

University Senate Minutes

September 6, 2022

3:45pm – 5:00pm, Eberly Auditorium

- Chairperson Piper called the September 6, 2022 meeting of the University Senate to order at 3:48pm
- Minutes from the April 26, 2022 meeting were previously **APPROVED**. The following corrections were **APPROVED** from the minutes on April 26, 2022 and November 2, 2022.

The April 26, 2022 minutes need to reflect the following additions/corrections:

1. From the University-Wide Graduate Committee:
 - New Courses
 - i. EDUC 641 – Student Teaching Field Experience
 - ii. ECON 556 – Advanced Econometrics
 - iii. MATH 511 – Univariate Data Analysis
 - iv. ANTH 525 – Archaeological Lab Methods
 - v. EDEX 535 – Methods and Curriculum – Severe Cognitive Disabilities
 - The following programs are being placed in moratorium:
 - i. Certificate in Autism Spectrum Disorder
 - ii. Supervisor of Pupil Services Certification

The November 2, 2022 minutes need to reflect the following additions/corrections:

1. From the University-Wide Undergraduate Curriculum Committee at their October 2021 meeting:
 - Program Revisions
 - i. Bachelor of Arts in Music
 - ii. Archaeology Track, Bachelor of Arts in Anthropology
 - iii. Cultural Competencies Certificate, Bachelor of Arts in Anthropology

- Agenda items for the September 6, 2022 meeting were **APPROVED**
- Chair Piper opened the floor for nominations for Vice Chairperson. Shagufta Haque was nominated and elected.

Reports and Announcements

A. President's Report (combined with Provost's Report):

- Dr. Luetkehans is unable to attend the meeting today so our comments are combined.
- We are focusing on the strategic priorities and the fundraising campaign which is led by University Advancement. We are excited to celebrate 150 years at IUP.
- This summer we started our work re-envisioning our Liberal Studies curriculum under the direction of Dawn Smith-Sherwood.

- We have three candidates coming to campus to interview for the Dean of Eberly College of Business. The open fora will be held on Tuesday afternoons. The search for our two other dean positions will begin soon.
- The Learning Commons Open House is on Wednesday, September 14 from 11am-1pm.
- Our 9/11 Memorial Service will be held during the common hour on Monday, September 12 with Constitution Day being held later that afternoon.
- IUP was approved for a \$1 million project as part of Build Back Better regional challenge grant. For more information visit: <https://www.iup.edu/news-events/news/2022/09/iup-approved-for-1-million-project-as-part-of-build-back-better-regional-challenge-grant.html>
- The Non-discrimination Policy will be addressed under New Business.

B. Provost's Report:

- Included in the President's report.

C. Chair's Report:

- The Non-discrimination Policy will be coming up for discussion under new business.
- Feedback on this policy from various Senate Committees will be solicited throughout the year.

D. Vice Chairperson's Report:

- SGA had an Ice Cream Social event where they had a great turnout of potential new members
- SGA will also be reinvigorating the Student House of Representatives this year, it will be a platform for all the organizations on-campus (through a representative) to connect via the monthly meetings.
- GSA has a new e-board which includes:
 - Koga Chilume - President
 - Atia Rasul - Vice President
 - Carly Park - Secretary
 - Atiqul Haque - Director of Public Relations
 - Lizoon Nahar - Treasurer
- The GSA e-board had a retreat over the summer, its main objective was to welcome the new members as well as plan and prepare for the academic year.
- GSA will be incorporating guest speakers from various departments on campus to come and talk to graduate students on the services and resources they are offering.
- GSA has numerous events/ activities planned for partaking in. For this month, September 21, 2022 the members of the GSA will be volunteering at the Indiana Community Garden from 5-7pm as a way of also giving back to the Indiana community.

- The GSA will also be working closely with the SGA to coordinate events that are intended for both undergraduates and graduates.

Standing Committee Reports

A. Rules Committee (Interim Chair Decker)

- Thank you to Dawn Smith-Sherwood for her leadership as the Chair of the Rules Committee. Due to her new role as the Director of Liberal Studies, she will be serving on the University-wide Undergraduate Curriculum Committee.
- There are several vacancies on our Senate Committees and a special election will take place for the UWCC and UWGCC. Please consider joining a Senate Committee if you are not already serving.
- Next meeting: Tuesday, September 13, 2022 @ 3:45pm in 409 Davis

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

- No report.

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

- No report. Please consider running for a position on the UWGCC.

D. Research Committee (Co-Chair Sciulli)

FOR INFORMATION:

Meeting Minutes – April 12, 2022

Senate Fellowships:

- There were two proposals for review and the decision was made to fund both proposals, totaling \$8,989.
 - Jeanine Mazak Kahne and Erin Conlin
 - C. Harrison Wick and Janet Blood
- There were 7 USRC Small Grant proposals for review and the decision was made to fund 5 proposals, totaling \$19,000.
 - Nicholas Deardorff
 - Sudeshna Gosh
 - Vida Irani
 - Sharon Massey and Sean Derry
 - Lisa Newell

Meeting Minutes – May 3, 2022

- There were 9 USRC Small Grant proposals for review, and the decision was made to fund 8 proposals, totaling \$19,000.
 - Stephanie Caulder
 - Rosemary Engelstad
 - Ivan Fortushniak
 - Lorraine Guth
 - Terilyn Huntingdon

- Anthony Perillo and Jennifer Perillo
- Josiah Townsend
- Jason Worzbyt

- Next meeting: Tuesday, September 13, 2022 @ 3:30pm via Zoom

E. Student Affairs Committee (Chair Erwin)

- Next meeting: Tuesday, September 13, 2022 @ 3:45pm via Zoom

F. University Development and Finance Committee (Chair Drye)

- The Committee met on August 30th to discuss the Non-discrimination Policy.
- Further conversation will take place at our next meeting on Tuesday, September 27, 2022 @ 3:45pm via Zoom.

G. Academic Affairs Committee (Chair Dugan)

FOR INFORMATION:

Information regarding Emeritus applications have been sent out. Initial deadlines are as noted following.

Please see application materials for additional deadlines and timeline.

DEAN Emeritus

All nomination forms, documents and supporting materials must be submitted in one pdf file to the Chair of the College Chairs' Council for their review and recommendation by noon on Monday, September 19, 2022.

FACULTY Emeritus

Nominations and all supporting materials must be submitted by the departmental or administrative unit to the College Deans or Administrative Vice Presidents for their review and recommendation in one pdf file by 4:30PM on Monday, September 19, 2022

FOR ACTION:

APPROVED

CURRENT

Undergraduate Transfer Admissions

A student who has been attending another institution of higher education and wishes to transfer to IUP must submit an application, official transcripts of all postsecondary educational work, and an official high school transcript. All admissions decisions are made on a rolling basis by the Admissions Committee. Under a rolling admissions policy, applications are reviewed as they become complete. Decisions can range from automatic acceptance, to requests for additional information, to other alternatives.

Transfer applications are reviewed on the basis of academic college course work attempted or

completed. Transfers are required to have at least a cumulative 2.0 GPA on a 4.0 scale (C average) from all schools previously attended and to have met the minimum requirements established by the academic department to which the student is applying. Some majors require increased standards for admission and additional information. Contact the Office of Admissions for specifics. If a student has at least 12 college level (non-developmental and non-technical) credits, the decision will be based solely on their transfer GPA. If the student has less than 12 college credits, the admissions decision considers other evidence of students' performance and ability to be a successful college student.

The evaluation of credits from other institutions of higher education is the responsibility of the Office of Admissions and the application of the credits is at the discretion of the academic dean who has jurisdiction over the student's desired major. Normally, courses considered for transfer are only those taken from institutions that are accredited by the seven regional accrediting agencies. Credit from institutions whose accreditation is recognized by CHEA (Council for Higher Education Accreditation) is also eligible for transfer. In accordance with PASSHE's Student Transfer Policy (Policy 1999-01-A), IUP evaluates learning from non-regionally accredited institutions on a student-by-student basis. IUP uses the American Council on Education's guidelines for learning evaluation to ensure consistency and equity in the application of credit from non-regionally accredited institutions as well as from military service, workplace training, digital credentials, and other alternative educational experiences.

Each course is evaluated separately. The evaluation includes a review of the description, credits, and grade of each course along with the applicability of the course to the student's major at IUP. However, only credits transfer, not grade point average.

Students may transfer credits in courses from regionally accredited institutions where the grade of "D" is earned only if the student has a GPA of 2.0 or higher from the institution(s) attended. Some academic programs at IUP may require the student to repeat certain courses in which a "D" grade was earned. Review of learning from non-regionally accredited institutions will be evaluated on a student-by-student basis.

No matter how many credits are transferable, the student must satisfy all of the degree requirements falling into the categories of (1) university requirements, (2) college requirements, and (3) department requirements.

