



USU Board of Trustees Regular Meeting

Friday, November 8, 2024, at 8:30 AM-10:30 AM MST

via Zoom ONLY: <https://usu-edu.zoom.us/j/82764731016?pwd=8OIAN6yh2d0A5r7IkT7arI6kzQJua0.1&from=addon>

Agenda

- 1. Call to Order** 8:30 AM
Presenter: Chair Jacey Skinner
- 2. Closed Session** 8:35 AM
- 3. Committee Reports** 8:55 AM
 - 3.1. Student Health, Safety, and Well-being**
Presenter: Trustee David Huntsman
 - 3.2. Research and Academic Approval**
Presenter: Trustee Kacie Malouf
 - 3.3. Statewide Mission & Campus Oversight**
Presenter: Trustee Kent Alder
 - 3.4. Audit, Risk and Compliance**
Presenter: Trustee David Petersen
 - 3.5. Honorary Degree, Awards and Recognition**
Presenter: Trustee Heather Mason
- 4. President's Report** 9:15 AM
Presenter: President Elizabeth Cantwell
- 5. Center for the School of the Future - Charter School Annual Report** 9:30 AM
Presenter: Dean Al Smith
- 6. CONSENT AGENDA** 9:40 AM
 - 6.1. Approve: 9.27.24 Board of Trustees Regular Minutes**
 - 6.2. Approve: Policy 330: Telework**
 - 6.3. Approve: Policy 392: Employment of Relatives**
 - 6.4. Approve: Proposal to Offer Certificates**
 - 6.4.1. Advanced Fashion Studies Certificate in the College of Agriculture and Applied Sciences**

- 6.4.2.** Listening and Spoken Language Deaf Education Post-Masters Certificate in the Emma Eccles Jones College of Education and Human Services
- 6.4.3.** Hearing Foundations Certificate in the Emma Eccles Jones College of Education and Human Services
- 6.4.4.** Clinical Rehabilitation Counseling Post-Master's Certificate in the Emma Eccles Jones College of Education and Human Services
- 6.4.5.** Dual Language Immersion Post-Baccalaureate Certificate in the College of Humanities and Social Sciences and the Emma Eccles Jones College of Education and Human Services

6.5. Approve: Proposal to Discontinue

- 6.5.1.** Medical Laboratory Technician AAS in the College of Agriculture and Applied Sciences

6.6. Approve: Proposal to Change Names

- 6.6.1.** Bioveterinary Science Bachelor of Science TO Veterinary Science Bachelor of Science in the College of Agriculture and Applied Sciences
- 6.6.2.** Physical and Sport Education MEd TO Applied Sport Coaching MEd in the Emma Eccles Jones College of Education and Human Services

6.7. Approve: Proposal for New Centers

- 6.7.1.** The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI) in the Emma Eccles Jones College of Education and Human Services
- 6.7.2.** Wanlass Center for Art Education and Research in the Office of the President

6.8. Approve: Proposal to Restructure

- 6.8.1.** Composite Materials and Structures Master of Science in the College of Engineering

6.9. Accept: Report of Institutional Discretionary Funds Supplemental Report of Budget Variances for the Fiscal Year Ended 30 June 2024

6.10. Accept: Report of Investments May 2024

6.11. Accept: Report of Investments June 2024

6.12. Accept: USU, USU Eastern, and USU Blanding Auxiliary Annual Reports and USU Service Enterprises for FY2023-24

7. ACTION AGENDA

7.1. Approve: New Student Fee Policies

9:45 AM

7.1.1. Policy 549: Logan Campus Student Fee

Presenters: Interim Vice President Krystin Deschamps, Linda Zimmerman, Alex Gatherum, Brooklyn Ward

7.1.2. Policy 549A: Statewide Campuses Student Fee

Presenters: Interim Vice President Krystin Deschamps, Linda Zimmerman, Alex Gatherum, Brooklyn Ward

7.2. Approve: Real Property Acquisition by Exchange (Bastian Agricultural Center) 9:55 AM

Presenter: Vice President Dave Cowley

7.3. Approve: Capital Improvement Priority List for FY2025-26 10:05 AM

Presenter: Vice President Dave Cowley

7.4. Authorize: Adjustment to Summer Term Tuition and Fee Tables 10:15 AM

Presenter: Vice President Dave Cowley

8. INFORMATION AGENDA

8.1. 2023-2024 University Honors Program Annual Report

8.2. Bad Debt Write-off for Fiscal Year Ending 30 June 2024

8.3. Leased Space Report as of 30 June 2024

8.4. Policy 533: Public Safety, Response, and Reporting

9. ADJOURN 10:30 AM

President's Report

NOVEMBER 8, 2024



Message from Utah State University President Elizabeth Cantwell

The month of November is a time for remembrance, gratitude, and thanksgiving. Personally, I am filled with gratitude for the dedication and hard work of our faculty, staff, and students.

This month's President's Report highlights our progress to advance academic excellence, research, student success, community engagement and more at our Utah State University including the recent strides made by our university in several areas.

I am pleased to report that several new meeting series were reframed or established recently to increase the strategic engagement and transparency across the university as follows:



UNIVERSITY LEADERSHIP COUNCIL (formerly known as VP Council + USU Monthly Leadership Meeting) Meets every other month (Feb., April, June, August, Oct., Dec.) for 90 minutes to discuss items "broadly representative" of the University and to inform strategic decision making, financial management and resource allocation, operations and administration, external relations/corporate partnerships, and crisis management and preparedness for USU future planning.

ACADEMIC STRATEGY & FUTURES THINKING (in addition to but NOT a replacement of the Dean's Council) Meets every other month (Jan., March, May, June, Sept., Nov.) for 90 minutes to discuss the future of higher education, academic program development and innovation, research and innovation, faculty development and support, student success and outcomes, and institutional effectiveness.

GOVERNANCE & POLICY ACTION COUNCIL Meets quarterly for 90 minutes to address policy updates and discussion, governance structure evaluation, institutional accreditation, risk management, legal & regulatory compliance, faculty and staff governance, and institutional ethics.

***NEW* USU DIRECTOR+ FORUM** Meets 3x per year for 90-120 minutes for invited USU senior leadership (USU Directors and above only). Meeting run by President with key updates by invited leaders, including, Operations, Business & Finance, Athletics, Title IX, Legal, and other areas of Administration to share goals, strategic insights to educate, inform, etc.

***NEW* UNIVERSITY FORUM** Meets 2x per year for 90-120 minutes for all USU faculty and staff. Meeting run by President with key strategic and aspirational updates by key invited leaders, including, Operations, Business & Finance, Athletics, Title IX, Legal, and other areas of Administration, to share goals, strategic insights, and to educate, inform, and gain support, etc. Topics are comprehensive and university-wide in nature with "state of the union" topics, including Presidential Roundtable findings, updates, metrics, etc.

Both the Director+ Forum on October 1 and the University Forum on October 14 were well-attended, receiving generous praise as the first meetings of their kind at Utah State. We look forward to continuing to share information and drive accountability and decision-making deep into the organization.

As a university community, we are particularly thankful for the unwavering support of our Board of Trustees, whose guidance has been instrumental in shaping our institution's future. I am especially encouraged by the increase in enrollment and opportunities that lay before us. We are also making diligent preparations for our upcoming 2025 Utah legislative session.

At Utah State, we remain committed to our mission of providing a high-quality education, fostering innovation, and serving our community in an innovative and impactful way.

Academic Enterprise

Our academic enterprise continues to grow and evolve. With our new organizational structure in place, we are well-positioned to enhance academic excellence, foster innovation, and better serve our students and community.

MAJOR SEARCHES UNDERWAY

- **Senior Vice President of Undergraduate Affairs:** This new leadership position will oversee enrollment management, retention, advising, and student life to enhance student success and experience.
- **Energy Engineering Initiative Project Leader:** This position will lead the Energy Engineering Initiative by establishing accredited programs, hiring nine faculty statewide, and developing academic units to attract students in energy engineering.
- **Dean of the College of Agriculture and Applied Sciences:** Following Dean and VP Ken White's transition to lead USU's Statewide Enterprise post reorganization, we seek an accomplished individual to lead as Dean of this well-established college.

90 CREDIT BACHELOR DEGREE PROGRAMS

The state of Utah now allows Bachelor Degree programs with a 90-credit requirement, rather than the traditional 120. A USU committee proposes a Bachelor of Applied Sciences (BAS) degree, starting with Criminal Justice through Statewide Campuses, while continuing to explore additional BAS offerings – another strong offering from Utah State.

STUDENT AFFAIRS DIVISION

The **Veteran's Resource Office (VRO)** at USU has experienced a substantial increase in daily visits, rising from 65 to 103. This surge in activity, combined with the positive feedback from student-veterans regarding increased satisfaction and belonging, underscores the effectiveness of the center's robust resources.

Campus Recreation plays a crucial role in enhancing student well-being by offering a wide range of intramural and outdoor programs. Furthermore, our commitment to community engagement has empowered students to contribute over 175,000 service hours in 2023-2024, fostering a strong sense of belonging and purpose.

STRATEGIC ENROLLMENT MANAGEMENT DIVISION

For the 2025-2026 academic year, USU implemented a new grant program providing \$1,000 to all first-time undergraduate students who complete their FAFSA by February 1, 2025, and enroll in fall courses by May 1, 2025. The grant, which can be used for various educational expenses, aims to support student success and affordability. Additionally, USU was selected as a Beta 3 partner for the 2025-2026 FAFSA testing, allowing up to 1,000 students to submit their applications in November. This early submission will help the university streamline the financial aid process and better prepare for the upcoming academic year.

Continuing a successful tradition, USU held recruitment kickoff events across multiple campuses for the second consecutive year. These events fostered collaboration among campus communities, addressing recruitment challenges and strategizing solutions to attract and enroll qualified students.

STUDENT SUCCESS DIVISION

This fall, the **Exploratory Advising** team at Utah State University has been hard at work, conducting 1,600 advising appointments, proactively reaching out to upper-level undeclared students, and partnering with the Office of Orientation to support incoming students.

University Advising has launched the Advising Excellence 2024-25 certificate and facilitated various professional development sessions, including change management and suicide prevention. They also presented at the Blanding Weaving Stories conference and trained 80 advisors in the Appreciative Advising framework through the NASNT II grant cycle.

This fall in the Office of **Academic Belonging & Learning Excellence** over 500 undergraduate students are enrolled in the Habits of Mind courses at USU, including more than 80 first-generation students in USU 1050: Navigating College for First-generation Students. These 1 or 3-credit courses, aim to equip students with essential behavioral habits for success in their academic, professional and personal lives.

Aggie Athletics

Our student-athletes are excelling both on and off the field, demonstrating a commitment to academic achievement and athletic prowess.

DEVELOPMENT

- Had a 23.6% YOY increase in Athletics' A Day of Giving and two new Blue A Society commitments and 2% ahead of FY24 pace.

ACADEMICS

- Ten Utah State teams achieved a perfect Academic Progress Rate (APR) in 2023-24, while other teams also exceeded the 930 benchmark, demonstrating strong academic performance across the board.

TICKETS

- Football season ticket sales were the highest since 2016 with a total of 8,812. Ranking fourth all time while men's basketball finished with an 88% season ticket renewal rate.

SOCCER

- Utah State Women's Soccer has set program records for goals (54), assists (53), points (159), and shutouts (12) in a single season and is tied with the school record for wins (15).
- The team has been ranked as high as No. 7 this season, matching the highest-ever ranking by a Utah State team, and is currently receiving votes in the United Soccer Coaches Top 25.
- USU ranks in the top 20 nationally in multiple categories, including goal differential (+42), scoring offense, and shutout percentage, with one of the nation's best scoring differentials and second-most players scoring goals.

FOOTBALL

- Utah State averages 516.3 yards and 34.5 points per game, ranking 10th in passing and 13th in total offense nationally.
- USU converts nearly 48% of third downs, averaging 25.5 first downs per game over the last four games.

VOLLEYBALL

- Utah State is 5-4 in Mountain West play, winning five of its last six matches and currently ranks fifth, aiming for a top-six spot to qualify for the MW Tournament in Las Vegas, Nov. 27-29.
- The team set a program attendance record with 2,559 fans at Spectrum Magic Night and ranks second in the MW for average attendance.

CROSS COUNTRY

- The Aggie men's cross-country team achieved a No. 19 national ranking after a strong showing at the Wisconsin Pre-Nationals, while the men and women rank fourth and seventh in the Mountain Region.
- The Aggies earned multiple team titles and weekly honors, including five consecutive MW Freshman of the Week awards, showcasing depth as they prepare for the MW and NCAA Championships in November.

GOLF

- Utah State golf finished in the top 10 in three of five fall tournaments, including second-place finishes at the Air Force Invitational and Utah Collegiate Shootout, and wrapped up its fall season at the Monterrey Collegiate Classic, which it won last year.

MEN'S TENNIS

- USU men's tennis saw standout performances this fall, with senior Sergi Micó Fenollar winning a singles title at the 67th Annual Men's Intercollegiate Championships, and seniors David Martirosian and Mohammad Alkotop capturing the doubles bracket at the Mountain West Fall Qualifiers

WOMEN'S TENNIS

- Utah State women's tennis opened the 2024 fall season with two doubles titles at the Idaho State Invitational, highlighted by freshman Natalie Paterova's finals appearance at the Bedford Cup, and concluded at the Gonzaga Invitational.

WOMEN'S BASKETBALL

- Head coach Wesley Brooks begins his first season as head coach of the Aggies.

MEN'S BASKETBALL

- Head coach Jerrod Calhoun begins his first season as head coach of the Aggies.

GYMNASTICS

- Head coach Kristin White begins her third season as head coach of the Aggies.

Finance & Administrative Services

Investing in Our Success

Our university is committed to providing state-of-the-art facilities that enhance the learning experience for our students. We are currently undertaking several ambitious construction projects across our campuses, including:

NEHMA Art Research Center (Figure 1.)

- Completion scheduled for February 2025

Gardner Learning & Leadership Building

- Completion scheduled for Spring 2025

South Campus Residence Hall

- Completion scheduled for Summer 2025

South Campus Parking Terrace (Figure 3.)

- Completion scheduled for Summer 2025

Monument Valley (Figure 2.)

- Completion scheduled for Winter 2025

College of Veterinary Medicine Building

- Completion scheduled for Summer 2026

Administrative Services Building

- Completion scheduled for Fall 2026

These projects will create **modern classrooms, research labs,** and **student support spaces**, ensuring that our students have the resources they need to succeed.



Figure 1. NEHMA Art Research Center



Figure 2. Monument Valley



Figure 3. South Campus Parking Terrace

USU Campus Store:

- In Fall 2024, the USU Campus Store launched the **Aggie Access Flat-Rate Textbook Program**, which provides all required textbooks to undergraduate students for a flat rate of \$250 per semester. The first program of its kind in Utah, Aggie Access promotes academic success by providing first-day-of-class access to all required textbooks.
- Aggie Access enables students to plan for the cost of textbooks each semester, creates a central repository for all required books, and promotes academic success. The first semester of Aggie Access was an **overwhelming success**, with 89% of students participating in the program. Students can also choose to opt out and obtain their materials independently. Aggie Access is a **future-focused program** in an ever-increasing digital learning environment.

Extension Enterprise

From The Washington Post to Hyrum, Utah, USU Extension's impact reaches audiences of all ages and walks of life.

Michael Wierda, a renowned Extension associate professor and director of the pesticide safety education program, was featured on the front page of the Washington Post for his groundbreaking research on eagles and avian flu. He was also honored with the 2024 Western Region Excellence in Extension Award for his innovative work in supporting professional pesticide applicators.

Voyageurs Park on June 15. CREDIT: Demetrius Freeman/The Washington Post



Bald-eagle researcher William Bowerman, left, and biologists Peggy Shrum and Michael Wierda head out for a second day searching for eagles and their offspring at Voyageurs Park on June 15. CREDIT: Demetrius Freeman/The Washington Post



The **Create Better Health** (SNAP-Ed) program concluded its grant year on September 30, 2023. Throughout the year, the program collaborated with 80 community partners to implement policy, systems, and environmental changes that promote healthier lifestyles. These efforts impacted approximately 146,868 Utahns.

USU Extension hosted **farmers markets at nine senior centers** in Salt Lake County and donated more than 3,500 pounds of free fresh produce to 455 seniors, valued at approximately \$8,000. Since 2016, the program has distributed nearly 21 tons of fresh produce to about 8,000 seniors in 144 markets and given away approximately \$87,650 worth of fresh produce.



TALENT READY
UTAH
BUILDING OUR WORKFORCE

The USU Extension Remote Online Initiative program was awarded a \$200,000 grant from **Talent Ready Utah**, part of the Utah System of Higher Education. The grant will support a one-year partnership to help rural residents secure high-demand jobs with fast-growing Utah companies.

The USU Extension **Remote Online Initiative Program**, in collaboration with Montana State University, launched a new Environmental Justice Resource Center. The center provides support for grant identification, project planning, and funding management, with emphasis on environmental remediation, clean energy development, air and water quality, and food security.

USU Extension in Utah County hosted **Farm Field Days**, which educated ~3,000 second graders on agriculture and earth science topics that meet the second-grade core curriculum. Extension partnered with the Utah Farm Bureau, the State FFA, and school districts. It will host another session in the spring for 3,000 more students.



USU Extension Cache County hosted Ag Days at Canyon Elementary in Hyrum, Utah, this fall, where 300 fifth and sixth graders learned about drones in agriculture, and 450 first through fifth graders participated in a farm safety event with a scavenger hunt.

USU Extension in Kane County hosted the first **Utah Women in Ag Cattlewomen "Boot" Camp** on September 9th in Alton, Utah, where 50 participants attended presentations and practiced hands-on cattle handling and production skills. The annual cattle reproduction workshop was held the following day with a record attendance of 110 participants.



Statewide Enterprise

USU's Statewide Enterprise is a key component of our university, making significant strides in several key areas. We are actively exploring new avenues to enhance our services and contribute to the university's overall mission.

Enrollment: The Statewide Enterprise experienced significant growth in both undergraduate and graduate enrollment, demonstrating a strong commitment to expanding access to higher education.

- Undergraduate: 6,491 (up 12.2%)
- Graduate: 884 (up 9.4%)

Residential Campuses

- Blanding is developing a tutoring strategy to help pre-nursing students study for and pass the Health Education Systems Incorporated (HESI) exam.
- Blanding has two students that competed with the Logan Rodeo Team who recently took 2nd place in the Team Roping Event at Pocatello Rodeo.
- Eastern Leaders Academy (ELA) had 14/26 applicants selected for their second cohort.
- Eastern has 381 students living on campus this semester (132 continuing, 249 new).
- Eastern's Blue Blast Block Party had 403 student attendees compared to 136 last year.

Regional Campuses: Statewide regional campuses are fostering a vibrant and supportive community in many ways.

- Aviation Department held a ribbon cutting ceremony for the new hangar at Brigham City Airport and classes have begun in Brigham City.
- Moab hosted the Colorado Grand Car Show and the group donated \$15,000 to their campus.
- Salt Lake has experienced significant growth, hosting over 225 events and attracting over 4,000 attendees thus far--surpassing all of 2023's totals.
- A team of USU faculty, including Drs. Amanda Deliman, Rachel Turner, and Ryan Knowles, secured a \$49,997 Spencer Education Grant to explore the challenges faced by elementary social studies teachers in making curriculum and instructional decisions.
- New USU Panguitch Center will increase access to higher education for Garfield County.
- Southwest partners with Snow College to offer apprenticeship technical education programs in remote central Utah.
- Dr. Scott Hammond (Salt Lake) was a keynote speaker at the International ICE SAR Conference in Reykjavik, Iceland in October.
- Tooele hosted Corridor Days, allowing sophomores from local high schools to engage in campus life, attend 30-minute mini-classes (biology, social work, criminal justice), and meet local faculty.

Central Team

- A dedicated team is working to enhance support services for new faculty and staff. The Assistant Vice President and Director of Statewide Academic Advising will host monthly live orientations, while standalone sessions will be available on the learning management system.
- In the first four weeks of Fall 2024, advisors conducted a remarkable 6,026 advising updates, a significant increase from the previous year's 2,342.
- To improve student engagement and provide timely assistance, the Director of Statewide Recruitment and Engagement is collaborating with the SEM Division to launch an AI chatbot on key USU websites.
- The Assistant Director of Career Design successfully launched a messaging campaign, generating 117 text responses and scheduling 30 appointments.
- Additionally, the 4th Social Media Workshop on Actionable Analytics was presented to campus social media coordinators.



Government & External Relations

Government and external relations play a crucial role in a university's success. The fall semester has already been packed with on-campus events featuring incredible speakers



DANA PERINO & HATCH FOUNDATION SYMPOSIUM

USU partnered with the Orrin G. Hatch Foundation to bring Dana Perino to campus. Perino, former White House Press Secretary and current Fox News anchor, spoke regarding improving civil dialogue on college campuses, followed by a panel discussion with other leaders in a sold-out event.



ATHLETES IN PUBLIC SERVICE FT. REP. BURGESS OWENS

Congressman Burgess Owens inspired students by sharing his journey from a successful athlete to a dedicated public servant. A panel discussion featuring Diana Sabau, Doug Fiefla, Cree Taylor, and Jontrell Rocquemoire, moderated by Dr. Jennifer Seelig, further explored the pathways for student-athletes to transition into public service.

Other Fall event highlights:



CD 1 DEBATE

Candidates for Utah's Congressional District 1: Blake Moore, Daniel Cottam, and Bill Campbell debated key issues at the Eccles Conference Center on October 8th. VP Wiser, as Utah's Debate Commission candidate relations chair.



STATE LEG SERVICES

Staff from the Utah State Legislative Services Office helped IOGP promote the Utah State Legislature Spring Internship program at the USU Spring Career and Internship Fair.



UNSHELTERED PANEL

Faculty and students explored the issue of homelessness in Cache Valley (and Utah) as well as potential responsibilities, avenues and resources that we have as individuals and community members to help address this issue in a panel discussion with Jayme Walters, Amy Zadeik Anderson, and Lindsey Harrelson.

University Marketing & Communications

Our university's marketing and communications team is effective in promoting our USU brand, engaging our target audiences, and helping to advance strategic goals.

Utah State Today Top Stories (in webpage views)

- [University Announces Volleyball Schedule Update](#) (8,626)
- [Nursing Students Receive Training in New State-of-the-Art Advanced Nursing Education Suite](#) (4,442)
- [USU Tooele Announces Four New Faculty Members](#) (3,741)
- [Utah State Responds to Notice of Noncompliance From Department of Justice](#) (3,276)
- [USU's Science Unwrapped STEM Outreach Program Launches 'Joining Forces' Series](#) (2,668)

In the Media and Faculty Expertise

- [In eagle nirvana, avian flu is decimating America's national bird](#) (The Washington Post, Oct. 5, 2024)
- [Why the most climate-resistant glaciers are hiding in plain sight](#) (National Public Radio, Sept. 30, 2024)
- [Utah political experts discuss 2024 presidential debate](#) (Yahoo – published from ABC4, Sept. 11, 2024)
- [Demand for bilingual Spanish health care services is growing – can Uth keep up?](#) (Yahoo – published from Utah News Dispatch, Sept. 4, 2024)
- [Yes, Tree Collecting Is a Thing](#) (New York Times, Aug. 28, 2024)

Utah State Magazine statistics: [Fall 2024 issue: Aggie Impacts](#)

- Mailed to 50K alumni
- Emailed to 182,497 people
- 49,357 pageviews with 5,546 unique users
- Top stories:
 - The Lasting Legacy of Ross Peterson
 - LDS Apostle, Elder Gary E. Stevenson, Fondly Recalls Growing Up An Aggie
 - Lexie & Lindsay Kite Are Changing the Body Image Resilience Game
 - Aggie Ice Cream From Cow to Cone: The Making of an Icon

Podcast Episode 7: [Navigating the Future of Space Exploration](#)

- In this episode, President Cantwell talks to Dr. Jed Hancock, President of the Space Dynamics Laboratory about advancing research and education in the field of space exploration. [Listen now](#)

Recruitment Marketing

- Statewide Campuses search advertising:
 - Clicks: 322 Impressions: 1,542 Conversions: 72
- Statewide Campuses digital display advertising:
 - Clicks: 463 Impressions: 97,128
- High School Football sports report with KUTV continues through November

Social Media

- Total Followers – 162,588 with a 2.45% growth rate
- 4 out of the top 10 most engaging posts across all Utah schools.
- Tik Tok - 14.5% growth rate with engagement rate up 151%
- Strategic decision to focus on video for this quarter
- On IG we had over 1.2 million video views from start of semester to date
- Over 500k video views on FB from start of semester to date

Institutional Advertising/Marketing

- Level Up Campaign ([usu.edu/levelup](#) to preview commercial)
- 163k views on Twitch (first Higher Edu institution running commercial on platform)
- 31k Google Ads Impressions
- Aggie Impact Ads
- Ran :30 ads during Green Bay Packers (Jordan Love alum) Oct. 6 & 13
- 78k ad impressions generated

Research Enterprise

USU is committed to growing its world-class research enterprise.

- **Transfer of Sponsored Programs Accounting (SPA) to the Office of Research:** To unify all portions of the sponsored research process, SPA has been officially moved from the Controller's Office to the Office of Research. This move will enable better process development for award management and a more integrated structure for meeting compliance requirements.
- **Sponsored Programs Accounting Executive Director Search:** To enhance sponsored award fiscal management across campus, a new leadership position (Executive Director) has been created in SPA. A nationwide search has been initiated to fill this position.
- **Proposal Submission Resources:** In FY24 the Office of Research partnered with colleges to add four new proposal development positions to enhance support to faculty for proposal preparation. There are now 18 proposal development specialists across USU, including in Extension and Statewide Campuses. Approximately, one-quarter of the way through FY25 we are seeing the highest proposal number and dollar amounts to date versus any prior year at USU.
- **Research and HB261:** The Office of Research worked with the Office of General Counsel to clarify USU eligibility for research programs involving topics related to HB261. A website is now available for faculty to consult during the proposal development process. See web link: <https://www.usu.edu/compliance/hb261/>

Research Summits – Nov. 5, 2024. The Office of Research will host a Research Summit for USU faculty on Nov. 5, 2024, with the topic being Health & Education Disparities (<https://research.usu.edu/rd/summits/health-disparities>). Research Summits are dynamic events where experts, thought leaders and industry representatives converge to discuss critical topics. These summits offer a unique opportunity for researchers to:

- **Connect with Peers:** Engage in meaningful conversations with fellow researchers and industry professionals.
- **Explore Funding Opportunities:** Gain insights into topic-related funding sources and stay informed about the latest opportunities.
- **Build Research Teams:** Network and form interdisciplinary teams to tackle complex challenges.



Advancement

USU Elevated Through Philanthropy and Engagement

Annual Impact Report: <https://www.usu.edu/advancement/bythenumbers>

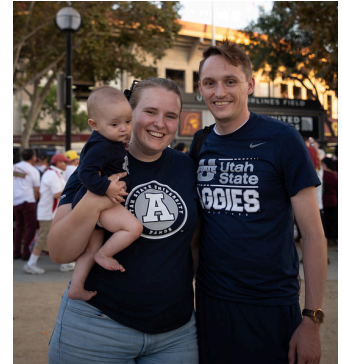
Links to Aggie Impact giving stories:

- [A Tradition of Aggie Blue and Fighting White: Aggie's Enduring Love for USU Athletics](#)
- [Celebrating Martyn Caldwell: A Memorial Endowment for Future Ecologists at USU](#)
- [Rocketing Forward: GAS Team Alum Honors USU Physicist Jan Sojka with Scholarship Endowment](#)

Alumni Events:

Past events:

- September 5: Aggie Night at the Museum of Idaho
- September 7: USU vs USC Football Tailgate
- September 9: USU Credit Union Golf Tournament
- September 15-21: Aggie Travel: Kansas City
- September 16: Emeriti Luncheon
- September 21: USU vs Temple Football Tailgate
- September 22: USU vs GCU Women's Soccer Tailgate
- October 4: Aggie Tailgate at Boise
- October 11: Homecoming True Aggie Night
- October 12: Homecoming 5k Running with the Bulls
- October 12: Homecoming Parade
- October 12: Homecoming Honoree Luncheon
- October 16-17, 22-24: Open House Alumni reps: Seattle, Portland, Las Vegas, Phoenix, DC, Denver
- October 23: Alumni Networking Event in DC
- October 26: Aggie Tailgate at Wyoming



Upcoming events:

- November 9: Aggie Tailgate at Washington State

FY Progress to Goal

As of 10/17/2024 6:57:25 AM

	Amount	Pace	Completion
Dollars	\$26,603,231.23	49.8%	44.3%
Granted	\$60,000,000		
Visits	894	-14.2%	25.4%
	3,520		
Qualification	349		
Visits	960		
Proposals	159		
Submitted >=	340		
\$50,000			
Proposals	63		
Granted >=	225		
\$25,000			



\$60M GOAL JUSTIFICATION FY25

HISTORIC DATA	2 donors in FY 2024 raising \$22.5M 5 Year Avg 2.0 donors	\$3M+	Have 6 prospects @ \$26.0M Have received 2 Totalling \$6.0M	PROPOSAL DATA
	4 donors in FY 2024 raising \$6.3M 5 Year Avg: 9.6 donors	\$1M - \$2.9M	Have 16 prospects @ \$22.2M Have received 7 Totalling \$10.9M	
	10 donors in FY 2024 raising \$5.9M 5 Year Avg 7.8 donors	\$500K - \$999K	Have 14 prospects @ \$7.5M Have received 4 Totalling \$2.6M	
	48 donors in FY 2024 raising \$11.1M 5 Year Avg: 48.8 donors	\$100K - \$499K	Have 84 prospects @ \$13.3M Have received 10 Totalling \$2.1M	
	161 donors in FY 2024 raising \$7.9M 5 Year Avg: 153.4 donors	\$25K - \$99K	Have 385 prospects @ \$13.3M Have received 44 Totalling \$2.1M	
	8,114 donors in FY 2024 raising \$9.3M 5 Year Avg: 8,302.0 donors	\$1 - \$24,999	(Does not include Annual Fund donors) Have 201 prospects @ \$1.3M	
Total Forecasted: \$83,685,617 + \$26,603,231 Raised FYTD = \$110,288,848 60% of Forecasted: \$50,211,370 + \$26,603,231 Raised FYTD = \$76,814,601 40% of Forecasted: \$33,474,247 + \$26,603,231 Raised FYTD = \$60,077,478 Forecasted at Current Close Rate of 37.36%: \$31,264,492 + \$26,603,231 Raised FYTD = \$57,867,723				Have received 4,291 Totaling \$3.0M



Conclusion

As we look to the future, Utah State University remains committed to our core values of student success, research excellence, and community engagement. We will continue to prioritize the following strategic areas:

Student Success and Enrollment: Enhancing the student experience and attracting top talent.

Research Excellence: Elevating our research profile and securing increased funding.

Statewide Enterprise: Expanding our impact across the state through innovative programs and partnerships.

Operational Modernization: Streamlining processes and leveraging technology to improve efficiency.

Academic Program Innovation: Developing relevant and in-demand academic programs.

I am grateful for the unwavering support of our Board of Trustees, whose guidance has been instrumental in shaping our institution's future. Together, we will continue to build a brighter future for Utah State University.



Elizabeth R. Cantwell
President, Utah State University



UtahStateUniversity



USU Charter School Authorizing Update
October 11, 2024

I. Recommendations

- a. School choice in Utah and nationally is gaining a great deal of traction among educational stakeholders. CSF is exploring how these K-12 school choice initiatives will impact USU's charter school authorizing. CSF will provide summary recommendations to the USU Board of Trustees on how these initiatives impact USU's charter school authorizing efforts.
- b. Additionally, going forward, CSF will continue to explore how charter school authorizing offers strategic advantages aligned to USU's mission.

II. Authorizing History

In its March 13, 2020, meeting, the USU Board of Trustees (BoT) authorized Utah State University's Center for the School of the Future (CSF) as its designee in the Emma Eccles Jones College of Education and Human Services to help deliver charter school authorizing recommendations to the USU BoT for approval.

CSF staff were directed to work closely with the USU BoT to promulgate processes identified in the USU charter school application processes, upon which authorization decisions for proposing charter schools can be made and to facilitate oversight/remediation of charter schools on behalf of the USU BoT. Additionally, CSF staff were to present charter school information (e.g., extending student numbers beyond the charter agreement, significant altering of the charter agreement...) to the USU-BoT that requires their approval under Utah Code 53G-5-306.

USU's charter authorizing processes were vetted through multiple stages by the Utah State Board of Education (USBE) staff and members of the USBE Law and Licensing Committee (LLC). On June 5, 2020, the LLC approved USU's charter school authorizing processes, recommending full USBE final approval which was given on July 9, 2020.

III. Authorized Charter School Updates

To date, USU has received 12 charter school authorization applications. Following applicant evaluation applying USBE approved processes, three of these applications resulted in positive recommendations from CSF to the USU-BoT for authorization. USU BoT approval of these recommendations, resulted in the formation of three signed charter school agreements. Updates on these three schools follows:

a. Career Academy of Utah (CAU)

Career Academy opened fall of 2022. This online school followed close in time to COVID, when online offerings were both popular and common. This school proposed to open with 750 students in year one, rising to 1400 in year two, and reaching its ceiling of 2200 students in year five. Surprisingly, given the need for online education options at the time, CAU opened with fewer than 100 students, rising to 275 students by year two.

Career Academy of Utah board members were interested in forming a school preparing students to take positions in their industries (i.e., construction, mining, gas, bio-medical). In year two, the CAU board learned that the industry specific course work available through the USBE was misaligned with industry standards the individual board members represented. This resulted in the CAU board recognizing that they would have to develop their own curricula for the school. With some study, they recognized the extended and arduous process for development of curricula and obtaining USBE approval of the resulting curricula. Ultimately, the CAU board determined this process would result in too little return (i.e., future employees for targeted industries) on the projected investment (i.e., time and effort for curriculum development and approval and general governance activities as a board).

USU authorizing through CSF evaluates authorized charter schools annually using the Learning Organization Performance Tool (LOPT). In year one, CAU earned 43% of available points on this tool—qualifying the school for intensive supports from CSF. However, before the end of year two, and completion of the year two annual report, the CAU board notified CSF that it would not open for year three due to the factors identified above (i.e., low student enrollment, arduous and lengthy processes for curricula development, and poor performance on the year one LOPT and low return on investment in time and effort). CAU is not operating now, nor does it have any registered students. CSF has worked carefully to aid the CAU board to successfully and fully close the school and its legal entity. It is anticipated that the legal entity of the school will fully close by January 1, 2025.

b. Cambridge Preparatory Academies (CPA – Salt Lake County and CPA Washington County)

These two schools were scheduled to open fall of 2023. The CPA board formally requested that the USU-BoT allow, due to construction supply line challenges and unfavorable interest rates, a delay in both schools opening to fall of 2024. As time elapsed and the 2024 opening drew closer, the CPA board asked the USU-BoT again to further delay the opening to fall 2025, and with an increased student number to allow for a fiscally viable plan. Simultaneously, they relinquished their charter school agreement in Washington County desiring to increase their focus on opening the Salt Lake County charter school. This request was approved.

Following this approval of extension, CSF leadership met with CPA board leadership monthly to receive reports on the preparations for opening fall of 2025. As time elapsed, it became clear that the CPA board's progress in securing a property for development was substantially delayed. Expressing concern beginning in the spring and through the summer of 2024, in September the CPA board announced that the contract on the property they had been pursuing fell through and that a fall 2025 opening was highly unlikely. CSF expressed to the CPA board that it could not recommend to the USU-BoT further extension for school opening, given no significant evidence of progress toward opening the school to that date.

With a USU charter agreement in hand, and the provision in Utah Code (R277-552-3(8)) that a school must open within three years of approval, the CPA board is currently using the final extension to open in 2025 and are engaging the Utah State Charter School Board regarding the possibility of transferring their charter agreement to that authorizer. This action is being pursued due to CSF being unable to recommend to the USU-BoT a third extension of delayed opening, given little evidence of progress in opening the school, and no prospects for a school location with the elimination of the prospective school site.



USU Board of Trustees Regular Meeting Minutes

Friday, September 27, 2024 at 8:30 AM MDT

via Zoom ONLY:

<https://usu-edu.zoom.us/j/84625521078?pwd=VZKlmp8uLd9s7T3CceiKMA9KFNPnVE.1&from=addon>

Attendance

Trustees present:

Jacey Skinner (Chair)
Kent K. Alder
John Y. Ferry
Kacie Malouf

David Petersen
Matthew Richey
Tessa White
Clark Whitworth

Trustees absent:

Gina Gagon
David H. Huntsman
Heather Mason

University representatives present:

Jodi Bailey
Janalyn Brown
Dave Cowley
Kerri Davidson
Nancy Hanks
Haley Klaassen
Mica McKinney
John O'Neil
Bill Plate
Ken White
Matt White

Devin Wiser
Steve Campbell
Grant Cardon
Krystin Deschamps
Crystal Giordano
Jana Lee Johnson
Susan Koch
John Mortensen
Katie Jo North
Diana Sabau
James Taylor

University representatives absent:

Elizabeth Cantwell

1. Welcome (Presenters: Chair Jacey Skinner)

Chair Skinner called the meeting to order at 8:35am and excused President Cantwell's absence. Skinner thanked President Cantwell and Vice President Sabau for their work with the PAC-12. Sabau expressed gratitude for the support from everyone and for the relationships they help build.

2. CLOSED SESSION

Motion:

Trustee Alder moved that in accordance with 52-4-205 of the Utah Code that the Trustees go into a closed Executive Session for the sole purpose of discussing the

character, professional competence, physical or mental health of individuals, pending or reasonably imminent litigation, and the possible sale of real property.

Motion seconded by Trustee Malouf. Roll call vote was initiated by Janalyn Brown. Voting was unanimous in the affirmative and the meeting moved to a closed session which commenced at 8:38am and concluded at 9:08am.

Attendance:

Trustees present:

Jacey Skinner (Chair)
Kent Alder
John Ferry
Kacie Malouf

David Petersen
Matthew Richey
Clark Whitworth

Trustees absent:

Gina Gagon
David Huntsman

Heather Mason
Tessa White

University representatives present:

Janalyn Brown
Kerri Davidson

Mica McKinney

Absent:

Elizabeth Cantwell

3. President's Report and Year in Review (Presenter: Vice President Kerri Davidson)
Vice President Davidson shared the President's Report in President Cantwell's absence and highlighted USU's strides to continuing excellence and shared the latest "Year in Review" which emphasizes the Top 10 accomplishments of USU. Davidson promised to send hard copies to each of the trustees.
4. Committee Reports
 - 4.1. Executive Committee (Presenter: Chair Jacey Skinner)
Committee Chair Skinner shared the Executive Committee met to approve the Board of Trustees Regular Meeting agenda and to review both consent and action items.
 - 4.2. Audit, Risk and Compliance (Presenter: Trustee David Petersen)
Committee Chair Petersen presented the attached committee report.
 - 4.3. Recruitment, Retention and Completion Committee (Presenter: Trustee Tessa White)
Committee Chair White presented the attached committee report. White also applauded Katie Jo North who has done a phenomenal job in empowering her team and helped to push students over the "finish line" of enrollment.

5. Consent Agenda

Motion:

Motion was made to approve the Consent Agenda.

Motion moved by David Petersen and motion seconded by John Ferry. Voting was unanimous in the affirmative. Motion passed.

- 5.1. Approve: Space Dynamics Laboratory Board Director Reappointment, General Bruce Carlson
- 5.2. Approve: 8.23.24 USU Board of Trustees Regular Meeting Minutes

6. Action Agenda

- 6.1. Approve: Authorization to Act in Capacity of Vice President for Finance and Administrative Services and Public Treasurer (Presenter: Vice President Dave Cowley)

Because USU Controller Dan Christensen retired, there needs to be an authorized signer named in addition to Vice President Dave Cowley. Cowley presented Dwight Davis, Associate Vice President for Finance & Administrative Services for approval as the only additional authorized signer.

Motion:

Motion was made to approve the Authorization to Act in Capacity of Vice President for Finance and Administrative Services and Public Treasurer as presented.

Motion moved by Kent Alder and motion seconded by Clark Whitworth. Voting was unanimous in the affirmative. Motion passed.

- 6.2. Approve: Authorization to Adjust Summer Term Tuition Tables (Presenter: Vice President Dave Cowley)

Vice President Cowley clarified this proposal has two parts. First, tuition increases approved in March by the Board of Higher Education take effect in the summer semester. This is a proposal to change this timeline so that increases begin in the fall semester, followed by spring and summer. This change aligns with other universities in the state and allows more time to inform and prepare students about tuition changes. This proposal benefits USU by improving their ability to market summer classes and provide students with more planning time.

Second, USU's current tuition structure front-loads cost, which burdens students taking fewer credits, particularly in the summer when most enroll in only 1-2 classes. This proposal is to adjust the summer tuition schedule for students taking between 1-9 credit hours, with savings diminishing for those students taking more credits. The expected savings are approximately \$500 for those students taking on 3-credit class, and \$250 for those taking two classes. This affordable tuition will be a benefit to the institution and USU students by encouraging additional

enrollment and supporting students in staying on track for graduation.

USU's John Mortensen joined the discussion and when asked about the reasoning, he stated it will help immensely with student momentum, retention and completion. If approved by the Board of Trustees, Cowley will take the proposal to the Utah Board of Higher Education for final approval.

Motion:

Motion was made to authorize adjustment of summer term tuition tables.

Motion moved by John Ferry and motion seconded by Tessa White. Voting was unanimous in the affirmative. Motion passed.

6.3. Approve: 800 East Residence Hall (a Non-State Funded Capital Development Project) (Presenter: Vice President Dave Cowley)

Vice President Cowley explained the university aims to increase on-campus housing to support more freshman commitments, ensuring that incoming students can secure housing. A growing number of sophomores also wish to stay on campus due to proven academic benefits, though most students prefer to move off-campus by junior year. The proposed location for a new housing structure is on the west side of the main campus, near the Wayne Estes Center and the Spectrum, where a former fraternity house was located. The project includes a building with up to 478 beds and an underground parking facility with 350 stalls, leveraging the natural slope for daylight and eliminating the need for costly ventilation. The estimated cost is \$101 million: \$77 million for housing and \$23 million for parking.

Approval from the Board of Higher Education and legislative bonding authority are required to proceed with detailed programming and design phases. Once finalized, further board approvals will ensure alignment on bond details and financial feasibility. Approval from the Board of Trustees and the Board of Higher Education will initiate the request for bonding authority from the legislature. Further design and cost assessments will follow, with the board reviewing final specifications and financials before bonds are issued.

Much discussion was had about cost, feasibility, return on investment, and next steps. Trustee Richey stated the proposed project may impact the Greek community, as the loss of fraternity space remains a concern among members. Currently, there are two housed fraternities and six total chapters, with limited housing options. While this remains a strong proposal, it may lead to some dissatisfaction within the growing fraternity and sorority community and will require sensitivity to their concerns.

Chair Skinner recommended moving forward with project authorization to allow next steps. However, before pursuing bonding, accruing debt, or starting

construction, a follow-up presentation with detailed project specifics and financials is required.

Motion:

Motion to authorize moving forward on the 800 East Residence Hall (a Non-State Funded Capital Development Project) to allow next steps. However, before pursuing bonding, accruing debt, or starting construction, Vice President Cowley will follow-up to the Board with detailed project specifics and financials.

Motion moved by John Ferry and motion seconded by Kent Alder. Voting was unanimous in the affirmative. Motion passed. Board of Trustee members voting: Trustee Ferry, Trustee Whitworth, Trustee Richey, Trustee Skinner, Trustee Alder, Trustee Petersen, and Trustee White.

7. Information Agenda

7.1. Policy 500: Threat Assessment Management Team (TAMT)

8. ADJOURN - 10:30AM

Chair Skinner expressed gratitude to each trustee for their dedication and contributions over the past year, which have significantly benefited the university. The next regular meeting is scheduled for November 8th.

Motion:

Motion was made to adjourn.

Motion moved by Tessa White and motion seconded by Clark Whitworth. Voting was unanimous in the affirmative. Meeting adjourned at 10:52am.

Jacey Skinner, Chair

Janalyn Brown, Secretary
(minutes taken by Janalyn Brown)

Date Approved

RESOLUTION

UTAH STATE UNIVERSITY

BOARD OF TRUSTEES

WHEREAS, USU Policy 330: Telework provides for telework arrangements in certain circumstances, outlines how telework is agreed upon, defines the type of telework allowed, and how to evaluate positions to determine eligibility;

WHEREAS, the Office of Human Resources desires to amend Policy 330 to clarify responsibilities for supervisors and Human Resources, out-of-state fee payments, types of telework, and the membership of the Telework Eligibility Committee, and establishes new forms for evaluating a position's eligibility for telework;

WHEREAS, the revisions requested by the Office of Human Resources received the appropriate review and approval as required by USU Policy 201;

WHEREAS, the President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the amendment to Policy 330: Telework.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees approve the amendment to Policy 330: Telework.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

ITEM FOR ACTION

Re: USU Policy 330: Telework

Key

- **Red** –Anything that was removed from the current policy
- **Blue** – Anything that was added
- **Black** – Original to Policy that was not changed
- **Dark/Light Green** – Text that was moved within the policy.

Summary of Changes

- **Clarified Types of Telework-** Based on experience with the new policy, clarifying types of telework as regular (every day), hybrid (some days), or flexible (as needed). Deleted full-time and part-time references.
- **Clarified Telework Eligibility Committee Makeup-** Added Office of Research and Office of Equity. Modified from departmental IT to general IT based on committee members.
- **Simplified Eligibility-** Now reference [Telework Position Assessment Form](#) and [Telework Performance Assessment Form](#) to help supervisors and employees evaluate eligibility.
- **Clarified Out of State Fee Payments-** Based on some state laws, clarified that some benefit/wage costs may have to be paid by the department or employee if they cannot be paid by the monthly fee.
- **Clarified Supervisor and HR Responsibilities-** Must meet with Telework Eligibility Committee if requesting out-of-state work. Also clarified HR's role in chairing the committee and supporting compliance efforts and supervisors.

University Policy 330: Telework

Category: ~~300 Personnel~~ [Human Resources](#)

Subcategory: Employment

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Office of Human Resources, [Senior](#) Associate Vice President of Human Resources

Last Revised: ~~2022/06/23~~ [2024/](#)

Previous USU Policy Number: N/A

330.1 PURPOSE AND SCOPE

Utah State University (USU) permits telework arrangements when doing so benefits both the department and the employee. Telework arrangements are successful when the job, person, environment, and work situation are appropriate. Telework can improve productivity and job performance; promote administrative efficiencies (e.g., reduce office and parking space needs); reduce traffic congestion, pollution, and transportation costs; and promote ~~the recruiting~~ [ment](#) and ~~retention~~ [retaining](#) of a highly qualified and diverse workforce.

330.2 POLICY

Telework is a privilege, subject to university approval, and is not a university-wide benefit. Telework arrangements must serve the department's objectives, and can be discontinued by and at the discretion of the department head/director and/or responsible dean/vice president at any time based on business and performance management considerations. Depending on the nature of work to be performed, not all positions will qualify for telework. Each telework decision will be made on a case-by-case basis by considering the employee's work responsibilities and performance, whether the position must be performed in person at a campus location, the needs and desires of both the department and the employee, schedules, and the overall likelihood for success. If USU establishes telework as a condition of employment, based on the university's business needs, it will be stated when the position is advertised and/or when telework is approved.

The dean/vice president, department head/director, supervisor, and teleworker must ~~all~~ agree to the work arrangements and expectations by signing a [telework agreement](#) prior to commencing telework. The telework agreement must address expected job performance and deliverables.

Regular, [hybrid](#), or flexible telework may be approved on a temporary, trial, or ongoing basis as follows:

- Regular ~~full-time~~ telework - An employee works every workday at a location other than a USU location.
- ~~Regular part-time~~ [Hybrid](#) telework (~~Hybrid~~) - An employee works one or more workdays at a location other than a USU location and the remainder of the week's workdays at a USU location (e.g., M-W alternative work location from home; Th-F work from USU workplace). The schedule is fixed to be the same each week to facilitate meeting schedules and other office activities.
- Flexible telework - ~~An e~~ [Employees](#) ~~vary~~ [ies](#) their work location throughout the week based on business and/or personal work/life needs. Only positions that can support this variety should be approved ~~under-~~ [using](#) this method.

