%	\$198,446,022	-5.2%	\$197,229,494	-5.5%
Total Expenditures and Transfers to Plant Funds	224,561,450	213,003,289	-5.1%	223,575,843	5.0%	223,998,170	5.2%	218,252,206	-2.4%	216,124,644	-3.5%
Revenues Less Expenditures/Transfers to/(from) Plant Funds	(\$2,060,127)	\$2,930,255	n/a	(\$14,302,855)	-588.1%	(\$15,281,328)	n/a	(\$19,806,184)	n/a	(\$18,895,149)	n/a
Surplus/(Deficit)--Excludes Transfers to/(from) Plant Funds	(\$1,442,436)	(\$5,139,514)		(\$13,877,810)		(\$14,856,328)		(\$19,056,184)		(\$18,145,149)	
Use of Supplemental Resources for Operations	\$0	\$0		\$6,194,654		\$6,194,654		\$4,300,000		\$4,300,000	
One-Time COVID Funds (revenue recognition adjustment)	\$0	\$0		\$0		\$0		\$0		\$0	
Revenues Less Expenditures and supplemental resources	(\$2,060,127)	\$2,930,255		(\$8,108,201)		(\$9,086,674)		(\$15,506,184)		(\$14,595,149)	

Unrestricted Financial Ratios – Projections and Actuals (as of the Mid-year CPP progress report dated February 22, 2022)

	Target	FY2019-20	FY 2020-21	FY 2021-22	FY 2022-23
Fall FTE Student/Fall FTE Faculty Ratio <i>Fall FTE student/Fall FTE faculty (excludes clock hour students and faculty)</i>	19.2	14.8	15.4	17.7	17.5
Student/Nonfaculty Ratio <i>Annualized FTE Student/Annualized FTE Nonfaculty</i>	17.7	13.5	14.9	14.9	15.5
Annual Operating Margin <i>Total Annual Revenues less Total Annual Expenses/Total Annual Revenues</i>	>2%	-2.4%	-4.5%		
Annual Primary Reserve Ratio <i>Estimated End of Year Balance in Expendable Net Assets/Total Expenses before Transfers</i>	>40%	34.9%	34.0%		
Minimum Reserves Ratio <i>Unrestricted Total Cash*365/Unrestricted Total Operating Expenses (excluding capital and transfers)</i>	>180 days	143	159		

Revenue and Expenses – Auxiliary

- Total enrollment decline over the past several years has resulted in fewer students residing on campus and purchasing meal plans, leading to a decline in housing and dining revenue.
- Since 2019-20, the auxiliary units have reduced the workforce from **42.74 FTE to 20.46 FTE**, or a **52.1%** decrease in overall workforce.
- As a result of COVID-19, fewer new and continuing students lived on campus for 2020-2021 resulting in fewer students purchasing volunteer meal plans for 2021-2022
- The on-going COVID-19 pandemic necessitated social distancing and utilizing double-occupancy rooms as single rooms therefore reducing total housing capacity and revenue earned for each double room.

Revenue and Expenses – Auxiliary

- Effective July 1, 2020, IUP has master leases in place for Phases I and IV.
- FY2021-22 projected revenue associated with these phases are \$6.1 million.
- The mid-year progress report was adjusted for an increase in revenue based on year-to-date actuals
- Expense projections were already conservative and were not adjusted in the mid-year report

Revenue and Expenses – Auxiliary

- The University continues to work with dining services contractor Aramark to identify cost-reduction and revenue generating measures while keeping meal plan rates flat for FY2021-2022.
- Total meal plan participation and dining revenue has increased 17% over Fall 2020. However participation has decreased by 25.7% compared to 2019, which is the comparison year for the new contract.
- The majority of this decrease, compared to 2019, is in off-campus student meal plans which have decreased by 40% since Fall 2019.
- This is a combined result of more continuing students electing to live on campus in Fall 2021 compared to Fall 2020 and, due to COVID-19, fewer third and fourth year students with voluntary meal plans.

Budget Reduction Strategies and Reinvestment Opportunities

Budget Reduction Strategies Implemented:

- ESLP for faculty and non-faculty
- One-time and ongoing savings from Operating expense reductions
 - 50% reduction to departmental operating budgets
 - Reductions to plant
 - Reductions to budgeted personnel pools
 - Historical review of spending resulted in better aligning budget with expenses in certain areas.
- One-time savings by limiting travel, equipment purchases
- Next Gen efforts resulting in merging/integration/elimination of academic colleges and/or departments
- Transfer/sale of Northpointe
- Workforce reductions - retrenchment of faculty, eliminating nonfaculty positions, program reductions, and org structure changes
- Slow down of personnel expenses, hiring only when it's critical.
- Phase 1 of the Facilities restructuring (which included merging Administrative Services with Facilities, eliminating the individual maintenance shops, elimination of 12 managers and supervisory positions.)
- Reduction of total clerical staff by reducing positions and converting clerical staff to 9-month employees
- Using one-time carry forward funds to reduce deficit
- Using one-time reserves to reduce deficit