For Second Bachelor Degree students, a block of 90 credits is awarded if the first degree was earned from another university. Liberal Studies requirements, other than ones specifically required by the major, are considered met. All second degree students, whether they completed the first degree at IUP or another university, are required to complete a minimum of 30 credits to earn the second degree. The academic department determines which courses must be completed to earn the second degree.

University Requirements: All students are obligated to fulfill a basic program in Liberal Studies. The transfer evaluator will look at this area first for applicable credits for transfer. A vast majority of introductory courses are generally equivalent.

Statewide transfer degrees: Also known as "TAOC" degrees these are specific AA or AS transfer programs at Pennsylvania community colleges. Students with these degrees are guaranteed to transfer at junior standing in a parallel program at IUP. Please discuss with the Transfer Services

office or reference the following IUP website www.iup.edu/admissions/undergraduate/apply-next-steps/transfer/college-guides-articulations-collaboratives/.

Undergraduate Credit Transfer Specifications

- In the acceptance and application of undergraduate transfer college-level credits, IUP will first apply as many college-level credits as possible toward the satisfaction of liberal studies requirements, then to requirements in the major, and finally to elective credits.
- IUP recognizes the integrity, design, and validity of liberal studies programs at other institutions with CHEA-recognized accreditation and will accept liberal studies coursework when comparable. Liberal studies credits aligned with the PA Statewide Transfer Credit Framework will transfer toward the liberal studies requirements at IUP.
- Students who transfer to IUP from a postsecondary institution with CHEA-recognized accreditation with an Associate of Science or an Associate of Arts degree, or having completed liberal studies requirements for a bachelor's degree, an Associate of Science or an Associate of Arts degree, shall have satisfied the liberal studies requirements at IUP. Exceptions may be made for the following, provided that these exceptions do not extend the student's time to the degree: (a) One signature liberal studies course (up to 3 credits), if applicable; (b) Any prescribed liberal studies course required for the major, if not satisfactorily completed; (c) Specific liberal studies overlays satisfied in advanced courses in the major.
- Undergraduate students who transfer into IUP with an Associate of Arts or an Associate of Science degree from a postsecondary institution with CHEA-recognized accreditation in a parallel academic program or as part of the Program to Program (P2P) articulation agreements will be awarded full junior standing and shall not be required to satisfactorily complete more than 60 credits to earn a 120-credit baccalaureate degree in a P2P or other parallel program, regardless of the courses they took to earn the Associate degree; they will have the same requirements for admission to a particular academic program and for retention as students who began their education at a IUP. Students transferring into a program with accreditation or licensing/certification standards may be required to take limited additional credits to meet those standards.

PROPOSED

Undergraduate Transfer Admissions

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- Undergraduate students who transfer into IUP with an Associate of Arts or an Associate of Science degree from a postsecondary institution with CHEA-recognized accreditation in a parallel academic program or as part of the Program to Program (P2P) articulation agreements will be awarded full junior standing and shall not be required to satisfactorily complete more than 60 credits to earn a 120-credit baccalaureate degree in a P2P or other parallel program, regardless of the courses they took to earn the Associate degree; they will have the same requirements for admission to a particular academic program and for retention as students who began their education at a IUP. Students transferring into a program with accreditation or licensing/certification standards may be required to take limited additional credits to meet those standards.

Rationale: This recently updated policy was further updated to reflect a missing necessary step.

H. Awards Committee (Chair Paul)

- No report.

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

- No report.

J. Library and Education Services Committee (Chair Chadwick)

- Next meeting: Tuesday, September 13, 2022 @ 3:45pm in Stapleton 203

Senate Representative Report

A. University Planning Council (Chair Moore)

- The UPC continued to meet over the summer. We are still willing to meet with departments to discuss how to develop your strategic plan.

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

- No report.

C. Academic Computing Policy Advisory Committee (Senator Ford)

- No report.

D. University Budget Advisory Committee (Senator Soni)

- See Appendix A.

New Business

- On July 25, 2022 Dr. Driscoll notified the University Senate of the University's adoption of the non-discrimination policy included below. The University Senate Constitution specifically allows for administrative personnel to occasionally initiate or modify policies when necessary due to expediency.
- The University's adoption of a non-discrimination policy is the last step in resolving a matter with the Office for Civil Rights (OCR). IUP and the OCR entered into a Resolution Agreement, dated December 17, 2015, that required IUP to undertake the necessary steps to initiate adoption of Section 504 Grievance Procedures. The Resolution Agreement provided that IUP's adoption of Grievance Procedures would involve consideration by all appropriate internal organizations and IUP presented the OCR-approved policy to the University's Senate on October 4, 2016, however the motion for the University Senate to recommend approval of the non-discrimination policy failed.
- The OCR contacted IUP, through University Legal Counsel, and indicated IUP must adopt and publish Section 504 Grievance Procedures for OCR to close the matter. In the absence of such action, OCR indicated they would begin an enforcement action against IUP. University Legal Counsel recommended that IUP take immediate action to adopt and publish Section 504 Grievance Procedures to resolve the matter.
- In addition, Board of Governors Policy 2009-03-A: Non-Discrimination Policy, amended on July 15, 2021, requires System universities to issue a non-discrimination policy to cover all types of discrimination. Policy 2009-03-A also requires the State System's Chancellor to "publish a template non-discrimination policy for resolving complaints of harassment, sexual harassment and discrimination based on protected categories that may be adopted or adapted for use by universities." Over the past year, a working group has drafted a template policy and the Office of the Chancellor has obtained approval of the template policy from its required constituencies and presented the template policy at Statewide Meet and Discuss meetings with each of the System's unions.
- Because IUP must comply with the OCR Resolution Agreement and Board of Governors Policy 2009-03-A, the following policy was adopted on July 26, 2022.
- Any feedback pertaining to the Non-discrimination Policy can be directed to David Drye (ddrye@iup.edu), Chair of the University Development and Finance Committee.

**INDIANA UNIVERSITY OF PENNSYLVANIA
Non-Discrimination Policy**

Subject: Non-Discrimination Policy

Original Date Established: 7/26/2022

Revision Dates

Originating Office: President **President's Approval:** Michael A. Driscoll

Distribution Code: **Date of Approval:** 7/26/2022

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PURPOSE

To define what actions and conduct are prohibited under this Policy and processes Indiana University of Pennsylvania ("University") will undertake to respond to reports of discrimination, harassment, and sexual misconduct allegations. This Policy applies to all applicants for admission or employment, students, employees, recognized volunteers, officials, and contractors of the University.

The Pennsylvania State System of Higher Education and the University are committed to providing equal access to all individuals and prohibiting any form of discrimination and harassment on the basis of race, color, religion, national origin, ancestry, sex, age, marital status, familial status, sexual orientation, gender identity and expression, pregnancy, genetic information, disability, status as a veteran, or any other characteristic prohibited under applicable federal or state law (each a "protected category") in any decision-making regarding admissions, employment, or participation in a University Education Program or Activity.

SCOPE OF POLICY

This Policy applies to on-campus and off-campus prohibited conduct. There is no time limit for reporting allegations of discrimination, harassment, or sexual misconduct; however, the University strongly encourages prompt reporting. If the reported Respondent is not a member of the University community or is no longer associated with the University at the time of the report or at the time a resolution process is initiated, the University may be unable to investigate or take disciplinary action and may be required to dismiss the complaint for a lack of jurisdiction.

LEGAL AUTHORITY

Discrimination, harassment, and sexual misconduct are currently prohibited under federal, state, and local laws including under Titles IV, VI and VII of the Civil Rights Act of 1964, as amended; the Americans with Disabilities Act; the Age Discrimination in Employment Act; Title IX of the Education Amendments of 1972 and its implementing regulations; and the Pennsylvania Human Relations Act.

This Policy is not intended to interfere with or replace any rights an individual may have under principles of due process, merit principles, an applicable collective bargaining agreement or applicable University or Board of Governors policies.

REPORTING

1. Reporting to the University: Any individual, including a third party, who becomes aware of behavior prohibited under this Policy may make a report to the Chief Diversity and Inclusion Officer and Title IX Coordinator in the Social Equity and Title IX Office. University administrators and supervisors who receive a verbal or written report of discrimination, harassment or sexual misconduct should contact the Chief Diversity and Inclusion Officer and Title IX Coordinator in the Social Equity and Title IX Office. While anonymous reports are accepted, the University's ability to address alleged misconduct reported anonymously may be significantly limited. Reports may be made at any time (including during non-business hours) by using the online reporting form (<https://www.iup.edu/social-equity/report-an-incident-of-concern/index.html>) or by contacting the Social Equity and Title IX Office directly at social-equity@iup.edu or during business hours by phone at 724-357-3402. If the Chief Diversity and Inclusion Officer and Title IX Coordinator determines the allegations, if true, may represent a violation of this Policy or a related policy, an investigator will be assigned. The Complainant or Reporting Individual will be notified that an investigation will occur, and the Respondent will be notified in writing of the allegations consistent with the requirements of the applicable policy and any applicable collective bargaining agreement(s). Allegations of Regulatory Prohibited Sexual Misconduct will follow the procedures set forth in the University's Sexual Discrimination and Sexual Misconduct Policy.