Surge telework is for those positions that a dean/vice president and department head/director has identified as being able to temporarily telework on days where the [Utah Division of Air Quality](#) has forecast an air quality of "unhealthy" (red) or higher at least 48 hours in advance for that county/location. Since surge

telework is expected to be temporary and infrequent, it does not require a formal telework

agreement. USU positions that provide in-person services, or ~~which~~ have an in-place-duties requirement are not eligible for surge telework and will still report to their normal work location as scheduled.

Surge telework may also be approved by appropriate campus leaders during other special circumstances, such as predicted heavy snowfall or other situations that could pose a risk to employee safety or health.

Campus Leaders Who Can Authorize Surge Telework for Special Circumstances:

- Main Campus in Logan - USU president or designee.
- Statewide Campuses - Vice President of Statewide Campuses in consultation with the respective campus associate vice president.
- Extension Offices - Vice President for Extension.

Employees or supervisors with questions about Americans with Disabilities (ADA) accommodations that involve telework should contact the Office of Human Resources for more information.

The USU president may approve telework in response to community crises, natural disasters, pandemics, or similar events.

2.1 Evaluating Positions for Telework

Departments may consult with the Office of Human Resources to analyze the nature of a position and how the work is performed to determine which positions are appropriate to designate or approve for telework.

Several factors should be considered in determining the feasibility of telework, including the supervisor's ability to adequately supervise the employee, whether any duties require [the](#) use of systems, equipment, or tools that cannot be replicated or provided at the alternative work location, and the potential impact to other team members' workload.

Telework should be performed within the state of Utah. Requests for an exception that would permit employees to telework from an out-of-state location for any period ~~of time~~ longer than 30 days must be recommended by the responsible dean/vice president and reviewed and approved by a telework eligibility committee. This committee includes representatives from Payroll/Finance, Risk Management, ~~Legal Affairs,~~ ~~a departmental IT support person~~ [Office of Research, Office of Equity, Information Technology](#), and Human Resources, [and is advised by the Office of General Counsel](#). The committee will evaluate the need for the out-of-state work location and the legal and compliance requirements related to payroll, unemployment, workers' compensation, state-mandated leave, and other ~~employment related~~ [associated](#) requirements which can vary significantly from state to state. ~~If a position is approved for regular out-of-state telework, any compliance costs related to such positions will be borne by the employing department.~~ The restriction on work locations ~~set forth~~ [outlined](#) in this policy does not apply to sabbatical leave (see USU [Policy 365: Sabbatical Leave](#)) and research field-work.

2.2 Eligibility

2.2.1 Evaluating Employees for Telework

When a telework request is made, the supervisor and department head/director determine if telework is feasible either on a trial or ongoing basis [by completing the Telework Position Assessment form](#). ~~Eligible employees must meet the following criteria:~~

- ~~• The employee has been in the position for a minimum of six (6) months—this requirement may be waived if the employee is specifically hired for a telework arrangement.~~
 - ~~• The employee has no active, formal corrective actions on file for the current or preceding performance review period (see USU Policy 311: Setting Expectations and Managing Performance).~~
 - ~~• The employee has demonstrated an ability to work productively and successfully in their work habits.~~
 - ~~• The employee's assignment is conducive to telework without causing reductions in services to students, inequities, or workload imbalances with other team members~~
- [Current employees must meet performance requirements as outlined in the employee's Telework](#)

[Performance Assessment form. \(See USU Policy 311: Setting Expectations and Managing Performance.\)](#)

Once the supervisor and department head/director have confirmed eligibility for telework ~~and approved~~, the request ~~it~~ will be sent to the respective dean/vice president for final approval.

A teleworking employee is responsible for any personal tax and insurance implications of a telework arrangement ~~as well as~~ [and for](#) conforming to any local zoning regulations.

2.2.2 Ineligible Positions

This policy applies only to those who work away from their USU location for one or more days per week ~~on a regular basis~~ [regularly](#) and not for ad hoc situations. Ad hoc situations will be coordinated and approved by the employee's supervisor in accordance with that department's practices.

Some positions are not typically eligible for telework, such as: faculty roles tied to on-campus programs and instruction; direct service positions; facilities trades workers; custodial workers; student-health staff; residence-life staff; coaches and athletic support; receptionist positions; agricultural production staff; research animal and plant care staff; library circulation staff; IT direct support positions; environmental health and safety staff; and place-specific positions, such as police officers, grounds workers, and parking support staff. The responsible dean or vice president has discretion in making the final determination as to whether a position is eligible for telework.

2.3 General Expectations and Conditions

2.3.1 Compliance

Teleworking employees must comply with all federal, state, and local laws as well as university rules, policies, and practices, and agree and understand that violation of such may result in the termination of the telework arrangement and/or corrective or disciplinary action.

2.3.2 Hours and Location of Work

The teleworker is responsible ~~to~~ [for recording](#) all hours worked in the same manner as they would in the normal USU workplace. Overtime hours for nonexempt employees require the advance approval of the supervisor. The university continues to expect the same level of productivity and availability from remote locations as from the normal USU workplace. (See USU Policies 311: Setting Expectations and Managing Performance and [378: Overtime](#).)

Supervisors may require employees to report to a central USU workplace ~~as needed~~ for work-related meetings or other events, or via virtual tools/technology ~~as needed~~ to discuss work progress or other work-related issues. Supervisors should provide enough notice to ensure the teleworker can be in attendance in person when required. Commuting to or from a central worksite at the beginning or end of the day will not be considered compensable time or be eligible for mileage reimbursement unless otherwise specified in the approved telework agreement.

2.3.3 Setting Up an Alternative Workspace

Teleworkers are expected to secure and maintain an efficient and safe workspace that provides adequate connectivity to systems and resources to complete duties and communicate ~~in an~~ [effectively](#) manner.

Employees with questions should consult with the Office of Environmental Health and Safety for general safe office standards and office ergonomics. Because telework is considered an extension of the USU workplace, injuries or illnesses ~~es~~ that occur as a result of their university assignment, during scheduled work hours, and within their alternative workspace, are eligible for coverage under USU [Policy 364: Worker's Compensation](#).

USU assumes no liability for damages to an employee's real or personal property throughout telework participation.

2.3.4 Alternative Workspace Distractions

Teleworking employees are expected to be productive and available as agreed in the approved telework agreement. This includes ensuring that teleworking employees are free from unnecessary or excessive distractions that could affect productivity, attendance ~~or~~ and participation at virtual meetings, or limit the ability to return to campus for work when requested. Examples of distractions include, but are not limited to, the need to care for other adults, children, or pets in the home during agreed-upon work times. Teleworking employees should make necessary arrangements to ensure the alternative workspace is conducive to work productivity and minimizes the potential negative impact ~~to~~ on the teleworker or other departmental colleagues.

Excessive distractions that impact productivity or ability to attend and participate in meetings may be considered a performance issue and result in the modification or termination of a telework agreement. Alternatively, employees may collaborate with their supervisor on other options such as flexible scheduling, reduction of FTE, etc.

2.3.5 Equipment and Materials

USU will provide the appropriate equipment and materials ~~employees~~ ~~needed by employees~~ to effectively perform their duties as agreed upon between the employee and their supervisor. The department may, but is not required to, duplicate resources between the normal USU workplace and the alternative work location. Telework employees may use university-owned equipment only for legitimate university purposes. Unapproved out-of-pocket expenses will not be reimbursed. All university policies and procedures regarding equipment will apply to teleworkers as they do for all other employees (e.g., inventory controls, data security, equipment disposal, etc.)

The teleworker must exercise reasonable care for the equipment and ~~should~~ take appropriate action to protect the items from damage, theft, or unauthorized use. The employee will be held liable for damage caused by negligence. University equipment will be maintained, serviced, and repaired by university personnel, ~~as well as meet~~ and all safety standards ~~will be met~~. Supervisors will ensure that training on equipment usage will be provided where needed. The department will document who is responsible for installing equipment and transportation to and from the normal USU workplace for repairs or service.

The telework agreement may permit employees to use their own equipment, provided ~~the use of~~ such equipment has been approved and meets IT security, management, and policy requirements. In this situation, USU is not responsible for the cost, repair, or service of the employee's personal equipment, unless otherwise expressly agreed to in advance in the telework agreement.

2.3.6 Costs of Telework

USU is not obligated to assume responsibility for operating costs, home maintenance, or other costs incurred by employees in their alternative work location. USU may provide a communication allowance per USU [Policy 518: Cell Phones](#).

If a position is approved for out-of-state telework, a monthly fee shall be charged to the employing department to cover compliance costs unless such position is eligible for a fee waiver. Costs related to the payment of out-of-state wages or benefits shall be borne by the department or employee if not able to be covered by the monthly fee.

2.3.7 Information Security and Data Protection

Employees must safeguard university information used or accessed from the alternative work location, in accordance with Utah State University's policies. (See USU [Policy 319: Employee Privacy and Confidentiality](#)) Telework employees must agree to follow university-approved security procedures to ensure confidentiality and security of data. Teleworking employees should not save files locally or on non-USU equipment. All computer and communications devices connected to the USU network are subject to monitoring, whether or not they are owned or operated by USU. The teleworker must notify university personnel immediately if any unauthorized access to university systems occurs. For additional information about information security and data protection, see USU [Policies 550-579: Information Technology](#).

2.3.8 Intellectual Property

Intellectual property created by USU employees within the scope of their employment, regardless of their

work location, falls under the scope of USU [Policy 587: Intellectual Property](#).

330.3 RESPONSIBILITIES

3.1 Teleworker

- Establish a work environment that is safe and free from distractions.
- Carry out the agreed-upon work duties while working at the alternative work location.
- Be productive and available during agreed upon work hours.
- Be responsible for any tax implications that affect telework.
- Report to the normal USU workplace as scheduled or requested.
- Safeguard all sensitive or confidential information.

3.2 Supervisor

- Consult with the department head/director and the Office of Human Resources to determine if telework arrangements are appropriate. Supervisors must ensure that telework decisions are made for appropriate, nondiscriminatory reasons and provide clear benefits to USU operations.
- Require employees, who request a telework arrangement, to sign the telework agreement and then send a copy of the signed agreement to the Office of Human Resources.
- Work with the employee to set clear expectations, requirements, availability, communication protocols and methods, engagement, etc. to ensure the department's needs are met and that the employee may ~~be~~ be successful.
- Clarify on-site and off-site schedule requirements and provide as much notice as practicable for call-back situations for on-site meetings or work needs.
- Develop a means to accurately record hours worked and evaluate work performance.
- Meet with the Out-of-State Telework Eligibility Committee if the employee is requesting to work out of state.

3.3 Department Head/Director & Dean/Vice President

- Approve, deny, or revoke any telework agreement.
- Ensure that telework decisions are made for appropriate, nondiscriminatory reasons; provide clear benefits to USU operations; and handle equitably across departments.

3.4 Office of Human Resources

- Answer questions, provide guidance as needed, and file telework agreements.
- Chair the telework eligibility committee and provide compliance support to supervisors employing out-of-state employees.

330.4 REFERENCES

- [Utah Executive Order No. 2021-03](#)
- [Utah Executive Order No. 2021-04](#)
- [A New Workplace: Modernizing Where, How, and When Utah Works](#)

330.5 RELATED USU POLICIES

- [USU Policy 311: Setting Expectations and Managing Performance](#)
- [USU Policy 319: Employee Privacy and Confidentiality](#)
- [USU Policy 364: Worker's Compensation](#)
- [USU Policy 378: Overtime](#)
- [USU Policy 518: Cell Phones \(Communication Allowance\)](#)
- [USU Policy 587: Intellectual Property](#)
- [USU Policies 550-579: Information Technology](#)

330.6 DEFINITIONS

6.1 Alternative Work Locations

Approved locations, other than a USU workplace, where official university business is performed. The most common alternative work location is the employee's home.

6.2 Surge Telework

Work ~~that is~~ done by employees whose position has been identified as telework eligible and/or a position identified as able to telework temporarily for red air days or other special circumstances (e.g., predicted heavy snowfall, etc.) as approved by the appropriate campus leader. Not all positions qualify for surge telework.

6.3 Telework

A remote work arrangement that allows an employee to work in an alternative work location for part, or all of, their regular work schedule. Other terms synonymous with telework are "telecommuting" or "remote work."

6.4 Teleworker

A university employee who has been approved to work at an alternative work location, other than a university location, on a regular basis.

Information below is not included as part of the contents of the official policy. It is provided only as a convenience for readers/users and may be changed at any time by persons authorized by the president.

RESOURCES

- [Utah Department of Environmental Quality Air Quality Forecast](#)
- [Telework Agreement](#)

POLICY HISTORY

Original issue date: 2021/10/15

Last review date: ~~2021/10/15~~[2024/](#)

Next scheduled review date: N/A

Previous revision dates: ~~New~~[2021/10/15, 2022/06/23](#)

University Policy 330: Telework

Category: Human Resources

Subcategory: Employment

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Office of Human Resources, Senior Associate Vice President of Human Resources

Last Revised: 2024/10/08

Previous USU Policy Number: N/A

330.1 PURPOSE AND SCOPE

Utah State University (USU) permits telework arrangements, when doing so benefits both the department and the employee. Telework arrangements are successful when the job, person, environment, and work situation are appropriate. Telework can improve productivity and job performance; promote administrative efficiencies (e.g., reduce office and parking space needs); reduce traffic congestion, pollution, and transportation costs; and recruit and retain a highly qualified and diverse workforce.

330.2 POLICY

Telework is a privilege, subject to university approval, and is not a university-wide benefit. Telework arrangements must serve the department's objectives. The arrangement can be discontinued by and at the discretion of the department head/director and/or responsible dean/vice president at any time based on business and performance management considerations. Depending on the nature of work to be performed, not all positions will qualify for telework. Each telework decision will be made on a case-by-case basis by considering the employee's work responsibilities and performance, whether the position must be performed in person at a campus location, the needs and desires of both the department and the employee, schedules, and the overall likelihood for success. If USU establishes telework as a condition of employment, based on the university's business needs, it will be stated when the position is advertised and/or when telework is approved.

The dean/vice president, department head/director, supervisor, and teleworker must agree to the work arrangements and expectations by signing a [telework agreement](#) prior to commencing telework. The telework agreement must address expected job performance and deliverables.

Regular, hybrid, or flexible telework may be approved on a temporary, trial, or ongoing basis as follows:

- Regular telework - An employee works every workday at a location other than a USU location.
- Hybrid telework - An employee works one or more workdays at a location other than a USU location and the remainder of the week's workdays at a USU location (e.g., M-W alternative work location from home; Th-F work from USU workplace). The schedule is fixed to be the same each week to facilitate meeting schedules and other office activities.
- Flexible telework - Employees vary their work location throughout the week based on business and/or personal work/life needs. Only positions that can support this variety should be approved using this method.

Surge telework is for those positions that a dean/vice president and department head/director has identified as being able to temporarily telework on days where the [Utah Division of Air Quality](#) has forecast an air quality of "unhealthy" (red) or higher at least 48 hours in advance for that county/location. Since surge telework is expected to be temporary and infrequent, it does not require a formal telework agreement. USU

positions that provide in-person services or have an in-place-duties requirement are not eligible for surge telework and will still report to their normal work location as scheduled.

Surge telework may also be approved by appropriate campus leaders during other special circumstances, such as predicted heavy snowfall or other situations that could pose a risk to employee safety or health.

Campus Leaders Who Can Authorize Surge Telework for Special Circumstances:

- Main Campus in Logan - USU president or designee.
- Statewide Campuses - Vice President of Statewide Campuses in consultation with the respective campus associate vice president.
- Extension Offices - Vice President for Extension.

Employees or supervisors with questions about Americans with Disabilities (ADA) accommodations that involve telework should contact the Office of Human Resources for more information.

The USU president may approve telework in response to community crises, natural disasters, pandemics, or similar events.

2.1 Evaluating Positions for Telework

Departments may consult with the Office of Human Resources to analyze the nature of a position and how the work is performed to determine which positions are appropriate to designate or approve for telework.

Several factors should be considered in determining the feasibility of telework, including the supervisor's ability to adequately supervise the employee, whether any duties require the use of systems, equipment, or tools that cannot be replicated or provided at the alternative work location, and the potential impact to other team members' workload.

Telework should be performed within the state of Utah. Requests for an exception that would permit employees to telework from an out-of-state location for any period longer than 30 days must be recommended by the responsible dean/vice president and reviewed and approved by a telework eligibility committee. This committee includes representatives from Payroll/Finance, Risk Management, Office of Research, Office of Equity, Information Technology, and Human Resources and is advised by the Office of General Counsel. The committee will evaluate the need for the out-of-state work location and the legal and compliance requirements related to payroll, unemployment, workers' compensation, state-mandated leave, and other associated requirements, which can vary significantly from state to state. The restriction on work locations outlined in this policy does not apply to sabbatical leave (see USU [Policy 365: Sabbatical Leave](#)) and research fieldwork.

2.2 Eligibility

2.2.1 Evaluating Employees for Telework

When a telework request is made, the supervisor and department head/director determine if telework is feasible either on a trial or ongoing basis by completing the [Telework Position Assessment form](#).

Current employees must meet performance requirements as outlined in the employee's [Telework Performance Assessment form](#). (See USU [Policy 311: Setting Expectations and Managing Performance](#).)

Once the supervisor and department head/director have confirmed eligibility for telework and approved the request, it will be sent to the respective dean/vice president for final approval.

A teleworking employee is responsible for any personal tax and insurance implications of a telework arrangement and for conforming to any local zoning regulations.

2.2.2 Ineligible Positions

This policy applies only to those who work away from their USU location for one or more days per week regularly and not for ad hoc situations. Ad hoc situations will be coordinated and approved by the employee's supervisor in accordance with that department's practices.

Some positions are not typically eligible for telework, such as faculty roles tied to on-campus programs and instruction; direct service positions; facilities trades workers; custodial workers; student-health staff; residence-life staff; coaches and athletic support; receptionist positions; agricultural production staff; research animal and plant care staff; library circulation staff; IT direct support positions; environmental health and safety staff; and place-specific positions, such as police officers, grounds workers, and parking support staff. The responsible dean or vice president has discretion in making the final determination as to whether a position is eligible for telework.

2.3 General Expectations and Conditions

2.3.1 Compliance

Teleworking employees must comply with all federal, state, and local laws as well as university rules, policies, and practices and agree and understand that violation of such may result in the termination of the telework arrangement and/or corrective or disciplinary action.

2.3.2 Hours and Location of Work

The teleworker is responsible for recording all hours worked in the same manner as they would in the normal USU workplace. Overtime hours for nonexempt employees require the advance approval of the supervisor. The university continues to expect the same level of productivity and availability from remote locations as from the normal USU workplace. (See USU Policies 311: Setting Expectations and Managing Performance and [378: Overtime](#).)

Supervisors may require employees to report to a central USU workplace for work-related meetings or other events or via virtual tools/technology to discuss work progress or other work-related issues. Supervisors should provide enough notice to ensure the teleworker can be in attendance in person when required. Commuting to or from a central worksite at the beginning or end of the day will not be considered compensable time or be eligible for mileage reimbursement unless otherwise specified in the approved telework agreement.

2.3.3 Setting Up an Alternative Workspace

Teleworkers are expected to secure and maintain an efficient and safe workspace that provides adequate connectivity to systems and resources to complete duties and communicate effectively.

Employees with questions should consult with the Office of Environmental Health and Safety for general safe office standards and office ergonomics. Because telework is considered an extension of the USU workplace, injuries or illnesses that occur as a result of their university assignment, during scheduled work hours, and within their alternative workspace are eligible for coverage under USU [Policy 364: Worker's Compensation](#).

USU assumes no liability for damages to an employee's real or personal property throughout telework participation.

2.3.4 Alternative Workspace Distractions

Teleworking employees are expected to be productive and available as agreed in the approved telework agreement. This includes ensuring that teleworking employees are free from unnecessary or excessive distractions that could affect productivity, attendance, and participation at virtual meetings or limit the ability to return to campus for work when requested. Examples of distractions include but are not limited to, the need to care for other adults, children, or pets in the home during agreed-upon work times. Teleworking employees should make necessary arrangements to ensure the alternative workspace is conducive to work productivity and minimizes the potential negative impact on the teleworker or other departmental colleagues.

Excessive distractions that impact productivity or ability to attend and participate in meetings may be considered a performance issue and result in the modification or termination of a telework agreement. Alternatively, employees may collaborate with their supervisor on other options such as flexible scheduling, reduction of FTE, etc.

2.3.5 Equipment and Materials

USU will provide the appropriate equipment and materials employees need to effectively perform their duties as agreed upon between the employee and their supervisor. The department may, but is not required to, duplicate resources between the normal USU workplace and the alternative work location. Telework employees may use university-owned equipment only for legitimate university purposes.

Unapproved out-of-pocket expenses will not be reimbursed. All university policies and procedures regarding equipment will apply to teleworkers as they do for all other employees (e.g., inventory controls, data security, equipment disposal, etc.)

The teleworker must exercise reasonable care for the equipment and take appropriate action to protect the items from damage, theft, or unauthorized use. The employee will be held liable for damage caused by negligence. University equipment will be maintained, serviced, and repaired by university personnel, and all safety standards will be met. Supervisors will ensure that training on equipment usage will be provided where needed. The department will document who is responsible for installing equipment and transportation to and from the normal USU workplace for repairs or services.

The telework agreement may permit employees to use their own equipment, provided such equipment has been approved and meets IT security, management, and policy requirements. In this situation, USU is not responsible for the cost, repair, or service of the employee's personal equipment unless otherwise expressly agreed to in advance of the telework agreement.

2.3.6 Costs of Telework

USU is not obligated to assume responsibility for operating costs, home maintenance, or other costs incurred by employees in their alternative work location. USU may provide a communication allowance per USU [Policy 518: Cell Phones](#).

If a position is approved for out-of-state telework, a monthly fee shall be charged to the employing department to cover compliance costs unless such position is eligible for a [fee waiver](#). Costs related to the payment of out-of-state wages or benefits shall be borne by the department or employee if not able to be covered by the monthly fee.

2.3.7 Information Security and Data Protection

Employees must safeguard university information used or accessed from the alternative work location in accordance with Utah State University's policies. (See USU [Policy 319: Employee Privacy and Confidentiality](#)) Telework employees must agree to follow university-approved security procedures to ensure confidentiality and security of data. Teleworking employees should not save files locally or on non-USU equipment. All computer and communications devices connected to the USU network are subject to monitoring, whether or not they are owned or operated by USU. The teleworker must notify university personnel immediately if any unauthorized access to university systems occurs. For additional information about information security and data protection, see USU [Policies 550-579: Information Technology](#).

2.3.8 Intellectual Property

Intellectual property created by USU employees within the scope of their employment, regardless of their work location, falls under the scope of USU [Policy 587: Intellectual Property](#).

330.3 RESPONSIBILITIES

3.1 Teleworker

- Establish a work environment that is safe and free from distractions.
- Carry out the agreed-upon work duties while working at the alternative work location.
- Be productive and available during agreed upon work hours.
- Be responsible for any tax implications that affect telework.
- Report to the normal USU workplace as scheduled or requested.
- Safeguard all sensitive or confidential information.

3.2 Supervisor

- Consult with the department head/director and the Office of Human Resources to determine if telework arrangements are appropriate. Supervisors must ensure that telework decisions are made for appropriate, nondiscriminatory reasons and provide clear benefits to USU operations.
- Require employees who request a telework arrangement to sign the telework agreement and then send a copy of the signed agreement to the Office of Human Resources.
- Work with the employee to set clear expectations, requirements, availability, communication protocols and methods, engagement, etc., to ensure the department's needs are met and that the employee may succeed.
- Clarify on-site and off-site schedule requirements and provide as much notice as practicable for call-back situations for on-site meetings or work needs.
- Develop a means to accurately record hours worked and evaluate work performance.
- Meet with the Out-of-State Telework Eligibility Committee if the employee requests to work out of state.

3.3 Department Head/Director & Dean/Vice President

- Approve, deny, or revoke any telework agreement.
- Ensure that telework decisions are made for appropriate, nondiscriminatory reasons, provide clear benefits to USU operations, and are handled equitably across departments.

3.4 Office of Human Resources

- Answer questions, provide guidance as needed, and file telework agreements.
- Chair the telework eligibility committee and provide compliance support to supervisors employing out-of-state employees.

330.4 REFERENCES

- [Utah Executive Order No. 2021-03](#)
- [Utah Executive Order No. 2021-04](#)
- [A New Workplace: Modernizing Where, How, and When Utah Works](#)

330.5 RELATED USU POLICIES

- [USU Policy 311: Setting Expectations and Managing Performance](#)
- [USU Policy 319: Employee Privacy and Confidentiality](#)
- [USU Policy 364: Worker's Compensation](#)
- [USU Policy 378: Overtime](#)
- [USU Policy 518: Cell Phones \(Communication Allowance\)](#)
- [USU Policy 587: Intellectual Property](#)
- [USU Policies 550-579: Information Technology](#)

330.6 DEFINITIONS

6.1 Alternative Work Locations

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RESOURCES

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- [Telework Agreement](#)

POLICY HISTORY

Original issue date: 2021/10/15

Last review date: 2024/10/08

Next scheduled review date: 2027/10/01

Previous revision dates: 2021/10/15, 2022/06/23



The Policy Custodian and Responsible Executive must complete this form before a policy proposal is initiated, drafted, or presented for approval. If you have any questions, contact the Policy Office.

Step 1: Provide basic information

POLICY INFORMATION			
Policy Number & Title:	330: Telework	Category:	Human Resources
Action Requested:	☐ NEW ☒ REVISION	Subsection:	Employment
Covered Individuals:	All employees		
Submitted by:	Patty MacSparran		
Responsible Executive:	 iate policy process	Date:	10/8/24
Policy Custodian:	 iate policy process	Date:	10/7/24
Is a law or regulation requiring USU to implement or revise a policy?			☐ YES ☒ NO
Provide a brief summary of the policy. Include any applicable laws or regulations.			
This policy outlines how telework is agreed upon, defines the types of telework allowed, and how to evaluate positions to determine eligibility. The revisions clarify responsibilities for supervisors and HR, out of state fee payments, types of telework, and the membership of the Telework Eligibility Committee. Added new forms to use to evaluate if a position is eligible for telework.			

*Policies that impact the general public may be subject to the Utah Administrative Rulemaking Process.

Step 2: Submit to the University Policy Office for preliminary review

POLICY OFFICE USE ONLY:	
Assign Policy #:	N/A
Policy proposal status:	☒ READY FOR NEXT PHASE ☐ REVISIONS NEEDED COMMENTS:
OFFICE OF GENERAL COUNSEL USE ONLY:	
Assigned to:	Name of OGC member advising policy process Mica McKinney

Administrative Rule:	☐ YES ☒ NO
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Do not begin drafting policy or soliciting stakeholder feedback until the Policy Office contacts you.

Step 3: Gather stakeholder input and research peer institutions

Consider which groups will be affected by the proposed policy or amendment. The Office of General Counsel and the Policy Office may recommend specific stakeholders to include.

Review the USU Compliance Matrix for possible stakeholders.

Review best practices from peer institutions and professional organizations. For more tips, review [Tips for a Successful Policy Development Team](#).

STAKEHOLDER INPUT			
Name/Office	Date Consulted	Comments	Signature
Leadership Council	6/12/2024		
SEA	7/3/2024		
Executive Faculty Senate	9/23/2024		
Faculty Senate	10/7/2024		
	MM/DD/YYYY		
	MM/DD/YYYY		
	MM/DD/YYYY		
	MM/DD/YYYY		
	MM/DD/YYYY		

Attach a list of additional stakeholders and comments if applicable.

Step 4: Begin drafting or amending policy

Follow the [Policy Template](#) to organize the content of your policy.

Review the [Policy Style Guide](#) for editorial consideration.

For existing policies, consult the [Checklist to Review USU Policy](#).

Collaborate with the Office of General Counsel liaison for review and guidance.

Draft an [implementation plan](#) that addresses communication to campus, required training, and updates to procedures or standards.

Once the policy is drafted, write an [Executive Summary](#).

DRAFT APPROVAL			
Responsible Executive:	 approve policy draft	Date:	10/8/24 YY
Policy Custodian:	 Signature to approve policy draft	Date:	MM/DD/YYYY

Step 5: Submit to the University Policy Office for final review

POLICY OFFICE USE ONLY:				
☒ Style Guide	☒ Template	☒ Stakeholder Input	☒ Executive Summary	☒ Redline
☒ Consistent with USU Policy		☐ Procedural Documents Updated	☐ Implementation Plan	
Comments: 				
Legal Approval:	Signature of OAG member reviewing policy		Date: 10.8.24	MM/DD/YYYY
Policy Office Approval:	Signature of Policy Office <i>Crystal Giordano</i>		Date: 10/8/2024	MM/DD/YYYY

While waiting for the final review, prepare to present the policy proposal. For tips on how to prepare, consult [Presenting Policy to Stakeholders](#).

Step 6: The University Policy Office submits the policy for approval. The Responsible Executive presents the policy at applicable meetings and records feedback and/or decisions.

APPROVAL PROCESS		
Body	Date Consulted	Decision or Comments
USUSA Academic Senate Exec Committee	MM/DD/YYYY	Approved? <i>N/A</i>
USUSA Full Academic Senate	MM/DD/YYYY	Approved? <i>N/A</i>
SEA Committee	<i>7/3/24</i> MM/DD/YYYY	Approved?
Faculty Senate	<i>9/1/24</i> MM/DD/YYYY	Approved?
USU Leadership Team	MM/DD/YYYY	Approved? Approved 10/9/2024
President	MM/DD/YYYY	Approved? President attended leadership meeting
Board of Trustees	MM/DD/YYYY	Approved?
Utah Board of Higher Education	MM/DD/YYYY	Approved?

POLICY OFFICE USE ONLY:			
Policy Approved	☐ YES ☐ NO ☐ WITH REVISIONS**	MM/DD/YYYY	
Published to Policy Library	MM/DD/YYYY	Published on Policy Office Home Page	MM/DD/YYYY
Email sent to Policy Update Subscribers	MM/DD/YYYY		

**Attach documentation for any required revisions.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, USU Policy 392: Romantic Relationships and Employment of Relatives and Household Members addresses relationships in the professional setting and is intended to prevent improper and perceived conflicts of interest or favoritism among employees arising out of romantic, familial, or household relationships;

WHEREAS, the Office of Human Resources desires to amend Policy 392 to bring the policy into compliance with recent revisions of Utah Code § 52-3-1, to clarify limits on supervising romantic partners, relatives, or household members, to require disclosures of covered relationships, to define romantic relationships, and to clarify when supervisory exceptions are permitted;

WHEREAS, the revisions requested by the Office of Human Resources are focused on compliance with state statute;

WHEREAS, the President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the amendments Policy 392; and

WHEREAS, the amendments Policy 392: Romantic Relationships and Employment of Relatives and Household Members received the appropriate administrative review and approval required by USU Policy 201.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees approve the amendments to Policy 392: Romantic Relationships and Employment of Relatives and Household Members.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

EXECUTIVE SUMMARY OF PROPOSED POLICY:

Updates to USU Policy [392](#): Romantic Relationships and Employment of Relatives and Household Members (fka: Employment of Relatives)

Key

- **Red** –Anything that was removed from the current policy
- **Blue** – Anything that was added
- **Black** – Original to Policy that was not changed
- **Dark/Light Green** – Text that was moved within the policy.

Summary of Changes

- **Reformatted and Retitle Policy-** Reformatted content to align with new policy format including adding Purpose and Scope. Retitled to Romantic Relationships and Employment of Relatives and Household Members. Partnered with Legal to update content to comply with [Utah Code §52-3-1](#) which was updated effective 7/1/23.
- **General Overview-** Policy addresses potential conflicts of interest, abuses of authority, favoritism, and biased treatment due to a familial, household, or romantic relationships (current and former).
- **Clarify Limits on Supervising Romantic Partners, Relatives, or Household Members-** Supervisors may not directly supervise, make decisions, or influence conditions of employment in areas such as:
 - Serving on a hiring panel.
 - Hiring, promoting, or transferring.
 - Assigning or reassigning work.
 - Preparing, conducting, or contributing information to a performance appraisal.
 - Approving time sheets or leave requests.
 - Granting or denying permission to attend a conference or other work-related event.
 - Approving reimbursement for work-related expenses.
 - Initiating or overseeing an administrative or disciplinary process.
- **Updated Disclosures of Covered Relationships-** Supervisors must disclose covered relationships to management and Human Resources. Employees are also encouraged to report concerns related to personal relationships impacting work.
- **Restated Supervisory Exceptions Permitted-** Exceptions will be considered case-by-case in consultation with HR.
 - The relative individual is employed because they are the only person available, qualified, or eligible for the position.
 - The individual is a volunteer.
 - The individual will be employed for 12 weeks or less, and all other USU hiring policies and procedures are followed.
 - The president has determined that the supervisor is the only person available or qualified to supervise the individual.

- **Definition of Romantic Relationship-** Clarified romantic relationship is viewed based on the nature, not the duration, of the relationship. Any interactions of an intimate, sexual, amorous, dating, or romantic nature would be considered a romantic relationship under this policy

POLICY MANUAL

EMPLOYMENT

Number 392

Subject: Employment of Relatives Covered

Employees: University Employees Date of

Origin: January 24, 1997

Effective Date of Last Revision: July 1, 1999

University Policy 392: Romantic Relationships and Employment of Relatives and Household Members

Category: Human Resources

Subcategory: Employment

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Office of Human Resources, Senior Associate Vice President of Human Resources

Last Revised: 2024/MM/DD

Previous USU Policy Number: N/A

392.1 POLICY

392.1 PURPOSE AND SCOPE

Professional and supportive relationships at Utah State University (USU) are a valuable part of the community and help in the success of achieving USU's mission and goals. There are also familial and romantic relationships that exist or that may develop among members of the university community. When these relationships exist, issues that may constitute real or perceived conflicts of interest, abuses of authority, or biased treatment can adversely impact the learning or work environment. This is particularly true when romantic relationships exist between individuals who hold positions of unequal institutional authority, meaning that one party supervises, mentors, teaches, evaluates, advises, or coaches the other.

This policy addresses these issues and is intended to prevent improper and perceived conflicts of interest or favoritism among employees arising out of romantic, familial, or household relationships.

For romantic relationships, the fact that a relationship was initially consensual does not insulate either party from a claim of sexual misconduct or sexual harassment (governed by USU Interim Policies 339 and 339A), nor does it guarantee that the relationship will remain consensual between the parties. This policy does not limit any individual's ability to report possible violations of the sexual misconduct policies with the appropriate university offices or with law enforcement, nor does it limit the ability of individuals to be part of romantic relationships where there is no evaluative or supervisory context.

392.2 POLICY

2.1 Supervision of Romantic Partners, Relatives, or Household Members

Supervisors may not directly or indirectly manage, exercise decision-making authority, or exert influence over the conditions of employment of a romantic partner, relative, or household member. This includes:

- Serving on a hiring panel.
- Hiring, promoting, or transferring.
- Assigning or reassigning work.
- Preparing, conducting, or contributing information to a performance appraisal.
- Approving work hours.
- Approving vacation, sick, or other leave time.
- Granting or denying permission to attend a conference or other work-related event.
- Approving reimbursement for work-related expenses.
- Initiating or overseeing an administrative investigation or disciplinary process.

This policy does not prohibit a supervisor from making employment decisions that impact an entire unit or group of employees including romantic partner, relative, or household member.

2.2 Committee Participation

Employees may not participate on a hiring or promotion and tenure committee if there is a candidate with whom they have a romantic, familial, or household relationship. Employees are expected to voluntarily remove themselves from participation in these situations.

2.3 Changes within Existing Relationships

When changes to existing relationships result in a romantic, familial, or household relationship in an employment or educational setting, supervisors must disclose this change to their immediate supervisor. Supervisors receiving these reports must consult with the Office of Human Resources (HR) to ensure they address potential issues related to supervisory responsibilities.

Similarly, when existing romantic, familial, or household relationships dissolve, the applicable parties should recognize potential biases and refrain from behaviors that may create a real or perceived conflict of interest.

Employees are encouraged to report their concerns to a member of their management chain or HR if they feel that their or others' personal relationships are having an adverse impact on their own employment and/or work environment.

2.4 Exceptions

~~No individual may employ, appoint, or vote for the appointment of his or her relative to any position of paid employment with Utah State University or directly supervise the employee.~~ Restrictions on employment supervision and decision making are applicable except in any of the following situations: (See Utah Code Annotated §52-3-1 ~~(1931 as amended)~~).

- ~~• The relative was appointed or employed before the supervisor assumed his or her position, if the relative's appointment did not violate the provisions of this policy which were in effect when the supervisor was appointed.~~
- The ~~relative individual~~ is employed because ~~he or she~~ they is/are the only person available, qualified, or eligible for the position.

- The individual is a volunteer as defined by ~~the employing department~~ [USU Policy 535: Volunteer Services](#).
- The individual will be employed for 12 weeks or less, and all [other](#) Utah State University hiring policies and procedures are followed.
- The ~~P~~resident has determined that the ~~appointee's relative~~ [supervisor](#) is the only person available or qualified to supervise the ~~appointee~~ [individual](#).

~~1.1—The University will not accept or retain employment of an individual if his or her initial appointment violates this policy.~~

~~1.2—When both the employee and supervisor positions are paid by Utah State University, the employee may accept or retain a supervisory position that results in supervising a relative only if the employee or supervisor makes a complete written disclosure of the relationship to the dean/vice-president and the President.~~

[Exception requests and their justification must be submitted in writing to the requesting party's immediate supervisor, who will then consult with HR. USU will consider exceptions on a case-by-case basis.](#)

[Exceptions will be granted only when the university determines that the relationship will not cause, or threaten to cause, the issues outlined in this policy. Any approved exception will require developing a conflict management plan under this policy.](#)

~~Any s~~Supervisors who ~~exercises authority over a relative~~ [have been granted an exception to this policy](#) may not evaluate the ~~relative's~~ job performance or recommend salary increases for ~~the relative~~ [any individual with whom they have a romantic, familial, or household relationship](#).

~~Any~~ Additionally, supervisors who ~~exercises authority over a relative~~ [have been granted an exception to this policy](#) may not treat ~~the relative~~ [individuals who are subject to the exception](#) differently than other employees—[including](#) ~~and may not give~~ preferential treatment or other advantages ~~to the relative~~.

[2.5 Prohibited Retaliation](#)

[Any person who reasonably believes there is a violation of this policy is encouraged to report the concern to their immediate supervisor, HR, or the Office of Equity.](#)

[Retaliation is strictly prohibited against anyone who reports a potential violation, assists someone with a report of a violation, or participates in any manner in an investigation or in the resolution of a report made under this policy. Retaliation includes, but is not limited, to threats, intimidation, reprisals, or adverse action related to an individual's employment or education. An individual who retaliates will be subject to disciplinary action, up to and including termination of employment. \(See USU Policy 326: Improper Conduct and Retaliation\)](#)

[2.6 Violations](#)

[Individuals should contact their supervisors, HR, or the Office of Equity to report violations of this policy. Violations of this policy or Utah Code Annotated §52-3-1 may result in actions in accordance with USU Policy 311: Setting Expectations and Managing Performance or USU Policy 407: Academic Due Process: Sanctions and Hearing Procedures.](#)

392.2 DEFINITIONS

2.1 Supervisor

~~A person employed by Utah State University who has hiring authority for and holds a position that directly~~

~~supervises an employee of Utah State University.~~

2.2 Relative

~~A father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, grandmother, grandfather, grandson, granddaughter, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law.~~

392.3 RESPONSIBILITY

392.3 RESPONSIBILITIES

~~Office of Human Resources, Dean, Vice President, and Provost~~
3.1 Supervisors

~~The Office of Human Resources is responsible for communicating this policy to all employees of the University and assisting in administering this policy in~~ Ensure employment practices comply accordance with Utah Law this policy. ~~When notified, it is the responsibility of~~ Consult with ~~the Office of Human Resources, dean, vice president, or the Provost to investigate any appointment that violates this policy regarding situations where concerns about working relationships involving romantic, familial, or household relationships are identified or reported.~~

3.2 Office of Human Resources

Administer this policy in accordance with this policy and Utah Law. Investigate any situations where concerns about working relationships defined in this policy are identified or reported.

~~Employees~~ 3.3 Employees

~~It is the responsibility of each employee to d~~ Disclose previously mentioned relationships in writing to the Office of Human Resources, dean, vice president, or the Provost any relationship noted in this policy and to a department management member who is outside the personal relationship. Employees are expected to voluntarily remove themselves from participation in hiring decisions in which a romantic partner, relative, or household member is involved.

392.4 REFERENCES

- Utah Code Annotated §52-3-1

392.5 RELATED USU POLICIES

- USU Policy 311: Setting Expectations and Managing Performance
- USU Policy 326: Reporting Improper Conduct and Retaliation
- USU Interim Policy 339: Title IX Sexual Misconduct in an Employment or Education Program or Activity
- USU Interim Policy 339A: Non-Title IX Sexual Misconduct
- USU Policy 407: Academic Due Process: Sanctions and Hearing Procedures
- USU Policy 535: Volunteer Services

392.6 DEFINITIONS

6.1 Relative

~~A father, mother, parent, husband, wife, spouse or domestic partner, son, daughter, child, sister, brother, sibling, uncle, aunt, nephew, niece, grandmother, grandfather, grandparent, grandson, granddaughter, grandchild, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law.~~

6.2 Romantic Relationship

Relationships of a romantic nature. This definition will be applied based on the nature, not the duration, of the relationship. Any interactions of an intimate, sexual, amorous, dating, or romantic nature would be considered a romantic relationship under this policy.

Information below is not included as part of the contents of the official policy. It is provided only as a convenience for readers/users and may be changed at any time by persons authorized by the president.

RESOURCES

Procedures

- None

Guidance

- None

Related Forms and Tools

- None

Contacts

- None

POLICY HISTORY

Original issue date: 1997/0/24

Last review date: 2024/

Next scheduled review date: 2027/10/01

Previous revision dates: 1999/07/01

University Policy 392: Romantic Relationships and Employment of Relatives and Household Members

Category: Human Resources

Subcategory: Employment

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Office of Human Resources, Senior Associate Vice President of Human Resources

Last Revised: 2024/MM/DD

Previous USU Policy Number: N/A

392.1 PURPOSE AND SCOPE

Professional and supportive relationships at Utah State University (USU) are a valuable part of the community and help in the success of achieving USU's mission and goals. There are also familial and romantic relationships that exist, or that may develop among members of the university community. When these relationships exist, issues that may constitute real or perceived conflicts of interest, abuses of authority, or biased treatment can adversely impact the learning or work environment. This is particularly true when romantic relationships exist between individuals who hold positions of unequal institutional authority, meaning that one party supervises, mentors, teaches, evaluates, advises, or coaches the other.

This policy addresses these issues and is intended to prevent improper and perceived conflicts of interest or favoritism among employees arising out of romantic, familial, or household relationships.

For romantic relationships, the fact that a relationship was initially consensual does not insulate either party from a claim of sexual misconduct or sexual harassment (governed by USU Interim Policies [339](#) and [339A](#)), nor does it guarantee that the relationship will remain consensual between the parties. This policy does not limit any individual's ability to report possible violations of the sexual misconduct policies with the appropriate university offices or with law enforcement, nor does it limit the ability of individuals to be part of romantic relationships where there is no evaluative or supervisory context.

392.2 POLICY

2.1 Supervision of Romantic Partners, Relatives, or Household Members

Supervisors may not directly or indirectly manage, exercise decision-making authority, or exert influence over the conditions of employment of a romantic partner, relative, or household member. This includes:

- Serving on a hiring panel.
- Hiring, promoting, or transferring.
- Assigning or reassigning work.
- Preparing, conducting, or contributing information to a performance appraisal.
- Approving work hours.
- Approving vacation, sick, or other leave time.
- Granting or denying permission to attend a conference or other work-related event.
- Approving reimbursement for work-related expenses.
- Initiating or overseeing an administrative investigation or disciplinary process.

This policy does not prohibit a supervisor from making employment decisions that impact an entire unit or group of employees, including a romantic partner, relative, or household member.

2.2 Committee Participation

Employees may not participate on a hiring or promotion and tenure committee if there is a candidate with whom they have a romantic, familial, or household relationship. Employees are expected to voluntarily remove themselves from participation in these situations.

2.3 Changes within Existing Relationships

When changes to existing relationships result in a romantic, familial, or household relationship in an employment or educational setting, supervisors must disclose this change to their immediate supervisor. Supervisors receiving these reports must consult with the Office of Human Resources (HR) to ensure they address potential issues related to supervisory responsibilities.

Similarly, when existing romantic, familial, or household relationships dissolve, the applicable parties should recognize potential biases and refrain from behaviors that may create a real or perceived conflict of interest.

Employees are encouraged to report their concerns to a member of their management chain or HR if they feel that their or others' personal relationships are having an adverse impact on their own employment and/or work environment.

2.4 Exceptions

Restrictions on employment supervision and decision-making are applicable except in any of the following situations: (See Utah Code Annotated §52-3-1).

- The individual is employed because they are the only person available, qualified, or eligible for the position.
- The individual is a volunteer as defined by USU [Policy 535: Volunteer Services](#).
- The individual will be employed for 12 weeks or less, and all other Utah State University hiring policies and procedures are followed.
- The president has determined that the supervisor is the only person available or qualified to supervise the individual.

Exception requests and their justification must be submitted in writing to the requesting party's immediate supervisor, who will then consult with HR. USU will consider exceptions on a case-by-case basis.

Exceptions will be granted only when the university determines that the relationship will not cause, or threaten to cause, the issues outlined in this policy. Any approved exception will require developing a conflict management plan under this policy.

Supervisors who have been granted an exception to this policy may not evaluate the job performance or recommend salary increases for any individual with whom they have a romantic, familial, or household relationship.

Additionally, supervisors who have been granted an exception to this policy may not treat individuals who are subject to the exception differently than other employees—including preferential treatment or other advantages.

2.5 Prohibited Retaliation

Any person who reasonably believes there is a violation of this policy is encouraged to report the concern to their immediate supervisor, HR, or the Office of Equity.

Retaliation is strictly prohibited against anyone who reports a potential violation, assists someone with a report of a violation, or participates in any manner in an investigation or in the resolution of a report made under this policy. Retaliation includes, but is not limited to, threats, intimidation, reprisals, or adverse action related to an individual's employment or education. An individual who retaliates will be subject to disciplinary action, up to and including termination of employment. (See USU [Policy 326: Improper Conduct and Retaliation](#))

2.6 Violations

Individuals should contact their supervisors, HR, or the Office of Equity to report violations of this policy. Violations of this policy or Utah Code Annotated §52-3-1 may result in actions in accordance with USU [Policy 311: Setting Expectations and Managing Performance](#) or USU [Policy 407: Academic Due Process: Sanctions and Hearing Procedures](#).

392.3 RESPONSIBILITIES

3.1 Supervisors

Ensure employment practices comply with this policy. Consult with the Office of Human Resources regarding situations where concerns about working relationships involving romantic, familial, or household relationships are identified or reported.

3.2 Office of Human Resources

Administer this policy in accordance with this policy and Utah Law. Investigate any situations where concerns about working relationships defined in this policy are identified or reported.

3.3 Employees

Disclose previously mentioned relationships in writing to the Office of Human Resources and to a department management member who is outside the personal relationship. Employees are expected to voluntarily remove themselves from participation in hiring decisions in which a romantic partner, relative, or household member is involved.

392.4 REFERENCES

- Utah Code Annotated §52-3-1

392.5 RELATED USU POLICIES

- USU [Policy 311: Setting Expectations and Managing Performance](#)
- USU [Policy 326: Reporting Improper Conduct and Retaliation](#)
- USU Interim [Policy 339: Title IX Sexual Misconduct in an Employment or Education Program or Activity](#)
- USU Interim [Policy 339A: Non-Title IX Sexual Misconduct](#)
- USU [Policy 407: Academic Due Process: Sanctions and Hearing Procedures](#)
- USU [Policy 535: Volunteer Services](#)

392.6 DEFINITIONS

6.1 Relative

A parent, spouse or domestic partner, child, sibling, uncle, aunt, nephew, niece, grandparent, grandchild, first cousin, parent-in-law, sibling-in-law, or child-in-law.

6.2 Romantic Relationship

Relationships of a romantic nature. This definition will be applied based on the nature, not the duration, of the relationship. Any interactions of an intimate, sexual, amorous, dating, or romantic nature would be considered a romantic relationship under this policy.

Information below is not included as part of the contents of the official policy. It is provided only as a convenience for readers/users and may be changed at any time by persons authorized by the president.