Budget Reduction Strategies

- Areas that were identified to be analyzed and considered *(please note that not all of these were specifically mentioned in the various versions of the CPP as submitted)*
 - Outsourcing of the custodial, grounds, and snow removal functions
 - Branch campuses (Northpointe, Pittsburgh East, and Punxsutawney)
 - Clerical pool
 - A current review of designated fund centers as well as the overall account structure
 - Reviewing student fee structure
 - Athletics
 - Health Service
 - Org structure changes; consolidate/merge areas
 - Review academic program mix
 - Library
 - Effectiveness of affiliate organizations
 - Many other items with feedback from UBAC and other constituency groups
 - Summer utility savings and consolidation of buildings
 - Reduce the number of cable drops
 - Reduce phone lines (VOIP project)
 - Review authorized cell phones and iPads

Strategic Reinvestment Opportunities

- The new Strategic Plan provides opportunities to focus and reinvest in priority student-focused areas to better position IUP for years to come.
 - Reducing cost of attendance
 - Improve student retention and graduation rates
 - Housing scholarship beginning FY 2021-22
 - \$300 one-time grant this year to assist students financially due to COVID-19
 - Sutton scholarships funded by E&G
 - Hawks Q&A Center
 - University College
 - IRMC and other academic/research partnerships
 - New Kopchick Hall construction
 - New academic program growth
 - Diversity, equity and inclusion initiatives and programming
 - Analyze student fees for possible reductions
 - Merit and need-based funding for students.
 - Emergency funding for students

Timeline (for next steps in CPP Mid-Year Progress Report process and financial sustainability planning)

- 02/22/22 - Universities submitted their mid-year CPP progress reports to the System office
- 03/09/22 – Reports will undergo peer review
- 03/14/22 – Deadline for Universities to respond to questions, comments, and clarifications from peer review
- 03/14 and 3/15 – Voting will take place with questions focused on whether each university is making progress toward its financial sustainability goals
- 03/25/22 – Mid-year CPP progress report summaries, polls, and feedback presented to Executive Leadership Group (ELG) for their review, discussion, recommendations
- IUP will continue to make multi-year progress on financial sustainability plan with the strategic plan core principles, impact areas, and presidential goals as a guide.

Mid-year Progress Report - Summary

- 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. It also demonstrates that **we still have further progress** towards balancing the budget and being financially sustainable
- We have also continued to work on reducing workforce and making additional expense reductions. This ongoing work is already showing results, reducing expenses by more than \$3.3 million. We continue the work and have other initiatives in progress that should continue to bear fruit as we continue working on addressing IUP's remaining financial challenges.
- 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 address the shortfalls by tackling our enrollment and revenue outlook through various measures and right sizing our workforce and expenses. This has been, and remains, a top priority. IUP leadership is confident that we will continue to make progress, during these challenging, and uncertain times.

System Sustainability Plan Update Mid-Year Sustainability Progress Summary

Due: February 22, 2022

University: IN University, Plan Level 2

Summary of Progress
(All yellow highlighted areas to be completed by submitting university)

Reviewer Comments
(To be completed by other CAOs/CFOs after February 22, 2022)

Fiscal Year Milestones

To achieve enrollment targets of 7,390 FTE at the fall freeze and spring headcount of 8,188; to reduce personnel expenditures by \$1.5 million [10 FTE]; personnel reductions through attrition of \$1.6 million; and to reduce operating expenses by \$2.7 million.

IUP exceeded the targets associated with expense reductions; headcount enrollment was mixed and credit hour actuals were lower than our conservative projections.

Narrative on progress from university, referring to tables on the back page

- Undergraduate:
- Graduate
- Noncredit Bearing (if applicable)
- Clock Hour (if applicable)
- Explanation of any new specific revenue

As outlined in Table 1 below, current fiscal year tuition revenues for IUP are lower than projected in the September 2021 by \$1.4 million. From an enrollment perspective, in summary, fall 2021 freeze headcount was slightly below projections; however, the average credit hours taken by students was also lower than projected, resulting in even fewer overall credit hours in spring than would have been expected with the level of decline in headcount. Since the revenue is based on credit-hour production, this results in lower revenue. Winter actuals exceeded the September 2021 projections by 11% and spring headcount was slightly under projections with the average credit hours lower than projected resulting in a decline in revenue. Table 2 outlines the decline in fall credit hours since FY2017-18 which have declined by over 31%.

Table 1:

	FY2021-22	FY2022-23
September 13, 2021 CPP: Tuition Revenue	81,077,338	82,735,550
February 2022 Mid-Year Projections : Tuition Revenue	79,721,714	81,054,109
Change in Tuition Revenue	(1,355,624)	(1,681,441)

Table 2:

Historical Fall Credit Hours					Change from FY2017-18 to Present
FY2017-18	FY2018-19	FY2019-20	FY2020-21	FY2021-22	
155,041	139,973	126,987	117,587	106,378	-31%

Revenue

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.