If the Chief Diversity and Inclusion Officer and Title IX Coordinator determines the allegations, if true, would not constitute discrimination, harassment, or sexual misconduct prohibited under this Policy, the Reporting Individual will be advised in writing of that determination.

The Chief Diversity and Inclusion Officer and Title IX Coordinator will respond to all inquiries, reports, and requests, or refer the Reporting Individual to the appropriate office in a manner appropriate to the circumstances. This response may include interim measures to protect the

parties during the investigation and/or informal resolution processes. Interim measures involving employees in collective bargaining units may be determined in consultation with the Office of Human Resources and labor relations representatives.

In the case of allegations against the President, the Social Equity and Title IX Office will communicate with and cooperate with the State System's Office of Chief Counsel to identify an investigator. The selected investigator will forward a report to the Chancellor or Designee for review and final determination.

In the case of allegations against the Chief Diversity and Inclusion Officer and Title IX Coordinator, the Office of the President will identify an investigator. The selected investigator will forward a report to the President or Designee for review and final determination.

In the case of allegations against an employee or agent of a Contractor, the matter may be referred to the Contractor for resolution.

2. Anonymous Reporting: Individuals may file an anonymous complaint with the State System's Incident Reporting System by calling 855-298-5316 or filling out a form [online](#). The [Incident Reporting System](#) is not intended to take the place of the reporting and investigation procedures established at the University. Matters reported through the State System's Incident Reporting System may be referred to the University to be handled under applicable University policy.

3. External Reporting: In addition to reporting to the University via the reporting procedures in this Policy, individuals may file a discrimination complaint directly with the outside agencies listed below.

A complaint may be filed with the U.S. Department of Education's Office for Civil Rights regarding an alleged violation of Title IX by calling 1-800-[421-3481](#) : [1-877-521-2172 TTY](#) or emailing OCR.Philadelphia@ed.gov or visiting <https://www2.ed.gov/about/offices/list/ocr/complaintintro.html>.

A complaint may be filed with the Pennsylvania Human Relations Commission by calling 717-787-9780 for the Harrisburg Regional Office; 412-565- 5395 for the Pittsburgh Regional Office; or 215-560-2496 for the Philadelphia Regional Office; or by visiting <https://www.phrc.pa.gov/File-a-Complaint/Pages/How-to-File-a-Complaint.aspx>.

Employees may file a charge with the Equal Employment Opportunity Commission regarding an alleged violation of Title VII by calling 1-800-669-4000 or visiting <https://www.eeoc.gov/employees/howtofile.cfm>.

The filing of a complaint under this Policy does not obviate the need to meet time limits of outside agencies, which generally require reports to be made within 180 days of the alleged incident or knowledge of the incident. The University may not be informed of reports made to external agencies.

4. Criminal Reporting Options: An individual may report criminal conduct to law enforcement, independent of, or parallel with, any report made to the University: Indiana University Police:

724-357-2141; Indiana Borough Police: 724-349-2121; Pennsylvania State Police: 724-357-1960. The University may not be informed of reports made to law enforcement agencies.

Please Note: The University's policy, definitions, and burden of proof may differ from criminal law. Neither law enforcement's decision whether to prosecute, nor the outcome of any criminal prosecution, is determinative of whether a violation of this Policy has occurred. In cases where there is a simultaneous law enforcement investigation, there may be circumstances when the University may need to temporarily delay its investigation; however, the University may choose to proceed with investigations even during the time of a pending law enforcement investigation.

RESOURCES

The University is committed to ensuring that individuals who experience discrimination, harassment, or sexual misconduct have access to a variety of services and resources. To talk with someone to receive support and assistance in a confidential setting, contact the following supportive resources, as applicable. Employees are eligible for crisis counseling by contacting the State Employee Assistance Program ("SEAP") at 800-692-7459. Students may contact a counselor at the University Counseling Center: 724-357-2621, counseling-center@iup.edu, G-31 Suites on Maple East.

TRAINING

The University will conduct annual training on discrimination, harassment, and sexual misconduct for employees and students and as part of new student and employee orientations. All faculty, staff, and administrators are required to participate in this training within 60 days of commencing employment and at least every year thereafter. Failure to do so may subject the individual to discipline.

FREE EXPRESSION AND ACADEMIC FREEDOM

The University is committed to the principles of free expression and academic freedom, applicable collective bargaining agreements, and related University policies, and to creating and maintaining a safe, healthy, and harassment-free environment for all members of its community. The free expression of ideas is protected, even if the expressions are unpopular. Freedom of speech can sometimes protect offensive and hurtful language and controversial ideas; however, it does not protect personal harassment, discriminatory conduct, or other acts of misconduct as defined in this Policy, the Community Standards Policy, other University or BOG policies, or relevant federal, state, and local laws.

STATEMENT ON PRIVACY AND CONFIDENTIALITY

The University has a duty to respond to allegations of discrimination, harassment and sexual misconduct and cannot guarantee confidentiality once allegations are disclosed to designated University personnel. The University will respect the sensitivity of information disclosed during investigations or informal resolution efforts. This means that information about the complaint is shared only with those individuals within the University community who "need to know" to effectively investigate and/or resolve the complaint, implement interim measures, or provide

support resources. Parties with a need to know include, but are not limited to, the Respondent, witnesses, and designated University personnel who need to be informed of the complaint as part of an investigation, implementing a resolution, implementing interim measures, or providing support. The University may be limited in restricting other individuals involved in the matter from sharing information with others. For more information on resources available to individuals who experience discrimination, harassment, or sexual misconduct, please refer to the Resources section of this document.

DISABILITY ACCOMMODATIONS

This Policy does not alter any obligations of the University under federal disability laws including the Americans with Disabilities Act of 1990 and Section 504 of the Rehabilitation Act of 1973. Parties may request reasonable accommodations for disclosed disabilities from the Reviewing Office at any point before or during the resolution process that do not fundamentally alter the process. The Reviewing Office will not affirmatively provide disability accommodations that have not been specifically requested by the Parties, even where the Parties may be receiving accommodations in other University Education Programs and Activities.

RELATED POLICIES

The University's Sexual Discrimination and Sexual Misconduct Policy and/or Community Standards Policy shall govern the investigation of complaints of sexual misconduct and related allegations against Respondents who are Students.

Reports of alleged sexual misconduct against an Employee that are defined as "Regulatory Prohibited Misconduct" in the University's Sexual Discrimination and Sexual Misconduct Policy will be handled pursuant to the Sexual Misconduct Resolution Process set forth in that University Policy.

DEFINITIONS

1. **Complainant:** An individual who has reported being or is alleged to be subjected to conduct that could constitute a violation of this Policy or other relevant policies.
2. **Contractor:** An individual, program, company, or school that provides a program, activity, or service to the University. This includes experiential learning services such as internships, practicum experiences, pre-service teaching experiences, or other community service experiences in which the University places students. For purposes of this Policy, ROTC instructors and employees and officials of recognized affiliated entities will be considered Contractors.
3. **Decision Maker:** The individual or individuals appointed by the University to render a decision on a Formal Complaint. The Decision Maker will be free of conflict of interest and bias and will not serve as the Investigator, Title IX Coordinator, or an Advisor to any Party in the same matter. The President of the University or their designee shall serve as the Decision Maker for all cases involving a Respondent who is an employee.

4. Employee: An individual who is employed by the State System including, but not limited to, faculty members, coaches, staff, managers, and student employees (when acting in their capacity as employees).
5. Education Program or Activity: For purposes of this Policy, the term includes any activity that occurs in, on or within:
 - (a) Any on-campus premises;
 - (b) Any off-campus premises over which the University has substantial control. This includes buildings or property owned or controlled by a recognized student organization or a recognized affiliated entity; or
 - (c) Computer and internet networks, digital platforms, and computer hardware or software owned or operated by, or used in the operations of, the University's programs and activities over which the University has substantial control.
6. Official: A member of a Council of Trustees or of the Board of Governors or their respective designees.
7. Respondent: Any individual who has been reported to be the perpetrator of conduct that could constitute a violation of this Policy.
8. Reporting Individual: The individual making a report of discrimination, harassment, or sexual misconduct, who may or may not be the Complainant.
9. Student: Any person:
 - (a) seeking admission to the University through the formal University application process;
 - (b) admitted to the University;
 - (c) eligible to register or schedule for classes.

The term "Student" shall include Employees, Registered Volunteers, and Officials where the Employee, Volunteer or Official otherwise meets the enrollment criteria set forth in this definition and is acting in that capacity as it pertains to the complaint.
10. Recognized Volunteer: A recognized individual who represents or acts on behalf of the University or whose actions may bind the University, regardless of whether the individual receives monetary or other compensation. A Recognized Volunteer is one who has undergone background checks consistent with Protection of Minors Policy.