RESOURCES

Procedures

- None

Guidance

- None

Related Forms and Tools

- None

Contacts

- None

POLICY HISTORY

Original issue date: 1997/0/24

Last review date: 2024/10/8

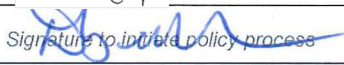
Next scheduled review date: 2027/10/01

Previous revision dates: 1999/07/01



The Policy Custodian and Responsible Executive must complete this form before a policy proposal is initiated, drafted, or presented for approval. If you have any questions, contact the Policy Office.

Step 1: Provide basic information

POLICY INFORMATION			
Policy Number & Title:	392: Romantic Relationships & Employment of Relatives & Household Members	Category:	Human Resources
Action Requested:	☒ NEW ☐ REVISION	Subsection:	Employment
Covered Individuals:	All employees		
Submitted by:	Patty MacSparran		
Responsible Executive:	 e policy process	Date:	10/8/24 MM/DD/YYYY
Policy Custodian:	 e policy process	Date:	10/17/24 MM/DD/YYYY
Is a law or regulation requiring USU to implement or revise a policy?			☒ YES ☐ NO
Provide a brief summary of the policy. Include any applicable laws or regulations. This policy is intended to prevent improper and perceived conflicts of interest among employees arising out of romantic, familial, or household relationships. Changes to this policy are necessary to bring it into compliance with Utah Code 52-3-1. The title has been revised (previously Employment of Relatives). It clarifies the limits on supervising romantic partners, relatives, or household members. It requires disclosures of covered relationships. It defines romantic relationship. Lastly, it clarifies when supervisory exceptions are permitted.			

*Policies that impact the general public may be subject to the Utah Administrative Rulemaking Process.

Step 2: Submit to the University Policy Office for preliminary review

POLICY OFFICE USE ONLY:	
Assign Policy #:	N/A
Policy proposal status:	☒ READY FOR NEXT PHASE ☐ REVISIONS NEEDED COMMENTS:
OFFICE OF GENERAL COUNSEL USE ONLY:	
Assigned to:	Name of OGC member advising policy process Mica McKinney

Administrative Rule:	☐ YES ☒ NO
-----------------------------	--

Do not begin drafting policy or soliciting stakeholder feedback until the Policy Office contacts you.

Step 3: Gather stakeholder input and research peer institutions

Consider which groups will be affected by the proposed policy or amendment. The Office of General Counsel and the Policy Office may recommend specific stakeholders to include. Review the [USU Compliance Matrix](#) for possible stakeholders. Review best practices from peer institutions and professional organizations. For more tips, review [Tips for a Successful Policy Development Team](#).

STAKEHOLDER INPUT			
Name/Office	Date Consulted	Comments	Signature
Leadership Council	6/12/2024		
SEA	7/3/2024		
Executive Faculty Senate	9/23/2024		
Faculty Senate	10/7/2024		
	MM/DD/YYYY		
	MM/DD/YYYY		
	MM/DD/YYYY		
	MM/DD/YYYY		
	MM/DD/YYYY		

Attach a list of additional stakeholders and comments if applicable.

Step 4: Begin drafting or amending policy

Follow the [Policy Template](#) to organize the content of your policy. Review the [Policy Style Guide](#) for editorial consideration. For existing policies, consult the [Checklist to Review USU Policy](#). Collaborate with the Office of General Counsel liaison for review and guidance. Draft an [implementation plan](#) that addresses communication to campus, required training, and updates to procedures or standards. Once the policy is drafted, write an [Executive Summary](#).

DRAFT APPROVAL			
Responsible Executive:	 rove policy draft	Date:	10/8/24 YY
Policy Custodian:	 Signature to approve policy draft	Date:	MM/DD/YYYY

Step 5: Submit to the University Policy Office for final review

POLICY OFFICE USE ONLY:				
☒ Style Guide	☒ Template	☒ Stakeholder Input	☒ Executive Summary	☒ Redline
☒ Consistent with USU Policy		☐ Procedural Documents Updated	☐ Implementation Plan	
Comments: 				
Legal Approval:	Signature of USU member reviewing policy	Date: 10.8.24	MM/DD/YYYY	
Policy Office Approval:	Signature of Policy Office <i>Crystal Giordano</i>	Date: 10/8/2024	MM/DD/YYYY	

While waiting for the final review, prepare to present the policy proposal. For tips on how to prepare, consult [Presenting Policy to Stakeholders](#).

Step 6: The University Policy Office submits the policy for approval. The Responsible Executive presents the policy at applicable meetings and records feedback and/or decisions.

APPROVAL PROCESS		
Body	Date Consulted	Decision or Comments
USUSA Academic Senate Exec Committee	MM/DD/YYYY	Approved? <i>N/A</i>
USUSA Full Academic Senate	MM/DD/YYYY	Approved? <i>N/A</i>
SEA Committee	<i>7/13/24</i> MM/DD/YYYY	Approved?
Faculty Senate	<i>10/1/24</i> MM/DD/YYYY	Approved?
USU Leadership Team	MM/DD/YYYY	Approved? Approved 10/9/2024
President	MM/DD/YYYY	Approved? Attended leadership meeting
Board of Trustees	MM/DD/YYYY	Approved?
Utah Board of Higher Education	MM/DD/YYYY	Approved?

POLICY OFFICE USE ONLY:			
Policy Approved	☐ YES ☐ NO ☐ WITH REVISIONS**	MM/DD/YYYY	
Published to Policy Library	MM/DD/YYYY	Published on Policy Office Home Page	MM/DD/YYYY
Email sent to Policy Update Subscribers	MM/DD/YYYY		

**Attach documentation for any required revisions.

8 November 2024

ITEM FOR ACTION

Utah State University's College of Agriculture and Applied Sciences proposes offering an Advanced Fashion Studies Certificate.

EXECUTIVE SUMMARY

The College of Agriculture and Applied Sciences proposes offering an Advanced Fashion Studies Certificate.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve offering an Advanced Fashion Studies Certificate.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's College of Agriculture and Applied Sciences proposes offering an Advanced Fashion Studies Certificate, and

WHEREAS, The proposal will provide students the opportunity to learn and build advanced skills utilized in careers within the fashion industry;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve offering an Advanced Fashion Studies Certificate in the College of Agriculture and Applied Sciences, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CAAS - *College of Agriculture and Applied Sciences Courses - Advanced Fashion Studies - Certificate

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[USHE R401 Policy](#)

[Process and Flowchart](#)

[Writing Guidelines/Suggestions](#)

[High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

[Student Learning Outcomes Assessment Plan](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this
request

COLLEGE (include all
cross listed
colleges)*

CAAS

DEPARTMENT
(include all cross
listed departments)*

*College of Agriculture and Applied Sciences Courses

Current Title (if
applicable)*

None

Proposed Title* Advanced Fashion Studies - Certificate

CIP Code

Enter the Correct CIP Code by Using the Following Link: [High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

CIP Code (6-digits) * 50.0407

Minimum Number of
Credits (if
applicable)* 12

Maximum Number of
Credits (if
applicable)* 18

Type of Degree: (BA, Certificate
BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

- New Academic Program:**
- ☒ Certificate - Academic (undergraduate)
 - ☐ Certificate - Technical
 - ☐ Certificate - Post Bachelor's
 - ☐ Certificate - Post Master's
 - ☐ K-12 Endorsement Program
 - ☐ Minor
 - ☐ New Emphasis for Existing Program
 - ☐ Out of Service Area Delivery Program (attached signed MOU)

- Existing Academic Program Changes:**
- ☐ Name Change of Existing Program
 - ☐ Program Restructure (with or without Consolidation)
 - ☐ Program Transfer to a New Academic Department or Unit
 - ☐ Program Suspension (on hold-not listed in catalog)
 - ☐ Program Discontinuation (permanent program removal)
 - ☐ Reinstatement of Previously Suspended Program
 - ☐ Out-of-Service Area Delivery Program (attach signed MOU)

- Administrative Unit Changes:**
- ☐ Name Change of Existing Unit
 - ☐ Administrative Unit (Transfer)
 - ☐ Administrative Unit (Restructure-with or without Consolidation)
 - ☐ Administrative Unit (Suspension-on hold)
 - ☐ Administrative Unit (Discontinuation-permanent unit removal)
 - ☐ Reinstatement of Previously Suspended Administrative Unit
 - ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council Approval*

☐ Yes
☒ No

Teacher Licensure Program Approval (STEP)*

☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose*

The fashion industry has a global presence and is one of the largest industries in the world. It is a driving force in the global economy and employs approximately 430 million people throughout the various sectors of the industry. (<https://www.solidaritycenter.org/wp-content/uploads/2023/04/Garment-Textile-Industry-Fact-Sheet-4-12-23.pdf>)

According to an internal study conducted by the Utah Advanced Materials and Manufacturing Initiative (UAMMI), the cut and sew industry is growing at a much faster rate here in Utah than in the rest of the nation, thus showing a need for trained individuals to meet the needs of the local job market. The job opportunities range from design, production, distribution, conservation, retail management, merchandising, marketing, and influencing amongst many other possibilities.

The Advanced Fashion Studies Certificate is designed to further students knowledge in the fashion industry, its history and social impact, sustainability concerns and solutions, as well as advanced patternmaking techniques, rendering and business. The goal of this certificate is to empower students through education, experiences and developing advanced skillsets in the fashion industry.

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale*

The first Fashion Studies Certificate has been immensely popular since it launched in 2023. Students are requesting an advanced certificate option to further their studies in fashion. A student pursuing the advanced certificate will have the opportunity to enhance their knowledge and skillsets in the fashion industry. Students will explore sustainability in apparel as it relates to design, production, and textiles. Students will also further explore the social and psychological aspects of fashion through historical and cultural contexts, modern theories of fashion in society, market research, designing for a variety of needs and target markets. Students will learn technical skills in patternmaking and computer rendering and have the opportunity to explore fashion from a business perspective.

Faculty within the Family and Consumer Science Education (FCSE) program have worked closely with industry professionals to align our textile and apparel courses with the needs of the industry. The courses offered in this certificate will provide students the opportunity to learn and build advanced skills utilized in careers within the fashion industry. This certificate is for students who would like to enhance and broaden their skills in fashion and to prepare for work within the fashion or an adjacent industry.

Labor Market Demand (if applicable)

Although there are not specific statistics for the labor market demand in Utah, the Utah Advanced Materials and Manufacturing Initiative (UAMMI) has indicated in that the cut and sew industry is growing at a much faster rate here in Utah than in the rest of the nation.

In the United States, an estimated 1.8 million people are employed in the fashion industry. Average salaries range from \$26,440 to \$84,600. Examples of fashion jobs in the supply chain range from fashion designers, illustrators, merchandisers, production specialists, technical designers, pattern graders, museum conservation, museum curators, textile designers, textile manufacturers and finishers, buyers, accountants, auditors, journalists, marketing and sales managers, apparel wholesale and merchandising personnel, apparel repair, machine repair, and market research.

Source:

<https://fashionunited.com/global-fashion-industry-statistics>

Fashion Designers:

Despite limited employment growth, approximately 2,500 openings for fashion designers are projected each year, on average, over the decade. Most of these openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as retirement. (<https://www.bls.gov/ooh/arts-and-design/fashion-designers.htm>)

Consistency with Institutional Mission & Institutional Impact*

This Advances Fashion Studies Certificate will strengthen the mission of USU as a land-grant institution in Utah through the instruction and practice of applying principles and theories to the practical skills utilized in the apparel and textile industries.

Describe and List any Anticipated Expenses and Revenue*

No additional resources are being requested in the department, college or university. The certificate will utilize courses and resources in place for the Family and Consumer Sciences

SECTION III: CURRICULUM (if applicable)
--

**Program Curriculum
Narrative**

The Advanced Studies Institutional Certificate of Proficiency will further students knowledge the apparel and fashion industry through textile science, apparel design, patternmaking, sustainability, product development, and management. Students will be able to learn design and development skills and processes related to soft goods apparel production. Courses include textile science, sustainable systems, relationships of fashion with a sociocultural context, fashion fundamentals, and business related to fashion marketing.

This certificate enhances various career paths in fashion, design, costuming, anthropology, journalism, and business. It strengthens resumes and empowers students through education and experience in fashion studies.

Students will need to complete prerequisites for the advanced level courses in the certificate. It is recommended that the Fashion Studies Certificate be completed before the Advanced Fashion Studies Certificate.

Required Courses 12 Credits

Textiles (Select 1 to 2 classes)		
FCSE 3030	Textile Science (DSC/QI)	4
FCSE 4030	Textiles and Technology	3

Historic and Social Context of Clothing (Select 1 to 2 classes)		
FCSE 4040	Advanced Apparel Studies	3
ANTH 3310 or MUSM 3310	Introduction to Museum Studies (CI)	3

Design (Select 1 to 2 classes)		
ASTE 3900	Special Problems – Fashion Studies Research	3
FCSE 3140	Digital Pattern Rendering	3
FCSE 4140	Advanced Apparel Design	3
FCSE 4900	Independent Study 2	3
OPDD 2420	Digital Technologies for 2-D Design	3

Business and Management (select 0 to 1 class)		
APEC 2310	Small Firm Management	3
MGT 3700	Operations Management	2
MGT 4790	Managing Global Value Chains	2
MSLE 3500	Fundamentals of Marketing	3
MSLE 4510	Consumer Behavior	2
MSLE 4555	B2B Marketing, Pricing and Merchandising	2

**Student Learning
Outcomes
Assessment Plan***

See attachment

**If this is a new
credential does the
curriculum require
more than 25%
newly developed
courses?***

☐ Yes

☒ No

Attach completed [Program Curriculum](#), [Degree Map](#), [Student Learning Outcomes Assessment Plan](#) and the [Budget Worksheet](#) by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of Communicative Disorders and Deaf Education, in the Emma Eccles Jones College of Education and Human Services proposes offering a Listening and Spoken Language Deaf Education Post-Masters Certificate.

EXECUTIVE SUMMARY

The Department of Communicative Disorders and Deaf Education in the Emma Eccles Jones College of Education and Human Services proposes offering a Listening and Spoken Language Deaf Education Post-Masters Certificate.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve offering a Listening and Spoken Language Deaf Education Post-Masters Certificate.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of Communicative Disorders and Deaf Education in the Emma Eccles Jones College of Education and Human Services proposes offering a Listening and Spoken Language Deaf Education Post-Masters Certificate, and

WHEREAS, The proposal will provide students with a USU certificate program on their transcript;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve offering a Listening and Spoken Language Deaf Education Post-Masters Certificate in the Emma Eccles Jones College of Education and Human Services' Department of Communicative Disorders and Deaf Education, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CEHS - Communicative Disorders and Deaf Education - Listening and Spoken Language Deaf Education - Post-Masters Certificate

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[Writing Guidelines/Suggestions](#)

[USHE R401 Policy](#)

[Process and Flowchart](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

CEHS

DEPARTMENT (include all cross listed departments)*

Communicative Disorders and Deaf Education

Current Title (if applicable)* Not applicable

Proposed Title* Listening and Spoken Language Deaf Education - Post-Masters Certificate

CIP Code

Enter the Correct CIP Code by Using the Following Link:

Classification Instruction Programs

CIP Code (6-digits) * 13.1003

Minimum Number of
Credits (if
applicable)* 18

Maximum Number of
Credits (if
applicable)* 18

Type of Degree: (BA, Post-Masters Certificate
BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

**New Academic
Program:**

- ☐ Certificates of Completion
- ☐ Certificates of Proficiency
- ☐ CTE - Certificate of Completion
- ☐ CTE - Certificate of Proficiency
- ☐ Institutional Certificate of Proficiency
- ☐ K-12 Endorsement Program
- ☐ Minor
- ☐ New Emphasis for Existing Program
- ☐ Out of Service Area Delivery Program (attach signed MOU)
- ☐ Post-Baccalaureate Certificate
- ☒ Post-Masters Certificate

**Existing Academic
Program Changes:**

- ☐ Name Change of Existing Program
- ☐ Program Restructure (with or without Consolidation)
- ☐ Program Transfer to a New Academic Department or Unit
- ☐ Program Suspension (on hold-not listed in catalog)
- ☐ Program Discontinuation (permanent program removal)
- ☐ Reinstatement of Previously Suspended Program
- ☐ Out-of-Service Area Delivery Program (attach signed MOU)

**Administrative Unit
Changes:**

- ☐ Name Change of Existing Unit
- ☐ Administrative Unit (Transfer)
- ☐ Administrative Unit (Restructure-with or without Consolidation)
- ☐ Administrative Unit (Suspension-on hold)
- ☐ Administrative Unit (Discontinuation-permanent unit removal)
- ☐ Reinstatement of Previously Suspended Administrative Unit
- ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain
change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council
Approval* ☒ Yes
☐ No

Teacher Licensure
Program Approval
(STEP)* ☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose* Utah State University's Department of Communicative Disorders and Deaf Education requests approval to offer the following Certificate: Listening and Spoken Language Deaf Education Certificate

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale* *For the past 15 years, licensed SLPs and special educators from Utah and across the country have completed the program to gain skills and competencies in LSL Deaf Education services. Utah-based students who hold a Utah professional educator license earn a LSL DHH Endorsement to attach to their license, issued by the Utah State Board of Education. For professionals outside Utah, program completion may or may not lead to additional certifications or endorsements, depending on their state licensure requirements or policies. Although each course taken is reflected on student transcripts, program completion has not resulted in a transcript notation nor an earned Certificate. This proposal is to request the program be recognized as a USU Certificate program.*

**Labor Market Demand
(if applicable)**

There is a state and national shortage of personnel to serve children who are D/HH and who understand hearing technology and LSL intervention services. According to the American Association for Employment in Education (AAEE) (2020), the national shortage of deaf educators (listed as hearing-impaired special education) is designated as having a “considerable shortage”. The shortages are similarly felt in Utah and in the Intermountain West, with the Utah State Office of Education rating deaf education 29th in the top areas of critical need in Utah from a list of 68 professional fields (Teaching Field Index of Criticality for 2019). These shortages have persisted for decades and have far-reaching ramifications. When positions go unfilled, it results in higher and more stressful workloads for existing staff and creates challenges for districts to not only recruit newly qualified deaf educators, but to retain those currently hired. These chronic shortages result in children being underserved or receiving services from unqualified personnel, with exacerbated impact for children with culturally and linguistically diverse needs.

This shortage of high-quality well-trained professionals may be further impacted by the declining number of deaf education teacher preparation programs in the United States. In 1985, there were 81 deaf education teacher preparation programs and by 2020, this number had fallen to just 58 graduate and undergraduate teacher training programs (American Annals of the Deaf, 2022). The 2016 AAEE report indicated that deaf education programs were offered by only 5% of colleges and universities. High retirement rates of the baby boomer generation are also likely exacerbating deaf education teacher shortages, with 28-31% of teacher attrition over the past decade due to retirement (Sutcher et al., 2019), and indications are this trend will continue. For early intervention and preschool programs that seek professionals with LSL expertise, the shortage prospects are particularly bleak. A national needs assessment (Behl et al., 2017) found of the deaf education programs in the U.S., 57% offered no credits and only 4% offered six or more credits in early intervention. Currently, less than 20% of existing deaf education teacher training programs offer dedicated training in LSL methodology (American Annals of the Deaf, 2022). Consistent with the overall shortage of early intervention and special education personnel (Mason-Williams et al., 2020; U.S. Department of Education, 2022), the ability to meet the needs of children who are DHH is of high concern.

**Consistency with
Institutional Mission
& Institutional
Impact***

The proposed Certificate is consistent with the Utah System of Higher Education (USHE) and USU's mission to "Advance knowledge; provide community outreach and continuing education, and contribute to the quality of life and social, cultural, and economic development of Utah, the nation, and the world." The Certificate program will continue to address a critical need for current professionals to gain specialized skills and competencies to effectively serve children who are DHH who are developing and using LSL as their primary language. Through asynchronous online coursework and using students' current work settings to obtain real-time mentoring, the program is uniquely effective in advancing the skills of professionals who serve young children who are DHH. By gaining more educators and SLPs with expertise, the program will help to ameliorate critical shortages and provide more highly skilled professionals to better serve children who are D/HH; thus, contributing to quality of life through academic, linguistic, and social/cultural development of children who are D/HH and their families in Utah and across the nation.

Finances*

Please see Appendix D.

SECTION III: CURRICULUM (if applicable)

**Program Curriculum
Narrative**

Fall semester: students are required to take ComD 6340 and ComD 6320, in addition to practicum, ComD 6700.

Spring semester: students are required to take ComD 6770. They then have a choice of taking one of two options: ComD 6350: LSL Early Elementary and Itinerant Support in Children who are DHH or ComD 6580: Family-Centered Practices for Children who are DHH. As current professionals, they are already established in their employment settings and can determine if a course in K-12 services (ComD 6350) or 0-5 Early Intervention services (ComD 6580) is most relevant to them.

Practicum fall and spring semesters: A unique aspect of the program is the individual mentoring students receive in fulfilling the practicum requirements during fall and spring semester (ComD 6700). USU faculty supervisors connect weekly with students to discuss lesson plans, observe them (recorded and real-time) as they are providing services in their employment settings, and provide them with guidance and feedback in service delivery. Students who have completed the program report this to be invaluable to them in connecting theory to practice.

Attach (if applicable) completed [Program Curriculum](#) and [Degree Map](#) to this request by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of Communicative Disorders and Deaf Education, in the Emma Eccles Jones College of Education and Human Services proposes offering a Hearing Foundations Certificate.

EXECUTIVE SUMMARY

The Department of Communicative Disorders and Deaf Education in the Emma Eccles Jones College of Education and Human Services proposes offering a Hearing Foundation Certificate.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve offering a Hearing Foundation Certificate.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of Communicative Disorders and Deaf Education in the Emma Eccles Jones College of Education and Human Services proposes offering a Hearing Foundations Certificate, and

WHEREAS, The proposal will provide education on core knowledge and skills for hearing-related career paths that do not require a bachelor's degree in communicative disorders;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve offering a Hearing Foundations Certificate in the Emma Eccles Jones College of Education and Human Services' Department of Communicative Disorders and Deaf Education, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CEHS - Communicative Disorders and Deaf Education - Hearing Foundations - Certificate

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[USHE R401 Policy](#)

[Process and Flowchart](#)

[Writing Guidelines/Suggestions](#)

[High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

[Student Learning Outcomes](#) Assessment Plan

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

CEHS

DEPARTMENT (include all cross listed departments)*

Communicative Disorders and Deaf Education

Current Title (if applicable)* Not applicable

Proposed Title* Hearing Foundations - Certificate

CIP Code

Enter the Correct CIP Code by Using the Following Link: [High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

CIP Code (6-digits) * 510299

Minimum Number of
Credits (if
applicable)* 12

Maximum Number of
Credits (if
applicable)* 12

Type of Degree: (BA, Certificate
BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

- New Academic Program:**
- ☒ Academic Certificate
 - ☐ CTE - Certificate
 - ☐ K-12 Endorsement Program
 - ☐ Minor
 - ☐ New Emphasis for Existing Program
 - ☐ Out of Service Area Delivery Program (attach signed MOU)
 - ☐ Post-Baccalaureate Certificate
 - ☐ Post-Masters Certificate

- Existing Academic Program Changes:**
- ☐ Name Change of Existing Program
 - ☐ Program Restructure (with or without Consolidation)
 - ☐ Program Transfer to a New Academic Department or Unit
 - ☐ Program Suspension (on hold-not listed in catalog)
 - ☐ Program Discontinuation (permanent program removal)
 - ☐ Reinstatement of Previously Suspended Program
 - ☐ Out-of-Service Area Delivery Program (attach signed MOU)

- Administrative Unit Changes:**
- ☐ Name Change of Existing Unit
 - ☐ Administrative Unit (Transfer)
 - ☐ Administrative Unit (Restructure-with or without Consolidation)
 - ☐ Administrative Unit (Suspension-on hold)
 - ☐ Administrative Unit (Discontinuation-permanent unit removal)
 - ☐ Reinstatement of Previously Suspended Administrative Unit
 - ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council Approval*

☐ Yes
☒ No

Teacher Licensure Program Approval (STEP)*

☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose* This certificate will provide education on core knowledge and skills for hearing-related career paths that do not require a bachelor's degree in communicative disorders.

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale* This set of coursework addresses speech and hearing problems, auditory anatomy and physiology, and acoustics and sound processing. The certificate is intended to support workforce training for audiology technicians or hearing instrument specialists, but is available to any student with an interest in hearing-related knowledge and skills. This certificate may encourage students to complete the remaining coursework required for the major in Communicative Disorders. It also provides students in other majors with most of the prerequisite coursework required to apply for a Utah State University clinical doctorate in audiology.

This set of courses exist as part of the current bachelor's degree in Communicative Disorders and can be taken on campus or online. The online courses are offered each semester (Fall, Spring, Summer) to support flexible access. The Department of Communicative Disorders and Deaf Education will market the certificate on social media and on the department website.

Labor Market Demand (if applicable) We do not have information to gauge the demand for this.

**Consistency with
Institutional Mission
& Institutional
Impact***

Consistency with Institutional Mission & Institutional Impact*

The proposed Hearing Foundations Certificate of Proficiency at Utah State University (USU) supports the university's mission in several ways:

1. Utah State University empowers people to lead successful lives of involvement, innovation, and impact: The certificate program will provide students with hearing-related knowledge and skills that can support them in succeeding in careers such as an audiology aid or hearing instrument specialist. This includes courses covering basic audiology, anatomy and physiology of speech and hearing, and aural rehabilitation.
2. Utah State University is committed to excellence, access, and inclusion: The certificate program is open to students from all majors, backgrounds, and cultures. This will help to create a more diverse and inclusive learning environment for all students.

**Describe and List any
Anticipated Expenses
and Revenue***

1) What new facilities or modifications to existing facilities or equipment are needed?

None.

2) Describe any budgetary impact on other programs or units within the institution.

None

3) If new funds are required, describe expected sources of funds and complete the budget worksheet.

No new funds are needed.

SECTION III: CURRICULUM (if applicable)

**Program Curriculum
Narrative**

Students completing the certificate will need to take four courses, totaling 12 credits that can be completed in two semesters. COMD 2600 provides introductory foundational knowledge in communication sciences and disorders. It can be taken in the same semester as COMD 3800, which is a prerequisite for COMD 4700 and 5330, so this set of courses can be completed in two semesters.

To earn the certificate, the courses must be completed with a grade of C or better. A maximum of three repeats across the set of courses is permitted (consistent with the policy for other COMDDE undergraduate programs).

The courses that make up the curriculum are:

COMD 2600 Introduction to Communication Disorders, 3 credit hours

COMD 3800 Anatomy and Physiology of Speech and Hearing, 3 credit hours

COMD 4700 Basic Audiology, 3 credit hours

COMD 5330 Aural Rehabilitation, 3 credit hours

**Student Learning
Outcomes
Assessment Plan***

Attached.

**If this is a new
credential does the
curriculum require
more than 25%
newly developed
courses?***

☐ Yes

☒ No

Attach completed [Program Curriculum](#), [Degree Map](#), [Student Learning Outcomes Assessment Plan](#) and the [Budget Worksheet](#) by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of Special Education and Rehabilitation Counseling, in the Emma Eccles Jones College of Education and Human Services proposes offering a Clinical Rehabilitation Counseling Post-Master's Certificate.

EXECUTIVE SUMMARY

The Department of Special Education and Rehabilitation Counseling in the Emma Eccles Jones College of Education and Human Services proposes offering a Clinical Rehabilitation Counseling Post-Master's Certificate.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve offering a Clinical Rehabilitation Counseling Post-Master's Certificate.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of Special Education and Rehabilitation Counseling in the Emma Eccles Jones College of Education and Human Services proposes offering a Clinical Rehabilitation Counseling Post-Master's Certificate, and

WHEREAS, The proposal will provide students with a path to mental health licensure;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve offering a Clinical Rehabilitation Counseling Post-Master's Certificate in the Emma Eccles Jones College of Education and Human Services' Department of Special Education and Rehabilitation Counseling, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CEHS - Special Education and Rehabilitation Counseling - Clinical Rehabilitation Counseling - Post-Master's Certificate

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[USHE R401 Policy](#)

[Process and Flowchart](#)

[Writing Guidelines/Suggestions](#)

[High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

[Student Learning Outcomes](#) Assessment Plan

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

CEHS

DEPARTMENT (include all cross listed departments)*

Special Education and Rehabilitation Counseling

Current Title (if applicable)* No current title - new certificate program proposal

Proposed Title* Clinical Rehabilitation Counseling - Post-Master's Certificate

CIP Code

Enter the Correct CIP Code by Using the Following Link: [High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

CIP Code (6-digits) * 51.1508

Minimum Number of
Credits (if
applicable)* 22

Maximum Number of
Credits (if
applicable)* 28

Type of Degree: (BA, BS, etc.)* Post Masters Degree Certificate Program

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

New Academic Program:

- ☐ Academic Certificate
- ☐ CTE - Certificate
- ☐ K-12 Endorsement Program
- ☐ Minor
- ☐ New Emphasis for Existing Program
- ☐ Out of Service Area Delivery Program (attach signed MOU)
- ☐ Post-Baccalaureate Certificate
- ☒ Post-Masters Certificate

Existing Academic Program Changes:

- ☐ Name Change of Existing Program
- ☐ Program Restructure (with or without Consolidation)
- ☐ Program Transfer to a New Academic Department or Unit
- ☐ Program Suspension (on hold-not listed in catalog)
- ☐ Program Discontinuation (permanent program removal)
- ☐ Reinstatement of Previously Suspended Program
- ☐ Out-of-Service Area Delivery Program (attach signed MOU)

- Administrative Unit Changes:**
- ☐ Name Change of Existing Unit
 - ☐ Administrative Unit (Transfer)
 - ☐ Administrative Unit (Restructure-with or without Consolidation)
 - ☐ Administrative Unit (Suspension-on hold)
 - ☐ Administrative Unit (Discontinuation-permanent unit removal)
 - ☐ Reinstatement of Previously Suspended Administrative Unit
 - ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council Approval* ☐ Yes
☒ No

Teacher Licensure Program Approval (STEP)* ☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose* The purpose of this proposal is to create a Graduate Certificate of Clinical Rehabilitation Counseling for individuals with an existing master's degree in rehabilitation counseling or school counseling that will enable them to meet eligibility requirements for licensure as a clinical mental health counselor in the state of Utah, thereby increasing the number of licensed mental health counselors in the state of Utah.

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale*

In the 2024 legislative session for the state of Utah, one of the primary foci was the lack of access to mental health care for the citizens of Utah. One goal of the legislative session was to increase the number of licensed mental health providers so that the projected 515,000 Utah citizens who need mental health services but presently are not able to access those services due to a lack of access and providers, are able to receive the support they need (Miller, 2024).

Historically, the Utah State University (USU) Master's of Rehabilitation Counseling (MRC) program was accredited by the Council on Rehabilitation Education (CORE). Although CORE accredited programs were to provide options for students to pursue mental health licensure, mental health licensure was not the primary focus. With the formal merger of the two main counseling accreditation bodies (CORE and CACREP) on July 1, 2017, the USU MRC program aligned with CACREP and has seen a steady increase in the number of graduates pursuing licensure as mental health counselors. Lobbying efforts were also undertaken by the USU MRC program to pave a formal route for USU MRC graduates in the 2020 legislative session here in Utah. These efforts have established a path for current and future students to mental health licensure.

However, USU MRC graduates prior to 2017 and graduates of the USU School Counseling have educational and training deficiencies that need to be addressed to be eligible to sit for the National Clinical Mental Health Counselor Exam and subsequently pursue the Clinical Mental Health Counselor (CMHC) license here in Utah. To address the educational and training deficiencies of USU MRC graduates and School counseling graduates, we propose the building of an on-line Certificate in Clinical Rehabilitation Counseling. This post graduate training degree will require clinical coursework and a 700-hour internship in a mental health setting, totaling between 24 and 30 credit hours.

Labor Market Demand (if applicable)

A work search using O*Net Online (https://www.onetonline.org/help/online/find_occ) showed 77 current openings for mental health counselors. The projected growth rate for mental health counselors in the next six years (through 2030) is 37%, with an expectation of 570 job openings each year. We have already had students come back and take classes to become eligible for national certification exams and pursue mental health licensing, but not in a formalized program. With the dissolving of the Licensed Vocational Rehabilitation Counselor (LVRC) credential by the Utah legislature in 2024 and the Utah Department of Occupational and Professional Licensing sending an email to past LVRCs notifying them of the elimination of the LVRC and then recommending they consider the Clinical Mental Health Counselor license, we feel the time has come to formalize a training program. We currently receive about 10 inquiries per year from past graduates who want information about mental health licensure, and also anticipate strong interest from graduates of the USU Master's of School Counseling program. A formal certificate program will help with academic counseling and systematize the process for all interested students.

Consistency with Institutional Mission & Institutional Impact*

One of the primary responsibilities of Utah State as Land Grant Institution is to ensure a college education is accessible to all the citizens of the state of Utah. Given the distance nature of the proposed certificate, we will be able to address the educational needs of interested students while also helping with the overall mental health crisis here in Utah, particularly in rural areas where training options are limited.

Describe and List any Anticipated Expenses and Revenue*

Given that all of the courses are existing courses required in the formal Master's of Rehabilitation Counseling program, we do not anticipate any expenses at this time. Adjunct faculty may be needed to help off-set the student/faculty ratio required for the internship, but that will be further down the road. Interested students can be folded into the existing didactic coursework.

We anticipate having about 8 students a year enroll in this program. This allows us to maintain a focus on our current students but also begin enrolling cohorts interested in this option. With the program totaling a minimum of 24 credits and with the current tuition rate of \$503 per credit, we anticipate generating a minimum of 192 student credit hours and \$96,576 in tuition per cohort. If the program demands continue to grow, we can look at generating a track specific to meeting the needs of these students and this will require the hiring of two to three adjunct faculty per semester. It is anticipated that any costs associated with the need for adjuncts will be easily offset by the tuition generated.

SECTION III: CURRICULUM (if applicable)

Program Curriculum Narrative

The curriculum is based off the educational requirements to sit for and pass the National Clinical Mental Health Counseling exam (the required licensing exam for Clinical Mental Health Counselors here in the state of Utah) as well as educational requirements specific to the CMHC licensure requirements outlined by the Utah Dept. of Occupational and Professional Licensing. The curriculum consists of existing coursework housed within the USU Master's of Rehabilitation Counseling Program and accredited by CACREP (the largest and most recognized counseling accreditation body in the United States).

The coursework will require a minimum of 24 credits, and a maximum of 30 credits (depending on courses previously taken by students, with REH 6250 Group Counseling* and REH 6260 Human Growth and Development* being the two classes students may not need to take):

Required Coursework

- REH 6130 Counseling Skill Development (3 credits)
- REH 6200 Theories of Counseling (3 credits)
- REH 6210 Mental Health Assessment (2 credits)
- REH 6320 Diagnostic and Statistical Manual (DSM 5) of Mental Health Disorders (2 credits)
- REH 6350 Treatment Approaches for Addictions Disorders (3 credits)
- REH 6560 Clinical Internship (Fall ~350 hours, 4 credits)
- REH 6560 Clinical Internship (Spring ~350 hours, 5 credits)

Elective Credits (based on student need)

- REH 6250 Group Counseling (3 credits)*
- REH 6260 Human Growth & Development (3 credits)*

**Student Learning
Outcomes
Assessment Plan***

The assessment for the proposed post-master's certificate will consist of four parts:

1. GPA – 3.0 GPA must be maintained with a “B” grade or higher being required to successfully pass REH Counseling Skill Development;
2. Completion of 700-hour mental health internship;
3. Endorsement for licensure by the student’s site supervisor at the end of the internship; and,
4. Successfully passing the National Clinical Mental Health Counselor Exam (or appropriate counseling licesnure exam for their state).

Students will be required to take a majority of coursework prior to starting the internship cycle. Feedback from students and site supervisors will collected on an annual basis to determine stakeholder satisfaction and recommendations for improvement.

**If this is a new
credential does the
curriculum require
more than 25%
newly developed
courses?***

☐ Yes

☒ No

Attach completed [Program Curriculum](#), [Degree Map](#), [Student Learning Outcomes Assessment Plan](#) and the [Budget Worksheet](#) by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of World Languages and Cultures and the School of Teacher Education and Leadership, in the College of Humanities and Social Sciences and the Emma Eccles Jones College of Education and Human Services propose offering a Dual Language Immersion Post-Baccalaureate Certificate.

EXECUTIVE SUMMARY

The Department of World Languages and Cultures and the School of Teacher Education and Leadership in the College of Humanities and Social Sciences and the Emma Eccles Jones College of Education and Human Services propose offering a Dual Language Immersion Post-Baccalaureate Certificate.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve offering a Dual Language Immersion Post-Baccalaureate Certificate.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of World Languages and Cultures and the School of Teacher Education and Leadership in the College of Humanities and Social Sciences and the Emma Eccles Jones College of Education and Human Services propose offering a Dual Language Immersion Post-Baccalaureate Certificate, and

WHEREAS, The proposal will provide educators an endorsement for their professional educator license;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve offering a Dual Language Immersion Post-Baccalaureate Certificate in the College of Humanities and Social Sciences and the Emma Eccles Jones College of Education and Human Services' Department of World Languages and Cultures and the School of Teacher Education and Leadership, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CHASS CEHS - School of Teacher Education and Leadership World Languages and Cultures - Dual Language Immersion - Post-Baccalaureate Certificate

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[Writing Guidelines/Suggestions](#)

[USHE R401 Policy](#)

[Process and Flowchart](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

CHASS

CEHS

DEPARTMENT (include all cross listed departments)*

School of Teacher Education and Leadership

World Languages and Cultures

Current Title (if applicable)* None

Proposed Title* Dual Language Immersion - Post-Baccalaureate Certificate

CIP Code

Enter the Correct CIP Code by Using the Following Link:
[Classification Instruction Programs](#)

CIP Code (6-digits) * 13.0201

Minimum Number of
Credits (if
applicable)* 17

Maximum Number of
Credits (if
applicable)* 17

Type of Degree: (BA, Post-Baccalaureate Certificate
BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

**New Academic
Program:**

- ☐ Certificates of Completion
- ☐ Certificates of Proficiency
- ☐ CTE - Certificate of Completion
- ☐ CTE - Certificate of Proficiency
- ☐ Institutional Certificate of Proficiency
- ☐ K-12 Endorsement Program
- ☐ Minor
- ☐ New Emphasis for Existing Program
- ☐ Out of Service Area Delivery Program (attach signed MOU)
- ☒ Post-Baccalaureate Certificate
- ☐ Post-Masters Certificate

**Existing Academic
Program Changes:**

- ☐ Name Change of Existing Program
- ☐ Program Restructure (with or without Consolidation)
- ☐ Program Transfer to a New Academic Department or Unit
- ☐ Program Suspension (on hold-not listed in catalog)
- ☐ Program Discontinuation (permanent program removal)
- ☐ Reinstatement of Previously Suspended Program
- ☐ Out-of-Service Area Delivery Program (attach signed MOU)

- Administrative Unit Changes:**
- ☐ Name Change of Existing Unit
 - ☐ Administrative Unit (Transfer)
 - ☐ Administrative Unit (Restructure-with or without Consolidation)
 - ☐ Administrative Unit (Suspension-on hold)
 - ☐ Administrative Unit (Discontinuation-permanent unit removal)
 - ☐ Reinstatement of Previously Suspended Administrative Unit
 - ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council Approval* ☒ Yes
☐ No

Teacher Licensure Program Approval (STEP)* ☒ Yes
☐ No

SECTION I: THE REQUEST

R401 Purpose*

Utah State University offers coursework that qualifies licensed teachers to have the Dual Language Immersion (DLI) Endorsement attached to their Professional Educator License. Eligible languages include: Spanish, French, Chinese, German, Portuguese, and Russian. The endorsement is available to:

- University students with state teaching licensure who are enrolled in the Master's program in the School of Teacher Education & Leadership or other related graduate program.
- Licensed teachers who are currently teaching in a DLI school in Utah

Currently, there is no efficient way to track which degree-seeking students and non-matriculated students are pursuing or completing the DLI endorsement through USU.

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale*

By creating a Post-Baccalaureate Certificate of Proficiency, the School of Teacher Education and Leadership and the Department of Languages and Cultures will be able to have students enroll in the graduate certificate program, which will allow both to track progress of students and completion rates.

**Labor Market Demand
(if applicable)**

In 2008, the Utah Senate passed the International Initiatives (Senate Bill 41), creating funding for Utah schools to begin Dual Language Immersion programs in Chinese, French, and Spanish. In addition, then-Governor Jon Huntsman Jr. initiated the Governor's Language Summit and the Governor's World Language Council both with a goal to create a K-12 language roadmap for Utah. These groups aimed to address the needs for language skills in business, government, and education. In 2010, current Governor Gary Herbert and State Superintendent of Public Instruction, Dr. Larry Shumway, issued a challenge to Utah educators to implement one hundred Dual Language Immersion programs throughout Utah by 2015, with a goal of enrolling 30,000 Utah students. Portuguese was added to the program for the 2012-13 school year. German was added for the 2014-15 school year, and Russian in 2017. Current enrollment far exceeds the original goal. From <https://www.utahdli.org/history-of-utah-dli/>

Although there is no breakdown in Department of Workforce Services or the Bureau of Labor Statistics website for dual immersion language teachers, a list of all of the schools in Utah that have DLI programs can be found here: <https://www.utahdli.org/participating-schools-district/>

It is possible for teachers to begin teaching at a DLI school prior to earning the DLI endorsement, and districts need a way to have these teachers earn the DLI endorsement in order to be fully qualified for their existing teaching placements. Creating this certificate will allow us to further market and increase enrollment in an underutilized program while meeting a need in the state for fully qualified bilingual and dual language immersion teachers.

**Consistency with
Institutional Mission
& Institutional
Impact***

Providing a pathway for teachers to teach a world language contributes to the cultivation of diversity of thought and culture. This is not a new program, except in the sense of formalizing it as a certificate.

Finances*

No impact on funding, facilities, or equipment because the courses already exist, courses are regularly offered by qualified instructors, and the advising infrastructure exists.

SECTION III: CURRICULUM (if applicable)

**Program Curriculum
Narrative**

The DLI endorsement consists of 17 credits, including 15 credits of classroom-based coursework (5 classes) and 2 credits of clinical experience working in a DLI classroom. Teachers who are already teaching DLI will complete their field credits by applying course concepts to their teaching practice within their own classrooms.

Foundations of DLI: 3 credits

- LING 6700: Foundations of Dual Language Immersion Education – 3 credits (spring semester only). LING 5400 (and the co-requisite field experience) are desired pre-requisites for LING 6700.

Elective: 3 credits

- Choice of one elective after consultation with advisor.
 - TEAL 5735*: Language Systems, Acquisition, and Instruction for English Learners - 3 credits
 - SPAN 5060: Spanish for Professional and Academic Purposes - 3 credits
 - SPAN 6200: Introduction to Hispanic Linguistics - 3 credits
 - SCED 5100: Motivation and Classroom Management-3 credits (Secondary)
 - ELED 5105: Motivation and Classroom Management -3 credits (Elementary)

Second Language Acquisition, Teaching Methods & Assessment: 9 Credits

While completing the courses listed below, students are required to apply what they are learning in the co-requisite field experiences associated with each course.

- LING 5400: Teaching Modern Languages – 3 credits (fall semester only) + 1 credit clinical (see below)
- TEAL 6770*: ESOL Instructional Strategies in the Content Areas – 3 credits (spring semester only) + 0.5 credit field experience (see below)
- TEAL 6780*: Assessment for Language Learners- 3 credits (spring semester only) + 0.5 credit field experience (see below)

Field Experience: 2 Credits

In-Service teachers must complete 2 credits of supervised field experience in a DLI classroom. **An OPI/OPlc score of Advanced-Mid or higher is required** to complete the field experiences.

- 1 Credit clinical to take with LING 5400
 - LING 3300/4300: Clinical Experience Dual Immersion Classroom - 1 credit (fall semester only) **OR** TEAL 6790*: ESOL Field Experience – 1 credit
- 1 Credit of TEAL 6790*: ESOL Field Experience
 - 0.5 credit with TEAL 6770 and 0.5 credit with TEAL 6780

*Courses with title changes effective 2024-2025.

Attach (if applicable) completed [Program Curriculum](#) and [Degree Map](#) to this request by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of Technology, Design and Technical Education in the College of Agriculture and Applied Sciences proposes the discontinuation of the Medical Laboratory Technician AAS.

EXECUTIVE SUMMARY

The Department of Technology, Design and Technical Education in the College of Agriculture and Applied Sciences proposes the discontinuation of the Medical Laboratory Technician AAS.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve discontinuing the Medical Laboratory Technician AAS.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of Technology, Design and Technical Education in the College of Agriculture and Applied Sciences proposes the discontinuation of the Medical Laboratory Technician AAS, and

WHEREAS, The proposal will allow resources to be moved to viable programs;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve discontinuing the Medical Laboratory Technician AAS in the College of Agriculture and Applied Sciences' Department of Technology, Design and Technical Education, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE:

CAAS - Technology, Design and Technical Education - Medical Laboratory Technician - AAS

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[USHE R401 Policy](#)

[Process and Flowchart](#)

[Writing Guidelines/Suggestions](#)

[High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

[Student Learning Outcomes Assessment Plan](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

CAAS

DEPARTMENT (include all cross listed departments)*

Technology, Design and Technical Education

Current Title (if applicable)* Medical Laboratory Technician - AAS

Proposed Title* Medical Laboratory Technician - AAS

CIP Code

Enter the Correct CIP Code by Using the Following Link: [High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

CIP Code (6-digits) * 511099

Minimum Number of
Credits (if
applicable)* 70

Maximum Number of
Credits (if
applicable)* 70

Type of Degree: (BA, AAS
BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

- New Academic Program:**
- ☐ Certificate - Academic (undergraduate)
 - ☐ Certificate - Technical
 - ☐ Certificate - Post Bachelor's
 - ☐ Certificate - Post Master's
 - ☐ K-12 Endorsement Program
 - ☐ Minor
 - ☐ New Emphasis for Existing Program
 - ☐ Out of Service Area Delivery Program (attached signed MOU)

- Existing Academic Program Changes:**
- ☐ Name Change of Existing Program
 - ☐ Program Restructure (with or without Consolidation)
 - ☐ Program Transfer to a New Academic Department or Unit
 - ☐ Program Suspension (on hold-not listed in catalog)
 - ☒ Program Discontinuation (permanent program removal)
 - ☐ Reinstatement of Previously Suspended Program
 - ☐ Out-of-Service Area Delivery Program (attach signed MOU)

- Administrative Unit Changes:**
- ☐ Name Change of Existing Unit
 - ☐ Administrative Unit (Transfer)
 - ☐ Administrative Unit (Restructure-with or without Consolidation)
 - ☐ Administrative Unit (Suspension-on hold)
 - ☐ Administrative Unit (Discontinuation-permanent unit removal)
 - ☐ Reinstatement of Previously Suspended Administrative Unit
 - ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council Approval* ☐ Yes
☒ No

Teacher Licensure Program Approval (STEP)* ☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose* The purpose of this proposal is to request discontinuance of the Medical Laboratory Technician AAS program.

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale*

The Associate of Applied Science degree (AAS) in Medical Laboratory Technician (MLT) in the Department of Technology, Design and Technical Education in the College of Agriculture and Applied Sciences has struggled to recruit qualified faculty, to achieve sustainable enrollment levels, and to achieve adequate student completion and placement rates required for program accreditation standards over the past several years.

The program is located in two very remote locations in Southeastern Utah. Although the area is in great need of MLTs, the area has many "frontier medicine" clinic locations dotted across the Navajo reservation. As a result, many of these facilities are so desperate to have lab technicians that they are hiring without requiring certification nor does the State of Utah require any type of licensure. This has caused the program enrollment and certification outcomes to be well below the required 70% threshold for National Accrediting Agency for Clinical Laboratory Science (NAACLS) accreditation standards.

Although the program continues to have enrollments, it is usually 1-2 students per cohort. If even one student withdraws, does not graduate, or is not placed, the outcomes cannot meet the required standard of 70%.

Additionally, with only 1-2 students per cohort, the program cost per student far exceeds what is reasonably sustainable.

If this request is approved, the procedure for program closure will be followed according to USU Policy and Procedure for teach-out plans. Students will be informed of intentional closure of the USU MLT program as soon as possible.