Updated enrollment projections for FY2022-23 have resulted in lower revenue projections than September 2021 projections by approximately \$1.7 million, as shown in Table 1.

To provide more specific detail on enrollment, overall, the undergraduate and graduate combined headcount for fall 2021 was 49 under the CPP projections. By level, undergraduate students were 34 students below projections overall, though we did exceed CPP projections for our in-state students (+15). Out of state students were -21 and international students were -28 from projections. Graduate students were 15 students under CPP projections. By residency, in-state graduate students were 56 students under CPP projections but both out of state and international students exceeded CPP projections (+5 and +36, respectively). For clock hour students, we were one student behind projections in fall 2021.

Undergraduate students did not meet the credit hour or FTE projections in fall 2021 due to a lower average credit load and a smaller proportion of full-time (12+ credits) students than projected. In state graduate students also did not meet overall credit hour or FTE projections; however, out of state and international students exceeded both credit hour and FTE projections. The percent of graduate students who were enrolled full-time (9+ credits) fell below expectations as well.

Winter headcount enrollment exceeded last winter by 167 students (+152 undergraduate and +15 graduate), or over 11%.

As of spring 2022 freeze, by headcount, we had 36 fewer students than the original spring projections of 8,188 as reported in the September 2021 CPP. Overall, graduate headcount was in line with projections. Undergraduate headcount was under projections by 36.

Our overall headcount projections in the CPP were slightly under projections and the number of overall credit hours generated and resulting FTE also did not meet the CPP projections. Students enrolled in fewer credit hours on average in both the undergraduate and graduate categories. In addition, the proportion of both undergraduate and graduate students who were full time this spring was lower than anticipated.

Fall to spring retention of the fall 2021 freshman cohort was 85.08%, which is 4 students below the projected fall to spring retention of 86.07%. Conversely, the percent of fall 2021 continuing student headcount that enrolled for spring 2022 exceeded projections by 0.26 percentage points, or 15 students ahead of projections.

For both new and continuing students, the university implemented a robust campaign to assist students with registration for spring. Retention funds were used for students who were above the threshold of the student account balance and had holds on their registrations, students with missing financial aid documents that prevented fall financial aid from being applied to their accounts were contacted several ways (phone, email, and in-person, if living in the residence halls), messages were placed on students' MyIUP accounts (the students' personal portal for the university), postcards were mailed to homes, Guides were notified about their students who had not yet registered (Guides are the staff and faculty members who volunteer to be a personal contact for students when they enter IUP), and Assistant/Associate Deans were provided lists of unregistered students in their respective colleges in order for them to contact the students. This activity is beyond the standard outreach by faculty advisors to their advisees.

As a result of this campaign, which is currently being assessed for effectiveness of the various activities in order to refine for outreach to students for summer and fall registration, was that a higher percentage of students were registered earlier in the semester than in the three previous spring registration periods. Between November 1 and the end of the fall semester, we averaged almost 5 ½ percentage points higher in undergraduate registrations as compared to the previous three years.

We are currently in the implementation phase of our Strategic Enrollment Plan, which has significant emphasis on recruitment and retention/persistence. The concentration in several of the action items are the recruitment and student success of our underrepresented students. To date, we are seeing indications of success with our Latinx recruitment strategies. Additionally, graduate enrollment and organizational changes in the recruitment of graduate students is being addressed, utilizing a very collaborative methodology between graduate admissions and the School of Graduate Studies and Research for best practices in graduate enrollment management. Finally, the plan is addressing affordability for students and all costs are being examined and proposals being brought forward to defray the cost of education at IUP. This is in addition to the significant investment in renewable scholarships by the university.

Narrative on progress from university, referring to tables on the back page

- Faculty:**
- Nonfaculty:**
- Operating:**
- Campus Footprint:**
- Planned Use of Unrestricted Net Assets:**
- Auxiliary Enterprises (if applicable)**

September 13, 2021, CPP included savings of \$1.5 million from the elimination of 10 non-represented positions. The mid-year projections include the actual savings from 13 identified non-represented positions, which surpass the initial target in the September 13, 2021, CPP.

February 2022 Mid-Year 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.

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 still overstaffed in the non-represented employee group when compared to state system average and two state system universities of comparable student enrollment. Discussions continue regarding organizational structure and other changes that can be made to further reduce these numbers.

Table 3A shows that overall, in all bargaining units, IUP is projecting a decrease of an additional 6.8 FTE beyond what was projected in September 2021 CPP which included a reduction of 10 FTE as a target for this fiscal year.

We are showing a further net reduction of 17.5 employee FTE for fall 2022 beyond the September 2021 CPP projection.

Therefore, IUP exceeded the workforce reduction targets set in the September 2021 CPP for both FY 2021-22 and FY 2022-23 projections. .