PROHIBITED CONDUCT

1. Discrimination: Conduct of any nature that denies a qualified individual the opportunity to participate in or benefit from a University Education Program or Activity, or otherwise adversely affects a term or condition of an individual's employment, education, or access to a University Education Program or Activity based on the individual's membership in a protected category.

There are generally two types of discrimination recognized: disparate treatment and disparate impact. Disparate treatment discrimination involves a person being treated differently because of membership in a protected category. Disparate impact discrimination involves a practice that has a greater negative effect on members of a particular protected

category than those not in the protected category.

2. Harassment: Unwelcome conduct directed against a person that is based on a protected category, that a reasonable person would determine is sufficiently severe or pervasive such that it has the effect of unreasonably interfering with access to a University Education Program or Activity or creates an intimidating, hostile, or offensive work or academic environment.
3. Sexual Misconduct: The University's Sexual Discrimination and Sexual Misconduct Policy (<https://www.iup.edu/social-equity/policies/sexual-discrimination-and-sexual-misconduct/index.html>) defines both regulatory and non-regulatory forms of Quid Pro Quo and Hostile Environment Sexual Harassment, Dating Violence, Domestic Violence, Sexual Assault, and Stalking. Those allegations defined as "Regulatory Prohibited Misconduct" in the University's Sexual Discrimination and Sexual Misconduct Policy will be handled pursuant to the Sexual Misconduct Resolution Process set forth in the University's Sexual Discrimination and Sexual Misconduct Policy.

All other allegations of sexual misconduct against an Employee, Official, Registered Volunteer, or Contractor, including non-regulatory sexual misconduct, will be handled under the General Procedures set forth in this Policy.

Allegations of sexual misconduct against a student, including regulatory and non-regulatory sexual misconduct, will be handled under the Sexual Misconduct Resolution Process set forth in the University's Sexual Discrimination and Sexual Misconduct Policy.

4. Retaliation: Any action, directly, indirectly, or through third parties, which is aimed to deter a reasonable person from reporting discrimination, harassment, or sexual misconduct or participating in an investigation, hearing, or action done in response to such activities.

This includes, but is not limited to, intimidation, through coercion, or discrimination against any individual because the individual has made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under this Policy.

A finding of retaliation under this Policy is not dependent on a finding that the underlying misconduct occurred.

5. False Report: Any person who willfully files a bad faith report or makes misrepresentations as part of a resolution of a complaint under this Policy is subject to disciplinary action up to and including dismissal or termination from the University.

GENERAL PROCEDURES

1. **Timeline:**

Absent unusual or extenuating circumstances or implementation of applicable collective bargaining agreement provisions, the resolution process typically takes about 90 days to resolve

once a complaint has been filed.

2. Written Notification of Allegations: Upon the Reviewing Office's determination that a complaint should be investigated, the Respondent(s) will be notified in writing of the allegations and the identity of the Reporting Individual consistent with any applicable collective bargaining agreement. The University will assign an investigator. The investigation may be delayed, and the identity of the Complainant may be withheld consistent with collective bargaining agreement requirements if the Complainant is a student in the Respondent faculty member's class.

3. Participation of Complainant or Respondent: The participation of the Complainant and the Respondent is encouraged. The University reserves the right to initiate resolution proceedings without participation by either the Complainant or the Respondent and proceed with the information available.

4. Role of Advisors/Union Representative: During the resolution process, whether formal or informal, an employee Complainant and an employee Respondent may designate and be accompanied by an advisor of that individual's choosing from the University community at meetings and interviews; however, no advisor may speak for or on behalf of the party or otherwise actively participate in a meeting or interview except as part of a reasonable accommodation. An individual may only have one advisor present at a time. A Respondent who is a member of a collective bargaining unit may designate a union representative as their advisor. Legal counsel for either party may not act in the capacity of an advisor as part of the resolution process.

During the resolution process, whether formal or informal, a student Complainant and a student Respondent may designate and be accompanied by an advisor of that individual's choosing at meetings and interviews; however, no advisor may speak for or on behalf of the party or otherwise actively participate in a meeting or interview except as part of a reasonable accommodation.

5. Informal Resolution: Informal means of resolution, such as mediation or restorative justice, may be used as alternatives to the formal investigation and hearing procedures. Upon written agreement of the Complainant and the Respondent, informal resolution may be initiated at any time prior to a finding of responsibility by the applicable decision maker and may be terminated by either party at any time prior to final resolution. If the informal process is terminated, the General Procedures process, which includes an investigation, may continue.

If a resolution has been reached and a written agreement signed by all parties and the University, the resolution may not be appealed.

6. Effect on Pending Disciplinary Actions: Allegations of a violation of this Policy may not stop or delay any evaluation or disciplinary action related to either a Complainant or Respondent.

7. Investigation Process: The investigator(s) will review and investigate the complaint. The investigator will provide to the Decision Maker an investigative report which includes a summary of possible policy violation(s) and copies of relevant evidence through an electronic format or a hard copy. The Complainant and the Respondent will be notified of the conclusion of the investigation and provided with a copy of the investigation report, including access to

relevant evidence. Information that is confidential by law or policy or not relevant to the underlying allegations may be redacted.

8. Pre-Disciplinary Conference for Employees: For cases involving employee Respondents, the Decision Maker will conduct a pre-disciplinary conference as required by the governing collective bargaining agreement or board or university policy prior to issuing a final determination.

9. Incident Review Meeting or Formal Hearing for Students: For cases involving student Respondents, the Decision Maker will conduct an Incident Review Meeting or arrange for a Formal Hearing prior to issuing a final determination.

10. Final Determination: The burden of proof for demonstrating violation of this Policy is on the University. The standard of proof is the preponderance of the evidence, meaning the Decision Maker must find it is more likely than not that a violation of the Policy occurred. If an employee is found to be in violation of this Policy, the governing collective bargaining agreement or board or university policy will be followed.

The Decision Maker may issue any combination of the following results concerning the investigation report:

- a. Not in Violation – If there is insufficient information to warrant a finding of a violation of this Policy, the matter will be closed.
- b. In Violation – If there is sufficient evidence to support a finding that this Policy has more likely than not been violated, the finding(s) of responsibility will be forwarded to the appropriate office for disciplinary action, consistent with applicable University and Board of Governors policy and collective bargaining agreements.

11. Notification of Conclusion of Process: Following the issuance of a final determination by the Decision Maker, the parties shall receive notification that the resolution process has been concluded. The decision of the Decision Maker is final.

DISCIPLINARY SANCTIONS

1. Students – The University may impose disciplinary sanctions upon Students, consistent with the University's Sexual Discrimination and Sexual Misconduct Policy or Community Standards Policy.
2. Employees – Disciplinary sanctions imposed on an Employee for violating this Policy, subject to applicable collective bargaining agreement/memoranda of understanding and/or University/System policies, may include a penalty up to and including separation from employment.
3. Officials and Volunteers – Disciplinary sanctions imposed on an Official or Volunteer may include a penalty up to and including removal or the request for removal of the Official or Volunteer from the respective position.

4. Contractors – Violations of this Policy by a Contractor or any employee or agent of the Contractor may result in the exercise of any contractual remedies including, but not limited to, termination of the contract for fault or for convenience and referral for disbarment.

INTERPRETATION AND REVISION

Procedural rules for investigations and the administration of hearings will be developed that are consistent with provisions of the Non-Discrimination Policy. A material deviation from these rules will, generally, only be made as necessary and may include reasonable notice to the parties involved either by posting online and/or in the form of written communication. Procedures may vary with notice upon determining that changes to law or regulation require policy or procedural alterations not reflected in this policy. Minor modifications to a procedure that do not materially jeopardize the fairness owed to any party may be made at the discretion of the President of the University as appropriate. Any question of interpretation of the Non-Discrimination Policy will be referred to the President of the University, whose interpretation is final. Non-Discrimination and related Policies and Procedures shall be updated as necessary to comply with applicable law, policy, or regulation. The review process shall be coordinated by the President of the University or designee.

EFFECTIVE DATE

This Policy is effective immediately following approval and replaces all other policies whether in print or electronic format.

Adjournment

- The meeting adjourned at 4:22pm.

Respectfully submitted:



Amber N. Racchini

UBAC Representative Report

By

Senate Rep on the UBAC (Ramesh Soni)

Key points

- There are many positives with respect to enrollments
- Higher  Pa and Pgh. market share, yield from admit to registration, average credit load, persistence rate, fulltime students.
- Headcount 
- PaSSHE State Appropriation up by \$75M; good news for IUP or “[u]nder the old formula, IUP would’ve received approximately **\$8 million less** in State Appropriations.”