Prospective students will be notified that the program will not take a new cohort due to program closure, will be advised regarding alternative MLT majors or areas of study, and will be advised in applying to other MLT programs within the State. Program closure information will be posted on the Health Professions website

Current students will be informed of program closure and will be allowed to complete MLT courses if closure is announced mid-academic year. MLT faculty will work with clinical sites and other colleges/universities to facilitate completion of the clinical experience.

Labor Market Demand (if applicable)

While there is an established need for medical laboratory technicians in southeastern Utah and the Four Corners region, the program has not been able to recruit qualified faculty or sustain adequate enrollment, even after significant marketing efforts.

Consistency with Institutional Mission & Institutional Impact*

NA

Describe and List any Anticipated Expenses and Revenue*

The current cost per student far exceeds what is reasonably sustainable. Discontinuing this program will allow resources to be moved to viable programs.

SECTION III: CURRICULUM (if applicable)

Program Curriculum
Narrative NA

Student Learning
Outcomes
Assessment Plan* NA

If this is a new
credential does the
curriculum require
more than 25%
newly developed
courses?*

☐ Yes ☒ No

Attach completed [Program Curriculum](#), [Degree Map](#), [Student Learning Outcomes Assessment Plan](#) and the [Budget Worksheet](#) by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the **SAVE ALL CHANGES** button below.

Scroll to the top left and click on the **LAUNCH**  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of Animal, Dairy and Veterinary Sciences in the College of Agriculture and Applied Sciences proposes changing the name of the Bioveterinary Science Bachelor of Science to Veterinary Science Bachelor of Science.

EXECUTIVE SUMMARY

The Department of Animal, Dairy and Veterinary Sciences in the College of Agriculture and Applied Sciences proposes changing the name of the Bioveterinary Science Bachelor of Science to Veterinary Science Bachelor of Science.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve changing the name of the Bioveterinary Science Bachelor of Science to Veterinary Science Bachelor of Science.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of Animal, Dairy and Veterinary Sciences in the College of Agriculture and Applied Sciences proposes changing the name of the Bioveterinary Science Bachelor of Science to Veterinary Science Bachelor of Science, and

WHEREAS, The proposal will bring USU into alignment with common practice among their peer institutions;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve changing the name of the Bioveterinary Science Bachelor of Science to Veterinary Science Bachelor of Science in the College of Agriculture and Applied Sciences' Department of Animal, Dairy and Veterinary Sciences, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CAAS - Animal, Dairy and Veterinary Sciences - Veterinary Science - BS

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[USHE R401 Policy](#)

[Process and Flowchart](#)

[Writing Guidelines/Suggestions](#)

[High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

[Student Learning Outcomes Assessment Plan](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

CAAS

DEPARTMENT (include all cross listed departments)*

Animal, Dairy and Veterinary Sciences

Current Title (if applicable)* Bioveterinary Science - BS

Proposed Title* Veterinary Science - BS

CIP Code

Enter the Correct CIP Code by Using the Following Link: [High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

CIP Code (6-digits) * 51.1104

Minimum Number of Credits (if applicable)* 120

Maximum Number of Credits (if applicable)* 120

Type of Degree: (BA, BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

- New Academic Program:**
- ☐ Certificate - Academic (undergraduate)
 - ☐ Certificate - Technical
 - ☐ Certificate - Post Bachelor's
 - ☐ Certificate - Post Master's
 - ☐ K-12 Endorsement Program
 - ☐ Minor
 - ☐ New Emphasis for Existing Program
 - ☐ Out of Service Area Delivery Program (attached signed MOU)

- Existing Academic Program Changes:**
- ☒ Name Change of Existing Program
 - ☐ Program Restructure (with or without Consolidation)
 - ☐ Program Transfer to a New Academic Department or Unit
 - ☐ Program Suspension (on hold-not listed in catalog)
 - ☐ Program Discontinuation (permanent program removal)
 - ☐ Reinstatement of Previously Suspended Program
 - ☐ Out-of-Service Area Delivery Program (attach signed MOU)

- Administrative Unit Changes:**
- ☐ Name Change of Existing Unit
 - ☐ Administrative Unit (Transfer)
 - ☐ Administrative Unit (Restructure-with or without Consolidation)
 - ☐ Administrative Unit (Suspension-on hold)
 - ☐ Administrative Unit (Discontinuation-permanent unit removal)
 - ☐ Reinstatement of Previously Suspended Administrative Unit
 - ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council Approval*

☐ Yes
☒ No

Teacher Licensure Program Approval (STEP)*

☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose* The ADVS department proposes changing the name of the Bioveterinary Science - BS to "Veterinary Science - BS."

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale* The major name "Bioveterinary science" is somewhat confusing, as the prefix "bio" is redundant given that veterinary science is indeed a life (or biological) science. Nearly all other undergraduate degrees designed to prepare students for professional school are called either "preveterinary science" or "veterinary science." This name change brings us into alignment with common practice among our peer institutions.

Labor Market Demand (if applicable)

Consistency with Institutional Mission & Institutional Impact* This change is consistent with the institutional mission and impact.

Describe and List any Anticipated Expenses and Revenue* None.

SECTION III: CURRICULUM (if applicable)

**Program Curriculum
Narrative**

**Student Learning
Outcomes
Assessment Plan***

Program Assessment

The degree follows the assessment plan currently in place for the emphasis. That plan can be found at: <https://caas.usu.edu/advs/assessment/index>

Student Standards of Performance

The degree requires existing student standards of performance for the emphasis. The learning objectives and course map for the emphasis can be accessed at:

<https://caas.usu.edu/advs/assessment/index>

**If this is a new
credential does the
curriculum require
more than 25%
newly developed
courses?***

☐ Yes

☒ No

Attach completed [Program Curriculum](#), [Degree Map](#), [Student Learning Outcomes Assessment Plan](#) and the [Budget Worksheet](#) by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of Kinesiology and Health Science, in the Emma Eccles Jones College of Education and Human Services proposes changing the name and restructuring the Physical and Sport Education MEd to Applied Sport Coaching MEd.

EXECUTIVE SUMMARY

The Department of Kinesiology and Health Science in the Emma Eccles Jones College of Education and Human Services proposes changing the name and restructuring the Physical and Sport Education MEd to Applied Sport Coaching MEd.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve changing the name and restructuring the Physical and Sport Education MEd to Applied Sport Coaching MEd.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of Kinesiology and Health Science in the Emma Eccles Jones College of Education and Human Services proposes changing the name and restructuring the Physical and Sport Education MEd to Applied Sport Coaching MEd, and

WHEREAS, The proposal will enhance the program's appeal and relevance and improve student outcomes;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve changing the name and restructuring the Physical and Sport Education MEd to Applied Sport Coaching MEd in the Emma Eccles Jones College of Education and Human Services' Department of Kinesiology and Health Science, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CEHS - Kinesiology and Health Science - Applied Sport Coaching

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[USHE R401 Policy](#)

[Process and Flowchart](#)

[Writing Guidelines/Suggestions](#)

[High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

[Student Learning Outcomes](#) Assessment Plan

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

CEHS

DEPARTMENT (include all cross listed departments)*

Kinesiology and Health Science

Current Title (if applicable)* Physical and Sport Education

Proposed Title* Applied Sport Coaching

CIP Code

Enter the Correct CIP Code by Using the Following Link: [High-Yield CIP Codes](#) or [Classification Instruction Programs](#)

CIP Code (6-digits) * 15.0001

Minimum Number of
Credits (if
applicable)* 30

Maximum Number of
Credits (if
applicable)* 30

Type of Degree: (BA, MEd
BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

**New Academic
Program:**

- ☐ Academic Certificate
- ☐ CTE - Certificate
- ☐ K-12 Endorsement Program
- ☐ Minor
- ☐ New Emphasis for Existing Program
- ☐ Out of Service Area Delivery Program (attach signed MOU)
- ☐ Post-Baccalaureate Certificate
- ☐ Post-Masters Certificate

**Existing Academic
Program Changes:**

- ☒ Name Change of Existing Program
- ☒ Program Restructure (with or without Consolidation)
- ☐ Program Transfer to a New Academic Department or Unit
- ☐ Program Suspension (on hold-not listed in catalog)
- ☐ Program Discontinuation (permanent program removal)
- ☐ Reinstatement of Previously Suspended Program
- ☐ Out-of-Service Area Delivery Program (attach signed MOU)

- Administrative Unit Changes:**
- ☐ Name Change of Existing Unit
 - ☐ Administrative Unit (Transfer)
 - ☐ Administrative Unit (Restructure-with or without Consolidation)
 - ☐ Administrative Unit (Suspension-on hold)
 - ☐ Administrative Unit (Discontinuation-permanent unit removal)
 - ☐ Reinstatement of Previously Suspended Administrative Unit
 - ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council Approval*

☒ Yes
☐ No

Teacher Licensure Program Approval (STEP)*

☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose*

The Kinesiology and Health Science (KHS) Department seeks to rename and restructure the curriculum for its Master of Education (M.Ed.) in Physical and Sport Education (PSED). The proposed changes aim to align the program with contemporary industry standards better, enhance student learning outcomes, and increase the program's attractiveness to prospective students. The proposed new name, "Master of Education in Applied Sport Coaching," more accurately reflects the program's comprehensive approach to sport pedagogy directed to both physical activity education and coaching.

Currently, the program admits approximately 8 - 10 new students annually. The proposed curriculum restructuring will maintain the existing total credit requirement of 30 credits while adjusting the curriculum to provide a comprehensive understanding of the multifaceted nature of physical activity and sport. The curriculum will focus on leadership, communication, athlete development, coaching and pedagogical techniques, and contemporary issues in physical activity and sport. As part of the program students complete both an internship and master's project, specific to their professional interests in this field. These experiences will allow students to gain hands-on experience to apply content learned in their courses, expand their networks, learn from professionals in this field, and produce a tangible product that they will have to demonstrate the application of the content covered.

The program is delivered in an online format. This flexible delivery method accommodates working professionals and allows for broader geographical participation. As part of this restructuring, the KHS Department has consulted with relevant community stakeholders, principals, athletics administrators, and physical educators who are currently working in public school districts to ensure that the proposed changes will not negatively impact students who would be interested in this program and that the program better aligns with future employment opportunities. This collaboration will support the transition as the curriculum is restructured and maintains USU's commitment to providing high-quality education in the field of physical activity

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale*

Proposed Action:

The proposed action involves changing the title of the program and restructuring its curriculum to better align with evolving educational and professional standards. The new title will reflect the updated focus and goals of the program, while the curriculum will be revised to ensure it remains relevant and beneficial for students now and in future years to come. The program will continue to require 30 credits for completion.

Rationale:

The rationale for this change stems from a thorough review conducted by the curriculum committee over the past year. This review included extensive consultations with community stakeholders such as principals, athletic administrators, and physical educators currently working in public school districts. These stakeholders affirmed the ongoing relevance of the degree and expressed a strong interest in the program, particularly for teachers who may transition into or assume additional roles in teaching and coaching. There was a perceived benefit for teachers regardless of their prior experience levels with sport, physical activity, and coaching.

The program curriculum within the KHS department committee also examined national and state education requirements for coaching and physical education, identifying that the current program title and structure were outdated and did not accurately reflect the program's objectives or the evolving demands of the field. This collaborative and evidence-based approach ensures that the proposed changes are well-informed and aligned with both community needs and regulatory requirements. The proposed name change and curriculum updates aim to address these gaps, making the program more attractive and pertinent to prospective students.

Benefits to USU and USHE:

The proposed changes will benefit USU by enhancing the program's appeal and relevance, thereby potentially increasing enrollment and improving student outcomes. In regards to the Utah System of Higher Education (USHE), a modernized program aligns with broader educational goals of producing well-prepared educators and coaches, which can positively impact public school systems statewide. By updating the program title and curriculum, USU will demonstrate its commitment to maintaining high standards and responding proactively to the evolving educational landscape.

**Labor Market Demand
(if applicable)**

The labor market demand for the proposed program updates can be substantiated through detailed analysis of local, state, and national labor market data. According to the Occupational Outlook Handbook (OOH) and other relevant sources, there are significant trends and needs in the education and coaching fields that support the necessity for an enhanced Master of Education (MEd) program.

The job market for physical education teachers is projected to grow by 1% between 2022 and 2032 (see links below). Although this increase is low, it indicates an increase in demand for professionals in this area. The current program has served students who are working as teachers, but it has not fully catered to those pursuing careers in coaching. Data from the Utah Department of Workforce Services (DWS) Occupation Information Data Viewer reflect consistent demand for physical education teachers across various educational levels, including elementary, middle, and high schools. These positions typically offer median annual wages ranging from approximately \$59,000 to \$61,000, depending on the level of education and location.

More notably, there is a greater demand for coaches, which aligns with the interests of many students enrolling in the program. The Bureau of Labor Statistics (BLS) reports that the employment of coaches and scouts is projected to grow 9% from 2022 to 2032. This growth is driven primarily by the increasing participation of young people in sports and the expanding need for professional scouting and coaching services. As of 2022, the median annual wage for coaches and scouts was around \$36,330, though this can vary widely based on the level of competition and geographic location.

Interviews with stakeholders, including school administrators, current students, and alumni, have revealed a sustained demand for the MEd program, particularly with enhancements that cater to coaching careers. Key takeaways from these interviews also note the necessity for a curriculum that includes both theoretical and practical components tailored to coaching. Stakeholders emphasized the need for skills in sports psychology, athletic training, and advanced coaching techniques, which are essential for preparing students for successful careers in this growing field.

In conclusion, the data indicates a need for an updated MEd program to better prepare students for careers as physical education teachers and coaches. By aligning the curriculum with market demands and incorporating feedback from stakeholders, the proposed program improvements will ensure that graduates are well-equipped to meet the evolving needs of the labor market.

Coaches and Scouts – <https://www.bls.gov/ooh/entertainment-and-sports/coaches-and-scouts.htm>

Kindergarten and Elementary School Teachers - <https://www.bls.gov/ooh/education-training-and-library/kindergarten-and-elementary-school-teachers.htm>

Middle School Teachers - <https://www.bls.gov/ooh/education-training-and-library/middle-school-teachers.htm>

High School Teachers - <https://www.bls.gov/ooh/education-training-and-library/high-school-teachers.htm>

**Consistency with
Institutional Mission
& Institutional
Impact***

The proposed changes for the PSED MEd program are tailored to elevate academic rigor and relevance, thereby supporting USU's commitment to excellence. By integrating cutting-edge educational theories, diverse pedagogical practices, and comprehensive field experiences, the revised program aims to produce highly competent educators who are well-equipped to meet the evolving demands of the educational landscape. This focus on academic excellence not only enhances the quality of the program but also amplifies the university's reputation as a leader in educational innovation. The changes are structured to improve access to quality education for a broader demographic. By incorporating flexible learning options, such as online courses, the MEd program becomes more accessible to working professionals, rural educators, and non-traditional students who might otherwise face barriers to advanced education. The proposed changes to the MEd program name and curriculum reflect Utah State University's dedication to excellence, access, and inclusion. By aligning with the institutional mission, these changes not only enhance the program's quality and reach but also reinforce USU's impact as a leading educational institution committed to serving a diverse and dynamic community.

**Describe and List any
Anticipated Expenses
and Revenue***

The proposed name change and restructuring of the curriculum are cost-neutral, and no impact on finances is anticipated.

SECTION III: CURRICULUM (if applicable)

**Program Curriculum
Narrative**

The proposed curriculum aims to address the evolving demands of the labor market while continuing to emphasize physical activity and sport. This innovative program consists of 30 credits, which are to be completed entirely online, providing flexibility for students who may be working concurrently. The program is designed to be completed over two years. However, for those who prefer a more accelerated or slower pace, there is an option to complete the coursework within one year or within the allotted 6 years that USU allows for master's degrees.

There is one variable credit course planned in the current and proposed curriculum. This course is the internship course which has been a part of the program for many years and is required for the completion of this degree. The course is variable, but students are expected to complete at least 3 credits. Students who wish to pursue an internship, beyond the 3 credits may do so based on their schedules, professional obligations, and academic goals with prior approval. This adaptability ensures that both full-time and part-time students can tailor their learning experience to better suit their individual needs.

By aligning the curriculum with current labor market demands and offering flexible learning options, the program is well-positioned to serve both students and faculty effectively. This approach not only enhances the relevance of the educational content but also supports students in balancing their professional and academic pursuits.

**Student Learning
Outcomes
Assessment Plan***

The program has identified core competencies, learning objectives, and outcomes that are assigned to specific courses (see worksheet 2 in the attached document). Currently, the program has discussed the use of pre and post-surveys, assignments, and the application of content in the master's project as assessment methods.

Each faculty member is responsible for covering the learning objectives assigned to their course. Faculty will participate in the development and implementation of assessment measures, ensuring that they are relevant and effective in evaluating student learning outcomes. Regular program curriculum meetings will provide a forum for sharing best practices and discussing assessment results.

The curriculum committee will meet regularly over the next year to further develop and refine the assessment measures for each course and the overall program. These meetings will focus on mapping out specific assessment techniques, reviewing data from current assessments, and making necessary adjustments to improve the assessment process.

**If this is a new
credential does the
curriculum require
more than 25%
newly developed
courses?***

☐ Yes

☒ No

Attach completed [Program Curriculum](#), [Degree Map](#), [Student Learning Outcomes Assessment Plan](#) and the [Budget Worksheet](#) by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Center for Persons with Disabilities, in the Emma Eccles Jones College of Education and Human Services proposes establishing The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI).

EXECUTIVE SUMMARY

The Center for Persons with Disabilities in the Emma Eccles Jones College of Education and Human Services proposes establishing The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI).

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve establishing The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI).

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Center for Persons with Disabilities in the Emma Eccles Jones College of Education and Human Services proposes establishing The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI), and

WHEREAS, The proposal will improve the quality, availability, and timely provision of accessible digital educational materials and instruction for children with disabilities;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve establishing The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI) in the Emma Eccles Jones College of Education and Human Services' Center for Persons with Disabilities, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE: _____

CEHS - Center for Persons with Disabilities - The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI)

4.1.c R401 NEW ADMINISTRATIVE UNIT

Proposal Information

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

Centers and Institutes are officially recognized academic organizational and administrative units that are created with the purpose of advancing scholarly activity. These organizations serve an important role in focusing efforts on issues or topics and fostering multi-disciplinary programs. Utah State University creates centers and institutes to explore research and educational initiatives that span colleges, departments, and disciplinary boundaries. They are essential to Utah State Universities land-grant mission of advancing education, research and discovery, and community contribution at the highest levels. The work of centers and institutes enhances Utah State Universities strengths and expands its impact by bringing together faculty, scholars, fellows, and students for academic exploration.

[Writing Guidelines/Suggestions](#)

[USHE R401 Policy](#)

[Process and Flowchart](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

DEPARTMENT or
UNIT: *

Center for Persons with Disabilities

PROPOSED UNIT
TITLE: *

The National Center on Accessible Digital Educational Materials and Instruction (NCADEMI)

REQUEST

TYPE OF UNIT BEING REQUESTED

(Click the button below that best reflects your proposal)

CENTERS: *A center is an organized unit, typically of a single college of the University, whose mission is to sponsor, coordinate, and promote research, training, instruction, and/or service, in order to enrich and support the core mission of the college. Centers are typically organized to conduct research, usually on a highly specific theme or topic. Centers shall not duplicate or substantially complete with the mission of university-wide institutes, special initiatives, or other centers. They may involve faculty from one or more departments, usually from within the same college or faculty of the University. Centers, as college-based entities, will generally be funded through a combination of external sponsored program funds and college-based support. Centers will typically report their activities to the respective dean of the college where the center is located. Centers have a five-year cycle for application and renewal.*

INSTITUTES: *An institute is an organized unit of the University typically staffed, supported, and governed by multiple colleges of the University or central administration. An institute's mission is to sponsor, coordinate, and promote research, training, instruction, and service and to enhance by collaboration the University's strength in specific areas, in order to augment and support the core mission of the University. An institute is an organization that is broader in scope and funding than a center. It is typically associated with a physical organizational infrastructure. Institutes will generally be funded through secure on-going sources (typically over \$1 million per year). An institute may house within it one or more centers. New institutes shall not duplicate or substantially overlap with the mission of existing institutes or special initiatives.*

Unit Being
Requested *

New Center



New Institute

DESCRIPTION | NARRATIVE

PROPOSING A NEW CENTER OF INSTITUTE: *A written proposal, using the R401C process, is required to be submitted and approved to establish a center or institute. The naming of a center or institute is typically based on a gift and must be recommended by the University Naming Committee and approved by the Board of Trustees. The proposal must include the following:*

**Administrative Unit
Description and
Narrative***

The National Center on Accessible Digital Educational Materials & Instruction (NCADEMI) is funded through a four-year \$7 million grant through the U.S. Department of Education Office of Special Education Programs (OSEP). The goal of the National Center on Accessible Digital Educational Materials & Instruction (NCADEMI) is to improve the quality, availability, and timely provision of accessible digital educational materials and instruction for children with disabilities served under Part B & Part C of the Individuals with Disabilities Education Act (IDEA).

The project's long-term outcomes by populations to be served are:

- State Education Agencies (SEAs) and Local Education Agencies (LEAs) will increase the provision and use of accessible digital educational materials and instruction, efficiencies with accessibility evaluation reviews of edtech products, and standardized data collection and reporting using the Common Education Data Standards (CEDS). SEAs will improve the quality and timely provision of braille for state-mandated assessment.
- Part C Lead Agencies (LAs) will improve the preparation of children with disabilities and their families to use accessible digital educational materials and instruction in Part B programs.
- OSEP-funded Technical Assistance (TA) & Dissemination Centers will improve the accessibility of products & services.
- OSEP-funded Parent Information Centers will improve the preparation of parents to communicate the ADEM&I needs of their children with disabilities.
- Pre- & In-service Educator and Administrator Programs in institutions of higher education will improve the preparation of candidates to create, select, and use accessible digital educational materials and instruction.

NCADEMI will add to the national knowledge base of evidence-based practices related to the provision and use of accessible digital educational materials and instruction for children with disabilities in early intervention, early childhood education, and elementary and secondary education. Project outcomes will inform improvements to agencies' policies and guidelines related to the implementation of IDEA and Sections 504 and 508 of the Rehabilitation Act of 1973.

True North Evaluation, Inc., will serve as the project's external evaluator. AEM Corp will co-develop a standardized data collection and reporting system for SEAs. The State Educational Technology Directors Association will facilitate the engagement of SEA digital leaders in all relevant project activities. The Institute for the Study of Knowledge Management in Education will develop products for the evaluation, creation, and selection of accessible Open Educational Resources. The Assistive Technology Industry Association will support a training event at its annual conference. The Described & Captioned Media Program will develop resources for creating and using accessible video. The IRIS Center will develop resources for pre- and in-service programs. Dr. Natalie Shaheen will conduct research activities to sustain and expand the knowledge base of evidence-based practices. The OCALI AT&AEM Center and Mr. Michael Cantino will support the development and dissemination of SEA practices for providing braille for state-mandated assessment.

Mission and Vision*

The mission of the National Center on Accessible Digital Educational Materials & Instruction or NCADEMI is to improve the quality, availability, and timely provision of accessible digital educational materials and instruction for children with disabilities served under Part B and Part C of IDEA in the United States.

The vision of NCADEMI is to become the primary national resource for accessible digital educational materials and instructional methods in early childhood, elementary, secondary, and post-secondary educational settings.

Goals and Objectives*

The broad goals of NCADEMI are to sustain and expand the knowledge base of evidence-based practices through literature reviews, interviews, and surveys of groups and individuals with critical perspectives in the populations to be served; maintain an accessible website with a searchable platform of policies, practices, and accessibility evaluation reviews of edtech products; facilitate web-based learning modules with CEUs and micro-credentials; provide training and coaching for populations to be served; disseminate information through social media, e-newsletters, and a blog; engage a National Advisory Council of representatives from the populations to be served and related experts.

NCADEMI's Logic Model (see in the attached Appendix) also presents the inputs, activities, and outputs by which the project will achieve the stated short-, mid-, and long-term outcomes for each of five distinct targeted technical assistance recipient groups (TTA groups): SEAs & LEAs, Part C Lead Agencies (Part C LAs), OSEP-funded TA&D centers (TA&D Centers), OSEP-funded Parent Information Centers (PICs), and pre- & in-service educator and administrator programs in institutions of higher education (Pre- & In-service Programs).

The table below represents NCADEMI's preliminary workplan of milestones to meet by project year and quarter. Quarters in which milestone activities will be conducted are marked with a checkmark. Quarters in which no activities for the milestone are conducted are marked with a filled square.

Evaluation Criteria*

The evaluation plan for NCADEMI is included in the attached Evaluation Plan document. This plan was created by the project staff in conjunction with True North Evaluation. True North Evaluation is the contracted third-party evaluator for this grant project.

List of Participating Faculty*

Dr. Brenda Smith, Ph.D., will serve as PI. Dr. Smith will work with the Project Director on operations and to ensure activities are continuously in alignment with the activities, outputs, and short-, mid-, and long-term outcomes of NCADEMI. She will also assist with facilitating the implementation science approach and theory of change associated with the project. Additionally, Dr. Smith will work with the Project Director on budget and evaluation tasks.

Cynthia Curry, M.S.Ed., will be Project Director. Ms. Curry will have operational responsibilities for NCADEMI, including staff, budget, evaluation, and reporting.

Jared Smith M.S. will be Senior Advisor of Digital Accessibility. Mr. Smith will serve as a content expert to the team.

Kristen Perez-Rickles, M.Ed., will be a TA Specialist, providing support across the four activity areas of NCADEMI (KD, UTA, TTA, and Dissemination). Under TTA, Ms. Rickles will be primarily assigned to SEAs & LEAs and Pre- & In-service Programs.

Alex Langevin, MA, M.Ed., will be a TA Specialist, providing support across the four activity areas. Under TTA, Ms. Langevin will be primarily assigned to SEAs & LEAs and Part C LAs.

Sue Olsen, M.Ed., will be a TA Specialist, primarily assigned to TTA for Part C LAs.

Katheryn Emmett will be a TA Specialist, primarily assigned to TTA for PICs.

Christopher Phillips, M.S. will be a Digital Accessibility Specialist, providing support across the four activity areas of NCADEMI.

Rob Carr will be a Digital Accessibility Specialist, primarily assigned to UTA and Knowledge Development & TTA for SEAs & LEAs and Pre- & In-service Programs.

Jonathan Whiting will be a Digital Accessibility Specialist, primarily assigned to UTA.

George Joeckel will be a Content Development Specialist, primarily assigned to UTA.

JoLynne Lyon will be a PR and Media Outreach Specialist.

Joana Franco Ph.D. will be an Instructional Designer and Graphic Design Specialist.

Subcontractors and consultants

- **True North Evaluation, Inc.**, will serve as NCADEMI's external evaluator.
- **AEM Corporation** will partner with NCADEMI to support the TTA project requirement to support ADEM&I-related data collection and reporting to identify gaps and facilitate systemic improvements in provision.
- **SETDA** will partner to support KD, TTA, and Dissemination specific to SEAs & LEAs.
- **ISKME** will partner to support KD, UTA, and TTA specific to the provision and use of accessible OER by SEAs & LEAs;
- **AT & AEM Center at OCALI** will partner to support the TTA project requirement to address challenges specific to digital accessibility of large-scale assessments;
- **Natalie Shaheen Ph.D.**, will partner on KD specific to SEAs & LEAs and pre- & in-service programs;

- **ATIA** will partner on Dissemination activities related to all I IA groups;
- **DCMP** will partner on KD and UTA products and services for increasing knowledge and skills on EBPs to create and select ADEM&I;
- **IRIS Center** will partner on KD and TTA for pre- & in-service programs to increase knowledge and skills of new and continuing teachers and administrators to create, select, and use ADEM&I.

Letters of support from collaborators and curriculum vitae for staff and advisory board members are included in the attached documents.

Governance Structure*

NCADEMI will be a sub-center housed within the Technical Assistance Division of the Institute for Disability Research, Policy & Practice (IDRPP) in the Emma Eccles Jones College of Education and Human Services. The NCADEMI will be directed by **Dr. Brenda Smith**, Associate Director from the Center for Technical Assistance for Excellence in Special Education (<https://www.taese.org/cms/>) and **Cynthia Curry**, the former director of the National Center for Accessible Education Materials (<https://aem.cast.org/>). Brenda and Cynthia will lead and direct a team of other IDRPP staff including:

- **Jared Smith M.S.** will be Senior Advisor of Digital Accessibility.
- **Kristen Perez-Rickles, M.Ed.**, will be a TA Specialist.
- **Alex Langevin, MA, M.Ed.**, will be a TA Specialist.
- **Sue Olsen, M.Ed.**, will be a TA Specialist, primarily assigned to TTA for Part C LAs.
- **Katheryn Emmett** will be a TA Specialist, primarily assigned to TTA for PICs.
- **Christopher Phillips M.S.** will be a Digital Accessibility Specialist.
- **Rob Carr** will be a Digital Accessibility Specialist.
- **Jonathan Whiting** will be a Digital Accessibility Specialist.
- **George Joeckel** will be a Content Development Specialist.
- **JoLynne Lyon** will be a PR and Media Outreach Specialist.
- **Joana Franco Ph.D.** will be an Instructional Designer and Graphic Design Specialist.

As noted earlier, NCADEMI will be housed within the Technical Assistance Division at the IDRPP and all NCADEMI activities will be overseen and informed by Technical Assistance Division leadership. TA Division Leadership (Norm Ames and Jared Smith) and Cynthia Curry also serve on the IDRPP Leadership Team. TA Division leadership and Cynthia Curry will meet monthly with the IDRPP Leadership Team and will keep IDRPP administration and College leadership apprised of NCADEMI activities, functions, and needs throughout the lifespan of the project.

NCADEMI will also be advised by a National Advisory Council on digital accessibility experts, educational leaders, educational publishers, and other content experts. This advisory board will help NCADEMI identify and address emerging needs and trends within the realm of educational accessibility. This advisory board does not have a governance role and will only function in an advisory capacity to NCADEMI leadership and staff. Please see the attached document for more information on the membership of this National Advisory Council.

Space and Facilities Requirements*

NCADEMI will be staffed by a combination of local IDRPP employees in Logan and multiple remote employees in various other locations across the U.S. (Salt Lake City, Maine, Oklahoma, Massachusetts, Vermont). As result, NCADEMI has minimal space needs. The majority of IDRPP employees working under this new center already have offices or cubicles in the IDRPP building. New staff who will be hired in Logan, will be allocated office or cubicle space from current vacancies in the IDRPP building.

It is not anticipated that the IDRPP will need to request any additional space for NCADEMI, but if it does, we will work with the College of Education and Human Services to identify other vacant or underused spaces in existing facilities.

Funding/Budget*

NCADEMI is funded by a Cooperative Agreement with the U.S. Department of Education's Office of Special Education Programs (OSEP). The Cooperative Agreement was awarded to the USU IDRPP on May 9, 2024, after a national call for proposals. The USU IDRPP proposal was the highest-reviewed proposal from a group of seven other proposals from various other public and private entities. The Cooperative Agreement is funded at \$1.8 million per year for 4 years (\$7.2 million total) and has a formal start date of October 1, 2024.

OSEP has provided the USU IDRPP with 90 days of funding to be used up to October 1 to help the IDRPP to hire and train new staff, begin branding and marketing materials development, and to get a basic web portal built with the expectation that the project will "go live" on October 1, 2024.

SUBMIT AND APPROVE THE PROPOSAL

Click on the save all changes button below.

Scroll to the top left and click on the launch  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Nora Eccles Harrison Museum of Art, in the Office of the President proposes establishing the Wanlass Center for Art Education and Research.

EXECUTIVE SUMMARY

The Nora Eccles Harrison Museum of Art in the Office of the President proposes establishing the Wanlass Center for Art Education and Research.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve establishing the Wanlass Center for Art Education and Research.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Nora Eccles Harrison Museum of Art in the Office of the President proposes establishing the Wanlass Center for Art Education and Research, and

WHEREAS, The proposal will provide enhanced and expanded learning and engagement opportunities with art;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve establishing the Wanlass Center for Art Education and Research in the Office of the President's Nora Eccles Harrison Museum of Art, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE:

PRES - Art Museum - Wanlass Center for Art Education and Research

4.1.c R401 NEW ADMINISTRATIVE UNIT

Proposal Information

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[Writing Guidelines/Suggestions](#)

[USHE R401 Policy](#)

[Process and Flowchart](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

**COLLEGE or
UNIVERSITY
DIVISION:***

PRES

**DEPARTMENT or
UNIT: ***

Art Museum

**PROPOSED UNIT
TITLE:*** Wanlass Center for Art Education and Research

REQUEST

TYPE OF UNIT BEING REQUESTED

Click the change that best reflects your proposal.

Centers typically involve faculty and staff from one or more departments, colleges or units engaged in dedicated research, educational or service activity.

Institute is an organization intended for research and is broader in scope and funding than a center; it is typically associated with a physical organizationl infrastructure for conducting research. It involves faculty and staff from multiple units who depend on a set of common facilities for their research. An institute may house within it one or more centers.

Unit Being Requested*

- ☐ New Administrative Unit (new colleges and professional schools - use full template)
- ☒ New Center
- ☐ New Institute
- ☐ New Bureau

DESCRIPTION | NARRATIVE

Administrative Unit Description and Narrative*

The Wanlass Center for Art Education and Research is part of the Nora Eccles Harrison Museum of Art. It will provide enhanced and expanded learning and engagement opportunities with art that are complementary to our current offerings in our existing museum facility. This new facility will include a studio space, a study center, a library, and visible, compaction collection storage to address future growth of the collection.

SUBMIT AND APPROVE THE PROPOSAL

Click on the save all changes button below.

Scroll to the top left and click on the launch  icon to launch your proposal.

8 November 2024

ITEM FOR ACTION

Utah State University's Department of Mechanical and Aerospace Engineering, in the College of Engineering proposes restructuring the Composite Materials and Structures Master of Science.

EXECUTIVE SUMMARY

The Department of Mechanical and Aerospace Engineering in the College of Engineering proposes restructuring the Composite Materials and Structures Master of Science.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve restructuring the Composite Materials and Structures Master of Science.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, Utah State University's Department of Mechanical and Aerospace Engineering in the College of Engineering proposes restructuring the Composite Materials and Structures Master of Science, and

WHEREAS, The proposal will provide USU graduate students and industry professionals with the opportunity to become familiar with how composite materials are used in areas of research and design.;

NOW THEREFORE BE IT RESOLVED, That the Utah State University Board of Trustees hereby approve restructuring the Composite Materials and Structures Master of Science in the College of Engineering's Department of Mechanical and Aerospace Engineering, and that notification of this proposal be forwarded to the Utah State Board of Higher Education of the Utah System of Higher Education.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

DATE:

COE - Mechanical and Aerospace Engineering - Composite Materials and Structures - MS

4.1.a R401 ABBREVIATED PROGRAM PROPOSAL

R401-Abbreviated Program Proposal

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

[Writing Guidelines/Suggestions](#)

[USHE R401 Policy](#)

[Process and Flowchart](#)

COLLEGE AND DEPARTMENT INFORMATION

Click on the college(s) and department(s) that are included on this request

COLLEGE (include all cross listed colleges)*

COE

DEPARTMENT (include all cross listed departments)*

Mechanical and Aerospace Engineering

Current Title (if applicable)* Composite Materials and Structures - MS

Proposed Title* Composite Materials and Structures - MS

CIP Code

Enter the Correct CIP Code by Using the Following Link:

Classification Instruction Programs

CIP Code (6-digits) * 14.1801

Minimum Number of
Credits (if
applicable)* 30

Maximum Number of
Credits (if
applicable)* 40

Type of Degree: (BA, MS
BS, etc.)*

REQUEST

TYPE OF CHANGE BEING REQUESTED

Click the change(s) that best reflect your proposal.

**New Academic
Program:**

- ☐ Certificates of Completion
- ☐ Certificates of Proficiency
- ☐ CTE - Certificate of Completion
- ☐ CTE - Certificate of Proficiency
- ☐ Institutional Certificate of Proficiency
- ☐ K-12 Endorsement Program
- ☐ Minor
- ☐ New Emphasis for Existing Program
- ☐ Out of Service Area Delivery Program (attach signed MOU)
- ☐ Post-Baccalaureate Certificate
- ☐ Post-Masters Certificate

**Existing Academic
Program Changes:**

- ☐ Name Change of Existing Program
- ☒ Program Restructure (with or without Consolidation)
- ☐ Program Transfer to a New Academic Department or Unit
- ☐ Program Suspension (on hold-not listed in catalog)
- ☐ Program Discontinuation (permanent program removal)
- ☐ Reinstatement of Previously Suspended Program
- ☐ Out-of-Service Area Delivery Program (attach signed MOU)

**Administrative Unit
Changes:**

- ☐ Name Change of Existing Unit
- ☐ Administrative Unit (Transfer)
- ☐ Administrative Unit (Restructure-with or without Consolidation)
- ☐ Administrative Unit (Suspension-on hold)
- ☐ Administrative Unit (Discontinuation-permanent unit removal)
- ☐ Reinstatement of Previously Suspended Administrative Unit
- ☐ Reinstatement of Previously Discontinued Administrative Unit

Other: (explain
change)

ADDITIONAL APPROVALS (if applicable)

Graduate Council
Approval* ☒ Yes
☐ No

Teacher Licensure
Program Approval
(STEP)* ☐ Yes
☒ No

SECTION I: THE REQUEST

R401 Purpose*

It is proposed that we add MS plans A and B to the Mechanical and Aerospace Engineering (MAE) Composite Materials and Structures program.

Admission and Program requirements will be the same as the Composite Materials and Structures Plan C program.

SECTION II: PROGRAM PROPOSAL

Proposed Action & Rationale*

It is proposed that we add MS plans A and B to the Mechanical and Aerospace Engineering Composite Materials and Structures program.

Both plans will require the students to take all five core composites courses available (MAE 5050, 5060, 6050, 6055 and 6060), nine credits of elective coursework and six research credits for Plan A or three project credits for Plan B. Total credit requirement for the Plan A and Plan B are 30 credits. The elective courses to choose from are MAE 5020, MAE 5045, MAE 5310, MAE 5350, MAE 5370, MAE 5700, MAE 5930 Aircraft Structures, MAE 5930 Experimental Analysis of Composite Manufacturing, MAE 6010, MAE 6030, MAE 6040, MAE/CEE 6090, MAE 6320, MAE 6420, MAE 6460, MAE 6670, MATH 5410, MATH 5710, MATH 6420, MATH 6610. Students may also transfer SE 6130 Systems Engineering from Weber State University (please add this course title).

Students are required to take at least 15 credits of 6000 level courses.

The program is focused on providing USU graduate students and industry professionals the opportunity to become familiar with how composite materials are used in areas of engineering research and design across multiple industries. Adding plan A and B options will allow participants practical experience is performing such research.

The proposed MS plans will be administered, delivered and hosted by the Mechanical and Aerospace Engineering (MAE) department. Within the department, we currently have one tenured professor and two tenure-track professors.

**Labor Market Demand
(if applicable)**

Analysis conducted by Utah Advanced Materials and Manufacturing Initiative (UAMMI) in 2020 found that from 2015 through 2019 there were 4,905 job postings in Utah for engineers with composite materials backgrounds. Of those, 91% (4,463) required a minimum of a Bs degree with most preferring or requiring an MS degree. The analysis also revealed the need for engineers and technicians with a composite materials background in Utah is expected to grow to over 15,000 in the next few years.

**Consistency with
Institutional Mission
& Institutional
Impact***

The College of Engineering provides unwavering support to the USU mission to be a premier student-centered land-grant university focused on quality research and excellent student outcomes. Adding the plan A and B options to the current plan C MS degree program significantly increases our ability to provide quality research in this area.

Finances*

This initiative requires no additional funding.

SECTION III: CURRICULUM (if applicable)
--

**Program Curriculum
Narrative**

Both plans will require the students to take all five core composites courses available (MAE 5050, 5060, 6050, 6055 and 6060), nine credits of elective coursework and six research credits for Plan A and three project credits for Plan B.

Total credit requirement for Plan A and Plan B are 30 total credits. The elective courses to choose from are MAE 5020, MAE 5045, MAE 5310, MAE 5350, MAE 5370, MAE 5700, MAE 5930 Aircraft Structures, MAE 5930 Experimental Analysis of Composite Manufacturing, MAE 6010, MAE 6030, MAE 6040, MAE/CEE 6090, MAE 6320, MAE 6420, MAE 6460, MAE 6670, MATH 5410, MATH 5710, MATH 6420, MATH 6610. Students may also transfer SE 6130 from Weber State University.

Students are required to take at least 15 credits of 6000 level courses.

Students in Plan A must submit a thesis proposal for approval by their supervisory committee and submit and defend a final thesis.

Students in Plan B must submit a project proposal for approval by their supervisory committee and submit and defend a final project.

Students in Plan A and B are required to attend 6 MAE Research Seminar Series presentations before graduating.

Approval of the following academic forms are required:

Supervisory Committee

Program of Study

Thesis/Project Approval

Appointment for Examination

Record of Examination

SGS and library review and approval

Attach (if applicable) completed [Program Curriculum](#) and [Degree Map](#) to this request by clicking on the Files  icon located on the right-hand side of the screen.

SUBMIT AND APPROVE THE PROPOSAL

Click on the SAVE ALL CHANGES button below.

Scroll to the top left and click on the LAUNCH  icon to launch your proposal.

ITEM FOR ACTION

RE: Report of Institutional Discretionary Funds for 2023-2024 (Actual), 2024-2025 (Estimate), and 2025-2026 (Estimate) and Institutional Discretionary Funds Supplemental Report of Budget Variances for the Fiscal Year Ended 30 June 2024

The Report of Institutional Discretionary Funds and Institutional Discretionary Funds Supplemental Report of Budget Variances are submitted to the Board of Trustees for consideration. The reports have received the appropriate administrative review and approval.

EXECUTIVE SUMMARY

Institutional discretionary funds are funds available for expenditure or transfer at the direction of the President of the University, generated from one or both of the following sources:

- A. Investment Income – Earnings resulting from the investment of cash balances in the Education and General Current Funds, and earnings resulting from the investment of other funds.
- B. Unrestricted Gifts and Grants – Gift and grant funds which are not restricted by the source to specific purposes, and are deposited in the Education and General Current Fund for expenditure or transfer.

Utah System of Higher Education Policy R548 requires that a three-year report of discretionary funds be submitted as part of the annual appropriated operating budget process. The report includes the actual expenditures of discretionary funds for the most recent fiscal year (2023-2024), estimates for the current fiscal year (2024-2025), and preliminary estimates of receipts and uses of funds for the request year (2025-2026).

The Supplemental Report of Budget Variances includes the actual sources of funds available; and the expenditures/transfers of these discretionary funds for the most recent fiscal year (2023-2024), the original budget for the year, and the actual variance from the budget.

RECOMMENDATION

The President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Report of Institutional Discretionary Funds and the Institutional Discretionary Funds Supplemental Report of Budget Variances for the Fiscal Year Ended 30 June 2024.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, Utah System of Higher Education Policy R548 requires an annual Report of Institutional Discretionary Funds; and

WHEREAS, Utah State University is required to submit the Report of Institutional Discretionary Funds to the Utah State University Board of Trustees for approval; and

WHEREAS, The Vice President for Finance and Administrative Services has reviewed the Report of Institutional Discretionary Funds and the Institutional Discretionary Funds Supplemental Report of Budget Variances for the Fiscal Year Ended 30 June 2024 and recommends approval to the Board of Trustees; and

WHEREAS, The President of Utah State University has reviewed the Report of Institutional Discretionary Funds and the Institutional Discretionary Funds Supplemental Report of Budget Variances for the Fiscal Year Ended 30 June 2024 and recommends approval to the Board of Trustees;

NOW, THEREFORE, BE IT RESOLVED, That the Utah State University Board of Trustees hereby approves the Report of Institutional Discretionary Funds and the Institutional Discretionary Funds Supplemental Report of Budget Variances for the Fiscal Year Ended 30 June 2024 as presented.

=====

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES:

Date

Date: 10/16/24
Initials: WK/WP



REPORT OF INSTITUTIONAL DISCRETIONARY FUNDS

	2023-24 Actual (1) \$	2024-25 Estimate (2) \$	2025-26 Estimate (3) \$
I SOURCES OF INSTITUTIONAL DISCRETIONARY FUNDS			
A. Carry forward	\$ 1,265,501	\$ 9,998,864	2,837,864
B. Current Funds Interest	20,462,847	18,000,000	16,000,000
C. Unrestricted Gifts and Grants	100,962	120,000	150,000
D. Total Amount Available	<u>21,829,310</u>	<u>28,118,864</u>	<u>18,987,864</u>
II. EXPENDITURES & TRANSFERS BY CATEGORY AND PROJECT			
A. Academic Program Enrichment (Student Success Completion)		1,000,000	1,000,000
B. Cultural Enrichment	20,000		
C. Scholarships, Fellowships and Student Aid	8,867,420	10,000,000	10,500,000
D. Faculty Development and Recognition			
E. Campus Development			
F. Seed Money for Program Grants and Contracts			
G. Fund Raising and Institutional Development			
H. Equipment Acquisitions			
I. Supplemental Library Support			
J. Other E&G Current Operating Support	15,605	25,000	30,000
K. Transfers To/From Other Funds			
1. Plant Funds (Spectrum Upgrades)		2,000,000	
2. Support of Athletic Department	2,922,363	4,250,000	4,250,000
2. Support of Athletic Department (PAC 12 Transition)		8,000,000	2,000,000
3. Quasi-Endowment Funds			
4. Other Funds	5,058	6,000	7,500
L. TOTAL EXPENDITURES & TRANSFERS	<u>11,830,446</u>	<u>25,281,000</u>	<u>17,787,500</u>
III. CARRY FORWARD			
	<u>\$ 9,998,864</u>	<u>\$ 2,837,864</u>	<u>\$ 1,200,364</u>

Utah State University
Institutional Discretionary Funds
Supplemental Report of Budget Variances
For The Fiscal Year Ended June 30, 2024

	2023-24 Actual	2023-24 Budgeted	Variance Fav/(Unfav)
I. Sources of institutional discretionary funds			
A. Carryforward	\$ 1,265,501	\$ 1,265,501	-
B. Current funds interest	20,462,847	15,000,000	5,462,847
C. Unrestricted gifts and grants	100,962	100,000	962
D. Total available	<u>21,829,310</u>	<u>16,365,501</u>	<u>5,463,809</u>
II. Expenditures by category and project			
A. Academic program enrichment		2,500	2,500
B. Cultural enrichment	20,000		(20,000)
C. Scholarships, fellowships & student aid	8,867,420	12,000,000	3,132,580
D. Faculty development and recognition		5,000	5,000
E. Campus development		100,000	100,000
F. Seed money for program grants and contracts			-
G. Fund raising and institutional development			-
H. Equipment acquisitions			-
I. Supplemental library support			-
J. Other E&G current operating support	15,605	30,000	14,395
K. Transfers to/from other funds			-
(1) Plant funds			-
(2) Support of Athletic department	2,922,363	3,150,000	227,637
(3) Net transfers to quasi-endowment funds			
(4) Other funds	5,058	13,000	7,942
L. Total expenditures/transfers	<u>11,830,446</u>	<u>15,300,500</u>	<u>3,470,054</u>
III. Carryforward	<u>\$ 9,998,864</u>	<u>\$ 1,065,001</u>	<u>\$ 8,933,863</u>

ITEM FOR ACTION

RE: Report of Investments for May 2024

The Report of Investments for May 2024 is submitted to the Board of Trustees for consideration. It has received the appropriate administrative review and approval.

EXECUTIVE SUMMARY

This set of investment reports presents investment activity for May 2024 and comparative year-to-date totals for FY 2023-2024 and FY 2022-2023.

CASH MANAGEMENT INVESTMENT POOL

The average daily fair value invested during May 2024 was \$621,423,192, down \$11,365,549 from April 2024. Total investment gain was \$5,087,834, up \$7,481,935 over April 2024, reflecting the decrease in the amount available for investing and an increase in total investment return. The annualized total investment return was 9.82%, up 14.36% over April 2024.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$618,943,693, up \$36,655,322 (6.30%) over FY 2022-2023. Total interest income for FY 2023-2024 amounted to \$23,541,590, up \$7,781,771 (49.38%) over FY 2022-2023, reflecting an increase in the amount available for investing and an increase in interest rates.

The total amount invested at 31 May 2024 was \$579,189,732, up \$53,096,984 (10.09%) over 31 May 2023.