Table 3A:
Budgeted Annualized FTE Employees (Include all permanent and temporary employees)

E&G Only	FY2021-22			FY2022-23		
	Sept. 2021 CPP	Feb. Mid-year 2022 Projections	Variance	Sept. 2021 CPP	Feb. Mid-year 2022 Projections	Variance
Faculty	438.12	434.37	(3.8)	433.88	417.88	(16.0)
AFSCME	264.34	267.42	3.1	264.25	269.62	5.4
Nonrepresented	147.31	146.65	(0.7)	147.33	142.85	(4.5)
SCUPA	55	51.94	(3.1)	54.92	53.48	(1.4)
Other	57.93	55.52	(2.4)	57.94	57.04	(0.9)
	Total Change in E&G Workforce			Total Change in E&G Workforce		
			(6.8)			(17.5)

Expenditures

Table 3B:

	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)
February 2022 Projections Faculty	607.16	421.76	(175.40)	-28.89%	(16,653,424)
February 2022 Projections Non-Faculty	699.02	538.86	(160.16)	-22.91%	(13,634,927)
Total February 2022 Projections	1306.18	970.62	(335.56)	25.69%	(30,288,351)
Difference - September 13 2021 CPP to February 2022 Projections	0	(0.99)	(0.99)	0.08%	1,022,372

In the comparison of Sept. 2021 CPP to Feb. 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, Feb. 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%	(11,437,255)
Total September 13, 2021 CPP	1306.18	967.4	(338.78)	25.94%	(26,103,613)
February 2022 Projections Faculty	607.16	415.37	(191.79)	-31.59%	(16,524,116)
February 2022 Projections Non-Faculty	699.02	540.45	(158.57)	-22.68%	(11,657,061)
Total February 2022 Projections	1306.18	955.82	(350.36)	26.82%	(28,181,177)
Difference - September 13 2021 CPP to February 2022 Projections	0	(11.58)	(11.58)	0.89%	(2,077,564)

In the comparison of Sept. 2021 CPP to Feb. 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 Feb. 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.

Some of those reductions are due to furloughs and retirements of non-represented employees. The majority of the reduction is due to retirement of faculty. The impact of the extended Enhanced Sick Leave Payout (ESLP) is captured in this mid-year report.

The FY2021-22 Faculty FTE and salary and benefit projections include an adjustment for approved spring temporary hires as well as budgeted reductions resulting from confirmed leave without pay situations, grant releases and sabbaticals that were not known at the time of the September CPP submittal.

Since the September 2021 CPP was submitted, we have received 17 notices of confirmed faculty separations. The majority of the savings will not be recognized until FY2022-23 and therefore not counted in Table 6 (Annual Summary Projections and Actuals for FY 2021-22). One of these faculty positions was deemed to be in a critical area and will be filled in FY2022-23. The remaining 16 faculty positions will be eliminated.

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.

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 and a big change for the university to adapt to. 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 our mid-year 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 from reducing our footprint from that sale/transfer were included in FY 2022-23 (\$50,000) for the February 2022 Mid-Year projections and will be adjusted as actual savings are achieved.

IUP submitted a balanced FY2021-22 budget for the September CPP submission through a variety of one-time and permanent budget reductions strategies.

Although we have made great progress this year and exceeded our targets for our expenditure reductions for workforce and for operating expenses, our mid-year progress report updated information is projecting a shortfall of \$1.7 million, after the use of \$6.2 million in one-time supplemental resources to aid in balancing. This is due to enrollment, particularly credit hours, being lower than projections and resulting in lower projected tuition and student fee revenues.

Our structural E&G deficit for FY2022-23 is projected to be approximately \$12 million, which is consistent with what was projected in September 2021.

Although, the university had made progress by reducing workforce and overall budgets beyond what was targets in the CPP, conservative enrollment projections have lowered projected revenue causing this deficit to remain around \$12 million.

As the university continues to work towards financial sustainability a variety of one-time budget reductions strategies has been implemented. An on-going review of our overall account structure has led to a one-time sweep of funding in various accounts, university wide. As noted above, a review of faculty budgets resulted in identification of positions that for various reasons including leave without pay, sabbaticals, and grant releases, were identified mid-year and were used to reduce personnel budgets. IUP is currently reviewing organizational structure and other alignments that can assist in further reductions. Vacancies are being scrutinized as they occur so that only priority positions get approved to be filled.