Key Points

- For the next three years (22-23, 23-24, 24-25), deficit is projected to be between around \$19M to \$20M each year.
- For 22-23, it is hoped that the deficit will be handled using one-time strategies (\$13.4 M) as well as permanent cuts (\$6.2M)
- **Here is the big issue:** “Our budget must be balanced by FY2024-25 with permanent strategies (not relying on one-time funds or reserves).”

University Budget Advisory Committee Meeting

Thursday, September 1, 2022

1:00 p.m.–2:30 p.m.

Join from PC, Mac, iOS or Android:

<https://iupvideo.zoom.us/j/93755514530>

Or join by phone:

+1 301 715 8592 (US Toll) or +1 309 205 3325 (US Toll)

Meeting ID: 937 5551 4530

Introductions-Balint/Fitzsimons

Reports

- **President's Report – Dr. Michael Driscoll – 15 minutes**
- **Enrollment Report – Dr. Patti McCarthy – 10 minutes**
- **Housing Status Report – Dr. Thomas Segar - 5 minutes**

Discussion

- **Draft CPP (Version 10) PowerPoint – outlining assumptions, changes, bottom line, and potential budget balancing strategies - presentation and discussion with UBAC (Fitzsimons, McCarthy, Cadile, et al) – 30-55 minutes**

Closing Comments – 5 minutes

Next Meeting

- **October 6, 2022 (1:00 p.m.-2:30 p.m.)**

Future Meetings

- **November 3, 2022 (1:00 p.m.-2:30 p.m.)**

Adjournment



Draft Comprehensive Program Plan - CPP (Version 10) Status Update and Discussion with UBAC



UBAC
September 1, 2022

Brief Update on Fall Enrollment

Positive News!

- New, first-time student registration is ahead of fall 2021 (+64 students).
 - Yield from admit to registration is +1.93 ppt. At last year's yield, we would have 148 fewer registrations.
- Received more Pennsylvania applications and net deposits this year for the period of March 2 to current than the last two years.
- Gained .04 ppt in Pennsylvania market share over last year (1.32% vs. 1.28%) and gained .52 ppt of market share in the Pittsburgh market (+129 registrations).
- The “melt” of new freshmen from deposit to registration fell by almost 3 ppt.

Brief Update on Fall Enrollment

Positive News!

- New, first-time undergraduate students are registered for an average of 14.55 credits, compared to 14.29 credits at this time last year.
 - The average of those who are full time is 14.9 credits, compared to 14.6 credits at this time last year.
- UG continuing student persistence is ahead of fall 2021 (+1.15 ppt), though slightly behind projections in the CPP.
- UG students are registered for more average credit hours and have a higher percentage of students who are full time.
- A higher percentage of the fall 2021 new, UG, first-time cohort who were NOT dismissed are registered than in the prior three years.
- Clock hour registrations are ahead of projections.
- Dual enrollment registrations are higher than any year since 2009.

Brief Update on Fall Enrollment

Areas to Focus:

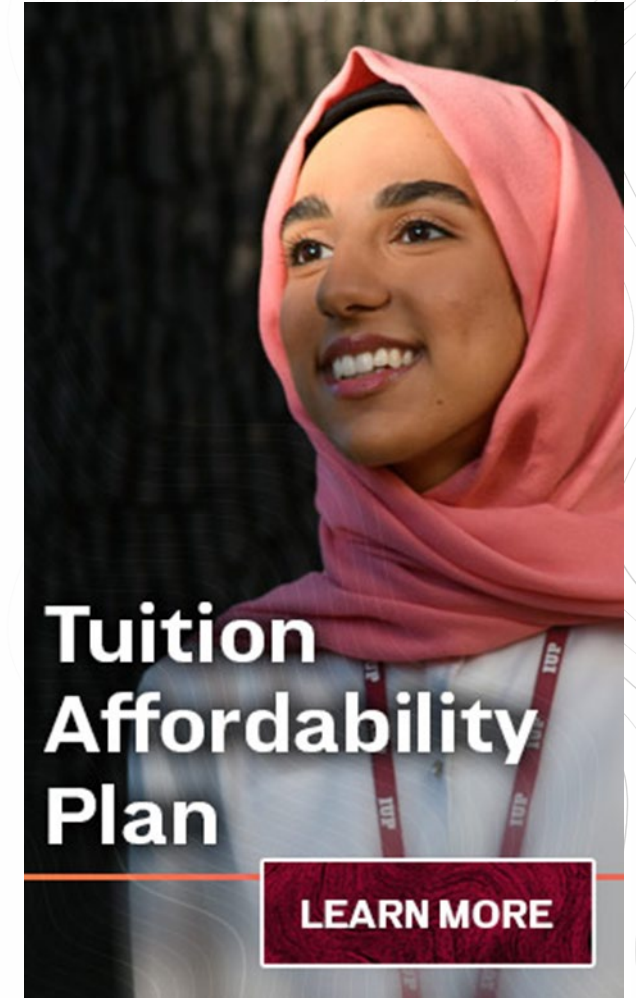
- Grad Enrollment:
 - Registrations are behind CPP projections for both new and continuing graduate students.
 - Overall, -8.82% behind last year in headcount and -10.5% in credit hours.
- Retention and persistence:
 - Fall 2021 new, first-time, UG student cohort retention is behind fall 2020 (-0.6 ppt).
 - A higher percentage of students were dismissed than in any of the past three years.
- Course planning:
 - Re-enrollment could be higher with more course availability in the subject areas and modes needed by adult learners.
 - Dual enrollment students, in order to continue to grow, need to have access to seats in key subject areas.

Making IUP More Affordable

The Tuition Model and Pricing Workgroup

Promoting affordability by providing financial resources to assist with the cost of education and exploring cost-reduction strategies.

- ✓ In state, undergraduate tuition
- Student fees
- Out of state and international student tuition
- Housing and dining



Making IUP More Affordable (continued)

- As part of our commitment to make IUP more affordable for our students, in March 2022 the Board of Governors approved the discontinuation of the per-credit tuition model.
- Because the change was not approved until the Spring 2022 semester, we planned to use one-time funds to supplement the FY2022-23 budget for the potential revenue loss in year one.
- This plan allowed for marketing materials to be developed and distributed quickly and will alleviate some of the revenue lost in the year due to the late approval.

CPP Revisions

Due: This next update is due on September 16, 2022 which includes worksheets and narrative documents

Changes: Requires five years of data; two prior years of audited data (FY2020-21 and FY2021-22) and projections for FY2022-23 through FY2024-25

- Tuition revenue will reflect the discontinuation of the per-credit pilot for full-time, in-state, undergraduates
- Flat tuition and fees for all 3 projection years
- Achieve a balanced budget and meet the various financial ratios by FY2024-25

CPP Revisions (continued)

Additional Information Required:

- Projected Housing occupancy report for Universities who are projecting less than 70 percent occupancy
- Supplemental Enrollment tab for universities who are projecting an increase in enrollment for any planning year (to explain how this will be achieved)
- Anticipated use of one-time funds allocated by the legislature (federal (CSFRF) funds)
- ESLP data collection will now be a separate submission outside of CPP
- Currently, we are working on first draft of this next version of the CPP
- Additional template for academic program array information

CPP Revisions (continued)

FY 2023-24 Comprehensive Planning Process (CPP) Projections Workbook

Indiana University of Pennsylvania

Optional Enrollment Projections

If universities are projecting an increase in enrollment for any planning year, this tab should be completed to explain how that increase in enrollment will be achieved and pasted into the CPP Narrative Template.

| | | Historical Data | | | | | Projections | | |
|---|--------------------------------|-----------------|----------|----------|----------|----------|-------------|----------|----------|
| | | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 |
| First-Time, Full-Time Cohort Progress to Undergraduate Degree | Number Enrolled First Year | 2,308 | 1,960 | 1,754 | 1,737 | 1,577 | 1,679 | 1,800 | 1,840 |
| | Second-year Retention Rate | 72% | 71% | 72% | 72% | 71% | 71% | 71% | 72% |
| | Number Retained to Second Year | 1,571 | 1,628 | 1,417 | 1,264 | 1,239 | 1,118 | 1,192 | 1,287 |
| | Third-year Retention Rate | 65% | 62% | 61% | 63% | 60% | 63% | 63% | 63% |
| | Number Retained to Third Year | 1,611 | 1,352 | 1,404 | 1,240 | 1,052 | 1,089 | 989 | 1,053 |
| | Fourth-year Retention Rate | 59% | 61% | 58% | 58% | 59% | 55% | 55% | 55% |
| | Number Retained to Fourth Year | 1,571 | 1,471 | 1,226 | 1,304 | 1,107 | 957 | 948 | 861 |
| | Number Graduated by Year Four | 1,102 | 1,023 | 825 | 856 | | 0 | 0 | 0 |
| | Four-year Graduation Rate | 41% | 41% | 38% | 37% | | | | |
| | Number Retained to Fifth Year | 450 | 418 | 413 | 374 | 424 | 360 | 322 | 319 |
| Enrollment by Program Level (Headcount) | Undergraduate | 10,389 | 9,471 | 8,567 | 8,032 | 7,343 | 6,735 | 6,719 | 6,801 |
| | Master's | 1,365 | 1,299 | 1,242 | 1,260 | 1,186 | 1,040 | 1,090 | 1,125 |
| | Doctoral/First Professional | 808 | 811 | 827 | 775 | 779 | 694 | 675 | 675 |
| Total Headcount | | 12,562 | 11,581 | 10,636 | 10,067 | 9,308 | 8,469 | 8,484 | 8,601 |
| Total FTE | | 10,825.48 | 9,857.25 | 9,015.03 | 8,264.54 | 7,547.00 | 7,513.56 | 7,540.46 | 7,577.56 |
| Headcount to FTE conversion | | 86% | 85% | 85% | 82% | 81% | 83% | 82% | 82% |

CPP Revisions (continued)

Revenue:

- The State System's E&G appropriations were approved with an additional increase of **\$75 million**.
- This CPP reflects the appropriations for IUP under the new allocation formula.
- Under the old formula, IUP would've received approximately **\$8 million less** in State Appropriations.