ENDOWMENT POOL

The average daily fair value invested during May 2024 was \$301,624,175, up \$480,005 over April 2024. Interest and dividend income of \$192,087 plus net realized gains of \$194,525 totaled \$386,612 in realized income for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$280,824,872, up \$18,662,639 (7.12%) over FY 2022-2023. Total realized income for FY 2023-2024 was \$11,275,592, up \$4,246,456 (60.41%) over FY 2022-2023. This increase resulted from \$665,691 more in interest and dividends and \$3,580,765 more in net realized gains during FY 2023-2024.

The total amount invested at 31 May 2024 was \$305,030,070, up \$34,635,278 (12.81%) over 31 May 2023.

OTHER INVESTMENTS

The average daily fair value invested during May 2024 was \$298,418,677, up \$817,616 over April 2024. Interest and dividend income of \$1,071,191 plus net realized gains of \$19,278 totaled \$1,090,469 in realized income for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$286,123,664, up \$26,677,306 (10.28%) over FY 2022-2023. Total realized income for FY 2023-2024 was \$11,533,321, up \$2,014,480 (21.16%) over FY 2022-2023. This increase resulted from \$2,558,265 more in interest and dividend income and \$543,785 less in net realized gains during FY 2023-2024.

The total amount invested at 31 May 2024 was \$301,802,671, up \$39,778,769 (15.18%) over 31 May 2023.

ENDOWMENT TRUSTS

The average daily fair value invested during May 2024 was \$6,729,546, up \$52,833 over April 2024. Interest and dividend income of \$28,653 plus net realized gains of \$35,544 totaled \$64,197 in realized gains for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$6,238,563, down \$10,677 (0.17%) from FY 2022-2023. Total realized income for FY 2023-2024 was \$600,346, up \$824,903 (367.35%) over FY 2022-2023. This increase resulted from \$14,006 more in interest and dividend income and \$810,897 more in net realized gains during FY 2023-2024.

The total amount invested at 31 May 2024 was \$6,888,674, up \$735,152 (11.95%) over 31 May 2023.

PLANT FUND TRUSTS

The average daily fair value invested during May 2024 was \$92,265,013, up \$1,673,071 over April 2024. Interest income totaled \$425,617 in realized income for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$96,796,188, up \$65,183,548 (206.19%) over FY 2022-2023. Total realized income for FY 2023-2024 was \$4,819,531, up \$3,824,237 (384.23%) over FY 2022-2023. This increase reflects the increased amount available for investing and an increase in the rate of return.

The total amount invested at 31 May 2024 was \$94,104,437, up \$65,472,172 (228.67%) over 31 May 2023.

SUMMARY OF INVESTMENT TRANSACTIONS

The University's average daily fair value invested for the month of May was \$1,206,652,211. Purchases totaled \$20,276,641 and sales totaled \$25,266,628. From this activity the University realized net gains of \$249,347 and earnings of \$3,555,392.

RECOMMENDATION

The President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Report of Investments for May 2024.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, The attached Report of Investments containing authorized transactions, documentation, and supporting papers has been filed for review by the Board of Trustees pertaining to the investment activities; and

WHEREAS, The investment transactions listed on the attached Report of Investments have been approved by the USU Controller's Office; and

WHEREAS, The investment activities listed on the attached Report of Investments are in accordance with the Utah State Money Management Act, the rules of the Utah State Money Management Council, the Utah State Uniform Prudent Management of Institutional Funds Act, and the laws and rules of Utah State University and the State of Utah; and

WHEREAS, The Chief Financial Officer for Utah State University, David T. Cowley, Vice President for Finance and Administrative Services, has certified to the best of his knowledge and belief all investment transactions listed on the attached Report of Investments were made in accordance with the guidelines, rules, and laws; and

WHEREAS, Vice President Cowley requests approval of the attached Report of Investments for the period 1 May 2024 to 31 May 2024 and comparative year-to-date totals for the periods 1 July 2023 to 31 May 2024 and 1 July 2022 to 31 May 2023; and

WHEREAS, The President of Utah State University has reviewed the attached report and recommends its approval by the Utah State University Board of Trustees; and

WHEREAS, The USU Board of Trustees has reviewed and given due consideration, review, and authorization of the investment transactions listed on the attached Report of Investments for the period 1 May 2024 to 31 May 2024 and comparative year-to-date totals for the periods 1 July 2023 to 31 May 2024 and 1 July 2022 to 31 May 2023;

NOW, THEREFORE, BE IT RESOLVED, That the USU Board of Trustees hereby approves the attached Report of Investments as presented and ratifies the transactions listed on said Report of Investments for May 2024.

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES:

Date



UTAH STATE UNIVERSITY
REPORT OF INVESTMENTS
MAY 2024

The following schedules (A through E-2) provide a report of the University's Investments. To the best of my knowledge, Utah State University is in compliance with the Utah State Money Management Act and the rules of the Utah State Money Management Council and the Utah State Uniform Prudent Management of Institutional Funds Act.

A handwritten signature in black ink, appearing to read 'Wendy Keller', written over a horizontal line.

Wendy Keller
Interim Controller

A handwritten date '10-16-2024' in black ink, written over a horizontal line.

Date

A handwritten signature in blue ink, appearing to read 'David T. Cowley', written over a horizontal line.

David T. Cowley
Vice President
for Finance and Administrative Services

A handwritten date '10/16/24' in blue ink, written over a horizontal line.

Date

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule A-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest Income	Less Service Charges	Net Interest Income
Jul 2023	\$520,975,134	\$11,654,830	\$2,735,924	(\$2,233,655)	\$527,660,385	\$565,097,854	\$1,654,830	\$14,975	\$1,639,855
Aug 2023	527,660,385	45,104,528	7,941,804	342,484	565,165,593	580,826,585	1,935,156	(15)	1,935,171
Sep 2023	565,165,593	30,123,074	9,108,764	(4,706,359)	581,473,544	623,109,583	2,105,327	(40)	2,105,367
Oct 2023	581,473,544	20,126,700	19,290,533	(1,093,402)	581,216,309	636,614,343	2,111,913	0	2,111,913
Nov 2023	581,216,309	2,097,932	33,207,406	7,736,730	557,843,565	615,809,352	2,097,932	0	2,097,932
Dec 2023	557,843,565	36,710,649	20,112,043	7,159,026	581,601,197	605,488,109	2,147,099	(25)	2,147,124
Jan 2024	581,601,197	92,695,707	63,848,260	699,861	611,148,505	630,722,693	2,217,934	(140)	2,218,074
Feb 2024	611,148,505	27,745,762	16,387,229	(3,114,530)	619,392,508	654,687,818	2,403,762	(25)	2,403,787
Mar 2024	619,392,508	2,340,565	16,796,208	986,805	605,923,670	641,812,349	2,340,565	0	2,340,565
Apr 2024	605,923,670	2,294,425	14,422,163	(4,688,526)	589,107,406	632,788,741	2,294,425	1,050	2,293,375
May 2024	589,107,406	2,232,647	15,005,508	2,855,187	579,189,732	621,423,192	2,232,647	(175)	2,232,822
Jun 2024									
Comparative Totals:									
Year-to-date									
FY 2023-24	\$520,975,134	\$273,126,819	\$218,855,842	\$3,943,621	\$579,189,732	\$618,943,693	\$23,541,590	\$15,605	\$23,525,985
FY 2022-23	492,148,729	222,826,070	177,045,852	(11,836,199)	526,092,748	582,288,371	15,759,819	8,762	15,751,057
Amt Change					53,096,984	36,655,322	7,781,771	6,843	7,774,928
% Change					10.09%	6.30%	49.38%	78.10%	49.36%

Note: The Cash Management Investment Pool includes cash of all funds over estimated daily operating requirements.

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL
SUMMARY OF INVESTMENT TRANSACTIONS AND PERFORMANCE
For the Month of May 2024

Schedule A-2

	Purchases	Sales		Earnings	Change in Fair Value	Total Investment Income	Average Daily Fair Value	Annualized Total Investment Return
		Cost	Receipts					
Miscellaneous				\$82,384		\$82,384		0.00%
Money Market Account				167,043		167,043	\$36,200,000	5.54%
Utah Public Treasurers' Investment Fund				23,543		23,543	5,100,000	5.54%
Commercial Paper and Corporate Notes	\$129,658	\$13,600,000	\$13,600,000	1,391,220	\$76,940	1,468,160	261,757,278	6.73%
Obligations of U. S. Government	7,539			563,999	2,753,393	3,317,392	315,365,914	12.62%
Municipal Bonds				4,458	24,854	29,312	3,000,000	11.72%
Receivable	2,095,450	1,405,508	1,405,508					0.00%
Total	\$2,232,647	\$15,005,508	\$15,005,508	\$2,232,647	\$2,855,187	\$5,087,834	\$621,423,192	9.82%

UTAH STATE UNIVERSITY
SUMMARY OF CASH MANAGEMENT INVESTMENT POOL TRANSACTIONS
For the Month of May 2024

Schedule A-3

	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Cash Management Investment Pool							
Miscellaneous							\$82,384
Money Market Account							167,043
Utah Public Treasurers' Investment Fund							23,543
Corporate Bonds and Floaters		\$129,658		\$13,600,000	\$13,600,000	\$0	1,391,220
Obligations of U. S. Government		7,539					563,999
Municipal Bonds							4,458
Accounts Receivable		2,095,450		1,405,508	1,405,508	0	
Total Cash Management Investment Pool		<u>\$2,232,647</u>		<u>\$15,005,508</u>	<u>\$15,005,508</u>	<u>\$0</u>	<u>\$2,232,647</u>

UTAH STATE UNIVERSITY
ENDOWMENT POOL
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule B-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income	Less Expenses	Net Realized Income/(Loss)
*Jul 2023	\$263,818,324	\$8,092,294	\$7,921,121	\$5,317,251	\$269,306,748	\$266,562,536	\$170,178	\$1,128,235	\$1,298,413	(\$994)	\$1,299,407
Aug 2023	269,306,748	3,627,362	2,725,956	(3,279,068)	266,929,086	268,117,917	110,229	635,758	745,987	\$3,320	742,667
Sep 2023	266,929,086	12,577,836	11,547,074	(4,831,194)	263,128,654	265,028,870	385,316	898,399	1,283,715	41,888	1,241,827
Oct 2023	263,128,654	14,035,033	13,724,961	(4,396,719)	259,042,007	261,085,331	213,723	2,090,621	2,304,344	12,381	2,291,963
Nov 2023	259,042,007	4,978,657	2,586,165	11,118,928	272,553,427	265,797,717	217,624	17,551	235,175	2,171	233,004
Dec 2023	272,553,427	6,869,477	3,452,036	8,783,623	284,754,491	278,653,959	1,237,174	523,269	1,760,443	38,446	1,721,997
Jan 2024	284,754,491	14,048,633	10,076,566	393,686	289,120,244	286,937,368	299,723	1,169,322	1,469,045	19,044	1,450,001
Feb 2024	289,120,244	12,966,386	11,096,729	6,536,496	297,526,397	293,323,321	215,933	(40,213)	175,720	(13,103)	188,823
Mar 2024	297,526,397	3,130,684	2,623,611	6,036,590	304,070,060	300,798,229	416,332	217,651	633,983	21,811	612,172
Apr 2024	304,070,060	7,905,184	6,873,995	(6,882,970)	298,218,279	301,144,170	284,381	697,774	982,155	33,769	948,386
May 2024	298,218,279	4,029,922	3,409,905	6,191,774	305,030,070	301,624,175	192,087	194,525	386,612	67,363	319,249
Jun 2024											
Comparative Totals:											
Year-to-date											
FY 2023-24	\$263,818,324	\$92,261,468	\$76,038,119	\$24,988,397	\$305,030,070	\$280,824,872	\$3,742,700	\$7,532,892	\$11,275,592	\$226,096	\$11,049,496
FY 2022-23	253,569,010	69,735,947	58,580,831	5,670,666	270,394,792	262,162,233	3,077,009	3,952,127	7,029,136	252,854	6,776,282
Amt Change					34,635,278	18,662,639	665,691	3,580,765	4,246,456	(26,758)	4,273,214
% Change					12.81%	7.12%	21.63%	90.60%	60.41%	-10.58%	63.06%

Note: The Endowment Pool includes endowment funds designated for long-term investment. Included in this pool are endowment funds invested in the University's Cash Management Investment Pool (CMIP) consisting of \$13,013,558 principal beginning balance, a \$13,489,090 ending balance, and a \$13,530,479 average daily balance for the current month. Current month interest and dividends from the CMIP were \$47,603 bringing the total to \$276,952 year-to-date. These amounts have also been reported in Schedules A-1 and A-2.

*The July beginning fair value has been adjusted to reflect the amount distributed to expendable accounts at fiscal year end.

UTAH STATE UNIVERSITY
SUMMARY OF ENDOWMENT POOL TRANSACTIONS
For the Month of May 2024

Schedule B-2
Page 1 of 1

	Purchases		Sales				
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	Earnings
Endowment Pool Transactions							
Cash Management Investment Pool							
Utah State University		\$495,293		\$67,363	\$67,363	\$0	
CMIP Interest		47,603					\$47,603
Fixed Income funds							
Longfellow		735,312		654,493	653,885	(608)	
Paydenfunds - Emerging Markets Bond Fund	1,144.427	11,788					11,788
Vanguard Long Term Treasury Institutional fund VLGIX	673.520	15,909					16,740
Wellington - CTF Opportunistic Emerging Markets	1,755.821	15,012					15,012
Alternatives							
Aether Investment Partners, LLC							
Aether Real Assets Seed Partners		298,067					73,284
Centerbridge							
Centerbridge Partners Real Estate Fund II, LP		109,453					
Commonfund							
CNR VIII				7,019	14,676	7,657	1,276
CNR IX				14,912	18,143	3,231	6,710
Constitution Capital							
Ironsides Partnership Fund III				0	77,222	77,222	(3,861)
Global Infrastructure Partners							
Global Infrastructure Partners III-A/B, L.P.				239,258	346,281	107,023	(52,080)
Silver Point Capital							
Silver Point Specialty Credit Fund III				71,949	71,949	0	3,521
Money Market Funds							
Goldman Sachs Bank Deposit		458					459
US Bank - Endowment Pool First Am Treas Ob Fd Cl Z		1,377,995		224,783	224,783	0	
US Bank - Longfellow First Am Treas Ob Fund Cl Z		333,019		1,828,898	1,828,898	0	
Cash							
Longfellow							
US Bank Cash		501,638		10,923	10,923	0	
Accruals / Payable							
Endowment Pool							
Goldman Sachs							
US Bank - Accruals		22,531		19,520	19,520	0	5,791
Longfellow							
US Bank Receivable - Interest Accrual		65,844		76,262	76,262	0	65,844
Total Endowment Pool Transactions		\$4,029,922		\$3,215,380	\$3,409,905	\$194,525	\$192,087

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule C1A

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income
Jul 2023	\$244,285,796	\$1,254,431	\$348,119	(\$115,300)	\$245,076,808	\$244,681,302	\$913,185	\$2	\$913,187
Aug 2023	245,076,808	11,981,833	10,538,360	(1,821,697)	244,698,584	244,887,696	975,226	0	975,226
Sep 2023	244,698,584	6,121,852	10,732,921	(4,417,206)	235,670,309	240,184,447	1,022,084	149,089	1,171,173
Oct 2023	235,670,309	9,006,964	927,537	(4,088,749)	239,660,987	237,665,648	995,463	(189)	995,274
Nov 2023	239,660,987	7,745,806	2,301,436	7,353,618	252,458,975	246,059,981	996,066	0	996,066
Dec 2023	252,458,975	11,304,058	9,438,061	6,119,778	260,444,750	256,451,863	1,103,144	0	1,103,144
Jan 2024	260,444,750	7,811,516	2,419,302	25,179	265,862,143	263,153,447	1,020,187	52	1,020,239
Feb 2024	265,862,143	2,565,692	6,825,965	(1,671,225)	259,930,645	262,896,394	1,030,243	0	1,030,243
Mar 2024	259,930,645	3,684,641	476,927	721,292	263,859,651	261,895,148	1,086,192	0	1,086,192
Apr 2024	263,859,651	2,159,222	977,125	(4,999,909)	260,041,839	261,950,745	1,074,090	(64)	1,074,026
May 2024	260,041,839	8,436,704	4,388,682	1,932,490	266,022,351	263,032,095	1,068,861	(437,066)	631,795
Jun 2024									

Comparative Totals:

Year-to-date									
FY 2023-24	\$244,285,796	\$72,072,719	\$49,374,435	(\$961,729)	\$266,022,351	\$252,987,160	\$11,284,741	(\$288,176)	\$10,996,565
FY 2022-23	232,326,049	97,223,728	92,742,552	(4,583,333)	232,223,892	230,275,630	8,729,035	79,258	8,808,293
Amt Change					33,798,459	22,711,530	2,555,706	(367,434)	2,188,272
% Change					14.55%	9.86%	29.28%	-463.59%	24.84%

Note: The Defensive Return Pool is comprised of quasi-endowment funds designated for long-term investment. Included in this pool are quasi-endowment funds invested in the University's Cash Management Investment Pool (CMIP) consisting of \$96,972,598 principal beginning balance, a \$100,298,958 ending balance, and a \$100,277,913 average daily balance for the current month. Current month interest and dividends from the CMIP were \$347,200 bringing the total to \$3,610,247 year-to-date. These amounts have also been reported in Schedules A-1 and A-2.

*The July beginning fair value has been adjusted to reflect the amount distributed to expendable accounts at fiscal year end.

UTAH STATE UNIVERSITY
SUMMARY OF DEFENSIVE RETURN POOL TRANSACTIONS
For the Month of May 2024

Schedule C1C
Page 1 of 1

	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Defensive Return Pool							
CMIP		\$3,136,800		\$157,640	\$157,640	\$0	
CMIP Earnings		347,200					\$347,200
Utah Public Treasurers' Investment Fund		109,350					109,350
Fixed Income							
US Bank							
Corporate Issues							
Harley Davidson Inc			11,000.000	1,027,202	884,466	(142,736)	
Zions Bancorp			10,000.000	1,000,000	912,250	(87,750)	
Zions Bancorp			10,000.000	1,000,000	951,250	(48,750)	
Foreign Issues							
Electricite De France			10,000.000	1,088,330	930,500	(157,830)	
Investment Funds							
Wellington Core Bond Fund	4,044.198	42,141					42,141
Alternatives							
Young Automotive Group							
Stokes Stevenson Young Automotive Net Lease Fund							1,003
Money Market / Cash							
US Bank - First Am Treasury Ob Fund Class Z		2,417,080					
US Bank - Cash		1,814,966					
Receivable / In Transit / Unsettled Purchases							
US Bank - Receivable		569,167		552,576	552,576	0	569,167
Total Other Investments		<u>\$8,436,704</u>		<u>\$4,825,748</u>	<u>\$4,388,682</u>	<u>(\$437,066)</u>	<u>\$1,068,861</u>

UTAH STATE UNIVERSITY
OTHER INVESTMENTS
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule C2A

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income
Jul 2023	\$31,317,444	\$81,847	\$91,020	\$874,307	\$32,182,578	\$31,750,011	\$2,002	\$5,159	\$7,161
Aug 2023	32,182,578	71,245	75,955	(575,269)	31,602,599	31,892,589	2,115	5,150	7,265
Sep 2023	31,602,599	4,739,167	4,016,947	(1,240,956)	31,083,863	31,343,231	5,924	(8,005)	(2,081)
Oct 2023	31,083,863	26,030	620,378	(696,250)	29,793,265	30,438,564	2,113	(25)	2,088
Nov 2023	29,793,265	186,350	175,615	2,317,716	32,121,716	30,957,491	2,043	(1,127)	916
Dec 2023	32,121,716	2,982,503	2,834,900	1,439,929	33,709,248	32,915,482	13,324	4,482	17,806
Jan 2024	33,709,248	127,871	370,590	402,227	33,868,756	33,789,002	2,796	14,964	17,760
Feb 2024	33,868,756	62,683	53,014	1,411,576	35,290,001	34,579,379	1,969	(1,881)	88
Mar 2024	35,290,001	117,883	143,361	1,043,265	36,307,788	35,798,895	5,528	18,264	23,792
Apr 2024	36,307,788	49,403	52,363	(1,311,984)	34,992,844	35,650,316	2,152	1,135	3,287
May 2024	34,992,844	271,002	741,221	1,257,695	35,780,320	35,386,582	2,330	456,344	458,674
Jun 2024									
Comparative Totals:									
Year-to-date									
FY 2023-24	\$31,317,444	\$8,715,984	\$9,175,364	\$4,922,256	\$35,780,320	\$33,136,504	\$42,296	\$494,460	\$536,756
FY 2022-23	28,417,079	3,732,490	4,877,953	2,528,394	29,800,010	29,170,728	39,737	670,811	710,548
Amt Change					5,980,310	3,965,776	2,559	(176,351)	(173,792)
% Change					20.07%	13.60%	6.44%	-26.29%	-24.46%

UTAH STATE UNIVERSITY
SUMMARY OF OTHER INVESTMENT TRANSACTIONS
For the Month of May 2024

Schedule C2C
Page 1 of 1

	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Other Investments							
Common and Preferred Stock							
Cetera Advisor Networks LLC							
Bluerock Total Income Real Estate Fund Class A			372.312	\$11,940	\$10,320	(\$1,620)	
Edward Jones							
JP Morgan Growth Advantage	204.195	\$7,155	204.195	7,155	7,155	0	
Morgan Stanley							
Allspring Disciplined US Core A	1,250.000	26,825					
Amphenol Corporation	49.000	6,479	49.000	6,479	6,385	(94)	
AppFolio Inc	33.000	7,658	33.000	7,658	7,522	(136)	
Deckers Outdoor Corporation	3.000	3,223	3.000	3,223	3,138	(85)	
Dick's Sporting Goods	25.000	5,523	25.000	5,523	5,546	23	
Evercore Inc	44.000	8,753	44.000	8,753	8,650	(103)	
JP Morgan Chase & Co	25.000	4,949	25.000	4,949	4,822	(127)	
NVIDIA Corp	9.000	10,188	9.000	10,188	10,141	(47)	
Qualcomm Inc	14.000	2,922	14.000	2,922	2,852	(70)	
Utah Public Treasurers'							
Investment Fund		758					\$758
ETF / Bonds / Mutual Funds							
Charles Schwab 7788-2481		1,026					1,112
Charles Schwab 9025-2459		116,638		111,542	112,034	492	447
Commonfund							
Multi-Strategy Equity			717.093	41,889	500,000	458,111	
Money Market / Cash							
Cetera - Money Market		10,321					1
Charles Schwab - Money Market 7788-2481		87					2
Charles Schwab - TD Bank USA NA Money Market 9025-2459		456		6,432	6,432	0	7
Schwab US Treasury Money Investor		1,830					3
Edward Jones		7,155		7,170	7,170	0	
Morgan Stanley		49,056		49,054	49,054	0	
Total Other Investments		<u>\$271,002</u>		<u>\$284,877</u>	<u>\$741,221</u>	<u>\$456,344</u>	<u>\$2,330</u>

UTAH STATE UNIVERSITY
ENDOWMENT TRUSTS
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule D-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income/(Loss)	Less Expenses	Net Realized Income/(Loss)
Jul 2023	\$6,219,981	\$598,201	\$933,200	\$209,655	\$6,094,637	\$6,157,309	\$12,271	(\$12,926)	(\$655)	\$651	(\$1,306)
Aug 2023	6,094,637	447,543	423,355	(174,594)	5,944,231	6,019,434	24,188	(29,778)	(5,590)	0	(5,590)
Sep 2023	5,944,231	771,884	745,545	(207,191)	5,763,379	5,853,805	26,482	30,493	56,975	143	56,832
Oct 2023	5,763,379	435,078	424,933	(158,848)	5,614,676	5,689,028	10,849	36,643	47,492	776	46,716
Nov 2023	5,614,676	573,554	548,239	395,166	6,035,157	5,824,917	25,315	(28,735)	(3,420)	0	(3,420)
Dec 2023	6,035,157	452,789	422,557	233,441	6,298,830	6,166,994	30,270	(16,582)	13,688	33	13,655
Jan 2024	6,298,830	767,632	761,342	106,227	6,411,347	6,355,089	6,356	8,607	14,963	66	14,897
Feb 2024	6,411,347	1,224,010	1,201,440	120,261	6,554,178	6,482,763	22,570	266,434	289,004	0	289,004
Mar 2024	6,554,178	845,805	809,620	192,644	6,783,007	6,668,593	36,218	77,209	113,427	33	113,394
Apr 2024	6,783,007	719,964	707,687	(224,866)	6,570,418	6,676,713	12,302	(2,037)	10,265	26	10,239
May 2024	6,570,418	1,015,651	986,997	289,602	6,888,674	6,729,546	28,653	35,544	64,197	0	64,197
Jun 2024											
Comparative Totals:											
Year-to-date											
FY 2023-24	\$6,219,981	\$7,852,111	\$7,964,915	\$781,497	\$6,888,674	\$6,238,563	\$235,474	\$364,872	\$600,346	\$1,728	\$598,618
FY 2022-23	6,174,670	6,716,878	6,521,131	(216,895)	6,153,522	6,249,240	221,468	(446,025)	(224,557)	16,223	(240,780)
Amt Change					735,152	(10,677)	14,006	810,897	824,903	(14,495)	839,398
% Change					11.95%	-0.17%	6.32%	181.81%	367.35%	-89.35%	348.62%

Note: Endowment Trusts include externally managed endowment trusts.

UTAH STATE UNIVERSITY
SUMMARY OF ENDOWMENT TRUST INVESTMENT TRANSACTIONS
For the Month of May 2024

Schedule D-2
Page 1 of 1

	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
<u>Endowment Trusts</u>							
Common and Preferred Stock							
American Elec Tower Co Inc			1,375.000	\$123,608	\$124,338	\$730	
Diamondback Energy Inc			519.000	80,753	101,033	20,280	
Johnson & Johnson	904.000	\$138,789					
Kellanova			2,276.000	122,705	140,315	17,610	
Organon & Co			5,914.000	128,259	125,183	(3,076)	
iShares Preferred & Income	11,145.000	356,223					
Funds held at Morgan Stanley - Dividends							\$28,256
Money Market & Cash Funds							
Morgan Stanley Bank N.A. #		520,639		495,012	495,012	0	397
Morgan Stanley Cash				1,116	1,116	0	
Total Endowment Trusts		<u>\$1,015,651</u>		<u>\$951,453</u>	<u>\$986,997</u>	<u>\$35,544</u>	<u>\$28,653</u>

UTAH STATE UNIVERSITY
PLANT FUND TRUSTS
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule E-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest Income	Realized Gain or (Loss)	Total Realized Income	Less Expenses	Net Realized Income/(Loss)
Jul 2023	\$92,986,097	\$33,139,886	\$26,092,248	\$0	\$100,033,735	\$99,767,440	\$432,189		\$432,189		\$432,189
Aug 2023	100,033,735	435,420	237,995	0	100,231,160	100,231,160	451,297		451,297		451,297
Sep 2023	100,231,160	2,751,431	2,238,781	0	100,743,810	100,261,291	447,531		447,531		447,531
Oct 2023	100,743,810	469,566	3,194,017	0	98,019,359	98,121,681	452,735		452,735		452,735
Nov 2023	98,019,359	9,456,262	2,216,551	0	105,259,070	101,382,828	457,257		457,257		457,257
Dec 2023	105,259,070	457,257	9,787,167	0	95,929,160	96,082,031	446,871		446,871		446,871
Jan 2024	95,929,160	446,871	846,837	0	95,529,194	95,752,997	445,795		445,795		445,795
Feb 2024	95,529,194	445,795	3,886,944	0	92,088,045	93,661,567	407,857		407,857		407,857
Mar 2024	92,088,045	8,231,172	213,308	0	100,105,909	96,640,123	446,815		446,815		446,815
Apr 2024	100,105,909	447,109	10,004,981	0	90,548,037	90,591,942	405,567		405,567		405,567
May 2024	90,548,037	4,290,715	734,315	0	94,104,437	92,265,013	425,617		425,617		425,617
Jun 2024											
Comparative Totals:											
Year-to-date											
FY 2023-24	\$92,986,097	\$60,571,484	\$59,453,144	\$0	\$94,104,437	\$96,796,188	\$4,819,531	\$0	\$4,819,531	\$0	\$4,819,531
FY 2022-23	34,488,447	36,497,579	42,353,761	0	28,632,265	31,612,640	995,294	0	995,294	0	995,294
Amt Change					65,472,172	65,183,549	3,824,237	0	3,824,237	0	3,824,237
% Change					228.67%	206.19%	384.23%	0.00%	384.23%	0.00%	384.23%

Note: Plant Fund Trusts include all debt service reserve and construction fund accounts in compliance with bond issue covenants.

UTAH STATE UNIVERSITY
SUMMARY OF PLANT TRUST INVESTMENT TRANSACTIONS
For the Month of May 2024

Schedule E-2

	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Plant Trusts							
Utah Public Treasurers' Investment Fund		\$4,290,715		\$734,315	\$734,315	\$0	\$425,617
Total Plant Trusts		<u>\$4,290,715</u>		<u>\$734,315</u>	<u>\$734,315</u>	<u>\$0</u>	<u>\$425,617</u>

ITEM FOR ACTION

RE: Report of Investments for June 2024

The Report of Investments for June 2024 is submitted to the Board of Trustees for consideration. It has received the appropriate administrative review and approval.

EXECUTIVE SUMMARY

This set of investment reports presents investment activity for June 2024 and comparative year-to-date totals for FY 2023-2024 and FY 2022-2023; investment portfolios at 30 June 2024; and Summary of Total Investment Returns for the quarter ended 30 June 2024 and year-to date 01 July 2023 to 30 June 2024.

CASH MANAGEMENT INVESTMENT POOL

The average daily fair value invested during June 2024 was \$602,705,667, down \$18,717,525 from May 2024. Total investment gain was \$4,898,793, down \$189,041 from May 2024, reflecting the decrease in the amount available for investing and a decrease in total investment return. The annualized total investment return was 9.75%, down 0.07% from May 2024.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$617,590,524, up \$37,057,276 (6.38%) over FY 2022-2023. Total interest income for FY 2023-2024 amounted to \$25,703,729, up \$8,347,917 (48.10%) over FY 2022-2023, reflecting an increase in the amount available for investing and an increase in interest rates.

The total amount invested at 30 June 2024 was \$566,309,321, up \$45,334,187 (8.70%) over 30 June 2023. Unrealized losses at 30 June 2024 were \$37,580,994.

ENDOWMENT POOL

The average daily fair value invested during June 2024 was \$306,319,496, up \$4,695,321 over May 2024. Interest and dividend income of \$556,689 plus net realized gains of \$348,428 totaled \$905,117 in realized income for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$282,949,424, up \$19,599,236 (7.44%) over FY 2022-2023. Total realized income for FY 2023-2024 was \$12,180,709, up \$4,818,219 (65.44%) over FY 2022-2023. This increase resulted from \$653,645 more in interest and dividends and \$4,164,574 more in net realized gains during FY 2023-2024.

The total amount invested at 30 June 2024 was \$307,608,921, up \$25,168,339 (8.91%) over 30 June 2023. Unrealized gains at 30 June 2024 were \$67,607,361.

OTHER INVESTMENTS

The average daily fair value invested during June 2024 was \$305,512,985, up \$7,094,308 over May 2024. Interest and dividend income of \$1,127,246 plus net realized gains of \$143 totaled \$1,127,389 in realized income for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$287,739,441, up \$27,932,352 (10.75%) over FY 2022-2023. Total realized income for FY 2023-2024 was \$12,660,710, up \$2,440,190 (23.88%) over FY 2022-2023. This increase resulted from \$2,790,538 more in interest and dividend income and \$350,348 less in net realized gains during FY 2023-2024.

The total amount invested at 30 June 2024 was \$309,223,297, up \$43,696,916 (16.46%) over 30 June 2023. Unrealized gains at 30 June 2024 were \$16,909,653.

ENDOWMENT TRUSTS

The average daily fair value invested during June 2024 was \$6,790,815, up \$61,269 over May 2024. Interest and dividend income of \$35,339 minus net realized losses of \$3,324 totaled \$32,015 in realized gains for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$6,284,584, up \$40,551 (0.65%) over FY 2022-2023. Total realized income for FY 2023-2024 was \$632,361, up \$708,162 (934.24%) over FY 2022-2023. This increase resulted from \$25,803 more in interest and dividend income and \$682,359 more in net realized gains during FY 2023-2024.

The total amount invested at 30 June 2024 was \$6,692,955, up \$472,974 (7.60%) over 30 June 2023. Unrealized gains at 30 June 2024 were \$426,817.

PLANT FUND TRUSTS

The average daily fair value invested during June 2024 was \$90,084,712, down \$2,180,301 from May 2024. Interest income totaled \$402,722 in realized income for the month.

Year-to-date numbers show that the average daily fair value invested for FY 2023-2024 was \$96,236,899, up \$63,503,902 (194.01%) over FY 2022-2023. Total realized income for FY 2023-2024 was \$5,222,253, up \$4,049,563 (345.32%) over FY 2022-2023. This increase reflects the increased amount available for investing and an increase in the rate of return.

The total amount invested at 30 June 2024 was \$90,057,156, down \$2,928,941 (3.15%) from 30 June 2023. Unrealized gains at 30 June 2024 were \$0.

SUMMARY OF INVESTMENT TRANSACTIONS

The University's average daily fair value invested for the month of June was \$1,190,379,531. Purchases totaled \$29,870,243 and sales totaled \$42,640,456. From this activity the University realized net gains of \$345,247 and earnings of \$3,868,065.

SUMMARY OF INVESTMENT RETURNS

The Endowment Pool composite benchmark is established based on the asset allocation of the Endowment Pool. At 30 June 2024 the Endowment Pool asset allocation was 5.83% cash, 17.71% fixed income, 76.46% equities. The benchmarks used include the Barclay's Capital U.S. Aggregate Bond Index, MSCI ACWIXUS, and the Russell 3000 index. The composite benchmark for the Endowment Pool at 30 June 2024 was 11.23%.

The Endowment Pool trailing 12-month rate of return was 11.64% at 30 June 2024. The Endowment Pool outperformed its benchmark by 41 bp year-to-date at 30 June 2024.

The Cash Management Investment Pool trailing 12-month rate of return was 5.40% at 30 June 2024. The benchmark for the Cash Management Investment Pool is the Utah Public Treasurers' Investment Fund (PTIF). The PTIF fiscal year-to-date annualized rate of return was 5.34% at 30 June 2024. The Cash Management Investment Pool outperformed its benchmark by 6 bp year-to-date at 30 June 2024.

ENDOWMENT FUNDS

The fair value of invested endowment funds at 30 June 2024 was \$638.1 million, up \$25.9 million (4.23%) over 31 March 2024. This increase includes the change in fair value and new gifts received through 30 June 2024.

Year-to-date, the endowment funds have increased \$77.6 million (13.84%) over 30 June 2023.

Endowment funds are currently invested 45.72% in the Endowment Pool, 20.75% in the Cash Management Investment Pool, 1.05% in the various Endowment Trusts and 32.48% in Other Investments.

RECOMMENDATION

The President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Report of Investments for June 2024.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, The attached Report of Investments containing authorized transactions, documentation, and supporting papers has been filed for review by the Board of Trustees pertaining to the investment activities; and

WHEREAS, The investment transactions listed on the attached Report of Investments have been approved by the USU Controller's Office; and

WHEREAS, The investment activities listed on the attached Report of Investments are in accordance with the Utah State Money Management Act, the rules of the Utah State Money Management Council, the Utah State Uniform Prudent Management of Institutional Funds Act, and the laws and rules of Utah State University and the State of Utah; and

WHEREAS, The Chief Financial Officer for Utah State University, David T. Cowley, Vice President for Finance and Administrative Services, has certified to the best of his knowledge and belief all investment transactions listed on the attached Report of Investments were made in accordance with the guidelines, rules, and laws; and

WHEREAS, Vice President Cowley requests approval of the attached Report of Investments for the period 1 June 2024 to 30 June 2024 and comparative year-to-date totals for the periods 1 July 2023 to 30 June 2024 and 1 July 2022 to 30 June 2023; and

WHEREAS, The President of Utah State University has reviewed the attached report and recommends its approval by the Utah State University Board of Trustees; and

WHEREAS, The USU Board of Trustees has reviewed and given due consideration, review, and authorization of the investment transactions listed on the attached Report of Investments for the period 1 June 2024 to 30 June 2024 and comparative year-to-date totals for the periods 1 July 2023 to 30 June 2024 and 1 July 2022 to 30 June 2023;

NOW, THEREFORE, BE IT RESOLVED, That the USU Board of Trustees hereby approves the attached Report of Investments as presented and ratifies the transactions listed on said Report of Investments for June 2024.

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES:

Date



UTAH STATE UNIVERSITY
REPORT OF INVESTMENTS
JUNE 2024

The following schedules (A through G) provide a report of the University's Investments. To the best of my knowledge, Utah State University is in compliance with the Utah State Money Management Act and the rules of the Utah State Money Management Council and the Utah State Uniform Prudent Management of Institutional Funds Act.



Wendy Keller
Interim Controller

10-16-2024
Date



David T. Cowley
Vice President
for Finance and Administrative Services

10/16/24
Date

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule A-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest Income	Less Service Charges	Net Interest Income
Jul 2023	\$520,975,134	\$11,654,830	\$2,735,924	(\$2,233,655)	\$527,660,385	\$565,097,854	\$1,654,830	\$14,975	\$1,639,855
Aug 2023	527,660,385	45,104,528	7,941,804	342,484	565,165,593	580,826,585	1,935,156	(15)	1,935,171
Sep 2023	565,165,593	30,123,074	9,108,764	(4,706,359)	581,473,544	623,109,583	2,105,327	(40)	2,105,367
Oct 2023	581,473,544	20,126,700	19,290,533	(1,093,402)	581,216,309	636,614,343	2,111,913	0	2,111,913
Nov 2023	581,216,309	2,097,932	33,207,406	7,736,730	557,843,565	615,809,352	2,097,932	0	2,097,932
Dec 2023	557,843,565	36,710,649	20,112,043	7,159,026	581,601,197	605,488,109	2,147,099	(25)	2,147,124
Jan 2024	581,601,197	92,695,707	63,848,260	699,861	611,148,505	630,722,693	2,217,934	(140)	2,218,074
Feb 2024	611,148,505	27,745,762	16,387,229	(3,114,530)	619,392,508	654,687,818	2,403,762	(25)	2,403,787
Mar 2024	619,392,508	2,340,565	16,796,208	986,805	605,923,670	641,812,349	2,340,565	0	2,340,565
Apr 2024	605,923,670	2,294,425	14,422,163	(4,688,526)	589,107,406	632,788,741	2,294,425	1,050	2,293,375
May 2024	589,107,406	2,232,647	15,005,508	2,855,187	579,189,732	621,423,192	2,232,647	(175)	2,232,822
Jun 2024	579,189,732	2,162,139	17,779,204	2,736,654	566,309,321	602,705,667	2,162,139	0	2,162,139
	<u>\$520,975,134</u>	<u>\$275,288,958</u>	<u>\$236,635,046</u>	<u>\$6,680,275</u>	<u>\$566,309,321</u>	<u>\$617,590,524</u>	<u>\$25,703,729</u>	<u>\$15,605</u>	<u>\$25,688,124</u>
Comparative Totals:									
Year-to-date									
FY 2023-24	\$520,975,134	\$275,288,958	\$236,635,046	\$6,680,275	\$566,309,321	\$617,590,524	\$25,703,729	\$15,605	\$25,688,124
FY 2022-23	492,148,729	224,422,063	183,758,772	(11,836,886)	520,975,134	580,533,248	17,355,812	23,737	17,332,075
Amt Change					45,334,187	37,057,276	8,347,917	(8,132)	8,356,049
% Change					8.70%	6.38%	48.10%	-34.26%	48.21%

Note: The Cash Management Investment Pool includes cash of all funds over estimated daily operating requirements.

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL PORTFOLIO
30 June 2024

Schedule A-1-A
Page 1 of 4

Description	Coupon Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Money Market						
Bank of Utah - Public Treasurer Acct	5.3700%			\$19,100,000	\$19,100,000	\$0
Cache Valley Bank	5.4814%			17,100,000	17,100,000	0
				<u>36,200,000</u>	<u>36,200,000</u>	<u>0</u>
Public Treasurers' Investment Fund						
Utah Public Treasurers' Investment Fund	5.3646%			5,100,000	5,100,000	0
				<u>5,100,000</u>	<u>5,100,000</u>	<u>0</u>
Commercial Paper and Corporate Notes						
Fixed Rate						
UBS	4.750%	01/08/24	08/09/24	8,259,413	8,289,809	30,396
Wells Fargo & Co	3.300%	10/05/23	09/09/24	6,835,920	6,967,146	131,226
Morgan Stanley	3.700%	09/07/23	10/23/24	7,025,996	7,142,174	116,178
Wells Fargo & Co	3.000%	12/13/23	02/19/25	6,801,760	6,886,480	84,720
Bank of Montreal	6.389%	01/11/24	06/07/25	7,000,000	7,036,075	36,075
Mitsubishi UFJ	4.788%	12/15/23	07/18/25	6,965,980	6,995,841	29,861
BNP Paribas	2.819%	12/22/23	11/19/25	6,835,710	6,912,869	77,159
American Express	6.693%	01/09/24	10/30/26	6,160,000	6,224,744	64,744
Floater Rate						
Banco Santander	5.7420%	01/12/23	06/30/24	11,737,800	12,000,000	262,200
Commonwealth Bank of Australia	2.8170%	08/21/23	07/30/24	4,859,600	4,995,000	135,400
GA Global Funding Trust	5.8240%	07/14/22	09/13/24	5,833,974	6,002,096	168,122
Athene Global	6.0640%	08/19/22	01/07/25	3,890,560	4,004,614	114,054
BPCE	5.9170%	01/14/22	01/14/25	5,000,000	5,005,354	5,354
Royal Bank of Canada	5.4150%	05/08/23	03/17/25	4,465,000	4,457,325	(7,675)
GA Global Funding Trust	6.7070%	07/14/22	04/11/25	6,216,606	6,352,730	136,124
Barclays Bank	6.6350%	09/02/22	09/02/25	7,000,000	7,002,423	2,423
Barclays Bank	6.6210%	09/15/22	09/15/25	7,000,000	7,002,625	2,625
Societe Generale	6.6250%	09/30/22	09/30/25	10,000,000	10,000,000	0
Macquarie	6.0570%	12/23/22	10/14/25	4,893,600	5,001,750	108,150

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL PORTFOLIO
30 June 2024

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Description	Coupon Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Floater Rate (continued)						
Bank of America	6.5000%	10/20/22	10/20/25	7,000,000	7,004,906	4,906
Morgan Stnaley	0.8640%	01/04/24	10/21/25	6,746,950	6,891,654	144,704
Fifth Third Bank	5.8520%	12/06/23	10/27/25	6,960,100	6,993,880	33,780
Standard Chartered	6.2670%	09/07/23	11/23/25	7,097,941	7,106,532	8,591
Citigroup	6.0370%	02/01/24	01/25/26	8,130,000	8,137,073	7,073
HSBC Holdings	6.7590%	01/29/24	03/10/26	5,000,000	5,031,485	31,485
Goldman Sachs	5.5650%	03/17/23	03/17/26	7,000,000	6,942,858	(57,142)
Citigroup	6.8600%	02/12/24	03/17/26	4,537,000	4,572,561	35,561
Standard Chartered	7.0800%	02/05/24	03/30/26	12,675,000	12,757,460	82,460
JP Morgan Chase	6.6630%	01/23/24	04/26/26	11,000,000	11,090,926	90,926
Charles Schwab	5.8580%	08/22/23	05/13/26	6,892,970	7,000,170	107,200
Goldman Sachs	6.7540%	08/18/23	05/15/26	8,000,000	8,057,200	57,200
Goldman Sachs	6.7540%	01/22/24	05/15/26	5,000,000	5,035,750	35,750
HSBC Holdings PLC	6.9850%	12/21/23	09/12/26	7,000,000	7,077,052	77,052
HSBC Holdings	6.9850%	01/11/24	09/12/26	8,000,000	8,088,059	88,059
Corporate Bond Premiums / Discounts				1,854,419	0	(1,854,419)
				<u>239,676,299</u>	<u>240,066,621</u>	<u>390,322</u>
Obligations of U. S. Government						
Federal Home Loan Bank FHLB	2.2500%	02/25/22	02/28/25	5,000,000	4,902,493	(97,507)
Federal Home Loan Bank FHLB	1.3750%	01/26/22	12/26/25	4,975,000	4,740,805	(234,195)
Federal Farm Credit Bank FFCB	1.6000%	01/27/22	01/27/26	5,000,000	4,749,791	(250,209)
Federal Farm Credit Bank FFCB	1.3900%	12/22/21	06/22/26	7,000,000	6,551,271	(448,729)
Federal Home Loan Bank FHLB	2.1250%	02/18/22	02/18/27	10,000,000	9,502,225	(497,775)
Federal Home Loan Bank FHLB	2.0500%	02/25/22	02/25/27	7,000,000	6,535,520	(464,480)
Federal Farm Credit Bank FFCB	1.2500%	07/06/21	07/06/27	7,000,000	6,325,298	(674,702)
Federal Farm Credit Bank FFCB	1.8700%	01/26/22	07/26/27	5,000,000	4,597,559	(402,441)
Federal Farm Credit Bank FFCB	1.3300%	09/01/21	09/01/28	10,000,000	8,787,217	(1,212,783)
Federal Farm Credit Bank FFCB	2.0000%	01/24/22	01/24/29	7,000,000	6,250,954	(749,046)
Federal Farm Credit Bank FFCB	1.0400%	01/25/21	01/25/29	10,000,000	8,553,090	(1,446,910)

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL PORTFOLIO
30 June 2024

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Description	Coupon Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Obligations of U. S. Government (continued)						
Federal Farm Credit Bank FFCB	1.2900%	09/09/21	02/26/29	\$9,980,000	\$8,632,494	(\$1,347,506)
Federal Farm Credit Bank FFCB	1.3700%	09/20/21	03/20/29	10,000,000	8,620,121	(1,379,879)
Federal Farm Credit Bank FFCB	1.4000%	07/27/21	04/26/29	5,000,000	4,354,411	(645,589)
Federal Home Loan Bank FHLB	2.0000%	01/27/22	07/27/29	4,991,250	4,422,656	(568,594)
Federal Farm Credit Bank FFCB	1.2300%	09/10/20	09/10/29	10,000,000	8,465,817	(1,534,183)
Federal Farm Credit Bank FFCB	1.4700%	09/17/21	12/17/29	10,000,000	8,486,306	(1,513,694)
Federal Farm Credit Bank FFCB	1.8300%	10/26/21	04/25/30	6,986,000	5,998,475	(987,525)
Federal Farm Credit Bank FFCB	1.2500%	09/03/20	06/03/30	10,000,000	8,236,502	(1,763,498)
Federal Home Loan Mortgage FHLMC	1.2500%	09/10/20	06/10/30	4,500,000	3,715,659	(784,341)
Federal Farm Credit Bank FFCB	1.5500%	08/10/21	07/26/30	9,995,000	8,381,528	(1,613,472)
Federal Farm Credit Bank FFCB	1.2300%	01/22/21	07/29/30	10,562,000	8,672,742	(1,889,258)
Farmer Mac FAMCA	1.2700%	08/19/20	08/19/30	6,500,000	5,341,708	(1,158,292)
Federal Home Loan Bank FHLB	1.2200%	08/26/20	08/26/30	8,000,000	6,513,549	(1,486,451)
Federal Farm Credit Bank FFCB	1.2400%	09/03/20	09/03/30	7,000,000	5,734,094	(1,265,906)
Farmer Mac FAMCA	1.3500%	09/09/20	09/09/30	10,000,000	8,245,927	(1,754,073)
Federal Home Loan Bank FHLB	2.1800%	01/25/22	09/25/30	5,000,000	4,315,000	(685,000)
Farmer Mac FAMCA	1.2900%	01/15/21	01/15/31	10,265,767	8,306,643	(1,959,124)
Federal Home Loan Bank FHLB	0.7500%	01/27/21	01/27/31	9,980,000	8,256,630	(1,723,370)
Federal Home Loan Bank FHLB	1.4000%	02/04/21	02/04/31	6,900,000	5,611,629	(1,288,371)
Federal Home Loan Bank FHLB	1.5000%	02/18/21	02/18/31	9,995,000	8,518,414	(1,476,586)
Federal Farm Credit Bank FFCB	1.7000%	08/25/21	04/28/31	4,290,854	3,556,424	(734,430)
Federal Farm Credit Bank FFCB	1.8500%	08/18/21	08/18/31	10,000,000	8,272,576	(1,727,424)
Federal Farm Credit Bank FFCB	1.7300%	01/13/22	09/22/31	10,122,763	8,503,196	(1,619,567)
Federal Farm Credit Bank FFCB	5.9000%	08/28/23	10/12/32	7,120,620	7,160,809	40,189
Federal Farm Credit Bank FFCB	5.9000%	10/31/23	01/10/33	3,228,947	3,249,915	20,968
Federal Farm Credit Bank FFCB	5.9400%	08/28/23	02/28/33	6,142,235	6,156,779	14,544
Federal Farm Credit Bank FFCB	5.9300%	08/31/23	03/28/33	3,153,947	3,165,524	11,577
Federal Farm Credit Bank FFCB	6.0800%	09/13/23	04/28/33	6,977,250	6,999,992	22,742
Federal Farm Credit Bank FFCB	4.7400%	01/22/24	05/24/33	12,749,360	12,616,760	(132,600)