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 expenses by more than \$3.3 million. We

	<p>continue the work and have other initiatives in progress that should continue to bear fruit as we continue working on addressing IUP's remaining financial challenges.</p> <p>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 address the shortfalls by tackling our enrollment and revenue outlook through various measures and right sizing our workforce and expenses. This has been, and remains, a top priority. IUP leadership is confident that we will continue to make progress, during these challenging, and uncertain times.</p>			
<p>Summary of Progress Against Milestones</p>	<p>The university has partially met mid-year milestones for enrollment, personnel expenditure/FTE reductions, operating expenditures, and campus footprint reductions. As stated above, IUP has exceeded the goals for expense reductions for workforce and operating expenses with continued enrollment declines resulting in less revenue. Year-end projected net assets are in line with projections in the sustainability plan. The university believes it will partially meet the sustainability milestones as set forth in the fiscal year goals above and will continue to address closing the budget gap.</p>	<p><i>To be competed at Joint Review Session:</i> The university has exceeded [met, partially met] mid-year [year-end] milestones for enrollment, personnel expenditure/FTE reductions, operating expenditures, and campus footprint reductions. Year-end projected net assets are in line with projections in the sustainability plan. The university believes it will exceed [meet, partially meet, will not meet] all milestones as set forth in the fiscal year goals above.</p>		
<p>Potential Loan Need in current year: N/A</p>	<p>CAO/CFO Recommendations? No/Yes (see below) Action plan required? No/Yes (see below)</p>	<p>Overall ranking: (To be competed at Joint Review Session)</p>		
<p>CAO/CFO Recommendations—To be completed at Joint Review Session (To be scheduled for early March 2022) There are no recommendations for follow-up activity for this reporting period. [Because enrollment projections were not met, a mid-course correction action plan and updated projections should be submitted by ...]. [Because sustainability plan actions were not achieved ...].</p>				
<p>Key:</p>	<p>Exceeds Expectations</p>	<p>Meets Expectations</p>	<p>Partially Meets Expectations</p>	<p>Does Not Meet Expectations</p>

_____IN_____ University
FY 2021-22 Mid-Year Sustainability Progress Summary

Sustainability Plan Executive Summary—**Copy or summarize from CPP Narrative**

Table 4:

	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 Enrollment											
						Actual Freeze					
Clock Hour	336.19	228.85	-31.9%	251.48	9.9%	257.20	12.4%	251.48	0.0%	258.06	0.3%
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%	6,238.22	-1.0%
Graduate	1,058.89	982.88	-7.2%	956.60	-2.7%	989.00	0.6%	1,004.49	5.0%	1,017.25	2.9%
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%	7,255.48	-0.5%
Annualized FTE Enrollment						Projected					
Undergraduate (includes clock hour)	8,094.03	7,589.39	-6.2%	6,991.44	-7.9%	6,821.31	-10.1%	6,949.76	-0.6%	6,765.24	-0.8%
Graduate	1,321.97	1,306.38	-1.2%	1,270.29	-2.8%	1,273.83	-2.5%	1,333.71	5.0%	1,310.16	2.9%
Total Annualized FTE Enrollment	9,416.00	8,895.77	-5.5%	8,261.73	-7.1%	8,095.14	-9.0%	8,283.47	0.3%	8,075.41	-0.2%

*Submitted September 2021

Table 5:

	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%	431.76	-18.4%	428.67	-1.0%	415.37	-3.8%
Annualized Unrestricted FTE Nonfaculty, net of turnover	673.70	598.88	-11.1%	538.75	-10.0%	538.86	-10.0%	538.73	0.0%	540.45	0.3%
Fall FTE Student/Fall FTE Faculty Ratio	14.8	15.4		17.2		17.1		17.4		17.7	

*Submitted September 2021

Table 6:

Annual Summary Projections and Actuals for FY 2021-22

Expenditure Category	Projected Year-End Reductions/Savings	Mid-Year Actual Reductions	Revised Projected Year-End Reductions 6/30/22
Faculty Personnel	106.71 FTE \$11,089,815	110.46 FTE* \$11,491,507	110.46 FTE \$11,491,507
Non-Faculty Personnel	51.44 FTE** \$5,776,356	54.50 FTE** \$5,129,660	54.50 FTE \$5,129,660
Operating	\$2.7 million	\$3.3 million	\$3.3 million
Campus Footprint	\$	\$	\$
Cash and Reserves Complete only if loan requested	Beginning Balance 7/1/21	Projected Ending Balance 6/30/22	Revised Projected Ending Balance 6/30/22
Unrestricted Net Assets	\$	\$	\$
Days of Cash on Hand	X days	X days	X days

*Faculty FTE reductions include an adjustment for approved spring temporary hires as well as budgeted reductions resulting from confirmed leave without pay situations, grant releases and sabbaticals that were not known at the time of the September CPP submittal.

Since the September 2021 CPP was submitted, we have received 17 notices of confirmed faculty separations. The majority of the savings will not be recognized until FY2022-23 and therefore not counted above. One of these positions was deemed to be in a critical area and will be filled in FY2022-23. The remaining 16 will be eliminated.

**Built into the non-faculty projections as submitted in September 2021, was a planned reduction of ten non-represented positions. To date, 13 non-represented positions have been identified; however, due to timing of mid-year separations the FTE and associated salary and benefits savings will be reflected only partially in the current fiscal year with the remainder being recognized in FY2022-23 and beyond.