CPP Revisions (continued)

Revenue: The combination of changes in the State System tuition rate assumptions (1% versus flat), the discontinuation of the per-credit model, which was anticipated to result in an est. potential decrease of over \$8 million, and updated enrollment projections resulted in \$14 million less in tuition revenue than projected last September for the current fiscal year.

| | FY2022-23 | FY2023-24 | FY2024-25 |
|---------------------------------------|-----------|-----------|-----------|
| Fall Headcount - Sept. 2021 | 9,112 | 9,255 | |
| Tuition Revenue Sept. 2021 (millions) | \$82.7 | \$85.2 | |
| | | | |
| Fall Headcount - Sept. 2022 | 8,559 | 8,570 | 8,635 |
| Tuition Revenue Sept. 2022 (millions) | \$68.8 | \$68.9 | \$69.4 |
| | | | |
| Change in Fall Headcount | (553) | (685) | |
| Change in Tuition Revenue | (\$13.9) | (\$16.3) | |

**Above data excludes clock hours

CPP Revisions (continued)

Personnel and Expenses:

- Personnel expenditures have been updated to include personnel changes confirmed through mid-August.
- CBA and benefit assumptions have been updated based on the State Systems assumptions.
- Operating expenditures are being reviewed and updated

CPP Revisions (continued)

Personnel and Expenses:

| | FY2018-19 Actual Unrestricted Annualized FTE | FY2018-19 Actual Salary & Benefits | FY2022-23 Projected Unrestricted Annualized FTE | FY2022-23 Projected Salary & Benefits | FTE Change | % FTE Change | Estimated Salary and Benefits Savings |
|------------------------|--|---------------------------------------|---|---|-----------------|-----------------|--|
| APSCUF | 607.16 | 88,538,086 | 414.10 | 69,868,504 | (193.06) | -31.8% | (18,669,582) |
| AFSCME | 391.66 | 30,456,005 | 282.34 | 22,835,777 | (109.32) | -27.9% | (7,620,228) |
| Non-Represented | 186.14 | 25,221,237 | 145.48 | 22,602,220 | (40.66) | -21.8% | (2,619,017) |
| SCUPA | 64.09 | 5,801,596 | 57.96 | 5,722,799 | (6.13) | -9.6% | (78,797) |
| Other | 57.13 | 14,576,172 | 57.35 | 12,547,787 | 0.22 | 0.4% | (2,028,385) |
| Total | 1,306.18 | \$ 164,593,096 | 957.23 | \$ 133,577,087 | (348.95) | -26.7% | \$ (31,016,009) |

FY2018-19 actuals obtained from the audited financial statements and FTE from SAP actuals.

FY2022-23 Projections obtained from preliminary CPP V10 and does not take into account any personnel targets at this time.
It includes vacancies and positions approved to be filled.

Does not include restricted funds

CPP Revisions (continued)

Bottom Line (E & G):

- When compared to the September 2021 CPP, the E&G structural deficit for FY2022-23 increased by approximately \$7.5 million, primarily due to the discontinuation of the per-credit pilot model and lower enrollment projections.
- Without any further steps to balance the budget, the annual structural deficit for FY2022-23 is \$19 million. A similar deficit is projected for the last two years of the plan.
- We were expecting a budget shortfall prior to the tuition change and further enrollment drop of approx. \$11 million.
- Enrollment dropped further than anticipated mainly due to retention decreases, decrease in graduate student enrollment, etc.
- Our budget must be balanced by FY2024-25 with permanent strategies (not relying on one-time funds or reserves).
- We will need to use one-time funds as a short-term strategy including a draw down of reserves in the first two years to enable IUP sufficient time to implement permanent strategies for the \$19 million budget shortfall.
- We will be involving UBAC, COT, and others in assisting to further identify how we can balance the short-term and longer-term budget, with the likelihood of the one-time funds needing to be a partial solution in the first two years.

CPP Revisions (continued)

| E&G Projections | CPP V8 (Sept. 2021) FY2022-23 | CPP V10 (Sept. 2022) FY2022-23 | CPP V10 (Sept. 2022) FY2023-24 | CPP V10 (Sept. 2022) FY2024-25 |
|---|----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|
| Revenue: | | | | |
| Appropriations | | | | |
| Base Allocations | 54,859,358 | 56,800,411 | 57,938,316 | 59,098,979 |
| AFRP (Academic Facilities Renovation Program) | 94,822 | 94,822 | 94,822 | 94,822 |
| SERS Adjustment | 1,090,843 | | | |
| Total Appropriations | 56,045,023 | 56,895,233 | 58,033,138 | 59,193,800 |
| Tuition Revenue | 82,735,550 | 68,837,910 | 68,906,139 | 69,377,553 |
| Non-Tuition Revenue | 39,211,660 | 41,303,351 | 41,310,666 | 41,384,666 |
| Total Revenue | \$ 177,992,233 | \$ 167,036,494 | \$ 168,249,943 | \$ 169,956,019 |
| Expenditures: | | | | |
| Personnel Expenditures | 133,342,828 | 129,037,156 | 133,493,920 | 135,901,200 |
| Operating Expenditures | 30,296,271 | 31,306,135 | 31,231,865 | 31,196,155 |
| Student Aid | 22,207,743 | 22,207,743 | 20,145,486 | 20,145,486 |
| Capital and Debt Principal Payments | 3,579,191 | 3,385,392 | 2,614,203 | 2,649,059 |
| Total Expenditures | \$ 189,426,033 | \$ 185,936,426 | \$ 187,485,474 | \$ 189,891,900 |
| E&G Revenue Less Expenditures (excl. transfers to plant) | (11,433,800) | (18,899,932) | (19,235,531) | (19,935,881) |

CPP Revisions – Discussion with UBAC

FY 2022-23 Budget Balancing Considerations (E & G):

- Use of one-time reserves and designated (both Academic and Non-Academic) fund balances
- Use of lost revenue claimed under HEERF III
- Use of one-time carryforward balances from FY2021-22 (general fund and designated general fund)
- Reviewing net attrition per employee group to recommend feasible reduction targets over the three-year period
- Utility Savings
- Review scholarship levels
- Review consultant contracts
- Reduce campus footprint (longer term savings to be achieved); Reports indicate that our campus footprint is more than 1.5 million sq. ft. higher than it should be at our student enrollment levels.

- Other?

E&G Budget Balancing Considerations to discuss/ get input from UBAC

A combination of one-time and permanent budget reductions will be necessary to achieve a balanced budget for this year.

As we work towards achieving this, we will need to identify permanent reductions and eliminate reliance on one-time reserves.

Our reserve levels will be significantly reduced during this two-year time period.

Potential E&G Budget Balancing Strategies - CPP V10 FY2022-23

For Discussion Only

| | (in Millions) |
|---|---------------|
| Preliminary FY2022-23 E&G Deficit (excluding transfers to plant) | 18.9 |
| Budget Balancing Strategies: | |
| One-Time Strategies: | |
| One-Time Use of Reserves and Designated (Academic and Non-Academic) Funds | 2.0 |
| Use of one-time lost revenue claimed under HEERF III | 5.0 |
| Use of prior year carryover balance (less ESF and supplementing tech fee to breakeven status) | 6.4 |
| Total One-Time Strategies | 13.4 |
| Permanent Strategies: | |
| Utility Savings - Summer Pilot Program | 0.5 |
| Personnel Savings Achieved through Net Attrition* | 5.2 |
| Review of Consultant Contracts (placeholder amount, thorough review to take place) | 0.5 |
| Total Permanent Strategies | 6.2 |
| Total One-Time and Permanent Budget Balancing Strategies for FY2022-23 | 19.6 |
| Deficit Remaining to Identify a Source to Balance | -0.7 |

*The above personnel savings for FY2022-23 reflects a full year of net attrition. This amount could be less depending when in the year positions are actually vacated.