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL PORTFOLIO
30 June 2024

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Description	Coupon Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Obligations of U. S. Government (continued)						
Federal Farm Credit Bank FFCB	6.2200%	10/03/23	09/19/33	\$7,949,920	\$8,008,456	\$58,536
Government Bond Premiums / Discounts				141,173	0	(141,173)
				<u>315,507,086</u>	<u>278,016,959</u>	<u>(37,490,127)</u>
Municipal Bonds						
Utah State Transit Authority	1.7830%	03/15/21	02/01/24	3,000,000	2,518,811	(481,189)
				<u>3,000,000</u>	<u>2,518,811</u>	<u>(481,189)</u>
Accounts Receivable						
Accounts Receivable				4,406,930	4,406,930	0
				<u>4,406,930</u>	<u>4,406,930</u>	<u>0</u>
Total Cash Management Investment Pool				<u>\$603,890,315</u>	<u>\$566,309,321</u>	<u>(\$37,580,994)</u>

UTAH STATE UNIVERSITY
CASH MANAGEMENT INVESTMENT POOL
SUMMARY OF INVESTMENT TRANSACTIONS AND PERFORMANCE
For the Month of June 2024

Schedule A-2

	Purchases	Sales		Earnings	Change in Fair Value	Total Investment Income	Average Daily Fair Value	Annualized Total Investment Return
		Cost	Receipts					
Miscellaneous				\$82,294		\$82,294		0.00%
Money Market Account				155,873		155,873	\$36,200,000	5.17%
Utah Public Treasurers' Investment Fund				22,817		22,817	5,100,000	5.37%
Commercial Paper and Corporate Notes	\$143,092	\$15,860,000	\$15,860,000	1,332,108	(\$108,215)	1,223,893	243,039,753	6.04%
Obligations of U. S. Government	7,539			564,590	2,823,120	3,387,710	315,365,914	12.89%
Municipal Bonds				4,457	21,749	26,206	3,000,000	10.48%
Receivable	2,011,508	1,919,204	1,919,204					0.00%
Total	\$2,162,139	\$17,779,204	\$17,779,204	\$2,162,139	\$2,736,654	\$4,898,793	\$602,705,667	9.75%

UTAH STATE UNIVERSITY
SUMMARY OF CASH MANAGEMENT INVESTMENT POOL TRANSACTIONS
For the Month of June 2024

Schedule A-3

	Purchases		Sales			Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)
Cash Management Investment Pool						
Miscellaneous						\$82,294
Money Market Account						155,873
Utah Public Treasurers' Investment Fund						22,817
Corporate Bonds and Floaters		\$143,092		\$15,860,000	\$15,860,000	\$0
Obligations of U. S. Government		7,539				564,590
Municipal Bonds						4,457
Accounts Receivable		2,011,508		1,919,204	1,919,204	0
Total Cash Management Investment Pool		<u>\$2,162,139</u>		<u>\$17,779,204</u>	<u>\$17,779,204</u>	<u>\$0</u>
						<u>\$2,162,139</u>

UTAH STATE UNIVERSITY
ENDOWMENT POOL
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule B-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income	Less Expenses	Net Realized Income/(Loss)
*Jul 2023	\$263,818,324	\$8,092,294	\$7,921,121	\$5,317,251	\$269,306,748	\$266,562,536	\$170,178	\$1,128,235	\$1,298,413	(\$994)	\$1,299,407
Aug 2023	269,306,748	3,627,362	2,725,956	(3,279,068)	266,929,086	268,117,917	110,229	635,758	745,987	\$3,320	742,667
Sep 2023	266,929,086	12,577,836	11,547,074	(4,831,194)	263,128,654	265,028,870	385,316	898,399	1,283,715	41,888	1,241,827
Oct 2023	263,128,654	14,035,033	13,724,961	(4,396,719)	259,042,007	261,085,331	213,723	2,090,621	2,304,344	12,381	2,291,963
Nov 2023	259,042,007	4,978,657	2,586,165	11,118,928	272,553,427	265,797,717	217,624	17,551	235,175	2,171	233,004
Dec 2023	272,553,427	6,869,477	3,452,036	8,783,623	284,754,491	278,653,959	1,237,174	523,269	1,760,443	38,446	1,721,997
Jan 2024	284,754,491	14,048,633	10,076,566	393,686	289,120,244	286,937,368	299,723	1,169,322	1,469,045	19,044	1,450,001
Feb 2024	289,120,244	12,966,386	11,096,729	6,536,496	297,526,397	293,323,321	215,933	(40,213)	175,720	(13,103)	188,823
Mar 2024	297,526,397	3,130,684	2,623,611	6,036,590	304,070,060	300,798,229	416,332	217,651	633,983	21,811	612,172
Apr 2024	304,070,060	7,905,184	6,873,995	(6,882,970)	298,218,279	301,144,170	284,381	697,774	982,155	33,769	948,386
May 2024	298,218,279	4,029,922	3,409,905	6,191,774	305,030,070	301,624,175	192,087	194,525	386,612	67,363	319,249
Jun 2024	305,030,070	7,256,908	6,460,804	1,782,747	307,608,921	306,319,496	556,689	348,428	905,117	93,702	811,415
	<u>\$263,818,324</u>	<u>\$99,518,376</u>	<u>\$82,498,923</u>	<u>\$26,771,144</u>	<u>\$307,608,921</u>	<u>\$282,949,424</u>	<u>\$4,299,389</u>	<u>\$7,881,320</u>	<u>\$12,180,709</u>	<u>\$319,798</u>	<u>\$11,860,911</u>

Comparative Totals:

Year-to-date

FY 2023-24	\$263,818,324	\$99,518,376	\$82,498,923	\$26,771,144	\$307,608,921	\$282,949,424	\$4,299,389	\$7,881,320	\$12,180,709	\$319,798	\$11,860,911
FY 2022-23	253,569,010	92,402,162	76,910,749	13,380,159	282,440,582	263,350,188	3,645,744	3,716,746	7,362,490	438,156	6,924,334
Amt Change					25,168,339	19,599,236	653,645	4,164,574	4,818,219	(118,358)	4,936,577
% Change					8.91%	7.44%	17.93%	112.05%	65.44%	-27.01%	71.29%

Note: The Endowment Pool includes endowment funds designated for long-term investment. Included in this pool are endowment funds invested in the University's Cash Management Investment Pool (CMIP) consisting of \$13,489,090 principal beginning balance, a \$15,871,586 ending balance, and a \$14,180,230 average daily balance for the current month. Current month interest and dividends from the CMIP were \$49,380 bringing the total to \$326,332 year-to-date. These amounts have also been reported in Schedules A-1 and A-2.

*The July beginning fair value has been adjusted to reflect the amount distributed to expendable accounts at fiscal year end.

UTAH STATE UNIVERSITY
ENDOWMENT POOL
INVESTMENT PERFORMANCE

Schedule B-1-A

	Total Number of Units	Fair Value Per Unit			Net Earnings	Earnings Per Unit
		Beginning of Month	End of Month	Percent Change		
July 2023	583,139.32	\$452.4105	\$461.8223	2.08%	\$170,178	\$0.2918
August 2023	584,859.67	461.8223	456.3985	-1.17%	110,229	0.1885
September 2023	586,365.67	456.3985	448.7450	-1.68%	385,316	0.6571
October 2023	586,607.97	448.7450	441.5931	-1.59%	213,723	0.3643
November 2023	591,537.93	441.5931	460.7539	4.34%	217,624	0.3679
December 2023	596,353.33	460.7539	477.4929	3.63%	1,237,174	2.0746
January 2024	604,084.10	477.4929	478.6093	0.23%	299,723	0.4962
February 2024	607,511.99	478.6093	489.7457	2.33%	215,933	0.3554
March 2024	607,741.81	489.7457	500.3277	2.16%	416,332	0.6850
April 2024	609,301.94	500.3277	489.4425	-2.18%	284,381	0.4667
May 2024	610,313.90	489.4425	499.7921	2.11%	192,087	0.3147
June 2024	610,980.41	499.7921	503.4677	0.74%	556,689	0.9111

UTAH STATE UNIVERSITY
ENDOWMENT POOL PORTFOLIO
June 30, 2024

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Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Cash Management Investment Pool						\$15,871,586	\$15,871,586	\$0
Total Cash Management Investment Pool						15,871,586	15,871,586	0
Equity funds								
Dimensional - DFA Emerging Markets Core Equity		152,570.240				3,288,687	3,666,263	377,576
Dimensional - DFA Micro Cap		82,542.509				1,789,113	2,189,027	399,914
Dimensional - DFA Small Cap		51,579.009				1,813,894	2,323,634	509,740
GQG Partners Emerging Markets Equity Fund						3,784,542	6,500,879	2,716,337
GQG Partners Global Equity Fund						17,238,585	33,450,588	16,212,003
LSV Global Value Fund Intl		1,762,890.578				21,471,381	25,544,284	4,072,903
RhumbLine QSI Index		385,687.146				9,158,414	16,638,691	7,480,277
Ryder Court Global Opportunistic Fund		1,415,905.723				15,676,146	22,783,600	7,107,454
Vanguard FTSE All-World ex-US Index Fund		146,374.345				13,851,626	16,900,382	3,048,756
Vanguard Russell 3000		25,660.990				6,653,563	11,911,832	5,258,269
Wasatch Global Opportunities Instl		1,551,804.012				6,000,000	6,796,902	796,902
Total Equities						100,725,951	148,706,082	47,980,131
Fixed Income funds								
Longfellow						21,987,045	20,940,190	(1,046,855)
Columbia Inst High Yield Fixed Income		31,784.980				3,652,535	4,201,530	548,995
GoldenTree Multi Sector Cayman, LTD		2,823.848				3,000,000	4,589,193	1,589,193
Pacific Asset Management						2,758,142	4,286,609	1,528,467
Paydenfunds - Emerging Markets Bond Fund		224,860.641				2,784,118	2,313,816	(470,302)
Silver Rock Offshore Tactical Allocation Fund - 2019						3,209,237	3,860,704	651,467
Silver Rock Offshore Tactical Allocation Fund - 2022						3,086,489	3,432,619	346,130
Vanguard Inflation Protected Secs Ad		78,744.630				2,031,438	1,801,677	(229,761)
Vanguard Long Term Treasury Institutional fund VLGIX		194,664.447				5,229,908	4,773,172	(456,736)
Vanguard Short Term Inflation Protected Securities Index Fur		80,528.580				1,991,403	1,942,349	(49,054)
Wellington - CTF Opportunistic Emerging Markets		273,030.563				2,754,056	2,328,951	(425,105)
Total Fixed Income Funds						52,484,371	54,470,810	1,986,439

UTAH STATE UNIVERSITY
ENDOWMENT POOL PORTFOLIO
June 30, 2024

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Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Alternatives								
Adaptive Trend Fund, LP								
AlphaSimplex						\$2,500,000	\$2,339,811	(\$160,189)
Aether Investment Partners, LLC								
Aether Real Assets IV, LP						1,816,399	1,869,349	52,950
Aether Real Assets V, LP						3,085,459	3,512,461	427,002
Aether Real Assets Seed Partners						1,664,635	2,541,594	876,959
BlackRock								
BlackRock Global Infrastructure Fund IV						1,184,543	1,211,448	26,905
The Carlyle Group								
Carlyle Realty Partners VIII						2,355,691	2,406,508	50,817
Centerbridge								
Centerbridge Partners Real Estate Fund II, LP						3,015,602	3,063,730	48,128
Commonfund								
CEP VII						0	162,130	162,130
CEP VIII						242,456	783,426	540,970
CNR VIII						618,274	342,559	(275,715)
CNR IX						805,622	1,051,268	245,646
CVP X						588,001	1,956,647	1,368,646
Constitution Capital								
Ironsides Co-Investment Fund III						87,074	411,698	324,624
Ironsides Partnership Fund III						30,189	10,228	(19,961)
DG partners								
BH-DG Systematic Trading Fund		15,716.969				2,500,000	2,398,775	(101,225)
Fort Washington Capital Partners Group								
Fort Washington Private Equity Investors X, LP						5,496,741	8,185,819	2,689,078
Global Infrastructure Partners								
Global Infrastructure Partners III-A/B, L.P.						2,284,524	2,773,913	489,389
Global Infrastructure Partners IV-A/B, L.P.						4,137,626	4,731,795	594,169

UTAH STATE UNIVERSITY
ENDOWMENT POOL PORTFOLIO
June 30, 2024

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Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Alternatives (continued)								
Goldman Sachs								
Vintage Fund VI						\$29,976	\$413,461	\$383,485
Grosvenor								
GCM Grosvenor Special Opportunity Fund		3,000.000				3,000,000	2,317,849	(682,151)
HarbourVest								
HarbourVest 2017 Global Fund L.P.						3,469,933	5,366,573	1,896,640
i Squared Capital								
ISQ Global Infrastructure Fund III						2,353,452	2,647,209	293,757
Morgan Stanley								
JP Morgan Prime Property Fund		424.046				6,613,546	8,285,939	1,672,393
MUFG Fund Services								
EnTrust Permal Special Opportunities Evergreen Fund		2,002.590				1,986,274	1,868,179	(118,095)
Pinehurst Institutional Ltd.								
Corbin		5,085.637				9,000,000	12,192,623	3,192,623
Silicon Valley Bank								
Strategic Investors Fund X Cayman, LP						884,311	1,019,335	135,024
Silver Point Capital								
Silver Point Specialty Credit Fund III						1,273,671	1,239,178	(34,493)
Solamere Capital								
Solamere Founders Fund I, LP						249,160	358,848	109,688
Solamere Founders Fund II, LP						1,713,213	3,223,510	1,510,297
Solamere Founders Fund IV, LP						2,927,863	3,152,602	224,739
Woodbury								
Woodbury Strategic Partners Fund, L.P.						151,600	215,644	64,044
Woodbury IFRI						32,223	73,897	41,674
Woodbury Capital II, LP						476,495	879,895	403,400
Woodbury Capital II, LP - WC2 IF Spring, LLC						144,869	160,618	15,749
Woodbury Capital II, LP - WB West						78,840	19,418	(59,422)
Woodbury Capital III, LP						1,763,596	2,690,722	927,126

UTAH STATE UNIVERSITY
ENDOWMENT POOL PORTFOLIO
June 30, 2024

Schedule B-1-B
Page 4 of 4

Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Alternatives (continued)								
WSP Wilmington, Phase I & II						\$235,919	\$512,865	\$276,946
WSP Wilmington Hotel LLC						63,700	110,744	47,044
Total Alternatives						<u>68,861,477</u>	<u>86,502,268</u>	<u>17,640,791</u>
Money Market Funds								
Goldman Sachs Bank Deposit						104,230	104,230	0
US Bank - Endowment Pool First Am Treas Ob Fd Cl Z						1,652,037	1,652,037	0
US Bank - Longfellow First Am Treas Ob Fund Cl Z						51,284	51,284	0
Total Money Market						<u>1,807,551</u>	<u>1,807,551</u>	<u>0</u>
Accruals / Payable								
Endowment Pool								
Goldman Sachs						45	45	0
US Bank - Accruals						105,953	105,953	
Pending Trades						7,443	7,443	0
Longfellow								
Longfellow Investment Management						(18,788)	(18,788)	0
US Bank Receivable - Interest Accrual						155,971	155,971	0
Total Accruals / payables						<u>250,624</u>	<u>250,624</u>	<u>0</u>
Total Endowment Pool						<u>\$240,001,560</u>	<u>\$307,608,921</u>	<u>\$67,607,361</u>

UTAH STATE UNIVERSITY
SUMMARY OF ENDOWMENT POOL TRANSACTIONS
For the Month of June 2024

Schedule B-2
Page 1 of 2

	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Endowment Pool Transactions							
Cash Management Investment Pool							
Utah State University		\$2,333,116					
CMIP Interest		49,380					\$49,380
Equity funds							
Dimensional - DFA Emerging Markets Core Equity							23,848
Dimensional - DFA Micro Cap							6,429
Dimensional - DFA Small Cap							7,022
GQG Partners Emerging Markets Equity Fund							
GQG Partners Global Equity Fund							
LSV Global Value Fund Intl							
RhumbLine QSI Index							
Ryder Court Global Opportunistic Fund			1,949.551	\$19,974	\$31,371	\$11,397	
Vanguard FTSE All-World ex-US Index Fund	1,137.318	130,917					130,917
Vanguard Russell 3000	83.792	39,013					39,013
Fixed Income funds							
Longfellow		530,427		496,420	494,286	(2,134)	
Columbia Inst High Yield Fixed Income			7,647.809	901,451	1,000,000	98,549	
GoldenTree Multi Sector Cayman, LTD							
Pacific Asset Management				1,000,000	1,000,000	0	
Paydenfunds - Emerging Markets Bond Fund	1,308.755	13,480					13,480
Silver Rock Offshore Tactical Allocation Fund - 2019				508,648	554,518	45,870	5,251
Silver Rock Offshore Tactical Allocation Fund - 2022		220,980					
Vanguard Inflation Protected Secs Ad							22,970
Vanguard Long Term Treasury Institutional fund VLGIX	691.444	16,740					16,293
Vanguard Short Term Inflation Protected Securities Index Fund							17,821
Wellington - CTF Opportunistic Emerging Markets	1,749.841	14,926					14,926
Alternatives							
BlackRock							
BlackRock Global Infrastructure Fund IV				53,189	53,189	0	(5,163)
The Carlyle Group							
Carlyle Realty Partners VIII		43,231		20,081	54,381	34,300	5,191
Commonfund							
CEP VII				2,500	40,120	37,620	613
CEP VIII				1,939	38,785	36,846	
HarbourVest							
HarbourVest 2017 Global Fund L.P.		89,997		70,396	113,367	42,971	
Morgan Stanley							
JP Morgan Prime Property Fund	4.19	81,872					81,872
MUFG Fund Services							
EnTrust Permal Special Opportunities Evergreen Fund	509.423	89,057					

UTAH STATE UNIVERSITY
SUMMARY OF ENDOWMENT POOL TRANSACTIONS
For the Month of June 2024

Schedule B-2
Page 2 of 2

	Purchases		Sales			Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)
Alternatives						
Silicon Valley Bank						
Strategic Investors Fund X Cayman, LP		\$58,100				
Silver Point Capital						
Silver Point Specialty Credit Fund III		189,106				\$30,972
Solamere Capital						
Solamere Founders Fund II, LP		29,115		\$61,891	\$104,900	\$43,009
Woodbury						
WSP Wilmington, Phase I & II						10,112
WSP Wilmington Hotel LLC						3,882
Money Market Funds						
Goldman Sachs Bank Deposit		417				417
US Bank - Endowment Pool First Am Treas Ob Fd Cl Z		2,758,227		2,512,889	2,512,889	0
US Bank - Longfellow First Am Treas Ob Fund Cl Z		374,614		369,693	369,693	0
Cash						
Longfellow						
US Bank Cash		10,923				
Accruals / Payable						
Endowment Pool						
Goldman Sachs		30				30
US Bank - Accruals		105,953		22,531	22,531	0
Pending Trades		7,443				
Longfellow						
Longfellow Investment Management				18,788	18,788	0
US Bank Receivable - Interest Accrual		69,844		51,986	51,986	0
Total Endowment Pool Transactions		<u>\$7,256,908</u>		<u>\$6,112,376</u>	<u>\$6,460,804</u>	<u>\$348,428</u>
						<u>\$556,689</u>

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule C1A

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income
Jul 2023	\$244,285,796	\$1,254,431	\$348,119	(\$115,300)	\$245,076,808	\$244,681,302	\$913,185	\$2	\$913,187
Aug 2023	245,076,808	11,981,833	10,538,360	(1,821,697)	244,698,584	244,887,696	975,226	0	975,226
Sep 2023	244,698,584	6,121,852	10,732,921	(4,417,206)	235,670,309	240,184,447	1,022,084	149,089	1,171,173
Oct 2023	235,670,309	9,006,964	927,537	(4,088,749)	239,660,987	237,665,648	995,463	(189)	995,274
Nov 2023	239,660,987	7,745,806	2,301,436	7,353,618	252,458,975	246,059,981	996,066	0	996,066
Dec 2023	252,458,975	11,304,058	9,438,061	6,119,778	260,444,750	256,451,863	1,103,144	0	1,103,144
Jan 2024	260,444,750	7,811,516	2,419,302	25,179	265,862,143	263,153,447	1,020,187	52	1,020,239
Feb 2024	265,862,143	2,565,692	6,825,965	(1,671,225)	259,930,645	262,896,394	1,030,243	0	1,030,243
Mar 2024	259,930,645	3,684,641	476,927	721,292	263,859,651	261,895,148	1,086,192	0	1,086,192
Apr 2024	263,859,651	2,159,222	977,125	(4,999,909)	260,041,839	261,950,745	1,074,090	(64)	1,074,026
May 2024	260,041,839	8,436,704	4,388,682	1,932,490	266,022,351	263,032,095	1,068,861	(437,066)	631,795
Jun 2024	266,022,351	18,751,851	12,425,713	426,123	272,774,612	269,398,482	1,121,195	0	1,121,195
	<u>\$244,285,796</u>	<u>\$90,824,570</u>	<u>\$61,800,148</u>	<u>(\$535,606)</u>	<u>\$272,774,612</u>	<u>\$254,354,771</u>	<u>\$12,405,936</u>	<u>(\$288,176)</u>	<u>\$12,117,760</u>

Comparative Totals:

Year-to-date									
FY 2023-24	\$244,285,796	\$90,824,570	\$61,800,148	(\$535,606)	\$272,774,612	\$254,354,771	\$12,405,936	(\$288,176)	\$12,117,760
FY 2022-23	232,326,049	103,869,595	97,736,441	(4,250,266)	234,208,937	230,520,695	9,618,327	(111,803)	9,506,524
Amt Change					38,565,675	23,834,076	2,787,609	(176,373)	2,611,236
% Change					16.47%	10.34%	28.98%	-157.75%	27.47%

Note: The Defensive Return Pool is comprised of quasi-endowment funds designated for long-term investment. Included in this pool are quasi-endowment funds invested in the University's Cash Management Investment Pool (CMIP) consisting of \$100,298,958 principal beginning balance, a \$105,870,592 ending balance and a \$106,853,913 average daily balance for the current month. Current month interest and dividends from the CMIP were \$366,690 bringing the total to \$3,976,937 year-to-date. These amounts have also been reported in Schedules A-1 and A-2.

*The July beginning fair value has been adjusted to reflect the amount distributed to expendable accounts at fiscal year end.

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL PORTFOLIO
30 June 2024

Schedule C1B
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Description	Face Value	Maturity Date	Interest Rate/Coupon	Cost	Fair Value	Unrealized Gain/(Loss)
Cash Management Investment Pool				\$105,870,592	\$105,870,592	\$0
Total Cash Management Investment Pool				105,870,592	105,870,592	0
Utah Public Treasurers' Investment Fund			5.365%	28,935,568	28,935,568	0
Total Utah Public Treasurers' Investment Fund				28,935,568	28,935,568	0
Fixed Income						
US Bank						
Corporate Issues						
Bank of NY Mellon	10,350.000	03/20/69	3.700%	991,540	983,115	(8,425)
Berkshire Hathaway	20,000.000	10/15/50	4.250%	2,076,940	1,567,880	(509,060)
BlackStone Holdings	18,700.000	04/22/33	6.200%	1,964,585	1,965,763	1,178
Bristol Myers Squibb Co	10,000.000	08/01/97	6.875%	1,354,660	1,054,080	(300,580)
Burlington North Santa Fe	10,000.000	08/01/97	7.250%	1,410,975	1,189,510	(221,465)
Case Western Reserve Univ	9,400.000	06/01/22	5.405%	995,855	885,884	(109,971)
Catholic Health Initiative	10,000.000	11/01/42	4.350%	905,670	845,170	(60,500)
Chevron	10,000.000	11/15/44	5.050%	952,600	941,280	(11,320)
Citigroup Inc	9,000.000	05/18/46	4.750%	989,091	772,056	(217,035)
Comcast Corp	10,000.000	10/15/58	4.950%	991,310	894,870	(96,440)
ConocoPhillips	10,000.000	02/01/39	6.500%	1,061,960	1,099,210	37,250
Cummins Inc	10,000.000	03/01/98	5.650%	1,065,050	948,400	(116,650)
Dignity Health	20,000.000	11/01/64	5.267%	2,059,480	1,819,660	(239,820)
Duke Energy	10,000.000	03/15/53	5.350%	992,650	937,690	(54,960)
Entergy Louisiana	10,000.000	01/15/45	4.950%	937,800	876,400	(61,400)
ExxonMobil	12,000.000	03/19/40	4.227%	1,073,460	1,054,680	(18,780)
Farmers Exchange Capital	9,500.000	07/15/48	7.200%	1,138,394	905,749	(232,645)
Assured Guarany Muni	10,000.000	12/15/66	6.400%	936,000	877,680	(58,320)
Ga Global Funding	22,590.000	01/06/32	2.900%	1,864,082	1,884,435	20,353
Goldman Sachs Group Inc Med Term Note	7,470.000	09/15/41	6.000%	858,482	776,312	(82,170)
Guardian Life	10,000.000	01/24/77	4.850%	971,620	834,520	(137,100)
Home Depot Inc	13,000.000	02/15/44	4.875%	1,254,370	1,204,372	(49,998)

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL PORTFOLIO
30 June 2024

Schedule C1B
Page 2 of 6

Description	Face Value	Maturity Date	Interest Rate/Coupon	Cost	Fair Value	Unrealized Gain/(Loss)
Corporate Issues (continued)						
Home Depot Inc	10,000.000	09/15/52	4.950%	\$976,250	\$923,350	(\$52,900)
IBM	10,000.000	12/01/96	7.125%	1,253,200	1,248,740	(4,460)
KKR Group Fin Co II	10,000.000	02/01/43	5.500%	1,069,400	952,080	(117,320)
Kentucky Utilities	10,000.000	10/01/45	4.375%	1,033,140	835,160	(197,980)
Liberty Mutual Insurance	3,300.000	10/15/97	7.697%	487,657	364,650	(123,007)
Mass Institute of Tech	7,800.000	07/01/11	5.600%	971,560	821,278	(150,282)
Mass Mutual Life Insurance	10,000.000	04/01/77	4.900%	981,080	830,630	(150,450)
Massachusetts Mut	13,460.000	02/15/69	5.077%	1,270,624	1,181,909	(88,715)
MetLife Inc	5,000.000	12/15/36	6.400%	540,625	506,080	(34,545)
MetLife Inc	4,730.000	04/08/38	9.250%	685,613	547,729	(137,884)
Morgan Stanley	9,600.000	01/19/38	5.948%	995,491	954,403	(41,088)
Mutual of Omaha Insurance Co	10,000.000	10/15/40	6.950%	1,253,880	992,860	(261,020)
National Rural Utility Cooperative	10,500.000	04/20/46	5.250%	1,052,625	1,020,285	(32,340)
Nationwide Financial Ser	10,000.000	05/15/37	6.750%	1,040,000	1,004,840	(35,160)
NY Presbyterian	10,000.000	08/01/19	3.954%	965,030	716,920	(248,110)
New York Life	19,600.000	05/15/69	4.450%	1,999,200	1,576,859	(422,341)
Northwestern Mutual	11,000.000	09/30/59	3.625%	1,000,373	746,911	(253,462)
Ohio National Life Insurance	10,000.000	06/15/42	6.875%	1,269,440	888,560	(380,880)
Oklahoma G&E	14,300.000	05/15/41	5.250%	1,472,900	1,341,798	(131,102)
PNC Financial Services	10,000.000	05/29/49	4.850%	992,730	1,004,680	11,950
Penn Mutual Life Insurance Co	13,650.000	06/15/40	7.625%	1,823,790	1,522,098	(301,692)
Principal Financial	10,100.000	03/15/53	5.500%	983,932	966,812	(17,120)
Protective Life	10,000.000	10/15/39	8.450%	1,399,140	1,234,690	(164,450)
Prudential Financial 5.1%	9,650.000	03/01/52	5.125%	991,895	897,074	(94,821)
Regions Financial Corp	10,000.000	12/10/37	7.375%	1,256,490	1,085,570	(170,920)
Republic New York Corp	5,000.000	07/15/97	7.200%	706,325	597,525	(108,800)
San Diego G E	11,000.000	05/15/40	5.350%	1,081,927	1,051,633	(30,294)
Charles Schwab Corp	5,600.000	06/01/69	4.000%	490,924	525,426	34,502
Security Benefit Life	20,350.000	10/01/33	7.450%	2,249,591	1,947,576	(302,015)

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL PORTFOLIO
30 June 2024

Schedule C1B
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Description	Face Value	Maturity Date	Interest Rate/Coupon	Cost	Fair Value	Unrealized Gain/(Loss)
Corporate Issues (continued)						
Teachers Insurance (TIAA)	10,000.000	09/15/44	4.900%	\$973,170	\$883,960	(\$89,210)
Toronto Dominion	9,850.000	10/31/82	8.125%	998,790	1,020,815	22,025
Truist Financial	9,600.000	10/15/50	5.100%	997,488	896,496	(100,992)
USF&G Capital I	10,000.000	12/15/45	8.500%	1,328,720	1,002,200	(326,520)
Washington University	20,000.000	04/15/22	4.349%	2,008,618	1,607,980	(400,638)
Wells Fargo & Co	10,000.000	01/26/39	5.450%	1,000,000	957,060	(42,940)
Western Southern Life	10,000.000	01/15/49	5.150%	1,023,010	877,820	(145,190)
Foreign Issues						
QBE Insurace Mtn	5,000.000	06/17/46	5.875%	525,870	495,605	(30,265)
Argentum (Zurich Insurance)	10,000.000	06/01/48	5.125%	1,002,000	974,390	(27,610)
M & G Plc Mtn	8,900.000	10/20/48	6.500%	994,584	902,318	(92,266)
Abn Amro Bank	12,410.000	03/13/37	1.375%	995,791	1,016,950	21,159
Anz Bank New Zealand	14,750.000	08/11/32	5.548%	1,496,034	1,471,327	(24,707)
Aegon NV	10,000.000	04/11/48	5.500%	985,060	961,950	(23,110)
Allianz SE Lw	10,000.000	09/06/53	6.350%	1,007,000	1,029,250	22,250
BP Cap Markets PLC	10,940.000	12/22/68	4.875%	989,534	1,031,379	41,845
BPCE SA	8,950.000	10/19/34	7.003%	987,131	956,764	(30,367)
Bank of Nova Scotia	9,800.000	10/27/82	8.625%	998,277	1,026,687	28,410
Barclays Bank Mtn	10,000.000	12/22/53	6.000%	1,000,000	959,210	(40,790)
HSBC Holdings PLC	8,720.000	11/03/33	8.113%	973,475	985,055	11,580
Ing Groep N V	10,000.000	09/11/34	6.114%	986,200	1,031,000	44,800
Invesco	10,000.000	11/30/43	5.375%	1,052,800	948,470	(104,330)
Lloyds Banking Group	10,000.000	01/09/48	4.344%	899,370	778,420	(120,950)
MacQuarie Group	11,000.000	06/21/33	4.442%	982,443	1,015,289	32,846
MacQuarie Mtn	9,870.000	11/09/33	5.491%	994,945	980,535	(14,410)
Natwest Group Plc	10,000.000	03/02/34	6.016%	984,220	1,022,200	37,980
Nippon Life	14,650.000	10/16/44	4.600%	1,480,273	1,459,257	(21,016)
Rio Tinto Fin USA LTD	11,000.000	11/02/40	5.200%	978,978	1,065,548	86,570
Societe Generale	10,000.000	11/24/45	5.625%	1,053,440	874,730	(178,710)

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL PORTFOLIO
30 June 2024

Schedule C1B
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Description	Face Value	Maturity Date	Interest Rate/Coupon	Cost	Fair Value	Unrealized Gain/(Loss)
Foreign Issues (continued)						
Standard Chartered	5,000.000	05/30/31	8.000%	\$625,465	\$543,630	(\$81,835)
Standard Chartered PLC	5,000.000	03/26/44	5.700%	510,415	480,480	(29,935)
Swiss Re Finance	29,200.000	04/02/49	5.000%	2,901,660	2,810,500	(91,160)
Trans-Canada Pipelines	10,000.000	06/01/40	6.100%	1,006,200	1,016,640	10,440
Westpac Banking	14,750.000	08/10/33	5.405%	1,498,290	1,440,559	(57,731)
Xlit LTD	10,000.000	03/31/45	5.500%	1,024,750	925,480	(99,270)
Municipal Issues						
Beaver County Utah School District	50,000.000	02/01/27	5.500%	5,000,000	5,087,550	87,550
Fresno California Water Sys Rev BAB	10,000.000	06/01/40	6.750%	1,027,500	1,107,490	79,990
Michigan St Univ	10,500.000	08/15/22	4.165%	992,786	812,553	(180,233)
Peralta CA Community College Dist. LTD	5,000.000	08/05/49	6.250%	599,435	446,850	(152,585)
University of Michigan	41,200.000	04/01/99	4.454%	3,964,676	3,407,982	(556,694)
Domestic Common Stocks						
Oaktree Capital	40,000.000			1,000,000	868,800	(131,200)
Domestic Preferred Stocks						
Affiliated Managers	40,000.000			1,000,000	893,200	(106,800)
Bank of America Corp	60,000.000			1,500,000	1,117,800	(382,200)
Bank of America Corp	20,000.000			500,000	416,200	(83,800)
Dte Energy Co 5.25%	40,000.000			980,000	944,800	(35,200)
Gabelli DVD & Inc TR	14,500.000			366,705	264,321	(102,384)
JP Morgan Chase Co 4.2%	10,000.000			250,000	190,900	(59,100)
JP Morgan Chase Co 4.625%	5,000.000			125,000	104,700	(20,300)
JP Morgan Chase & Co 4.55%	4,000.000			100,000	82,760	(17,240)
Kimco Realty Corp	40,000.000			1,000,000	818,000	(182,000)
Prudential Financial 5.6%	40,000.000			1,000,000	980,400	(19,600)
Public Storage	20,000.000			500,000	359,000	(141,000)
Public Storage	20,000.000			500,000	459,400	(40,600)
Charles Schwab	20,000.000			500,000	400,800	(99,200)
US Bancorp	20,000.000			500,000	394,400	(105,600)

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL PORTFOLIO
30 June 2024

Schedule C1B
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Description	Face Value	Maturity Date	Interest Rate/Coupon	Cost	Fair Value	Unrealized Gain/(Loss)
Domestic Preferred Stocks (continued)						
US Bancorp	40,000.000			\$1,000,000	\$697,200	(\$302,800)
US Bancorp	40,000.000			994,000	926,400	(67,600)
Virtus Allianzgi Conv Ser A	40,000.000			1,000,000	834,000	(166,000)
Wells Fargo & Co	20,000.000			500,000	385,200	(114,800)
Foreign Stocks						
Arch Capital Group	40,000.000			1,000,000	896,000	(104,000)
Investment Funds						
Wellington Core Bond Fund	1,011,947.029			10,603,066	10,605,205	2,139
				<u>132,908,575</u>	<u>121,558,707</u>	<u>(11,349,868)</u>
Alternatives						
Dakota Pacific Real Estate Group						
Dakota Pacific Real Estate				695,057	944,957	249,900
Stonebrook Multifamily, LLC				1,000,000	930,500	(69,500)
IFM Investors						
IFM Global Infrastructures LP				5,110,457	5,832,867	722,410
Roots Management						
MHC Impact Fund I				930,056	581,518	(348,538)
Roots Fund IV, LP				1,000,000	923,275	(76,725)
Woodbury						
Woodbury Strategic Partners Fund				116,899	71,810	(45,089)
Woodbury IFRI				10,742	24,633	13,891
Woodbury Capital II, LP				429,878	879,895	450,017
Woodbury Capital II, LP - WC2 IF Spring, LLC				144,869	160,618	15,749
Woodbury Capital II, LP - WB West				78,840	19,418	(59,422)
Woodbury Capital III, LP				871,165	1,345,362	474,197
WSP Wilmington, Phase I & II				278,999	590,294	311,295
WSP Wilmington Hotel LLC				73,317	127,463	54,146
Young Automotive Group						
Stokes Stevenson Young Automotive Net Lease Fund				1,000,000	984,774	(15,226)
Total Alternatives				<u>11,740,279</u>	<u>13,417,384</u>	<u>1,677,105</u>

UTAH STATE UNIVERSITY
DEFENSIVE RETURN POOL PORTFOLIO
30 June 2024

Schedule C1B
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Description	Face Value	Maturity Date	Interest Rate/Coupon	Cost	Fair Value	Unrealized Gain/(Loss)
Money Market / Cash						
US Bank - First Am Treasury Ob Fund Class Z				\$1,560,194	\$1,560,194	\$0
Total Money Market / Cash				<u>1,560,194</u>	<u>1,560,194</u>	<u>0</u>
Receivable / In Transit / Unsettled Purchases						
US Bank - Receivable				<u>1,432,167</u>	<u>1,432,167</u>	<u>0</u>
Total Receivable / In Transit / Unsettled Purchases				<u>1,432,167</u>	<u>1,432,167</u>	<u>0</u>
 Total Other Investments				<u><u>\$282,447,375</u></u>	<u><u>\$272,774,612</u></u>	<u><u>(\$9,672,763)</u></u>

UTAH STATE UNIVERSITY
SUMMARY OF DEFENSIVE RETURN POOL TRANSACTIONS
For the Month of June 2024

Schedule C1C
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	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Defensive Return Pool							
CMIP		\$10,204,943		\$5,000,000	\$5,000,000	\$0	
CMIP Earnings		366,690					\$366,690
Utah Public Treasurers' Investment Fund		5,121,363					121,363
Fixed Income							
US Bank							
Investment Funds							
Wellington Core Bond Fund	4,078.693	42,744					42,744
Alternatives							
Woodbury							
WSP Wilmington, Phase I & II							11,639
WSP Wilmington Hotel LLC							4,468
Young Automotive Group							
Stokes Stevenson Young Automotive Net Lease Fund							1,233
Money Market / Cash							
US Bank - First Am Treasury Ob Fund Class Z		2,443,053		5,002,163	5,002,163	0	
US Bank - Cash				1,814,966	1,814,966	0	
Receivable / In Transit / Unsettled Purchases							
US Bank - Receivable		573,058		608,584	608,584	0	573,058
Total Other Investments		<u>\$18,751,851</u>		<u>\$12,425,713</u>	<u>\$12,425,713</u>	<u>\$0</u>	<u>\$1,121,195</u>

UTAH STATE UNIVERSITY
OTHER INVESTMENTS
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule C2A

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income
Jul 2023	\$31,317,444	\$81,847	\$91,020	\$874,307	\$32,182,578	\$31,750,011	\$2,002	\$5,159	\$7,161
Aug 2023	32,182,578	71,245	75,955	(575,269)	31,602,599	31,892,589	2,115	5,150	7,265
Sep 2023	31,602,599	4,739,167	4,016,947	(1,240,956)	31,083,863	31,343,231	5,924	(8,005)	(2,081)
Oct 2023	31,083,863	26,030	620,378	(696,250)	29,793,265	30,438,564	2,113	(25)	2,088
Nov 2023	29,793,265	186,350	175,615	2,317,716	32,121,716	30,957,491	2,043	(1,127)	916
Dec 2023	32,121,716	2,982,503	2,834,900	1,439,929	33,709,248	32,915,482	13,324	4,482	17,806
Jan 2024	33,709,248	127,871	370,590	402,227	33,868,756	33,789,002	2,796	14,964	17,760
Feb 2024	33,868,756	62,683	53,014	1,411,576	35,290,001	34,579,379	1,969	(1,881)	88
Mar 2024	35,290,001	117,883	143,361	1,043,265	36,307,788	35,798,895	5,528	18,264	23,792
Apr 2024	36,307,788	49,403	52,363	(1,311,984)	34,992,844	35,650,316	2,152	1,135	3,287
May 2024	34,992,844	271,002	741,221	1,257,695	35,780,320	35,386,582	2,330	456,344	458,674
Jun 2024	35,780,320	66,345	77,945	679,965	36,448,685	36,114,503	6,051	143	6,194
	<u>\$31,317,444</u>	<u>\$8,782,329</u>	<u>\$9,253,309</u>	<u>\$5,602,221</u>	<u>\$36,448,685</u>	<u>\$33,384,670</u>	<u>\$48,347</u>	<u>\$494,603</u>	<u>\$542,950</u>

Comparative Totals:

Year-to-date

FY 2023-24	\$31,317,444	\$8,782,329	\$9,253,309	\$5,602,221	\$36,448,685	\$33,384,670	\$48,347	\$494,603	\$542,950
FY 2022-23	28,417,079	4,818,205	5,957,674	4,039,834	31,317,444	29,286,394	45,418	668,578	713,996
Amt Change					5,131,241	4,098,276	2,929	(173,975)	(171,046)
% Change					16.38%	13.99%	6.45%	-26.02%	-23.96%

UTAH STATE UNIVERSITY
OTHER INVESTMENTS PORTFOLIO
30 June 2024

Schedule C2B
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Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Common and Preferred Stock Gifts								
Cetera Advisor Networks LLC								
Bluerock Total Income Real Estate Fund Class A		1,412.061				\$45,285	\$38,281	(\$7,004)
						<u>45,285</u>	<u>38,281</u>	<u>(7,004)</u>
Utah Public Treasurers' Investment Fund			5.365%			165,843	165,843	0
						<u>165,843</u>	<u>165,843</u>	<u>0</u>
ETF / Bonds / Mutual Funds								
Charles Schwab 7788-2481								
Fixed Income								
Bank of America C Var		1,000.000				10,000	9,819	(181)
ETF - Equity								
First Trust Value		5,891.000				176,289	240,058	63,769
Bond Funds								
Janus Henderson Multi Sector Income Fund		5,523.603				52,178	47,061	(5,117)
PIMCO Income Instl		7,629.101				85,401	79,953	(5,448)
Western Asset Core Plus Bond		8,337.474				97,404	76,621	(20,783)
Equity Funds								
American Funds American Balanced F3		7,210.522				186,506	249,051	62,545
JPMorgan Large Cap Growth		2,444.984				110,181	182,665	72,484
MFS Intl Diversification I		1,336.520				24,576	31,288	6,712
Thrivent Mid Cap Stock S		666.445				19,806	23,785	3,979
Charles Schwab 9025-2459								
Corporate Bonds								
BNP Paribas Note Index Linked 07/22/2024		15,000.000				15,000	16,148	1,148
BNP Paribas Note Index Linked 07/22/2024		15,000.000				15,000	18,620	3,620
Morgan Stanley Finance LLC 08/23/2024		2,000.000				2,000	1,979	(21)
Barclays Bank PLC 01/17/2025		3,000.000				3,000	906	(2,094)
Barclays Bank PLC 01/17/2025		3,000.000				3,000	1,252	(1,748)
GS Finance Corp Note 03/14/2025		14,000.000				14,000	24,221	10,221
BNP Paribas Note Conv Index Lnkd 06/26/2025		4,000.000				4,000	7,202	3,202
Citigroup Global Markets Holdings 02/09/2026		20,000.000				20,000	24,348	4,348
Morgan Stanley Finance LLC 05/19/2026		10,000.000				10,000	12,074	2,074

UTAH STATE UNIVERSITY
OTHER INVESTMENTS PORTFOLIO
30 June 2024

Schedule C2B
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Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Corporate Bonds (continued)								
Citigroup Global Markets Holdings 06/29/2026		10,000.000				\$10,000	\$9,176	(\$824)
Societe Generale 08/25/2026		2,000.000				2,000	763	(1,237)
Equities								
Adobe Inc		1.000				590	556	(34)
Airbnb Inc Class A		7.000				1,105	1,061	(44)
Alphabet Inc Class		8.000				1,343	1,457	114
Aon Plc A		4.000				1,174	1,174	0
Apple Inc		6.000				1,065	1,264	199
Applied Materials		8.000				1,280	1,888	608
Auto Data Processing		4.000				974	955	(19)
Cisco Systems Inc		21.000				1,008	998	(10)
ConocoPhillips		10.000				1,230	1,144	(86)
EOG Resources Inc		9.000				1,167	1,133	(34)
Exxon Mobil Corp		11.000				1,148	1,266	118
Illinois Tool Works		5.000				1,202	1,185	(17)
KLA Corp		2.000				981	1,649	668
LAM Research Corp		1.000				698	1,065	367
Mastercard Inc		2.000				833	882	49
Merck & Co Inc		8.000				1,036	990	(46)
Microsoft Corp		4.000				1,460	1,788	328
Nucor Corp		5.000				853	790	(63)
Occidental Petrol Co		18.000				1,149	1,135	(14)
Pfizer Inc		47.000				1,433	1,315	(118)
Qualcomm Inc		6.000				1,062	1,195	133
Vertex Pharmaceutical		2.000				844	937	93
Visa Inc		4.000				1,018	1,050	32
Exchange Traded Funds								
Abrdn Blmbr Al Cm Ln D		479.000				15,634	15,529	(105)
First Trust TCW		486.000				20,939	20,922	(17)
Franklin Senior Loan		286.000				6,969	6,981	12
Innovator Grow Acclrt		393.000				11,161	12,120	959
Innovator US Equity		322.000				10,046	10,395	349

UTAH STATE UNIVERSITY
OTHER INVESTMENTS PORTFOLIO
30 June 2024

Schedule C2B
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Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Exchange Traded Funds (continued)								
Innovator US Equity Acclrtd		360.000				\$11,156	\$11,952	\$796
Invesco S&P 500 GARP		77.000				7,235	7,914	679
Invesco S&P 500 Equal		44.000				6,792	7,228	436
Ishares Gold ETF		119.000				4,526	5,228	702
Ishares Morningstar		97.000				6,514	7,897	1,383
Ishares Russell 1000		21.000				6,360	7,655	1,295
Janus Henderson AAA		301.000				15,218	15,315	97
KFA Mnt Lucas Furt Inx		62.000				1,847	1,808	(39)
Simplify Aggregate Bond		334.000				6,967	6,934	(33)
Simplify Managed Futurs		68.000				1,834	1,831	(3)
Simplify MBS ETF		233.000				11,717	11,734	17
Simplify Short Tsry Ftg		897.000				19,097	19,124	27
Spdr Long Term Treasury ETF		54.000				1,532	1,470	(62)
Vanguard Extended Dur ETF		121.000				9,117	8,883	(234)
Other Assets								
Public Storage		4.000				1,084	1,151	67
Commonfund								
Multi-Strategy Bond		347,710.288				4,358,436	5,145,842	787,406
Multi-Strategy Equity		41,586.808				3,998,795	29,614,122	25,615,327
Harold Dance Investments								
American Balanced Fund - Class A		887.659				17,021	30,677	13,656
Vanguard								
500 Index Fund Admiral Shares		153.367				21,736	77,260	55,524
Total Bond Market Index Fund Admiral Shares		1,970.915				21,321	18,684	(2,637)
						<u>9,478,048</u>	<u>36,152,523</u>	<u>26,674,475</u>
Alternatives								
vSpring								
Kickstart Seed Fund 1, L.P.						130,336	45,281	(85,055)
						<u>130,336</u>	<u>45,281</u>	<u>(85,055)</u>

UTAH STATE UNIVERSITY
OTHER INVESTMENTS PORTFOLIO
30 June 2024

Schedule C2B
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Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
Money Market / Cash								
Cetera - Money Market						\$513	\$513	\$0
Charles Schwab - Money Market 7788-2481						7,318	7,318	0
Charles Schwab - Cash 9025-2459						75	75	0
Charles Schwab - TD Bank USA NA Money Market 9025-2459						16,146	16,146	0
Schwab US Treasury Money Investor						2,281	2,281	0
Edward Jones						5	5	0
						<u>26,338</u>	<u>26,338</u>	<u>0</u>
Receivable / In Transit / Unsettled Purchases								
Morgan Stanley Unsettled Purchases						20,419	20,419	0
						<u>20,419</u>	<u>20,419</u>	<u>0</u>
Total Other Investments						<u>\$9,866,269</u>	<u>\$36,448,685</u>	<u>\$26,582,416</u>

UTAH STATE UNIVERSITY
SUMMARY OF OTHER INVESTMENT TRANSACTIONS
For the Month of June 2024

Schedule C2C
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	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Other Investments							
Common and Preferred Stock							
Cetera Advisor Networks LLC							
Bluerock Total Income Real Estate Fund Class A							\$513
Morgan Stanley							
Allspring Disciplined US Core A			1,250.000	\$26,825	\$27,044	\$219	
JP Morgan Chase & Co	102.000	\$20,485	102.000	20,485	20,419	(66)	
Utah Public Treasurers'							
Investment Fund		738					738
ETF / Bonds / Mutual Funds							
Charles Schwab 7788-2481		1,911					3,642
Charles Schwab 9025-2459		9,989		9,509	9,498	(11)	599
Harold Dance Investments							98
Vanguard		441					441
Money Market / Cash							
Cetera - Money Market		515		10,993	10,993	0	2
Charles Schwab - Money Market 7788-2481		1,734					2
Charles Schwab - Cash 9025-2459		75					
Charles Schwab - TD Bank USA NA Money Market 9025-2459		10,038		9,989	9,989	0	6
Schwab US Treasury Money Investor							10
Morgan Stanley				2	2	0	
Receivable / In Transit / Unsettled Purchases							
Morgan Stanley Unsettled Purchases		20,419					
Total Other Investments		<u>\$66,345</u>		<u>\$77,803</u>	<u>\$77,945</u>	<u>\$142</u>	<u>\$6,051</u>

UTAH STATE UNIVERSITY
ENDOWMENT TRUSTS
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule D-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest and Dividends	Realized Gain or (Loss)	Total Realized Income/(Loss)	Less Expenses	Net Realized Income/(Loss)
Jul 2023	\$6,219,981	\$598,201	\$933,200	\$209,655	\$6,094,637	\$6,157,309	\$12,271	(\$12,926)	(\$655)	\$651	(\$1,306)
Aug 2023	6,094,637	447,543	423,355	(174,594)	5,944,231	6,019,434	24,188	(29,778)	(5,590)	0	(5,590)
Sep 2023	5,944,231	771,884	745,545	(207,191)	5,763,379	5,853,805	26,482	30,493	56,975	143	56,832
Oct 2023	5,763,379	435,078	424,933	(158,848)	5,614,676	5,689,028	10,849	36,643	47,492	776	46,716
Nov 2023	5,614,676	573,554	548,239	395,166	6,035,157	5,824,917	25,315	(28,735)	(3,420)	0	(3,420)
Dec 2023	6,035,157	452,789	422,557	233,441	6,298,830	6,166,994	30,270	(16,582)	13,688	33	13,655
Jan 2024	6,298,830	767,632	761,342	106,227	6,411,347	6,355,089	6,356	8,607	14,963	66	14,897
Feb 2024	6,411,347	1,224,010	1,201,440	120,261	6,554,178	6,482,763	22,570	266,434	289,004	0	289,004
Mar 2024	6,554,178	845,805	809,620	192,644	6,783,007	6,668,593	36,218	77,209	113,427	33	113,394
Apr 2024	6,783,007	719,964	707,687	(224,866)	6,570,418	6,676,713	12,302	(2,037)	10,265	26	10,239
May 2024	6,570,418	1,015,651	986,997	289,602	6,888,674	6,729,546	28,653	35,544	64,197	0	64,197
Jun 2024	6,888,674	776,844	993,353	20,790	6,692,955	6,790,815	35,339	(3,324)	32,015	33	31,982
	<u>\$6,219,981</u>	<u>\$8,628,955</u>	<u>\$8,958,268</u>	<u>\$802,287</u>	<u>\$6,692,955</u>	<u>\$6,284,584</u>	<u>\$270,813</u>	<u>\$361,548</u>	<u>\$632,361</u>	<u>\$1,761</u>	<u>\$630,600</u>
Comparative Totals:											
Year-to-date											
FY 2023-24	\$6,219,981	\$8,628,955	\$8,958,268	\$802,287	\$6,692,955	\$6,284,584	\$270,813	\$361,548	\$632,361	\$1,761	\$630,600
FY 2022-23	6,174,670	7,548,559	7,557,863	54,615	6,219,981	6,244,033	245,010	(320,811)	(75,801)	18,126	(93,927)
Amt Change					472,974	40,551	25,803	682,359	708,162	(16,365)	724,527
% Change					7.60%	0.65%	10.53%	212.70%	934.24%	-90.28%	771.37%

Note: Endowment Trusts include externally managed endowment trusts.