Table 7:
Unrestricted Financial Projections—Update new "Charts for Sustainability" tab in CPP template with revised 2021-22 and 2022-23 data; copy table here.

	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
Total E&G Budget											
Total Revenues	\$200,559,258	\$191,630,132	-4.5%	\$190,045,525	-0.8%	\$188,796,005	-1.5%	\$177,992,233	-6.3%	\$175,981,927	-6.8%
Total Expenditures and Transfers to Plant Funds	202,004,525	187,866,947	-7.0%	196,240,179	4.5%	196,662,507	4.7%	190,176,033	-3.1%	188,048,470	-4.4%
Revenues Less Expenditures/Transfers to/(from) Plant Funds	(\$1,445,267)	\$3,763,185	n/a	(\$6,194,654)	-264.6%	(\$7,866,502)	n/a	(\$12,183,800)	n/a	(\$12,066,543)	n/a
Surplus/(Deficit)—Excludes Transfers to/(from) Plant Funds	(\$809,986)	(\$3,139,702)		(\$5,769,654)		(\$7,441,502)		(\$11,433,800)		(\$11,316,543)	
Use of Supplemental Resources for One-Time Needs/ Strategic Initiatives	\$0	\$0		\$0				\$0			
One-Time COVID Funds (<i>revenue recognition adjustment</i>)	n/a	\$0		\$0				n/a		n/a	
Resources/Adjustments Less Expenditures & Transfers	(\$1,445,267)	\$3,763,185		(\$6,194,654)		(\$7,866,502)		(\$12,183,800)		(\$12,066,543)	
Use of Supplemental Resources for Operations (to Balance Budget)	\$0	\$0		\$6,194,654		\$6,194,654		\$4,300,000		\$4,300,000	
Total Auxiliary Budget											
Total Revenues	\$21,942,065	\$24,303,412	10.8%	\$19,227,463	-20.9%	\$19,920,837	-18.0%	\$20,453,789	6.4%	\$21,247,567	6.7%
Total Expenditures and Transfers to Plant Funds	22,556,925	25,136,342	11.4%	27,335,663	8.7%	27,335,663	8.7%	28,076,174	2.7%	28,076,174	2.7%
Revenues Less Expenditures/Transfers to/(from) Plant Funds	(\$614,860)	(\$832,930)	n/a	(\$8,108,200)	n/a	(\$7,414,826)	n/a	(\$7,622,385)	n/a	(\$6,828,607)	n/a
Surplus/(Deficit)—Excludes Transfers to/(from) Plant Funds	(\$632,450)	(\$1,999,812)		(\$8,108,156)		(\$7,414,826)		(\$7,622,385)		(\$6,828,607)	
Use of Supplemental Resources for One-Time Needs/ Strategic Initiatives	\$0	\$0		\$0				\$0			
One-Time COVID Funds (<i>revenue recognition adjustment</i>)	n/a	\$0		\$0				n/a		n/a	
Resources/Adjustments Less Expenditures & Transfers	(\$614,860)	(\$832,930)		(\$8,108,200)		(\$7,414,826)		(\$7,622,385)		(\$6,828,607)	
Use of Supplemental Resources for Operations (to Balance Budget)	\$0	\$0		\$0				\$0			
Total Unrestricted (E&G and Auxiliary) Budget											
Total Revenues	\$222,501,323	\$215,933,544	-3.0%	\$209,272,988	-3.1%	\$208,716,842	-3.3%	\$198,446,022	-5.2%	\$197,229,494	-5.5%
Total Expenditures and Transfers to Plant Funds	224,561,450	213,003,289	-5.1%	223,575,843	5.0%	223,998,170	5.2%	218,252,206	-2.4%	216,124,644	-3.5%
Revenues Less Expenditures/Transfers to/(from) Plant Funds	(\$2,060,127)	\$2,930,255	n/a	(\$14,302,855)	-588.1%	(\$15,281,328)	n/a	(\$19,806,184)	n/a	(\$18,895,149)	n/a
Surplus/(Deficit)—Excludes Transfers to/(from) Plant Funds	(\$1,442,436)	(\$5,139,514)		(\$13,877,810)		(\$14,856,328)		(\$19,056,184)		(\$18,145,149)	
Use of Supplemental Resources for One-Time Needs/ Strategic Initiatives	\$0	\$0		\$0		\$0		\$0		\$0	
One-Time COVID Funds (<i>revenue recognition adjustment</i>)	\$0	\$0		\$0		\$0		\$0		\$0	
Resources/Adjustments Less Expenditures & Transfers	(\$2,060,127)	\$2,930,255		(\$14,302,855)		(\$15,281,328)		(\$19,806,184)		(\$18,895,149)	
Use of Supplemental Resources for Operations (to Balance Budget)	\$0	\$0		\$6,194,654		\$6,194,654		\$4,300,000		\$4,300,000	