CPP Revisions (continued)

Auxiliary:

- Food Services sales are projected to increase slightly due to increased participation in meal plans for FY2022-23.
- IUP has entered into a Master Lease with Phase III, revenues and expenditures have been adjusted to reflect this.
- Housing occupancy and associated revenue projections now take into account the re-opening of Whitmyre Hall beginning in fall 2023.
- Fall 2021 total occupancy, including the Indiana and Punxsutawney campuses, was 57.1%, this is projected to be 59.6% for fall 2022.

CPP Revisions (continued)

Bottom Line (Auxiliary):

- Auxiliary units continue to project a deficit in all three years of the CPP plan that is consistent with prior CPP submissions (**approximately \$8 million** for all years of the plan)

| CPP V10 Auxiliary Projections | FY2021-22 Actual | FY2022-23 Projection | FY2023-24 Projection | FY2024-25 Projection |
|----------------------------------|--------------------|----------------------|----------------------|----------------------|
| Food Service Sales | 9,849,417 | 10,055,000 | 10,693,400 | 10,693,400 |
| Housing Fees | 6,723,672 | 11,890,968 | 12,529,368 | 12,529,368 |
| Privatized Housing | 4,577,327 | 2,415,073 | 2,486,535 | 2,560,140 |
| Sales and Services | 216,986 | 150,000 | 150,000 | 150,000 |
| Other Revenue | 59,311 | 50,000 | 50,000 | 50,000 |
| Total Revenue | 21,426,713 | 24,561,041 | 25,909,303 | 25,982,908 |
| Expenditures: | | | | |
| Personnel | 4,453,486 | 4,539,931 | 4,664,615 | 4,705,570 |
| Utilities | 1,477,777 | 2,750,000 | 2,750,000 | 2,750,000 |
| Other Services/Supplies | 11,974,406 | 13,731,695 | 14,006,000 | 14,006,000 |
| Principal and Interest | 8,978,150 | 12,027,650 | 12,168,294 | 12,168,294 |
| Capital | 6,116 | 5,000 | 5,000 | 5,000 |
| Total Expenditures | 26,889,935 | 33,054,276 | 33,593,909 | 33,634,864 |
| | | | | |
| Revenue Less Expenditures | (5,463,222) | (8,493,235) | (7,684,606) | (7,651,956) |

CPP Revisions-Addition of Academic Program Array

Due: This addition is due on October 7, 2022

Summary:

Number and type of programs that can be supported financially, using the following factors:

- Enrollment, Student Credit Hours, Type of Student
- Faculty FTE and Workload Assignments
- Program Completions
- Section Sizes
- This is a work in progress with the Chief Academic Officers (CAO's)

One-time funding for IUP-Strategic Investment

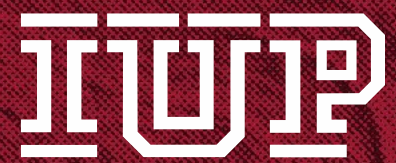
Amount: \$12 million one-time funding from state legislature (Federal funds (CSFRF))

Guidelines: The allowable uses of these funds are still being developed by the Commonwealth. More information will be shared once those guidelines are received, and we can determine what our flexibility for these one-time funds are. IUP will be required to report on the use of these funds to the state chancellor's office and legislature.

Options: The below items are for **discussion only**, but the intent is to invest the one-time resources with most impact-highest priorities that will:

- a) Decrease cost of attendance/assist overall student affordability;
- b) enhance student experience; and/or
- c) increase institutional sustainability.

Thank you



Enrollment Management Update

UBAC

September 1, 2022

Fall 2022 Total Registrations to Date (Freeze to occur on September 12, 2022)

| Fall 22 Registration by Student Type | | | | | | | |
|--------------------------------------|---------------------------------|-----------|------------|-------------------|-------------------------|-----------|------------|
| 8/30/2022 | Registered (new and continuing) | | | 8/30/2022 | Registered (Clock Hour) | | |
| | Fall 2022 | Fall 2021 | Difference | | Fall 2022 | Fall 2021 | Difference |
| Dual Enr | 92 | 64 | 28 | Int'l Sdent Exch | 1 | 0 | 1 |
| Continuing | 4519 | 4886 | (367) | ALI/ALI Prov. | 39 | 19 | 20 |
| New Fresh | 1726 | 1662 | 64 | Baking & Pastry | 52 | 60 | (8) |
| Readmit | 109 | 137 | (28) | Criminal Justice* | 28 | 31 | (3) |
| Transient | 27 | 27 | 0 | Culinary Arts | 96 | 90 | 6 |
| Transfer | 276 | 284 | (8) | EMT | 23 | 13 | 10 |
| Grad Cont | 1293 | 1420 | (127) | Paramedic | 41 | 49 | (8) |
| Grad New | 423 | 462 | (39) | Officer | 24 | 23 | 1 |
| TOTAL | 8,465 | 8,942 | (477) | TOTAL | 304 | 285 | 19 |

| | Fall 2022 | Fall 2021 | Difference |
|-------------------|-----------|-----------|------------|
| TOTAL UG+GR+CH | 8,769 | 9,227 | (458) |

Fall 2022 Undergraduate Registration

| Undergraduate Registrations for Fall 2022 | | | | | | | | | | | | |
|---|--------------|-----------|------------|---------|--------------|-----------|------------|---------|--------------|-----------|------------|---------|
| | Headcount | | | | Credit Hours | | | | FTE | | | |
| 8/30/2022 | % Difference | | | | % Difference | | | | % Difference | | | |
| | Fall 2022 | Fall 2021 | Difference | % | Fall 2022 | Fall 2021 | Difference | % | Fall 2022 | Fall 2021 | Difference | % |
| New, First Time | 1726 | 1657 | 64 | 3.86% | 25,098.50 | 23,746.00 | 1352.50 | 5.70% | 1,673.23 | 1,583.07 | 90.17 | 5.70% |
| New Transfer | 276 | 285 | -8 | -2.81% | 3,844.00 | 3,904.00 | -60.00 | -1.54% | 256.27 | 260.27 | (4.00) | -1.54% |
| Continuing Undergraduate | 4519 | 4886 | -367 | -7.51% | 60,638.50 | 65,030.50 | -4392.00 | -6.75% | 4,042.57 | 4,335.37 | (292.80) | -6.75% |
| Dual Enrollment | 92 | 64 | 28 | 43.75% | 360.00 | 223.00 | 137.00 | 61.43% | 24.00 | 14.87 | 9.13 | 61.43% |
| Re-Enroll | 109 | 137 | -28 | -20.44% | 1,098.50 | 1,398.50 | -300.00 | -21.45% | 73.23 | 93.23 | (20.00) | -21.45% |
| Transient | 27 | 27 | 0 | 0.00% | 138.00 | 152.00 | -14.00 | -9.21% | 9.20 | 10.13 | (0.93) | -9.21% |
| TOTAL | 6749 | 7060 | -311 | -4.41% | 91,177.50 | 94,454.00 | -3276.50 | -3.47% | 6,078.50 | 6,296.93 | (218.43) | -3.47% |
| Headcount to FTE Ratio | 90.07% | 89.19% | 0.87 | | | | | | | | | |

| 8/30/2022 | FT/PT Registration by Headcount | | | | | | |
|--|---------------------------------|------|------|--------|--------|--------|-----|
| Undergraduate (88.8% FT at Fall 21 freeze) | Full-Time | 6005 | 6275 | 88.98% | 88.88% | 0.10 | (6) |
| | Part-Time | 744 | 785 | 11.02% | 11.12% | (0.10) | 6 |

| Average Fall Credit Hours by Level and Full-Time/Part-Time Enrollment | | | |
|---|---------|---------|-------|
| | UG | | |
| | Fall 22 | Fall 21 | Diff |
| Full Time | 14.61 | 14.40 | 0.21 |
| Part Time | 5.16 | 5.69 | -0.53 |
| Average | 13.57 | 13.43 | 0.14 |

Fall 2022 Graduate Registration (note: we are still anticipating another 45 off-shore registrations prior to freeze.)