UTAH STATE UNIVERSITY
ENDOWMENT TRUSTS PORTFOLIO
30 June 2024

Schedule D-1-A
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Description	Number of Shares	Cost	Fair Value	Unrealized Gain/(Loss)
Common and Preferred Stock				
Abbvie Inc Com	928.000	\$138,487	\$159,171	\$20,684
Amazon Com Inc	952.000	119,287	183,974	64,687
Apple Inc	3,075.000	134,951	647,656	512,705
AT & T Inc	9,950.000	178,879	190,144	11,265
Atlantica Sustainable Infr. Plc	3,550.000	114,194	77,923	(36,271)
BP Plc Ads	6,650.000	259,707	240,065	(19,642)
Coca Cola Co	2,149.000	130,644	136,784	6,140
Colgate Palmolive Co	1,532.000	115,038	148,665	33,627
Crown Castle Intl Corp	1,282.000	194,325	125,251	(69,074)
Diamondback Energy Inc	347.000	52,209	69,466	17,257
Enbridge Inc	4,600.000	193,980	163,714	(30,266)
Enterprise Prod Partnership LP	7,100.000	186,120	205,758	19,638
Ford Motor Co New	8,540.000	121,789	107,092	(14,697)
Johnson & Johnson	1,366.000	207,497	199,655	(7,842)
JP Morgan Chase & Co	971.000	131,928	196,394	64,466
Lazard Inc	3,381.000	134,189	129,087	(5,102)
Medtronic Plc Shs	2,549.000	215,160	200,632	(14,528)
MetLife Incorporated	1,836.000	110,733	128,869	18,136
Microsoft Corp	398.000	110,355	177,886	67,531
Morgan Stanley	1,950.000	162,927	189,520	26,593
Nextera Energy Inc	3,005.000	196,391	212,784	16,393
Occidental Petroleum Corp De	1,701.000	104,115	107,214	3,099
Pfizer Inc	7,167.000	233,579	200,533	(33,046)
Procter & Gamble	789.000	109,314	130,122	20,808
Prologis Inc Com	1,124.000	135,354	126,236	(9,118)
Public Storage	250.000	69,635	71,913	2,278
Rio Tinto Plc Spon ADR	1,061.000	67,478	69,952	2,474
Teva Pharmaceuticals ADR	5,200.000	212,490	84,500	(127,990)

UTAH STATE UNIVERSITY
 ENDOWMENT TRUSTS PORTFOLIO
 30 June 2024

Schedule D-1-A
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Description	Number of Shares	Cost	Fair Value	Unrealized Gain/(Loss)
Common and Preferred Stock (continued)				
Verizon Communications	3,300.000	\$148,318	\$136,092	(\$12,226)
Viatis Inc	8,896.000	131,375	94,564	(36,811)
Energy Sel Sect Spdr Fd	1,550.000	128,682	141,282	12,600
iShares Preferred & Income	51,089.000	1,688,809	1,611,858	(76,951)
		<u>6,237,939</u>	<u>6,664,756</u>	<u>426,817</u>
Money Market & Cash Funds				
Morgan Stanley MSILF Govt Sec Part		22,246	22,246	0
Morgan Stanley Cash		<u>5,953</u>	<u>5,953</u>	<u>0</u>
		<u>28,199</u>	<u>28,199</u>	<u>0</u>
Total Endowment Trusts		<u><u>\$6,266,138</u></u>	<u><u>\$6,692,955</u></u>	<u><u>\$426,817</u></u>

UTAH STATE UNIVERSITY
SUMMARY OF ENDOWMENT TRUST INVESTMENT TRANSACTIONS
For the Month of June 2024

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	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
<u>Endowment Trusts</u>							
Common and Preferred Stock							
Johnson & Johnson	462.000	\$68,708					
Occidental Petroleum Corp De	1,701.000	104,115					
Prologis Inc Com	607.000	68,820					
Public Storage	250.000	69,635					
iShares Preferred & Income			13,829.000	\$433,551	\$430,227	(\$3,324)	
Funds held at Morgan Stanley - Dividends							\$34,844
Money Market & Cash Funds							
Morgan Stanley Bank N.A. #		459,580		563,093	563,093	0	495
Morgan Stanley Cash		5,986		33	33	0	
Total Endowment Trusts		<u>\$776,844</u>		<u>\$996,677</u>	<u>\$993,353</u>	<u>(\$3,324)</u>	<u>\$35,339</u>

UTAH STATE UNIVERSITY
PLANT FUND TRUSTS
SUMMARY REPORT OF INVESTMENTS AND INVESTMENT INCOME

Schedule E-1

	Beginning Fair Value	Purchases	Sales Proceeds	Change in Fair Value	Ending Fair Value	Average Daily Fair Value	Total Interest Income	Realized Gain or (Loss)	Total Realized Income	Less Expenses	Net Realized Income/(Loss)
Jul 2023	\$92,986,097	\$33,139,886	\$26,092,248	\$0	\$100,033,735	\$99,767,440	\$432,189		\$432,189		\$432,189
Aug 2023	100,033,735	435,420	237,995	0	100,231,160	100,231,160	451,297		451,297		451,297
Sep 2023	100,231,160	2,751,431	2,238,781	0	100,743,810	100,261,291	447,531		447,531		447,531
Oct 2023	100,743,810	469,566	3,194,017	0	98,019,359	98,121,681	452,735		452,735		452,735
Nov 2023	98,019,359	9,456,262	2,216,551	0	105,259,070	101,382,828	457,257		457,257		457,257
Dec 2023	105,259,070	457,257	9,787,167	0	95,929,160	96,082,031	446,871		446,871		446,871
Jan 2024	95,929,160	446,871	846,837	0	95,529,194	95,752,997	445,795		445,795		445,795
Feb 2024	95,529,194	445,795	3,886,944	0	92,088,045	93,661,567	407,857		407,857		407,857
Mar 2024	92,088,045	8,231,172	213,308	0	100,105,909	96,640,123	446,815		446,815		446,815
Apr 2024	100,105,909	447,109	10,004,981	0	90,548,037	90,591,942	405,567		405,567		405,567
May 2024	90,548,037	4,290,715	734,315	0	94,104,437	92,265,013	425,617		425,617		425,617
Jun 2024	94,104,437	856,156	4,903,437	0	90,057,156	90,084,712	402,722		402,722		402,722
	<u>\$92,986,097</u>	<u>\$61,427,640</u>	<u>\$64,356,581</u>	<u>\$0</u>	<u>\$90,057,156</u>	<u>\$96,236,899</u>	<u>\$5,222,253</u>	<u>\$0</u>	<u>\$5,222,253</u>	<u>\$0</u>	<u>\$5,222,253</u>

Comparative Totals:

Year-to-date

FY 2023-24	\$92,986,097	\$61,427,640	\$64,356,581	\$0	\$90,057,156	\$96,236,899	\$5,222,253	\$0	\$5,222,253	\$0	\$5,222,253
FY 2022-23	34,488,447	112,936,066	54,438,416	0	92,986,097	32,732,997	1,172,690	0	1,172,690	0	1,172,690
Amt Change					(2,928,941)	63,503,902	4,049,563	0	4,049,563	0	4,049,563
% Change					-3.15%	194.01%	345.32%	0.00%	345.32%	0.00%	345.32%

Note: Plant Fund Trusts include all debt service reserve and construction fund accounts in compliance with bond issue covenants.

UTAH STATE UNIVERSITY
PLANT TRUSTS PORTFOLIO
30 June 2024

Schedule E-1-A

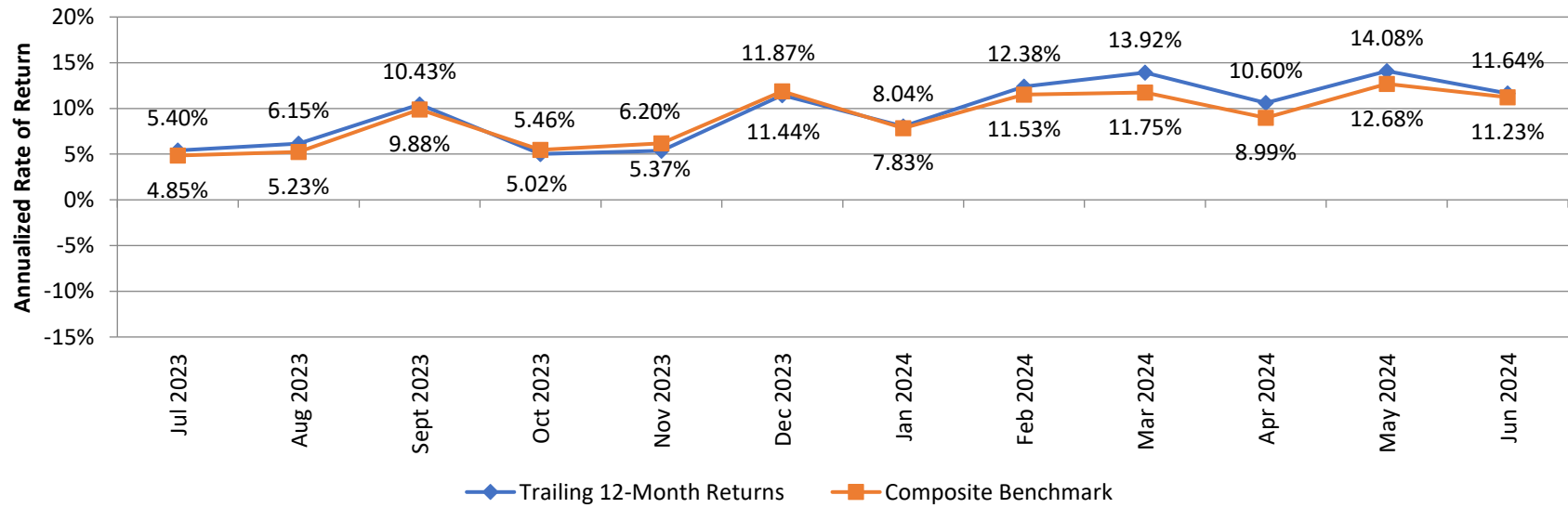
Description	Face Value	Number of Shares	Interest Rate	Date Acquired	Maturity Date	Cost	Fair Value	Unrealized Gain/(Loss)
US Bank								
Utah Public Treasurers' Investment Fund			5.365%			\$89,654,434	\$89,654,434	\$0
						<u>89,654,434</u>	<u>89,654,434</u>	<u>0</u>
Receivable								
Utah Public Treasurers' Investment Fund						402,722	402,722	0
						<u>402,722</u>	<u>402,722</u>	<u>0</u>
Total Plant Trusts						<u>\$90,057,156</u>	<u>\$90,057,156</u>	<u>\$0</u>

UTAH STATE UNIVERSITY
SUMMARY OF PLANT TRUST INVESTMENT TRANSACTIONS
For the Month of June 2024

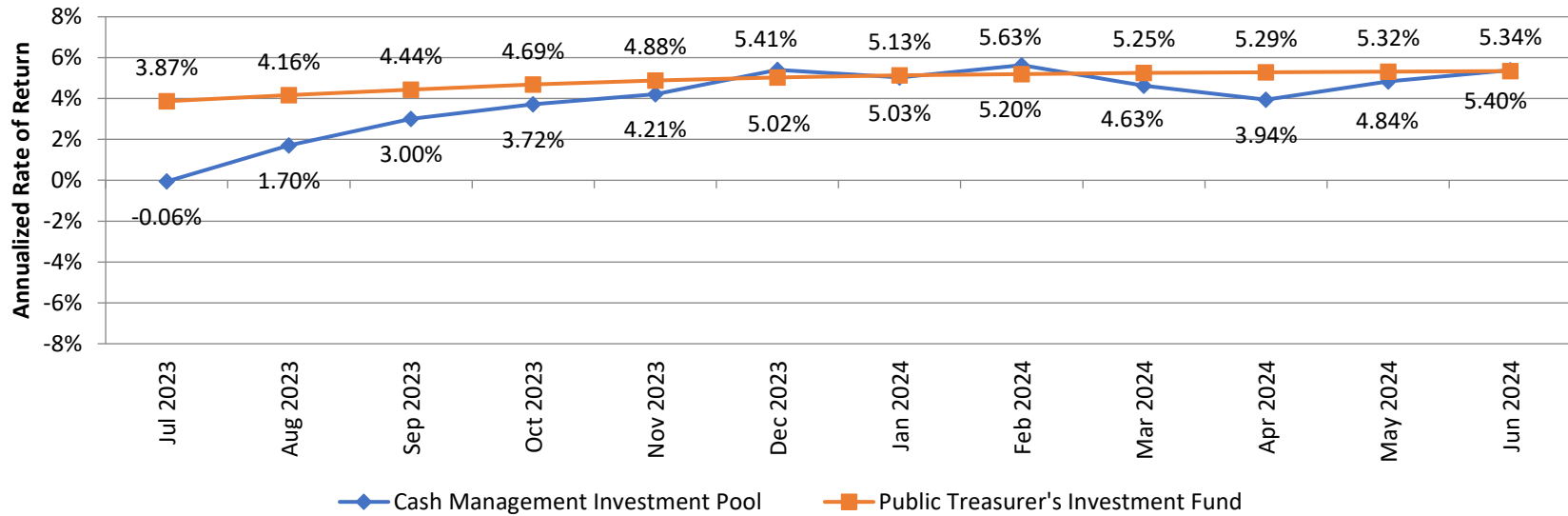
Schedule E-2

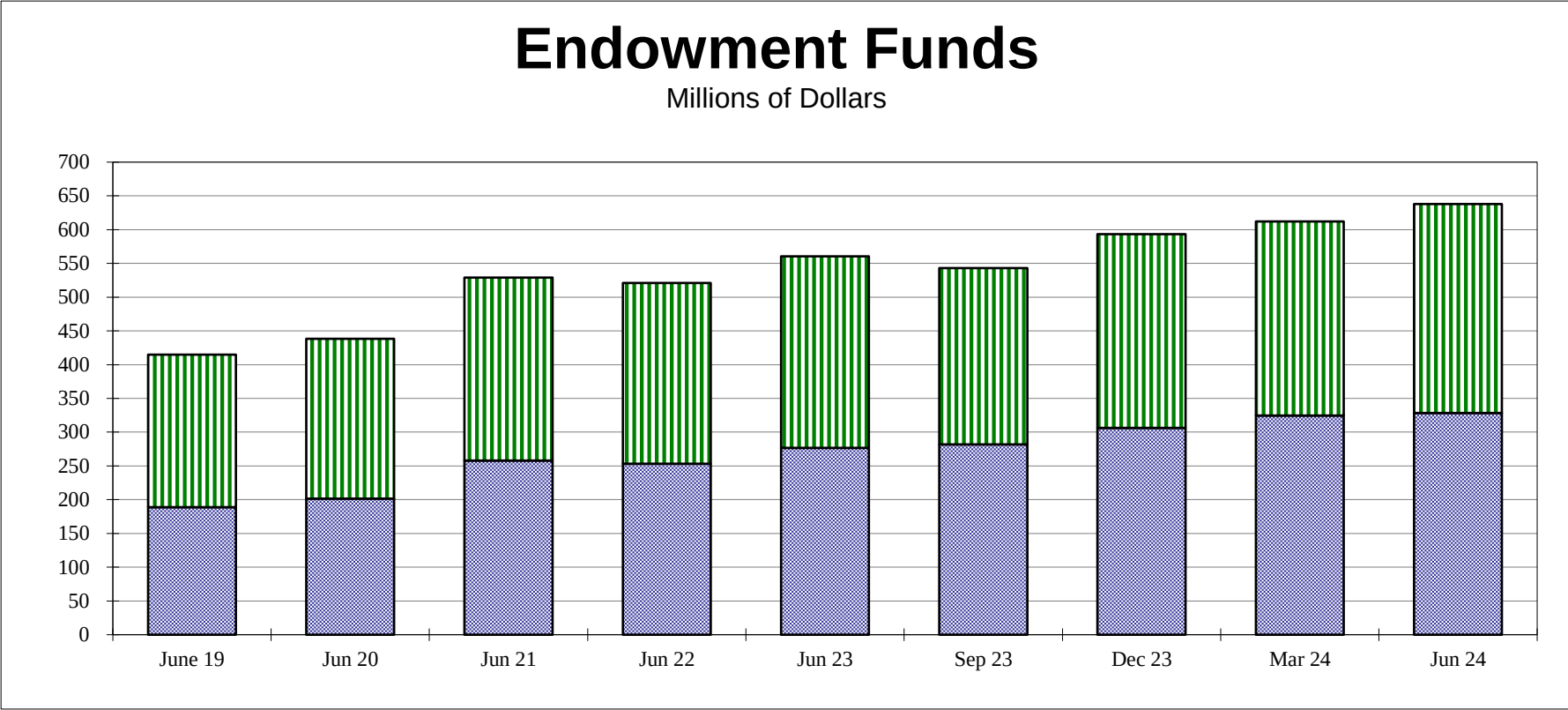
	Purchases		Sales				Earnings
	Shares	Cost	Shares	Cost	Receipts	Gain/(Loss)	
Plant Trusts							
US Bank							
Utah Public Treasurers' Investment Fund		\$453,434		\$4,903,437	\$4,903,437	\$0	\$402,722
Receivable							
Utah Public Treasurers' Investment Fund		402,722					
Total Plant Trusts		\$856,156		\$4,903,437	\$4,903,437	\$0	\$402,722

Endowment Pool



Cash Management Investment Pool





Quasi Endowment
True Endowment
Total

Fair Value	Fair Value	Fair Value	Fair Value	Fair Value	Fair Value	Fair Value	Fair Value	Fair Value
\$226.0	\$236.5	\$271.0	\$267.7	\$283.8	\$261.1	\$287.4	\$287.7	\$309.8
188.7	201.7	257.8	253.4	276.7	282.0	306.1	324.5	328.3
\$414.7	\$438.2	\$528.8	\$521.1	\$560.5	\$543.1	\$593.5	\$612.2	\$638.1

8 November 2024

ITEM FOR ACTION

RE: USU, USU Eastern, and USU Blanding Auxiliary Annual Reports and USU Service Enterprises for FY2023-24

The attached report of Auxiliary Enterprises Operations and Service Enterprises are submitted for the Trustees consideration. The reports have received the appropriate administrative review and approval.

EXECUTIVE SUMMARY

Auxiliary Enterprises – Utah System of Higher Education Policy R550 requires Utah State University to submit an annual report of Auxiliary Enterprises operations. Auxiliary Enterprises are business enterprises or other support activities (as distinguished from primary programs of instruction, research, and public service) operated on an essentially self-supporting basis. The primary purpose of such operations is to provide specified services to students, faculty, staff, or guests of the institution. The Report of Auxiliary Enterprises Operations, summarizes actual totals for the fiscal year just ended. The Board of Trustees is responsible to review and approve the Report of Auxiliary Enterprises Operations.

Service Enterprises - Utah System of Higher Education Policy R220 delegates review and approval authority to the Board of Trustees for Service Enterprises reports, subject to being reported annually to the Utah Board of Higher Education. Service Enterprises provide a specific type of service to various institutional departments, rather than to individuals, and are supported by internal charges to departmental operating budgets.

These reports present financial information for the Auxiliary and Service Enterprises at Utah State University, Utah State University Eastern, and Utah State University Blanding.

RECOMMENDATION

The President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Auxiliary and Service Enterprises Annual Reports as presented.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, Utah System of Higher Education policy requires that Utah State University, Utah State University Eastern, and Utah State University Blanding annually submit reports of Auxiliary Enterprises Operations and Utah State University Service Enterprises; and

WHEREAS, The Board of Trustees is to review and approve the referenced Auxiliary and Service Enterprises reports; and

WHEREAS, The Report of Auxiliary Enterprises Operations is to summarize the actual revenues, expenditures, transfers, and total net income/(loss) from operations for the fiscal year just ended; and

WHEREAS, The Service Enterprises Report is to summarize the actual revenues, expenditures, transfers, and total income/loss from operations for the fiscal year just ended; and

WHEREAS, The President and Vice President for Finance and Administrative Services recommend approval of the attached Report of Auxiliary Enterprises Operations and the Service Enterprises Report:

NOW, THEREFORE, BE IT RESOLVED, That the USU Board of Trustees hereby approves the attached Report of Auxiliary Enterprises Operations summarizing FY2023-24 actuals and the Service Enterprises Report summarizing FY2023-24 actuals.

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES:

Date



**Report of Auxiliary Enterprises Operations
FY24**

Revenue/Expenses Category	Campus Store	Dining Services	Parking Operations	Student Housing	Taggart Student Center	University Inn	TOTAL
Operating Revenue	\$9,447,293	\$13,267,356	\$2,923,969	\$20,974,627	\$2,627,194	\$1,131,040	\$50,371,479
Expenses (including COGS)	\$9,693,349	\$12,808,025	\$1,239,092	\$10,733,290	\$2,016,940	\$1,007,083	\$37,497,779
Net Income/(loss) from operations	(\$246,056)	\$459,331	\$1,684,877	\$10,241,337	\$610,254	\$123,957	\$12,873,700
Debt Service		\$110,002	\$1,121,156	\$7,375,003			8,606,161
Total Net Income/(loss)	(\$246,056)	\$349,329	\$563,721	\$2,866,334	\$610,254	\$123,957	\$4,267,539

**Report of Service Enterprises Operations
FY24**

Revenue/Expenses Category	Distribution Center/Mailing Bureau	Information Technology	Motor Pool	Aggie Print	Surplus Sales	TOTAL
Operating Revenue	\$793,563	\$16,155,490	\$1,849,346	\$2,598,081	\$294,256	\$21,690,736
Expenses (including COGS)	\$776,223	\$15,777,564	\$1,953,775	\$2,200,854	\$255,410	\$20,963,826
Net Income/(loss) from operations	\$17,340	\$377,926	(\$104,429)	\$397,227	\$38,846	\$726,910



USU Eastern
Report of Auxiliary Enterprises Operations
FY24

Revenue/Expenses Category	Dining Services	Student Housing	Student Center	TOTAL
Operating Revenue	\$1,045,406	\$956,949	\$23,054	\$2,025,409
Expenses (including COGS)	\$1,135,422	\$865,340	\$4,222	\$2,004,984
Net Income/(loss) from operations	(\$90,016)	\$91,609	\$18,832	\$20,425

USU Blanding
Report of Auxiliary Enterprises Operations
FY24

Revenue/Expenses Category	Bookstore	Dining Services	Student Housing	Student Center	TOTAL
Operating Revenue	\$78,989	\$636,320	\$391,386	\$25,592	\$1,132,287
Expenses (including COGS)	\$78,989	\$646,173	\$525,503	\$25,592	\$1,276,257
Net Income/(loss) from operations	\$0	(\$9,853)	(\$134,117)	\$0	(\$143,970)

RESOLUTION

UTAH STATE UNIVERSITY

BOARD OF TRUSTEES

WHEREAS, USU has an obligation to align University Policy with Utah System of Higher Education (USHE) regulations, including USHE Policy R516 – General Student Fees;

WHEREAS, USU desires to separate Logan Campus General Student Fee Board policies from procedures;

WHEREAS, USU Policy 549 codifies the general student fee process for USU's Logan campus as University Policy, better aligns with USHE Policy, and allows for flexibility in procedure by separating fee board procedures from codified policy;

WHEREAS, the new policy received the appropriate administrative review and approval as required by USU Policy 203; and

WHEREAS, the President and Vice President for Student Affairs recommend that approval of USU Policy 549 be ratified by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees ratify the adoption of USU Policy 549: Logan Campus General Student Fee Policy.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

EXECUTIVE SUMMARY OF PROPOSED POLICY: 549 – Logan Campus General Student Fees

Purpose: The purpose of Proposed Policy 549 – Logan Campus General Student Fees is to bring current student fee board policy into alignment with USHE Policy R516 – General Student Fees and to separate Logan Campus General Student Fee Board policy from procedures.

Benefits: Codifies the general student fee process for USU's Logan Campus as University Policy, and better aligns with USHE Policy. Allows for flexibility in procedure by separating fee board procedures from codified policy.

University Policy 549: Logan Campus General Student Fee Policy

Category: Operating Policies

Subcategory: General

Covered Individuals: Current USU Students

Responsible Executive: Vice President of Student Affairs

Policy Custodian: Student Involvement and Leadership Advisor

Last Revised: N/A

Previous USU Policy Number: N/A

549.1 PURPOSE AND SCOPE

The University is committed to ethical stewardship of funds generated through student fees. This policy establishes the process to implement, review, revise, and repeal student fees in a fiscally responsible manner in compliance with USHE R516, General Student Fees. This policy applies to General Student Fees generated for Utah State University's Logan Campus.

549.2 POLICY

Revenue generated from a General Student Fee must be identified for a specific purpose. It must not be used to fund instruction, academic support, general administrative expenses, or other expenses that should reasonably be covered with state appropriations or tuition. General Student Fees may be used for the following purposes:

- 2.1 Student-Approved Facility Construction:** Revenue from General Student Fees may be pledged to secure bonds to construct or renovate a specific facility that the student body approved in accordance with this policy. Such facilities shall be for the enrichment of the student experience and may not be for the construction of instructional space.
- 2.2 Student-Approved Facility Operation:** Revenue from General Student Fees may fund operation and maintenance, capital improvements, and other necessary operating expenses for student-approved facilities.
- 2.3 Student Activities, Programs, and Services:** Revenue from General Student Fees may be used to fund activities, programs, and services from which the general student body may benefit.

2.4 Process

The General Student Fee Advisory Board oversees the following tasks: (a) establishing and revising fees; (b) reviewing fees; (c) repealing fees; (d) five-year comprehensive review; and (e) sunset of student-approved facility construction fees.

2.4.1 Establishing and Revising Fees. Establishing new student fees shall be supported by a demonstrated need, a clear statement describing the purpose of the fee, and a sound budget plan. Proposed revisions to General Student Fees must include a rationale for the proposed change and a revised budget plan.

Course fees, special fees for distinct groups, and tuition charges shall not be subject to review by the General Student Fee Advisory Board.

After review and comment by the USU Leadership Council, all new fee requests shall be voted on by the General Student Fee Advisory Board. A favorable vote by the General Student Fee Advisory Board will move the fee request to a referendum at the general student-body election. If the referendum passes, the General Student Fee Advisory Board will provide a positive recommendation to the University President and, if approved, to the Board of Trustees. A student referendum for new General Student Fees may be initiated by student petition as outlined in the USUSA Constitution.

Exceptions to the referendum process may be approved by the General Student Fee Advisory Board as long as the existing fee increase request is less than \$30 (per student per semester). Details about this exception are outlined in the Logan Campus General Student Fee Procedures Manual.

Requests for new General Student Fees for student-approved facility construction or renovation projects shall be subject to a vote of the student body. A majority of voting students must vote in favor of the proposal to move forward to the Board of Trustees.

Unless otherwise required by this policy, General Student Fees proposed to renovate or replace an existing student-approved facility do not require a student body vote if the project does not expand the facility's capacity and does not exceed \$10,000,000.

There shall be no automatic annual increases in General Student Fees. All increases must be implemented in a manner consistent with this policy. However, when the University President and Utah Legislature authorize a salary increase for USU employees, the General Student Fee Advisory Board should consider increasing General Student Fees to match the salary increase for USU employees paid through student fees. The General Student Fee Advisory Board may hold a special meeting to address salary increases or act early on anticipated action by the University President and Utah Legislature.

2.4.2 Reviewing Fees. The General Student Fee Advisory Board shall review each Logan Campus General Student Fee annually to ensure the fee meets established objectives. The General Student Fee Advisory Board shall also review USU enrollment projections and enrollment impact on Logan Campus General Student Fee revenue, examine whether each Logan Campus General Student Fee may be proportionally adjusted with enrollment change, and assess the adequacy of fund balances. The General Student Fee Advisory Board may require an annual report/program review to determine if the expenditures are appropriate, if the fee is still necessary, and supports the original intent of the fee.

The General Student Fee Advisory Board shall provide a report of its annual report/program review of each Logan Campus General Student Fee, including any recommendations for revision or repeal, to the University President and Board of Trustees.

Fees created or adjusted for student-approved facility operation shall continue and be annually reviewed and adjusted according to the procedures set in this policy.

2.4.3 Repealing Fees. The General Student Fee Advisory Board may recommend repealing a general student fee when pledged revenue is no longer needed for debt service, when programs, services, or activities are discontinued, or when an alternative funding source is identified.

2.4.4 Five-Year Comprehensive Review. Beginning in 2020-21 and every five years thereafter, the General Student Fee Advisory Board shall comprehensively review all General Student Fees and determine whether each fee should be retained, transitioned to tuition or state appropriations, or repealed.

2.4.5 Sunset of Student-Approved Facility Construction Fees. Notwithstanding any other provision in this policy, each General Student Fee established for constructing or renovating a student-approved facility shall be repealed by the beginning of the academic year after bond obligations end. The General

Student Fee Advisory Board shall identify these fees and make the appropriate recommendations to the University President and Board of Trustees.

2.4.6 Reporting Obligations. The chair(s) of each Administrative-Fee Committee will report the utilization and efficacy of the student fee for which their committee has oversight. The report will be presented to the General Student Fee Advisory Board annually. The General Student Fee Advisory Board will report to the University President and Board of Trustees on proposed changes relating to existing fees and on all requests for new fees.

549.3 RESPONSIBILITIES

3.1 General Student Fee Advisory Board

Notify currently enrolled students of proposed student fee changes and the date, time, and location of the student hearing on the proposal. Hold a student hearing and summarize student comments to the Board of Trustees. Hold annual meetings to orient new members, review this policy, and identify issues to address over the coming year.

The General Student Fee Advisory Board comprises all elected USUSA officers, the Vice President for Student Affairs, the Associate Vice President for Student Affairs, the Executive Director of Budget and Planning Office, the Executive Director of Student Involvement and Leadership, Student Involvement and Leadership Advisor and Student Involvement and Leadership Staff Assistant, as well as seven students-at-large. Only the elected USUSA officers, the students-at-large, and the Vice President for Student Affairs hold voting privileges.

3.2 Administrative Fee Committees

Review proposed budgets and actual expenditures of each fee-receiving area. Forward budgets and reports to the General Student Fee Advisory Board. Ensure that each fee-receiving area maintains a desired level of service. The Administrative Fee Committees may recommend revisions to General Student Fees to the General Student Advisory Board to ensure that the fees are appropriate to maintain the level of service. Maintain a record that sets forth the rationale for each decision regarding fees.

549.4 REFERENCES

- [USHE R516 General Student Fees](#)

549.5 RELATED USU POLICIES

- [USU Policy 350: Educational Benefits](#)
- [USU Policy 538: Course Fees](#)
- USU Policy 549A: Statewide Campus General Student Fee Policy (pending approval)

549.6 DEFINITIONS

6.1 Administrative Fee Committee

The committee reviews and recommends fee allocation and service levels within its fee-receiving area to the General Student Fee Advisory Board.

6.2 General Student Fee Advisory Board

The committee oversees the establishment, review, revision, or repeal of General Student Fees.

6.3 General Student Fees

Mandatory fees are assessed to students attending a Logan Campus upon registration to benefit students broadly and to support student inclusion, enrichment, and success as a campus community.

Information below is not included as part of the contents of the official policy. It is provided only as a convenience for readers/users and may be changed at any time by persons authorized by the president.

RESOURCES

Procedures

- Logan Campus General Student Fees Procedure Manual

Guidance

- None

Related Forms and Tools

- None

Contacts

- [Alex Gatherum, Student Involvement and Leadership Office](#)

POLICY HISTORY

Original issue date: N/A

Last review date: N/A

Next scheduled review date: 2027/10/01

Previous revision dates: N/A

Utah State University
Logan Campus General Student Fee Procedures

1. Purpose: USU Policy 549: Logan Campus General Student Fees establishes the appropriate uses for student fees and delegates decision-making authority to the Administrative Fee Committee and General Student Fee Advisory Board. These procedures will be carried out in accordance with USU Policy 549A.
2. Definitions
 - 2.1. **Administrative Fee Committee:** a committee that reviews and recommends to the General Student Fee Advisory Board fee allocation and service levels within its fee receiving area.
 - 2.2. **General Student Fee Advisory Board:** the committee that oversees the establishment, review, revision, or repeal of General Student Fees.
 - 2.3. **General Student Fees:** institution-wide mandatory fees assessed to students upon registration to benefit students broadly and to support student inclusion, enrichment, and success as a campus community.
3. Structure
 - 3.1. The following individuals serve on the General Student Fee Advisory Board as voting members, with their primary area of responsibility noted. Where two individuals share the same primary area of responsibility, they serve as co-chairs for that area.
 - a. USUSA Executive Vice President (Chairperson)
 - b. USUSA Logan Campus VP: USUSA Activity Fee
 - c. USUSA Engineering Senator: Technology Fee
 - d. USUSA Science Senator: Technology Fee
 - e. USUSA Student Events Executive Director: Building Fee (TSC Maintenance)
 - f. USUSA Athletics Executive Director: Athletics Fee
 - g. USUSA CAAS Senator: Athletics Fee
 - h. USUSA Art Senator: Arts Fee
 - i. USUSA Education Senator: Bus Fee
 - j. USUSA CHaSS Senator: Activity Fee (Student Media)
 - k. USUSA Diversity and Organizations Executive Director: Campus Recreation
 - l. USUSA Business Senator: Building Fee (Stadium, Spectrum, ARC)
 - m. USUSA Graduate Studies Senator: Library Fee
 - n. USUSA Natural Resources Senator: Library Fee
 - o. Vice President for Student Affairs
 - 3.2. The following individuals serve on the General Student Fee Advisory Board as non-voting members.

- p. Associate Vice President for Student Affairs
 - q. Executive Director Budget and Planning Office
 - r. Executive Director of Student Involvement and Leadership
 - s. Student Involvement and Leadership Advisor over the USUSA Executive Vice President
 - t. Student Involvement and Leadership Staff Assistant (Executive Secretary)
- 3.3. The General Student Fee Advisory Board also includes seven students-at-large that are chosen through an application process at the beginning of the fall semester. This application process shall be conducted by the Executive Vice President, Student Advocate, Graduate Senator and one College Senator appointed by the Academic Senate. Both USUSA Academic Senate and USUSA Executive Council must approve the selections by simple majority vote before the new member may serve on the board. The seven students-at-large are voting members of the General Student Fee Advisory Board, and they serve one-year terms.
- 3.4. If a USUSA officer declines or is unable to fulfill their obligations on the General Student Fee Advisory Board, the Executive Vice President and the Student Advocate shall appoint another USUSA officer to replace them. The appointment must be approved by the USUSA Executive Council before the new member may serve on the board.
- 3.5. If a student-at-large member of the General Student Fee Advisory Board declines or is unable to fulfill their obligations on the General Student Fee Advisory Board, the Executive Vice President and Student Advocate must appoint another student to fill the position.
- 3.6. Each fee receiving area at USU shall establish an Administrative Fee Committee, chaired by a member(s) of the General Student Fee Advisory Board. Students must constitute a majority of each Administrative Fee Committee.

4. Process

- 4.1. Requests for new student fees and revisions to current student fees must be submitted to the USUSA Executive Vice President by the first Wednesday of spring semester. Requests must be completed using a form established for that purpose. The USUSA Executive Vice President will provide a copy of all requests to the USUSA President, the Vice President for Student Affairs, and the executive secretary of the General Student Fee Advisory Board. The Vice President for Student Affairs will meet with the USU Leadership Council for input. The Leadership Council will provide comments on each request and give an un-prioritized list of requests it supports to the General Student Fee Advisory Board.
- 4.2. The General Student Fee Advisory Board's recommendations are due to the President annually by February 7.

- 4.3. All new fee requests, after review and comment by the USU Leadership Council, shall be voted on by the General Student Fee Advisory Board. A favorable vote by the General Student Fee Advisory Board will move the fee request to a referendum at the general student-body election. If the referendum passes, the General Student Fee Advisory Board will provide a positive recommendation to the University President, and, if approved, to the Board of Trustees. A student referendum for new General Student Fees may be initiated by student petition as outlined in the USUSA Constitution.
- 4.3.1. The General Student Fee Advisory Board may recommend revising an existing General Student Fee without going through the referendum process. However, if an existing fee increase request is more than \$30 (per student, per semester), the General Student Fee Advisory Board may not issue a recommendation to the University President and Board of Trustees without first going through the referendum process. A favorable vote by the General Student Fee Advisory Board will move the fee request to a referendum at the general student-body election. If the referendum passes, the General Student Fee Advisory Board will provide a positive recommendation to the University President, and, if approved, to the Board of Trustees.
- 4.3.2. The General Student Fee Advisory Board shall notify currently enrolled students and provide them the following information regarding the purpose and amount of the proposed fees at least 30 days prior to a vote:
- a. details of the proposed facility and estimated costs for construction;
 - b. the projected amount of the general student fee needed to fund the debt service for the cost of facility construction or renovation;
 - c. the estimated length of debt service;
 - d. the estimated costs, over the life of the facility, for the operation of the facility including operation and maintenance and capital improvements; and
 - e. the projected amount of the general student fee to cover the cost of facility operation including operations and maintenance, capital improvements, and other necessary operating expenses.
- 4.4. When there is a proposal for establishing a new General Student Fee, revising an existing General Student Fee, or repealing a General Student Fee, the General Student Fee Advisory Board shall:
- a. Notify currently enrolled students using a method(s) that the General Student Fee Advisory Board determines best reaches the majority of students (e.g. email, text, social media, student newspaper, digital signage, etc.) of the proposed change and the date, time, and location of a student hearing on the proposal; and
 - b. Hold a student hearing which shall be attended by at least one student representative from the General Student Fee Advisory Board. The student representative shall provide a summary of student comments received during

the hearing to the Board of Trustees. The hearing may be held in conjunction with USU's truth-in-tuition hearing.

4.5. An introductory meeting of the General Student Fee Advisory Board will be held annually during the first part of October to orient members to one another, to review this policy, and to identify issues that the current board will be addressing over the next year.

4.6. The Administrative Fee Committees shall oversee the following tasks:

- a. Review proposed budgets and actual expenditures of each fee receiving area. The budgets and reports shall be forwarded to the General Student Fee Advisory Board.
- b. Ensure that each fee receiving area maintains a desired level of service. The Administrative Fee Committees may recommend to the General Student Fee Advisory Board revisions to General Student Fees to ensure that the fees are appropriate to maintain the level of service.
- c. Maintain a record that sets forth the rationale for each decision regarding fees.

4.7. The Administrative Fee Committee may also:

- a. Request and conduct in-depth, comprehensive reviews of specific fees; and
- b. Review budgets and recommend to the appropriate fee administrators any necessary changes.

5. Reporting

5.1. The chair(s) over each fee receiving area will report directly to the General Student Fee Advisory Board. The General Student Fee Advisory Board will report to the University President and Board of Trustees on proposed changes relating to existing fees, and on all requests for new fees.

5.2. Student fee issues will typically be presented once a year to the University President and the Board of Trustees as a package proposal. The General Student Fee Advisory Board will prepare the proposal after hearing all requests for new fees and increases in existing fees.

5.3. General Student Fees shall be published on USU's website.



The Policy Custodian and Responsible Executive must complete this form before a policy proposal is initiated, drafted, or presented for approval. If you have any questions, contact the Policy Office.

Step 1: Provide basic information

POLICY INFORMATION			
Policy Number & Title:	549: Logan Campus General Student Fee Policy	Category:	Operating
Action Requested:	☒ NEW ☐ REVISION	Subsection:	General
Covered Individuals:	Current USU students		
Submitted by:	Alex Gatherum		
Responsible Executive:	<i>Kristin M. Deschamps</i>	Date:	10-3-24
Policy Custodian:	<i>Alex Gatherum</i>	Date:	10-3-24
Is a law or regulation requiring USU to implement or revise a policy?			☒ YES ☐ NO
Provide a brief summary of the policy. Include any applicable laws or regulations.			
This policy establishes the process to implement, review, revise, and repeal student fees in a fiscally responsible manner in compliance with USHE R516, General Student Fees. This policy applies to General Student Fees generated for USU's Logan campus. This policy existed within the Student Involvement and Leadership Office previously but was not formalized as university policy. A procedure manual has also been revised to support this policy.			

*Policies that impact the general public may be subject to the Utah Administrative Rulemaking Process.

Step 2: Submit to the University Policy Office for preliminary review

POLICY OFFICE USE ONLY:	
Assign Policy #:	N/A
Policy proposal status:	☒ READY FOR NEXT PHASE ☐ REVISIONS NEEDED COMMENTS:
OFFICE OF GENERAL COUNSEL USE ONLY:	
Assigned to:	Burke Nazer

Administrative Rule:	☐ YES ☒ NO
-----------------------------	--

Do not begin drafting policy or soliciting stakeholder feedback until the Policy Office contacts you.

Step 3: Gather stakeholder input and research peer institutions

Consider which groups will be affected by the proposed policy or amendment. The Office of General Counsel and the Policy Office may recommend specific stakeholders to include.

Review the USU Compliance Matrix for possible stakeholders.

Review best practices from peer institutions and professional organizations. For more tips, review [Tips for a Successful Policy Development Team](#).

STAKEHOLDER INPUT			
Name/Office	Date Consulted	Comments	Signature
Logan Campus Student Fee Board	10/1/24	Students viewed and approved of split between policy + procedure. No concerns.	Alex Galt

Attach a list of additional stakeholders and comments if applicable.

Step 4: Begin drafting or amending policy

Follow the [Policy Template](#) to organize the content of your policy.

Review the [Policy Style Guide](#) for editorial consideration.

For existing policies, consult the [Checklist to Review USU Policy](#).

Collaborate with the Office of General Counsel liaison for review and guidance.

Draft an [implementation plan](#) that addresses communication to campus, required training, and updates to procedures or standards.

Once the policy is drafted, write an [Executive Summary](#).

DRAFT APPROVAL			
Responsible Executive:	Kristin M. Deschamps	Date:	10-3-24
Policy Custodian:	Alex Galt	Date:	10-3-24

Step 5: Submit to the University Policy Office for final review

POLICY OFFICE USE ONLY:				
☒ Style Guide	☒ Template	☒ Stakeholder Input	☒ Executive Summary	☐ Redline
☒ Consistent with USU Policy		☒ Procedural Documents Updated	☐ Implementation Plan	
This is a new policy so a redline version does not exist. This existed as a dept-level policy/procedure. This process is just formalizing the policy and the Comments: practice is already in place so no implementation plan is needed.				
Legal Approval:	<i>Bk M</i> Signature of Legal Counsel reviewing policy		Date: 10/8/2024	MM/DD/YYYY
Policy Office Approval:	<i>Crystal Giordano</i> Signature of Policy Office		Date: 10/7/2024	MM/DD/YYYY

While waiting for the final review, prepare to present the policy proposal. For tips on how to prepare, consult Presenting Policy to Stakeholders.

Step 6: The University Policy Office submits the policy for approval. The Responsible Executive presents the policy at applicable meetings and records feedback and/or decisions.

APPROVAL PROCESS		
Body	Date Consulted	Decision or Comments
USUSA Academic Senate Exec Committee	MM/DD/YYYY	Approved? See dates info above
USUSA Full Academic Senate	MM/DD/YYYY	Approved? See dates info above
SEA Committee	MM/DD/YYYY	Approved? N/A
Faculty Senate	MM/DD/YYYY	Approved? N/A
USU Leadership Team	10/9/2024	Approved? Approved
President	MM/DD/YYYY	Approved? President attended leadership mtg
Board of Trustees	MM/DD/YYYY	Approved?
Utah Board of Higher Education	MM/DD/YYYY	Approved?