Enrollment Management Update

UBAC

3/4/22

Freeze Spring 2022 Compared to CPP:

	CPP V8 (Spring)			Spring 2022 Freeze (per IR)			Difference CPP to Spring Freeze		
	Headcount	Credit Hours	FTE	Headcount	Credit Hours	FTE	Headcount	Credit Hours	FTE
UG In state	6,007	81,948.00	5,463.20	6,009	79,818.00	5,321.20	2	(2,130.00)	(142.00)
UG Out of state	285	3,967.00	264.47	257	3,464.00	230.93	(28)	(503.00)	(33.53)
UG Int'l	106	1,322.00	88.13	96	1,245.00	83.00	(10)	(77.00)	(5.13)
GR in state	1,298	8,050.00	670.83	1,251	7,606.00	633.83	(47)	(444.00)	(37.00)
GR Out of state/int'l	492	2,324.00	193.67	538	2,520.00	210.00	46	196.00	16.33
Total UG/GR	8,188	97,611.00	6,680.30	8,151	94,653.00	6,478.97	(37)	(2,958.00)	(201.33)
Total Clock Hours				187	75,644.00*				
Total UG/GR/CH				8,338					

Undergraduate Retention and Persistence to Spring 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
2/15/2022				
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%	86.15%	0.29	-15
Cont. UG Persistence to Spr 21	85.88%	85.90%	0.02	-1
Ppt Difference		0.24		

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

2/15/2022							
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 21 freeze)	Full-Time	540	622	30.18%	33.10%	(2.92)	52
	Part-Time	1249	1257	69.82%	66.90%	2.92	(52)
Undergraduate (87.41% FT at spring 21 freeze)	Full-Time	5569	6136	87.54%	87.42%	0.12	(7)
	Part-Time	793	883	12.46%	12.58%	(0.12)	7

Average Spring Credit Hours by Level and Full-Time/Part-Time Enrollment as of 2/15/2022						
	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	5.55	5.65	-0.1	3.69	3.94	-0.25
Average	13.29	13.37	-0.08	5.66	5.94	-0.28

Fall 2022 New Student Admissions

3/3/2022	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	7560	7798	-3.05%	-238	6981	7368	-5.25%	-387	888	915	-2.95%	-27	12.72%	12.42%	0.30
Transfers	214	216	-0.93%	-2	173	166	4.22%	7	65	51	27.45%	14	37.57%	30.72%	6.85
Culinary	207	240	-13.75%	-33	191	206	-7.28%	-15	62	77	-19.48%	-15	32.46%	37.38%	-4.92
Graduate	593	668	-11.23%	-75	317	371	-14.56%	-54	70	73	-4.11%	-3	22.08%	19.68%	2.41
<i>Note: As of 2/27/22 for grad and Culinary</i>															

Fall 2022 Freshman Market Share

Number of HS Grads	DMA	Difference in Market Share F22 to F21 to Date		
		Applications	Admits	Net Deposits
52,005	Philadelphia	-0.22	-0.34	-0.06
21,063	Harrisburg	-0.79	-0.58	-0.07
6,389	Johnstown	-0.03	0.03	-0.15
25,171	Pgh DMA	0.96	0.89	0.10
20,398	All other PA	-0.66	-0.70	-0.02
125,026	Total PA	-0.16	-0.19	-0.03

Fall 2022 Freshman Market Share

IMPACT OF MARKET SHARE ON ENROLLMENT							
		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	Philly DMA	2471	2355	-116	121	88	-33
21,063	Harrisburg DMA	1011	844	-167	103	88	-15
6,389	Johnstown DMA	882	880	-2	170	160	-10
25,171	Pgh DMA	2680	2921	241	380	404	24
20,398	All other PA DMAs	1117	983	-134	107	103	-4
125,026	Total PA	8161	7983	-178	880	843	-37

**Fall 2022 Housing Report Summary
As of February 28, 2022**

Suites		
Change in Housing Applications between February 21, 2022 and February 28, 2022		
Last Report: February 21, 2022	This Week: February 28, 2022	Change
Total Students: 1169 New Students: 497 Continuing Students: 672	Total Students: 1217 New Students: 543 Continuing Students: 674	Total Change: +48 New Students: +46 Continuing Students: +2
Percent of Occupied Designed Capacity: 33.13% Total Designed Capacity: 3528	Percent of Occupied Designed Capacity: 34.50%	Occupied Designed Capacity: Gain/Loss: +1.37%
Percent of Occupied Socially Distanced Capacity: 45.14% Total Utilizable Capacity: 2590	Percent of Occupied Socially Distanced Capacity: 46.99%	Occupied Socially Distanced Capacity Gain/Loss: +1.85%

University-Owned		
Punxsutawney Living Center		
Last Week: February 21, 2021	This Week: February 28, 2022	Change
Total Students: 9 Occupied: 4.55% Total Capacity: 198	Total Students: 9 Occupied: 4.55%	Total Change: 0 Gain/Loss: 0%