| Graduate Registrations for Fall 2022 | | | | | | | | | | | | |
|--------------------------------------|--------------|-----------|------------|--------------|--------------|-----------|------------|--------------|--------------|-----------|------------|--------------|
| | Headcount | | | | Credit Hours | | | | FTE | | | |
| 8/30/2022 | % Difference | | | | % Difference | | | | % Difference | | | |
| | Fall 2022 | Fall 2021 | Difference | % Difference | Fall 2022 | Fall 2021 | Difference | % Difference | Fall 2022 | Fall 2021 | Difference | % Difference |
| New, Doctoral | 75 | 1657 | 0 | 0.00% | 645.00 | 636.96 | 8.04 | 1.26% | 53.75 | 53.08 | 0.67 | 1.26% |
| Continuing, Doctoral | 644 | 285 | -33 | -11.58% | 2,030.88 | 2,173.92 | -143.04 | -6.58% | 169.24 | 181.16 | (11.92) | -6.58% |
| New, Master's | 347 | 386 | -39 | -10.10% | 2,936.04 | 3,564.00 | -627.96 | -17.62% | 244.67 | 297.00 | (52.33) | -17.62% |
| Continuing, Master's | 650 | 744 | -94 | -12.63% | 4,522.44 | 4,948.92 | -426.48 | -8.62% | 376.87 | 412.41 | (35.54) | -8.62% |
| TOTAL | 1716 | 1882 | -166 | -8.82% | 10,134.36 | 11,323.80 | -1189.44 | -10.50% | 844.53 | 943.65 | (99.12) | -10.50% |
| Headcount to FTE Ratio | 49.22% | 50.14% | -0.93 | | | | | | | | | |

| 8/30/2022 | FT/PT Registration by Headcount | | | | | | |
|---------------------------------------|---------------------------------|----------------------|----------------------|-------------------|-------------------|----------|--|
| Level | Full Time/Part Time | Registered Fall 2022 | Registered Fall 2021 | % FT/PT Fall 2022 | % FT/PT Fall 2021 | PPT Diff | Registration Diff Fall 2022 if at Fall 2021 Proportion |
| Graduate (37.4% FT at Fall 21 freeze) | Full-Time | 616 | 678 | 35.90% | 36.03% | (0.13) | 2 |
| | Part-Time | 1100 | 1204 | 64.10% | 63.97% | 0.13 | (2) |

| Average Fall Credit Hours by Level and Full-Time/Part-Time Enrollment | | | | 8/30/2022 |
|---|---------|---------|-------|-----------|
| | Grad | | | |
| | Fall 22 | Fall 21 | Diff | |
| Full Time | 9.94 | 10.09 | -0.15 | |
| Part Time | 3.65 | 3.73 | -0.08 | |
| Average | 5.92 | 6.02 | -0.10 | |

Fall 2022 Clock Hour Registration

| Clock Hour Registrations for Fall 2022 | | | | |
|--|-----------|-----------|------------|------------|
| 8/30/2022 | % | | | |
| | Fall 2022 | Fall 2021 | Difference | Difference |
| ALI | 39 | 19 | 20 | 105.26% |
| Baking and Pastry | 52 | 60 | -8 | -13.33% |
| Criminal Justice Training Program | 28 | 31 | -3 | -9.68% |
| Culinary Arts | 96 | 90 | 6 | 6.67% |
| EMT | 23 | 13 | 10 | 76.92% |
| Int'l Student Exchange | 1 | 0 | 1 | 0.00% |
| Paramedic | 41 | 49 | -8 | -16.33% |
| School Security Training | 24 | 23 | 1 | 4.35% |
| TOTAL | 304 | 285 | 19 | 6.67% |

Undergraduate Retention and Persistence

| 8/30/2022 | Fall 22 CPP/Actual Fall 2021 Freeze | Retention as of report Date | Difference to CPP | Add'l students needed to meet Fall 22 CPP/final Fall 21 Freeze |
|--|--|--------------------------------|----------------------|--|
| Retention for Fall 21 cohort to Fall 22 | 71.50% | 70.96% | (0.54) | 9 |
| Retention for Fall 20 cohort to Fall 21 | 71.32% | 71.56% | 0.24 | -4 |
| Ppt Difference | | -0.60 | | |
| Cont. UG Persistence to Fall 22 | 61.83% | 61.73% | (0.10) | 5 |
| Cont. UG Persistence to Fall 21 | 60.21% | 60.58% | 0.37 | -21 |
| Ppt Difference | | 1.15 | | |

Fall 2023 New Undergraduate Admissions

| 8/31/2022 | Fall 2023 Applications vs. Fall 2022 | | | | |
|-----------------------|--------------------------------------|-------------|-------------|------------|--------------------|
| Student Type | Residency | Fall 2023 | Fall 2022 | Difference | Percent Difference |
| New First Time | In State Resident | 1217 | 1092 | 125 | 11.45% |
| | International | 21 | 5 | 16 | 320.00% |
| | Out of State Resident | 69 | 73 | -4 | -5.48% |
| New First Time | | 1307 | 1170 | 137 | 11.71% |
| Transfer | In State Resident | 49 | 41 | 8 | 19.51% |
| | International | 6 | 1 | 5 | 500.00% |
| | Out of State Resident | 5 | 4 | 1 | 25.00% |
| New Transfer | | 60 | 46 | 14 | 30.43% |
| TOTAL NEW | | 1367 | 1216 | 151 | 12.42% |

**Fall 2022 Housing Report Summary
As of August 29, 2022**

| Suites | | |
|--|---|---|
| Change in Housing Applications between August 22, 2022 and August 29, 2022 | | |
| Last Report: August 22, 2022 | This Week: August 29, 2022 | Change |
| Total Students: 2359 New Students: 1624 Continuing Students: 735 | Total Students: 2310 New Students: 1600 Continuing Students: 710 | Total Change: -49 New Students: -24 Continuing Students: -25 |
| Percent of Occupied Designed Capacity: 66.87% Total Designed Capacity: 3528 | Percent of Occupied Designed Capacity: 65.48% | Occupied Designed Capacity: Gain/Loss: -1.39% |
| Percent of Occupied Socially Distanced Capacity: 91.08% Total Utilizable Capacity: 2590 | Percent of Occupied Socially Distanced Capacity: 89.19% | Occupied Socially Distanced Capacity Gain/Loss: -1.89% |

| University-Owned | | |
|--|--|---|
| Punxsutawney Living Center | | |
| Last Week: August 22, 2022 | This Week: August 29, 2022 | Change |
| Total Students: 71 Occupied: 35.86% Total Capacity: 198 | Total Students: 71 Occupied: 35.86% | Total Change: 0 Gain/Loss: 0.00% |

| Suites Year-to-Year Application Comparison | |
|--|-------------------------------------|
| Total Fall 2022 as of August 29, 2022: 2310 | Fall 2022 vs Fall 2021: +106 |
| Total Fall 2021 as of August 30, 2021: 2204 | Fall 2022 vs Fall 2020: +420 |
| Total Fall 2020 as of August 31, 2020: 1890 | |

| University-Owned Year-to-Year Application Comparison | |
|--|--|
| Year-to-Year Comparison: Punxsutawney | Fall 2022 vs Fall 2021: +6 |
| Total Fall 2022 as of August 29, 2022: 71 | Fall 2022 vs Fall 2020: -34 |
| Total Fall 2021 as of August 30, 2021: 65 | |
| Total Fall 2020 as of August 31, 2020: 105 | |
| Grand Total Application | As of 8/29/22: 2381 – Fall 2022 As of 8/30/21: 2269 – Fall 2021 |
| | To Date Fall 2022 v Fall 2021 Grand Total Comparison: +112 |

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 August 29, 710 continuing students have signed up for the 2022-2023 academic year. As of August 30, 2021, 693 continuing students had signed up for the 2021-2022 academic year **for a difference between 2022 and 2021 of +17.**

**Fall 2022 Housing Report Summary
As of August 29, 2022**

- b. New Student Year-to-Year Date and Point-in-Process Comparison (process opened on the same dates for new students): As of August 29, 1600 new students have signed up for the 2022-2023 academic year. As of August 30, 2021, 1511 new students had signed up for the 2021-2022 academic year **for a difference between 2022 and 2021 of +89.**
 - c. Continuing Student Point-in-Process Comparison: As of week 48 since the beginning of continuing student housing sign ups, 710 continuing students have signed up for housing for the 2022-2023 academic year. Comparatively, during the same point-in-process for 2021-2022 housing sign ups, 691 continuing students had signed up for housing **for a difference of +19.**
2. Trends among new and continuing students who have contracted to live on campus for 2022-23 are as follows:
- Academic Interests
 - Nursing (202), Criminology (120), Biology (129), and Psychology (114) are the most common majors, followed closely by majors in Computer Science, Health and Human Services majors, Management, and Natural Science-each with 89-107 students who contracted.
 - 188 are members of the Cook Honors College
 - 1499 (62.9%) identify as female
 - Distance from Home
 - 1484 (62%) live more than 50 miles from IUP
 - 897 (38%) live fewer than 50 miles from IUP
 - Desire for Privacy
 - Of the 2310 students that have signed up for 22-23 housing, 24% of them have selected the most expensive housing options (over \$5000 per semester – 1-person private suite and 2-person private suite with private bath).
 - 12% of the students signed up for 22-23 housing have selected the least expensive housing option (2-person shared semi suite at \$4150 per semester).