Suites Year-to-Year Application Comparison	
Total Fall 2022 as of February 28, 2022: 1217	Fall 2022 vs Fall 2021: +137
Total Fall 2021 as of March 1, 2021: 1080	Fall 2022 vs Fall 2020: +71
Total Fall 2020 as of February 27, 2020: 1146	

University-Owned Year-to-Year Application Comparison	
Year-to-Year Comparison: Punxsutawney	Fall 2022 vs Fall 2021: -2
Total Fall 2022 as of February 21, 2022: 9	Fall 2022 vs Fall 2020: +9
Total Fall 2021 as of February 22, 2021: 11	
Total Fall 2020 as of February 20, 2020: 0	

Grand Total Application	As of 2/28/22: 1226 – Fall 2022	As of 3/1/21: 1091 – Fall 2021
	To Date Fall 2022 v Fall 2021 Grand Total Comparison: +135	

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 February 28, 674 continuing students have signed up for the 2022-2023 academic year. As of March 1, 2021, 613 continuing students had signed up for the 2021-2022 academic year **for a difference between 2022 and 2021 of +61.**

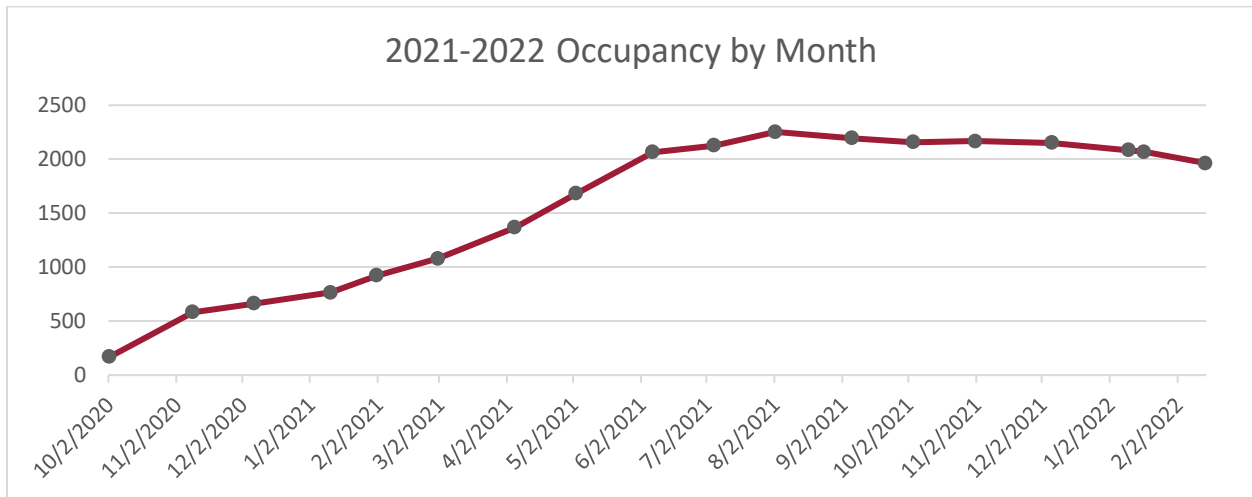
Fall 2022 Housing Report Summary
As of February 28, 2022

- b. New Student Year-to-Year Date and Point-in-Process Comparison (process opened on the same dates for new students): As of February 28, 543 new students have signed up for the 2022-2023 academic year. As of March 1, 2021, 467 new students had signed up for the 2021-2022 academic year **for a difference between 2021 and 2020 of +76.**
 - c. Continuing Student Point-in-Process Comparison: As of week 22 of housing sign ups, 674 continuing students have signed up for housing for the 2022-2023 academic year. Comparatively, during 2021-2022 housing sign ups, 618 continuing students had signed up for housing **for a difference of +56.**
2. Trends among new and continuing students who have contracted to live on campus for 2022-23 are as follows:
- Nursing (132), Criminology (77), Biology (73), and Psychology (69) are the most common majors, followed closely by majors in Computer Science, Health and Human Services majors, Management, and Natural Science—each with 41-52 students who contracted.
 - 107 are members of the Cook Honors College
 - 872 identify as female
 - 769 live more than 50 miles from IUP
 - 457 live fewer than 50 miles from IUP

Spring 2022 Housing Report Summary As of February 28, 2022

Housing occupancy on the Indiana Campus for the Spring 2022 is currently at 1,947 compared to 1,499 in Spring 2021. This accounts for an increase of 106 new first-year and transfer students who moved into campus housing for the Spring 2022 semester compared to 63 new first-year and transfers for Spring 2021. The total number of continuing students lost from Fall to Spring is currently 301 (-14.5%).

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 due to students deciding to complete their studies at home for the Spring 2021 semester. This year's decrease is currently 14.5% and is anticipated to hold steady at this level for the remainder of the semester.



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.