POLICY OFFICE USE ONLY:			
Policy Approved	☐ YES ☐ NO ☐ WITH REVISIONS**	MM/DD/YYYY	
Published to Policy Library	MM/DD/YYYY	Published on Policy Office Home Page	MM/DD/YYYY
Email sent to Policy Update Subscribers	MM/DD/YYYY		

**Attach documentation for any required revisions.

RESOLUTION

UTAH STATE UNIVERSITY

BOARD OF TRUSTEES

WHEREAS, USU has an obligation to align University Policy with Utah System of Higher Education (USHE) regulations, including USHE Policy R516 – General Student Fees;

WHEREAS, USU desires to separate Statewide Campus General Student Fee Board policies from procedures;

WHEREAS, USU Policy 549A codifies the general student fee process for USU's statewide campuses as University Policy, better aligns with USHE Policy, and allows for flexibility in procedure by separating fee board procedures from codified policy;

WHEREAS, the new policy received the appropriate administrative review and approval as required by USU Policy 203; and

WHEREAS, the President and Vice President for Student Affairs recommend that approval of USU Policy 549A be ratified by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees ratify the adoption of USU Policy 549A: Statewide Campuses General Student Fee Policy.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

EXECUTIVE SUMMARY OF PROPOSED POLICY: 549A – Statewide Campuses General Student Fees

Purpose: The purpose of Proposed Policy 549A – Statewide Campuses General Student Fees is to bring current student fee board policy into alignment with USHE Policy R516 – General Student Fees and to separate Statewide Campuses General Student Fee Board policy from procedures.

Benefits: Codifies the general student fee process for Statewide Campuses as University Policy, and better aligns with USHE Policy. Allows for flexibility in procedure by separating fee board procedures from codified policy.

University Policy 549A: Statewide Campuses General Student Fee Policy

Category: Operating Policies

Subcategory: General

Covered Individuals: Current USU Students

Responsible Executive: Vice President of Student Affairs

Policy Custodian: Student Involvement and Leadership Advisor

Last Revised:

Previous USU Policy Number: N/A

549A.1 PURPOSE AND SCOPE

The University is committed to ethical stewardship of funds generated through student fees. This policy establishes the process to implement, review, revise, and repeal student fees in a fiscally responsible manner in compliance with USHE R516, General Student Fees. This policy applies to General Student Fees generated for Utah State University's Statewide Campuses.

549A.2 POLICY

Revenue generated from a Statewide Campus General Student Fee must be identified for a specific purpose. It may not be used to fund instruction, academic support, general administrative expenses, or other expenses that should reasonably be covered with state appropriations or tuition. Fund balances may be accumulated for large expenditures or reserves needing multi-year revenues only if planned, budgeted, and preapproved by USU's Board of Trustees. The Statewide Campuses General Student Fee Advisory Board shall annually budget general student fee revenue and expenses and shall account for the revenue of each Statewide Campus General Student Fee individually and separately from other sources. Statewide Campuses General Student Fees may be used for the following purposes:

- 2.1. Student-Approved Facility Construction:** Revenue from Statewide Campuses General Student Fees may be pledged to secure bonds to construct or renovate a specific facility that the student body approved in accordance with this policy. Such facilities shall be for the enrichment of the student experience and may not be for the construction of instructional space.
- 2.2. Student-Approved Facility Operation:** Revenue from Statewide Campuses General Student Fees may be used to fund operation and maintenance, capital improvements, and other necessary operating expenses for student-approved facilities.
- 2.3. Student Activities, Programs, and Services:** Revenue from Statewide Campuses General Student Fees may fund activities, programs, and services from which the general student body may benefit.
- 2.4. Fee Categories:** Statewide student fees shall fall into four categories: Activity, Athletics, Building, and Instructional & Student Support. The Statewide Campuses General Student Fee Board will define how fees within these categories may or may not be used. Changes to the categories themselves, increases, decreases, or changes to the

Definitions of Use shall be reviewed and approved by the Statewide Campuses General Student Fee Board. Within the four categories, each Region Fee Committee is authorized to allocate the fee revenue into subcategories as part of its annual meeting. The Statewide Campuses General Student Fee Board may review the subcategory allocations to ensure they align with the definitions of use.

2.5 Process

The Statewide Campuses General Student Fee Advisory Board oversees the following tasks: (a) establishing and revising fees; (b) reviewing fees; (c) repealing fees; (d) five-year comprehensive review; and (e) sunset of student-approved facility construction fees.

2.5.1 Establishing and Revising Fees. Establishing new student fees shall be supported by a demonstrated need, a clear statement describing the purpose of the fee, and a sound budget plan. Proposed revisions to Statewide Campuses General Student Fees must include a rationale for the proposed change and a revised budget plan.

The Statewide Campuses General Student Fee Advisory Board shall consider only Statewide Campuses General Student Fees. Course fees, special fees for distinct groups, and tuition charges shall not be subject to review by the Statewide Campuses General Student Fee Advisory Board.

After review and comment by the USU Leadership Council, all new fee requests shall be voted on by the Statewide Campuses General Student Fee Advisory Board. A favorable vote by the Statewide Campuses General Student Fee Advisory Board will move the fee request to a referendum at the general student-body election. If the referendum passes, the Statewide Campuses General Student Fee Advisory Board will provide a positive recommendation to the University President and, if approved, to the Board of Trustees. A student referendum for new Statewide Campuses General Student Fees may be initiated by student petition as outlined in the USUSA Constitution.

Exceptions to the referendum process may be approved by the General Student Fee Advisory Board as long as the existing fee increase request is less than \$30 (per student per semester). Details about this exception are outlined in the Logan Campus General Student Fee Procedures Manual.

Requests for new Statewide Campus General Student Fees for student-approved facility construction or renovation projects shall be subject to a vote of the student body. A majority of voting students must vote in favor of the proposal to move forward to the Board of Trustees.

Unless otherwise required by this policy, Statewide Campuses General Student Fees proposed to renovate or replace an existing student-approved facility do not require a student body vote if the project does not expand the facility's capacity and does not exceed \$10,000,000.

There shall be no automatic annual increases in Statewide Campuses General Student Fees. All increases must be implemented in a manner consistent with this policy. However, when the University President and Utah Legislature authorize a salary increase for USU employees, the Statewide Campuses General Student Fee Advisory Board should consider increasing Statewide Campuses General Student Fees to match the salary increase for USU employees paid through student fees. The Statewide Campuses General Student Fee Advisory Board may hold a special meeting to address salary increases or act early on anticipated action by the University President and Utah Legislature.

The total of all Statewide Campuses General Student Fee amounts on each Statewide Campus must be consistent between all campuses and regions.

2.5.2 Reviewing Fees. The Statewide Campuses General Student Fee Advisory Board shall review each Statewide Campus General Student Fee annually to ensure the fee meets established objectives. The Statewide Campuses General Student Fee Advisory Board shall also review USU enrollment projections and enrollment impact on Statewide Campus General Student Fee revenue, examine whether each Statewide Campus General Student Fee may be proportionally adjusted with enrollment change, and

assess the adequacy of fund balances. In addition, each fee-receiving area's chair(s) shall provide an annual report/program review for the Statewide Campuses General Student Fee Advisory Board to consider. The chair(s) may work with fee administrators to prepare the report.

The Statewide Campuses General Student Fee Advisory Board may not recommend reducing a Statewide Campuses General Student Fee authorized by the referendum process or previously approved by the University President and Board of Trustees unless either three years have passed since the fee was first authorized or the University President recommends the reduction. Upon the recommendation of the University President and the Board of Trustees, a fee may be discontinued.

The Statewide Campuses General Student Fee Advisory Board shall provide a report of its annual report/program review of each Statewide Campus General Student Fee, including any recommendations for revision or repeal, to the University President and Board of Trustees.

2.5.3 Repealing Fees. The Statewide Campuses General Student Fee Advisory Board may recommend repealing a general student fee when pledged revenue is no longer needed for debt service when programs, services, or activities are discontinued, when an alternative funding source is identified, or when existing fees no longer align with this policy.

2.5.4 Five-Year Comprehensive Review. Beginning in 2020-21 and every five years thereafter, the Statewide Campuses General Student Fee Advisory Board shall comprehensively review all Statewide Campuses General Student Fees and determine whether each fee should be retained, transitioned to tuition or state appropriations, or repealed.

2.5.5 Sunset of Student-Approved Facility Construction Fees. Notwithstanding any other provision in this policy, each Statewide Campus General Student Fee established for constructing or renovating a student-approved facility shall be repealed by the beginning of the academic year after bond obligations end. The Statewide Campuses General Student Fee Advisory Board shall identify these fees and make the appropriate recommendation to the University President and Board of Trustees. Fees created or adjusted for student-approved facility operation shall continue and be annually reviewed and adjusted according to the procedures set in this policy.

2.5.6 Reporting Obligations. Each Region Fee Committee will report the utilization and efficacy of statewide campus fees to the Statewide Campuses General Student Fee Advisory Board annually. The Statewide Campuses General Fee Advisory Board will report to the University President and Board of Trustees on proposed changes relating to existing fees and on all requests for new fees.

549A.3 RESPONSIBILITIES

3.1 Statewide Campuses General Student Fee Advisory Board

Notify currently enrolled students of proposed student fee changes and the date, time, and location of the student hearing on the proposal. Hold a student hearing and summarize student comments to the Board of Trustees. Hold annual meetings to orient new members, review this policy, and identify issues to address over the coming year.

The Statewide Campuses General Student Fee Advisory Board is comprised of the USUSA Executive VP (chair), all elected Statewide Service Region, Vice Presidents, one technical education student-at-large each from the Blanding, Eastern, and Moab service regions, a technical education administrator, Vice President for Student Affairs, Assistant Vice President of Statewide Campuses, Statewide Campuses Financial Officer, USU Eastern Director of Campus Life, USU Blanding Program Coordinator of Student Involvement, and a Program Coordinator of Statewide Campuses from the Student Involvement and Leadership Center.

Only the elected USUSA officers, the students-at-large, the technical education administrator, and the Vice President for Student Affairs hold voting privileges.

3.2 Region Fee Committee

Review proposed budgets and actual expenditures of each fee-receiving area. Forward reports to the Statewide Campuses General Student Fee Advisory Board. Make recommendations to the Statewide Campuses General Student Fee Advisory Board regarding the appropriate use of fees to maintain a high level of service. Maintain a record that sets forth the rationale for each decision regarding fees.

549A.4 REFERENCES

- USHE R516 General Student Fees

549A.5 RELATED USU POLICIES

- USU Policy 549A: Logan Campus General Student Fee Policy

549A.6 DEFINITIONS

6.1 Region Fee Committee

A committee that reviews and recommends to the Statewide Campuses General Student Fee Advisory Board fee allocation and service levels within each Statewide Campus Region.

6.2 Statewide Campuses General Student Fee Advisory Board

The committee oversees establishing, reviewing, revising, or repealing General Student Fees on Statewide Campuses.

6.3 Statewide Campuses General Student Fees

Upon registration, mandatory fees are assessed to students attending a Statewide Campus to benefit students broadly and support student inclusion, enrichment, and success as a campus community.

Information below is not included as part of the contents of the official policy. It is provided only as a convenience for readers/users and may be changed at any time by persons authorized by the president.

RESOURCES

Procedures

- [USU Policy 350: Educational Benefits](#)
- [USU Policy 538: Course Fees](#)
- USU Policy 549: Logan Campus General Student Fee Procedures (pending approval)

Guidance

- None

Related Forms and Tools

- None

Contacts

- [Alex Gatherum, Student Involvement and Leadership Office](#)

POLICY HISTORY

Original issue date:

Last review date: N/A

Next scheduled review date: 2027/10/01

Previous revision dates: N/A

Utah State University
Statewide Campuses General Student Fee Procedures

1. Purpose: USU Policy 549A: Statewide Campuses General Student Fees establishes the appropriate uses for student fees and delegates decision-making authority to the Administrative Fee Committee and General Student Fee Advisory Board. These procedures will be carried out in accordance with USU Policy 549B.

2. Definitions

2.1. **Region Fee Committee:** a committee that reviews and recommends to the Statewide Campuses General Student Fee Advisory Board fee allocation and service levels within each Statewide Campus Region.

2.2. **Statewide Campuses General Student Fee Advisory Board:** the committee that oversees the establishment, review, revision, or repeal of General Student Fees on Statewide Campuses.

2.3 **Statewide Campuses General Student Fees:** mandatory fees assessed to students attending a Statewide Campus upon registration to benefit students broadly and to support student inclusion, enrichment, and success as a campus community.

3. Structure

3.1. The Statewide Campuses General Student Fee Advisory Board oversees establishing, revising, maintaining, and repealing Statewide Campuses General Student Fees.

3.2. The following individuals serve on the Statewide Campuses General Student Fee Advisory Board as voting members.

- a. USUSA Executive Vice President (Chairperson)
- b. USUSA Eastern Service Region Vice President
- c. USUSA Blanding Service Region Vice President
- d. USUSA Moab Service Region Vice President
- e. USUSA Brigham City Service Region Vice President
- f. USUSA Tooele Service Region Vice President
- g. USUSA Wasatch Service Region Vice President
- h. USUSA Southwest Service Region Vice President
- i. USUSA Uintah Basin Service Region Vice President
- j. Blanding Service Region Technical Education Student at Large
- k. Eastern Service Region Technical Education Student at Large
- l. Moab Service Region Technical Education Student at Large
- m. Vice President for Student Affairs
- n. Technical Education Administrator

3.3. The following individuals serve on the Statewide Campuses General Student Fee Advisory Board as non-voting members.

- o. Assistant Vice President of Statewide Campuses (non-voting)
- p. Statewide Campuses Financial Officer (non-voting)
- q. USU Eastern Director of Campus Life (non-voting)
- r. USU Blanding Program Coordinator of Student Involvement and Leadership (non-voting)
- s. Program Coordinator of Statewide Campuses, Student Involvement and Leadership Center (non-voting – executive secretary)

3.4. If any student body officer position is vacant at the time of the annual meeting the chair and region administration shall work together to find a suitable substitute. Preference will be given to any campus representative(s) from the same region currently in good standing. Additionally, if any staff position is vacant, or if there is a change in their titles or job responsibilities, the chair and region administration shall work together to appoint applicable staff members to sit on the board as needed.

3.5. Each statewide region shall establish a Region Fee Committee for a review of student fee spending in the region. This committee will:

- (a) Review the previous fiscal years spending of student fees to ensure their appropriate use,
- (b) Review and provide feedback on the planned spending of the student fees for the current fiscal year,
- (c) Review and approve requests for any increases or decreases in student fee subcategory allocation(s), and
- (d) Review requests for any increases or decreases in student fee categories and make recommendations to the Statewide Campuses General Student Fee Advisory Board.

The regions shall be defined as:

Blanding
Brigham City
Eastern
Moab
Southwest
Tooele
Uintah Basin
Wasatch

Each committee must complete its work and submit the required reports no later than November 15th of each year. These committees will consist of a minimum of the following positions from within the region:

USUSA Region Vice President
Student association officer(s)
Associate Vice President
Director of Students
Statewide Campuses Finance Officer or their designee

For Blanding, Eastern and Moab, one Technical Education student at large and one Technical Education Administrator must also be present. Students at large for these regions will be appointed by the corresponding USUSA Vice President. Technical education students at large must be enrolled in a technical education program and pursuing a certificate.

The Statewide Campuses General Student Fee Board and Region Fee Committees may include students and university faculty and/or staff as members, when deemed necessary by the committee chair. Students must constitute a majority of any Region Fee Committee.

Statewide student fees shall fall into four categories; Activity, Athletics, Building, and Instructional & Student Support. The Statewide Campuses General Student Fee Board will define how fees within these categories may or may not be used. Changes to the categories themselves, increases, decreases, or changes to the Definitions of Use shall be reviewed and approved by the Statewide Campuses General Student Fee Board.

Within the four categories each Region Fee Committee is authorized to allocate the fee revenue into subcategories as part of their annual meeting. The subcategory allocations may be reviewed by the Statewide Campuses General Student Fee Board to ensure they are in line with the definitions of use.

4. Process

- 4.1. Requests for new student fees and revisions to current student fees must be submitted to the USUSA Executive Vice President by November 15th each year. Requests must be completed using a form established for that purpose. The USUSA Executive Vice President will provide a copy of all requests to the USUSA President, the Vice President for Student Affairs, and the executive secretary of the Statewide Campuses General Student Fee Advisory Board. The Vice President for Student Affairs will meet with the USU Leadership Council for input. The Leadership Council will provide comments on each request and give an un-prioritized list of requests it supports to the Statewide Campuses General Student Fee Advisory Board.
- 4.2. The Statewide Campuses General Student Fee Advisory Board's recommendations are due to the President annually by February 7. The Statewide Campuses General Student Fee Advisory Board shall consider only Statewide Campuses General Student Fees. Course fees, special fees for distinct groups, and tuition charges shall not be subject to review by the Statewide Campuses General Student Fee Advisory Board.
- 4.3. All new fee requests, after review and comment by the USU Leadership Council, shall be voted on by the Statewide Campuses General Student Fee Advisory Board. A favorable vote by the Statewide Campuses General Student Fee Advisory Board will move the fee request to a referendum at the general student-body election. If the referendum passes, the Statewide Campuses General Student Fee Advisory Board will provide a positive recommendation to the University President, and, if approved, to the Board of Trustees. A student referendum for new Statewide Campuses General Student Fees may be initiated by student petition as outlined in the USUSA Constitution.

- 4.3.1. The Statewide Campuses General Student Fee Advisory Board may recommend revising an existing Statewide Campus General Student Fee without going through the referendum process. However, if an existing fee increase request is more than \$30 (per student, per semester), the Statewide Campuses General Student Fee Advisory Board may not issue a recommendation to the University President and Board of Trustees without first going through the referendum process. A favorable vote by the Statewide Campuses General Student Fee Advisory Board will move the fee request to a referendum at the general student-body election. If the referendum passes, the Statewide Campuses General Student Fee Advisory Board will provide a positive recommendation to the University President, and, if approved, to the Board of Trustees.

The total of all Statewide Campuses General Student Fee amounts on each Statewide Campus must be consistent between all campuses and regions.

- 4.4. When there is a proposal for establishing a new Statewide Campus General Student Fee, revising an existing Statewide Campus General Student Fee, or repealing a Statewide Campus General Student Fee, the Statewide Campuses General Student Fee Advisory Board shall:
- a. Notify currently enrolled students using a method(s) that the Statewide Campuses General Student Fee Advisory Board determines best reaches the majority of students (e.g. email, text, social media, student newspaper, digital signage, etc.) of the proposed change and the date, time, and location of a student hearing on the proposal; and
 - b. Hold a student hearing which shall be attended by at least one student representative from the Statewide Campuses General Student Fee Advisory Board. The student representative shall provide a summary of student comments received during the hearing to the Board of Trustees. The hearing may be held in conjunction with USU's truth-in-tuition hearing.
- 4.5. An introductory meeting of the Statewide Campuses General Student Fee Advisory Board will be held annually during the first part of October to orient members to one another, to review this policy, and to identify issues that the current board will be addressing over the next year.
- 4.6. The Region Fee Committees shall oversee the following tasks:
- a. Review proposed budgets and actual expenditures of each fee receiving area. The budgets and reports shall be forwarded to the Statewide Campuses General Student Fee Advisory Board.
 - b. Ensure that each fee receiving area maintains a desired level of service. The Region Fee Committees may recommend to the Statewide Campuses General Student Fee Advisory Board revisions to Statewide Campuses General

Student Fees to ensure that the fees are appropriate to maintain the level of service.

- c. Maintain a record that sets forth the rationale for each decision regarding fees.

4.7. The Region Fee Committee may also:

- a. Request and conduct in-depth, comprehensive reviews of specific fees; and
- b. Review budgets and recommend to the appropriate fee administrators any necessary changes.

5. Reporting

5.1. The chair(s) over each Region Fee Committee will report directly to the Statewide Campuses General Student Fee Advisory Board. The Statewide Campuses General Student Fee Advisory Board will report to the University President and Board of Trustees on proposed changes relating to existing fees, and on all requests for new fees.

5.2. Student fee issues will typically be presented once a year to the University President and the Board of Trustees as a package proposal. The Statewide Campuses General Student Fee Advisory Board will prepare the proposal after hearing all requests for new fees and increases in existing fees.

5.3. Statewide Campuses General Student Fees shall be published on USU's website.



The Policy Custodian and Responsible Executive must complete this form before a policy proposal is initiated, drafted, or presented for approval. If you have any questions, contact the Policy Office.

Step 1: Provide basic information

POLICY INFORMATION			
Policy Number & Title:	549A: Statewide Campus General Student Fee Policy	Category:	Operating
Action Requested:	☒ NEW ☐ REVISION	Subsection:	General
Covered Individuals:	Current USU students		
Submitted by:	Alex Gatherum		
Responsible Executive:	<i>Kristin M. Deschamps</i>	Date:	10-3-24
Policy Custodian:	<i>Alex Gatherum</i>	Date:	10-3-24
Is a law or regulation requiring USU to implement or revise a policy?			☒ YES ☐ NO
Provide a brief summary of the policy. Include any applicable laws or regulations.			
This policy establishes the process to implement, review, revise, and repeal student fees in a fiscally responsible manner in compliance with USHE R516, General Student Fees. This policy applies to General Student Fees generated for USU's statewide campuses. This policy existed within the Student Involvement and Leadership Office previously but was not formalized as university policy. A procedure manual has also been revised to support this policy.			

*Policies that impact the general public may be subject to the Utah Administrative Rulemaking Process.

Step 2: Submit to the University Policy Office for preliminary review

POLICY OFFICE USE ONLY:	
Assign Policy #:	N/A
Policy proposal status:	☒ READY FOR NEXT PHASE ☐ REVISIONS NEEDED COMMENTS:
OFFICE OF GENERAL COUNSEL USE ONLY:	
Assigned to:	Burke Nazer

Administrative Rule:	☐ YES ☒ NO
----------------------	--

Do not begin drafting policy or soliciting stakeholder feedback until the Policy Office contacts you.

Step 3: Gather stakeholder input and research peer institutions

Consider which groups will be affected by the proposed policy or amendment. The Office of General Counsel and the Policy Office may recommend specific stakeholders to include.

Review the USU Compliance Matrix for possible stakeholders.

Review best practices from peer institutions and professional organizations. For more tips, review [Tips for a Successful Policy Development Team](#).

STAKEHOLDER INPUT			
Name/Office	Date Consulted	Comments	Signature
Statewide Campuses	April 25, 2024	Students acknowledge the need for	Alan Galt
Student Fee Board	Sep. 26, 2024	changes and approve	

Attach a list of additional stakeholders and comments if applicable.

Step 4: Begin drafting or amending policy

Follow the [Policy Template](#) to organize the content of your policy.

Review the [Policy Style Guide](#) for editorial consideration.

For existing policies, consult the [Checklist to Review USU Policy](#).

Collaborate with the Office of General Counsel liaison for review and guidance.

Draft an [implementation plan](#) that addresses communication to campus, required training, and updates to procedures or standards.

Once the policy is drafted, write an [Executive Summary](#).

DRAFT APPROVAL			
Responsible Executive:	Kristine M. Deschamps	Date:	10-3-24
Policy Custodian:	Alan Galt	Date:	10-3-24

Step 5: Submit to the University Policy Office for final review

POLICY OFFICE USE ONLY:				
☒ Style Guide	☒ Template	☒ Stakeholder Input	☒ Executive Summary	☐ Redline
☒ Consistent with USU Policy		☒ Procedural Documents Updated		☐ Implementation Plan
Comments: This is a new policy so a redline version does not exist. This existed as a dept-level policy/procedure. This process is just formalizing the policy and the practice is already in place so no implementation plan is needed.				
Legal Approval:	<i>[Signature]</i> Signature of Legal Counsel reviewing policy		Date: 10/8/2024	MM/DD/YYYY
Policy Office Approval:	<i>[Signature]</i> Signature of Policy Officer Crystal Giordano		Date: 10/8/2024	MM/DD/YYYY

While waiting for the final review, prepare to present the policy proposal. For tips on how to prepare, consult Presenting Policy to Stakeholders.

Step 6: The University Policy Office submits the policy for approval. The Responsible Executive presents the policy at applicable meetings and records feedback and/or decisions.

APPROVAL PROCESS		
Body	Date Consulted	Decision or Comments
USUSA Academic Senate Exec Committee	MM/DD/YYYY	Approved? See dates and info above
USUSA Full Academic Senate	MM/DD/YYYY	Approved? See dates and info above
SEA Committee	MM/DD/YYYY	Approved?
Faculty Senate	MM/DD/YYYY	Approved?
USU Leadership Team 10/9/2024	MM/DD/YYYY	Approved? Approved
President	MM/DD/YYYY	Approved? President attended leadership mtg
Board of Trustees	MM/DD/YYYY	Approved?
Utah Board of Higher Education	MM/DD/YYYY	Approved?

POLICY OFFICE USE ONLY:			
Policy Approved	☐ YES ☐ NO ☐ WITH REVISIONS**	MM/DD/YYYY	
Published to Policy Library	MM/DD/YYYY	Published on Policy Office Home Page	MM/DD/YYYY
Email sent to Policy Update Subscribers	MM/DD/YYYY		

**Attach documentation for any required revisions.

ITEM FOR ACTION

RE: Real Property Acquisition by Exchange

The real property acquisition by exchange is submitted to the Utah State University Board of Trustees for review and approval. The proposed action has received appropriate administrative review and approval.

EXECUTIVE SUMMARY

Utah State University (USU) desires approval to acquire approximately 1 acre of agriculture property located at 2100 West 11400 South, South Jordan, Utah, adjacent to the Bastian Agricultural Center (BAC) through an exchange of 0.96 acres of USU property located near the Bastian Agricultural Center as illustrated in Exhibit A.

Acquiring the 1-acre parcel will provide USU with a preferred property location adjacent to the Bastian Agricultural Center, and provide an additional 0.04 acres of land at no cost. The property exchange will be mutually beneficial for both parties.

No monetary consideration will be paid to either party.

RECOMMENDATION

The President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Real Property Acquisition by Exchange for approximately 1 acre of agriculture property adjacent to the Bastian Agricultural Center located at 2100 West 11400 South, South Jordan, Utah.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, Utah State University (USU) desires approval to acquire approximately 1 acre of agriculture property located at 2100 West 11400 South, South Jordan, Utah, adjacent to the Bastian Agricultural Center (BAC) through an exchange of 0.96 acres of USU property located near the Bastian Agricultural Center as illustrated in Exhibit A;

WHEREAS, Acquiring the 1-acre parcel will provide USU with a preferred property location adjacent to the Bastian Agricultural Center, and provide an additional 0.04 acres of land at no cost;

WHEREAS, The property exchange will be mutually beneficial for both parties;

WHEREAS, No monetary consideration will be paid to either party; and

WHEREAS, The President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Real Property Acquisition by Exchange:

NOW, THEREFORE, BE IT RESOLVED that the Utah State University Board of Trustees hereby approves the Real Property Acquisition by Exchange.

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES

Date

EXHIBIT A



8 November 2024

ITEM FOR ACTION

RE: Capital Improvement Priority List for FY2025-26

The attached Capital Improvement Priority List for FY2025-26 is submitted to the Board of Trustees for consideration. It has received the appropriate administrative review and approval.

EXECUTIVE SUMMARY

The Utah Legislature appropriates state funds for the purpose of capital facilities improvement. The attached Capital Improvement Priority List for FY2025-26 emphasizes critical repairs, renovations, and infrastructure projects.

RECOMMENDATION

The President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Capital Improvement Priority List for FY2025-26 as presented.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, the Utah Legislature appropriates state funds for the purpose of capital facilities improvement;

WHEREAS, Utah State University is required to submit its prioritized recommendation for such projects to the Utah Board of Higher Education after approval by the Utah State University Board of Trustees; and

WHEREAS, the President and Vice President for Finance and Administrative Services have reviewed the Capital Improvement List for FY2025-26 and recommend its approval to the Utah State University Board of Trustees:

NOW, THEREFORE, BE IT RESOLVED that the Utah State University Board of Trustees hereby approves the Capital Improvement Priority List for FY2025-26 as presented.

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES

Date

Utah State University Capital Improvement Priority List for FY 2025-26

Priority	Building Name	Project Name	Project Description	Requested Amount	Cumulative Amount
1	Logan Campus	Medium Voltage Upgrade	Install oil switches, circuit breakers and underground cable campuswide.	\$1,500,000.00	\$1,500,000.00
2	Logan Campus	Planning and Design Fund	Funds to be used for general programming, designs and studies for current or future projects. Preliminary design work for estimating future project requests.	\$200,000.00	\$1,700,000.00
3	Logan Campus	Campus-Wide Health, Life Safety, Code Compliance & Asbestos Abatement	To include but not limited to: handrails, hardware, ADA, asbestos abatement, mold abatement, code compliance and miscellaneous safety issues, etc.	\$150,000.00	\$1,850,000.00
4	Logan Campus	Campus Concrete Replacement	Replacement of exterior concrete campus-wide, focusing on areas that pose a safety hazard.	\$250,000.00	\$2,100,000.00
5	Logan Campus	Campus-Wide Bike Racks & Site Furnishings	Install and replace bike racks, benches, handrails and other fixed outdoor furnishings and infrastructure.	\$60,000.00	\$2,160,000.00
6	Logan Campus	Campus Sign System	Plan, install and/or replace way-finding signage across campus.	\$70,000.00	\$2,230,000.00
7	Logan Campus	Campus Wide Classroom Upgrades	Upgrade classrooms across campus. Upgrades include HVAC, teaching consoles, lighting, whiteboards, screens, blinds, paint, floor coverings, electrical infrastructure, and pathways for future classroom IT equipment.	\$300,000.00	\$2,530,000.00
8	Logan Campus	Public Safety Communication Upgrade	Upgrade the communication signal in buildings across campus.	\$400,000.00	\$2,930,000.00

Utah State University Capital Improvement Priority List for FY 2025-26

9	Statewide Campus	Campus-Wide Security and Electronic Access Control	Expand and upgrade electronic card access system to existing buildings to improve building security.	\$100,000.00	\$3,030,000.00
10	Statewide Campus	Campus Concrete Replacement	Replacement of exterior concrete campus-wide focusing on areas that pose a safety hazard.	\$500,000.00	\$3,530,000.00
11	Statewide Campus	Campus Wide Classroom Upgrades	Upgrade classrooms across campus. Upgrades include HVAC, teaching consoles, lighting, whiteboards, screens, blinds, paint, floor coverings, electrical infrastructure, and pathways for future classroom IT equipment.	\$200,000.00	\$3,730,000.00
12	Lyric Theater	Lyric Theatre Upgrades	Theatre upgrades based on feasibility study.	\$3,500,000.00	\$7,230,000.00
13	Military Science	HVAC upgrade Phase 2	Install new HVAC system and controls.	\$2,000,000.00	\$9,230,000.00
14	Vet Science	Building Re-roof	Built-up Roof to PVC. Provide seismic bracing.	\$2,000,000.00	\$11,230,000.00
15	Logan Campus	Restroom Upgrades	Upgrade existing restrooms including lactation rooms and changing tables.	\$400,000.00	\$11,630,000.00
16	Old Main	Hydronic Piping Upgrade	Replace existing vacuolic fittings with welded joints to prevent leaking.	\$500,000.00	\$12,130,000.00
17	Fieldhouse	Fieldhouse HVAC Upgrade	Install air conditioning at the Fieldhouse. Convert heating system from steam to hot water.	\$2,000,000.00	\$14,130,000.00
18	WW Lundberg	Building Re-roof	Replace built up roof system with PVC (1992).	\$500,000.00	\$14,630,000.00
19	Lilly White/Comm D	Building Re-roof	Replace built up roof system with PVC (2001).	\$500,000.00	\$15,130,000.00

Utah State University Capital Improvement Priority List for FY 2025-26

20	USUE Central Energy Plant	Campuswide steam to heating water conversion Phase I	Install high efficiency condensing boilers at select buildings to convert from steam to hot water systems.	\$800,000.00	\$15,930,000.00
21	USUE McDonald Career Center	Building Reroof	Re-roof existing building. Design only	\$100,000.00	\$16,030,000.00
22	USUE Reeves Building	Controls Upgrade	Upgrade existing building automation system.	\$350,000.00	\$16,380,000.00
23	USU Blanding Arts Center	Arts Center Improvements	Replace storefront glazing and doors.	\$200,000.00	\$16,580,000.00
24	HPER	Restroom Upgrades	Upgrade existing locker room space to include family/private restrooms including showers with access to HPER pool.	\$700,000.00	\$17,280,000.00
25	Ray B. West/Lundberg/Shed Parking Lot	Parking Lot Paving	Repave parking lot and improve curb at Ray B. West, Lundberg and The Shed buildings.	\$700,000.00	\$17,980,000.00
26	HPER	Natatorium Air Handler Upgrade	Replace existing air handling units serving both pool areas	\$600,000.00	\$18,580,000.00
27	Old Main Hill	Old Main Staircase, Flagpole Upgrade	Replace old concrete stairs, handrails, improve site drainage, lighting, and landscaping - Design	\$100,000.00	\$18,680,000.00
28	Logan Campus	800 East Roundabout Improvements	Upgrade bus roundabout area. Design	\$120,000.00	\$18,800,000.00
29	SLC Campus	Parking Lot Paving	Repave/repair parking lot for Bldg. 882D. Design only	\$50,000.00	\$18,850,000.00
30	Nutrition and Food Science	Industrial Water System Upgrade	Upgrade existing building RO and DI water systems throughout NFS Building.	\$300,000.00	\$19,150,000.00
31	Merrill-Cazier Library	Elevator Upgrade	Upgrade existing elevator equipment.	\$350,000.00	\$19,500,000.00
32	Ray B. West	Air Handler Upgrade	Replace existing air handling unit	\$500,000.00	\$20,000,000.00

Utah State University Capital Improvement Priority List for FY 2025-26

33	Logan Campus	Irrigation Filtration System & Pump House	Install new pump house and filter system to serve main campus irrigation system. Design Only	\$200,000.00	\$20,200,000.00
34	800 East Bus Stop	800 East Bus Stop Storm Drain Upgrade	Revise existing storm drain system to prevent drainage from entering Blue Square housing building.	\$100,000.00	\$20,300,000.00
35	University Reserve (East Side)	Building Re-roof	TPO Roof System Replacement (1980).	\$200,000.00	\$20,500,000.00
36	USU Blanding Arts Center	Arts Center Fire Safety Upgrade	Fire Sprinkling Upgrade.	\$500,000.00	\$21,000,000.00
37	Spectrum	Mechanical, Electrical, Life Safety Capital Improvements	Replace existing HVAC, plumbing and electrical systems	\$3,500,000.00	\$24,500,000.00
38	West Stadium	West Stadium Parking Lot Utilities	Replace the existing sewer line and storm drainage system in the West Stadium Parking Lot.	\$1,000,000.00	\$25,500,000.00
39	BNR	BNR South Wing HVAC Upgrade Phase III	Replace existing multizone air handling systems with variable air volume reheat systems. Provide central variable air volume laboratory exhaust. Replace Steam radiant system with hot water system.	\$2,500,000.00	\$28,000,000.00
40	Animal Science	Animal Science Reroof	Reroof the Animal Science building. Design was funded FY22.	\$5,200,000.00	\$33,200,000.00

ITEM FOR ACTION

RE: Authorization to Adjust Summer Term Tuition and Fee Tables

EXECUTIVE SUMMARY

Utah State University seeks approval to implement small but meaningful changes in the structure of its summer tuition and fee tables. This is in response to repeated requests from students as well as surveys of current students. A university task force was formed to determine the feasibility of implementing changes to make summer courses more affordable for students enrolled in one or two classes, but especially for those enrolled in just one class.

1. Change to Effective Date of Annual Tuition Increases

The university has historically followed a Summer-Fall-Spring approach in applying any board-approved tuition increases. The university is seeking approval to change to a Fall-Spring-Summer approach, meaning any tuition rate increase approved by the Board of Trustees and the Utah Board of Higher Education (traditionally at the March meeting) will take effect in the subsequent Fall term. The Utah Board of Higher Education has given institutions the option of selecting which structure it will follow. This change will allow the university to publish its Summer term tuition schedule much earlier in the year, which will make a meaningful impact in the university's ability to market its Summer course offerings.

This change will impact all tuition tables.

2. Change in Rates Below the Plateau

The second change requested by the university is a reduction in the rates at the lower credit hour levels. Tuition and fees will remain flat at the plateau levels. The price at the 3 credit hour level, as well as the 6 credit hour level (where the majority of Summer students enroll), has been a barrier. The proposed structure will lower the cost to students who register for less than 12 credit hours, as illustrated in Exhibit A and B. Logan undergraduate students at the 3 credit hour level will realize savings of \$500 while those at the 6 credit hour level will see savings of \$333. Statewide undergraduate students will see savings of \$341 and \$228 at the 3 credit hour and 6 credit hour levels respectively. The savings difference for Statewide students reflects the fact that Statewide students pay the same tuition as Logan students but already pay a lower amount for student fees. Nearly 90% of students who enroll in Summer courses enroll in fewer than 10 credit hours.

These recommendations are consistent with the wishes of the student body as assessed in several recent surveys of current students.

The changes will not affect the following tuition and fee tables:

- Price/Blanding/Moab with 65 or fewer earned credits,
- out of state online,
- technical education, and
- veterinary medicine

RECOMMENDATION

Based on the above request, the President, Provost, and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the changes as presented.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, Utah State University seeks approval to implement small but meaningful changes in the structure of its summer tuition and fee tables; and

WHEREAS, The university is seeking approval to change to a Fall-Spring-Summer approach, meaning any tuition rate increase approved by the Board of Trustees and the Utah Board of Higher Education (traditionally at the March meeting) will take effect in the subsequent Fall term; and

WHEREAS, This change will impact all tuition tables; and

WHEREAS, The second change requested by the university is a reduction in the summer rates at the lower credit hour levels; and

WHEREAS, Tuition will remain flat at the plateau levels; and

WHEREAS, The proposed structure will lower the cost to students who register for less than 12 credit hours; and

WHEREAS, These recommendations are consistent with the wishes of the student body as assessed in several recent surveys of current students; and

WHEREAS, The changes will not affect tuition tables for Price/Blanding/Moab with 65 or fewer earned credits, out of state online, technical education, and veterinary medicine:

NOW, THEREFORE, BE IT RESOLVED, That the USU Board of Trustees hereby approves the changes as presented.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES:

Date

Exhibit A

Illustration of Proposed Changes – USU Summer Tuition and Fee Schedules

Logan Undergraduate			
Credits	Current	Proposed	Change
3	\$1,631	\$1,131	-\$500
6	\$2,514	\$2,181	-\$333
9	\$3,397	\$3,230	-\$167
12 (Plateau)	\$4,280	\$4,280	\$0

Logan Graduate			
Credits	Current	Proposed	Change
3	\$1,850	\$1,298	-\$552
6	\$2,882	\$2,514	-\$368
9	\$3,914	\$3,730	-\$184
12 (Plateau)	\$4,946	\$4,946	\$0

Statewide Undergraduate			
Credits	Current	Proposed	Change
3	\$1,481	\$1,140	-\$341
6	\$2,345	\$2,117	-\$228
9	\$3,208	\$3,094	-\$114
12 (Plateau)	\$4,071	\$4,071	\$0

Statewide Graduate			
Credits	Current	Proposed	Change
3	\$1,700	\$1,306	-\$394
6	\$2,712	\$2,450	-\$262
9	\$3,725	\$3,594	-\$131
12 (Plateau)	\$4,738	\$4,738	\$0

Exhibit B

Logan FY26 Summer

Credits					
	Tuition	Diff	Fees	Diff	Total

UNDERGRAD

1	317.85	---	113.58	---	431.43
2	635.62	317.77	145.66	32.08	781.28
3	953.39	317.77	177.74	32.08	1,131.13
4	1,271.16	317.77	209.82	32.08	1,480.98
5	1,588.93	317.77	241.90	32.08	1,830.83
6	1,906.70	317.77	273.98	32.08	2,180.68
7	2,224.47	317.77	306.06	32.08	2,530.53
8	2,542.24	317.77	338.14	32.08	2,880.38
9	2,860.01	317.77	370.22	32.08	3,230.23
10	3,177.78	317.77	402.30	32.08	3,580.08
11	3,495.55	317.77	434.38	32.08	3,929.93
12	3,813.32	317.77	466.46	32.08	4,279.78
13	3,813.32	-	466.46	-	4,279.78
14	3,813.32	-	466.46	-	4,279.78
15	3,813.32	-	466.46	-	4,279.78
16	3,813.32	-	466.46	-	4,279.78
17	3,813.32	-	466.46	-	4,279.78
18	3,813.32	-	466.46	-	4,279.78
19	4,131.09	317.77	498.54	32.08	4,629.63
20	4,448.86	317.77	530.62	32.08	4,979.48
21	4,766.63	317.77	562.70	32.08	5,329.33
22	5,084.40	317.77	594.78	32.08	5,679.18
23	5,402.17	317.77	626.86	32.08	6,029.03
24	5,719.94	317.77	658.94	32.08	6,378.88
25	6,037.71	317.77	691.02	32.08	6,728.73

GRAD

1	373.32	---	113.58	---	486.90
2	746.62	373.30	145.66	32.08	892.28
3	1,119.92	373.30	177.74	32.08	1,297.66
4	1,493.22	373.30	209.82	32.08	1,703.04
5	1,866.52	373.30	241.90	32.08	2,108.42
6	2,239.82	373.30	273.98	32.08	2,513.80
7	2,613.12	373.30	306.06	32.08	2,919.18
8	2,986.42	373.30	338.14	32.08	3,324.56
9	3,359.72	373.30	370.22	32.08	3,729.94
10	3,733.02	373.30	402.30	32.08	4,135.32
11	4,106.32	373.30	434.38	32.08	4,540.70
12	4,479.62	373.30	466.46	32.08	4,946.08
13	4,479.62	-	466.46	-	4,946.08
14	4,479.62	-	466.46	-	4,946.08
15	4,479.62	-	466.46	-	4,946.08
16	4,479.62	-	466.46	-	4,946.08
17	4,479.62	-	466.46	-	4,946.08
18	4,479.62	-	466.46	-	4,946.08
19	4,852.92	373.30	498.54	32.08	5,351.46
20	5,226.22	373.30	530.62	32.08	5,756.84
21	5,599.52	373.30	562.70	32.08	6,162.22
22	5,972.82	373.30	594.78	32.08	6,567.60
23	6,346.12	373.30	626.86	32.08	6,972.98
24	6,719.42	373.30	658.94	32.08	7,378.36
25	7,092.72	373.30	691.02	32.08	7,783.74

Statewide FY26 Summer

Credits					
	Tuition	Diff	Fees	Diff	Total

UNDERGRAD

1	317.85	---	170.40	---	488.25
2	635.62	317.77	178.37	7.97	813.99
3	953.39	317.77	186.34	7.97	1,139.73
4	1,271.16	317.77	194.31	7.97	1,465.47
5	1,588.93	317.77	202.28	7.97	1,791.21
6	1,906.70	317.77	210.25	7.97	2,116.95
7	2,224.47	317.77	218.22	7.97	2,442.69
8	2,542.24	317.77	226.19	7.97	2,768.43
9	2,860.01	317.77	234.16	7.97	3,094.17
10	3,177.78	317.77	242.13	7.97	3,419.91
11	3,495.55	317.77	250.10	7.97	3,745.65
12	3,813.32	317.77	258.07	7.97	4,071.39
13	3,813.32	-	258.07	-	4,071.39
14	3,813.32	-	258.07	-	4,071.39
15	3,813.32	-	258.07	-	4,071.39
16	3,813.32	-	258.07	-	4,071.39
17	3,813.32	-	258.07	-	4,071.39
18	3,813.32	-	258.07	-	4,071.39
19	4,131.09	317.77	266.04	7.97	4,397.13
20	4,448.86	317.77	274.01	7.97	4,722.87
21	4,766.63	317.77	281.98	7.97	5,048.61
22	5,084.40	317.77	289.95	7.97	5,374.35
23	5,402.17	317.77	297.92	7.97	5,700.09
24	5,719.94	317.77	305.89	7.97	6,025.83
25	6,037.71	317.77	313.86	7.97	6,351.57

GRAD

1	373.32	---	170.40	---	543.72
2	746.62	373.30	178.37	7.97	924.99
3	1,119.92	373.30	186.34	7.97	1,306.26
4	1,493.22	373.30	194.31	7.97	1,687.53
5	1,866.52	373.30	202.28	7.97	2,068.80
6	2,239.82	373.30	210.25	7.97	2,450.07
7	2,613.12	373.30	218.22	7.97	2,831.34
8	2,986.42	373.30	226.19	7.97	3,212.61
9	3,359.72	373.30	234.16	7.97	3,593.88
10	3,733.02	373.30	242.13	7.97	3,975.15
11	4,106.32	373.30	250.10	7.97	4,356.42
12	4,479.62	373.30	258.07	7.97	4,737.69
13	4,479.62	-	258.07	-	4,737.69
14	4,479.62	-	258.07	-	4,737.69
15	4,479.62	-	258.07	-	4,737.69
16	4,479.62	-	258.07	-	4,737.69
17	4,479.62	-	258.07	-	4,737.69
18	4,479.62	-	258.07	-	4,737.69
19	4,852.92	373.30	266.04	7.97	5,118.96
20	5,226.22	373.30	274.01	7.97	5,500.23
21	5,599.52	373.30	281.98	7.97	5,881.50
22	5,972.82	373.30	289.95	7.97	6,262.77
23	6,346.12	373.30	297.92	7.97	6,644.04
24	6,719.42	373.30	305.89	7.97	7,025.31
25	7,092.72	373.30	313.86	7.97	7,406.58



UtahState
University

University Honors Program

Annual Report

Fiscal Year 2023-2024



September 13, 2024



UtahState
University

University Honors Program

Annual Report

Fiscal Year 2023-2024



Dr. Kristine Miller, Executive Director

Compiled by: Andreas Leidolf, Coordinator
Reporting Period: 1 July 2023 – 30 June 2024

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A. TEN-YEAR IMPACT AND FUTURE GROWTH POTENTIAL

The 2023-2024 fiscal year marks a decade since the establishment of the University Honors Program (UHP) under the leadership of its current Executive Director, Dr. Kristine Miller. The program immediately faced a challenge: in response to a recommendation and proposal issued in 2012 by Utah State University's (USU) *Task Force on the Future of the Honors Program*, the charge was to transition from a departmental honors model to a university-wide program starting in 2014. That work engaged faculty and students across disciplines in conversation about how to build a curriculum with both the flexibility to map onto any major and the capacity to showcase and reward intellectually curious undergraduates committed to making a difference. To implement such a curriculum, the program had to forge partnerships with campus and community groups, double the number of UHP staff, and renovate a small office space in USU's Living and Learning Community. The program rose to this challenge to become an institutional force multiplier. Over the past ten years, the UHP has grown its student population by 37% and its engaged faculty numbers by 34% when compared to the previous ten-year period. In addition, since 2017, when the program started systematically tracking partners, the UHP's on-campus partnerships and collaborations have more than tripled.

As this year's annual report shows, the UHP currently offers 689 highly motivated students the well-developed structure, expansive network, and generous support they need to become bold innovators, leaders in their disciplines, and global change agents. Engaging with USU's nationally recognized faculty and dedicated staff in cutting-edge research, collaborative problem-solving, community-based learning, and professional and leadership development, Honors students from all disciplines practice designing their own projects, questioning their initial assumptions, and working together to apply knowledge for the common good. Honors challenges students to think deeply and reflectively about their academic journey, and they develop skills as persuasive advocates for both their own professional value and the value of an education at USU. Honors Aggies become fiercely loyal alumni ready to support our students and USU into the future.

The UHP has demonstrated the ability to enrich the education of these students by working effectively and thoughtfully across USU's entire academic enterprise and range of student-support services. Over the past decade, the UHP has steadily increased the number of mutually advantageous institutional partnerships that benefit students and exemplify the program's central role as a highly engaged, productive, and sought-after collaborator. More importantly, the UHP models and establishes best practices for the curricular integration of high-impact learning—including undergraduate research, internships, leadership training, alumni mentoring, and community- and global-engagement—and thus creates blueprints for experiential learning accessible to all USU students. In just ten years, the UHP has attained the *de facto* status of ideas lab, incubator, and accelerator, where academic plans and modeling can be scaled to make broader impacts.

Indeed, the UHP's dedicated service to our statewide community has consistently generated impacts far beyond the boundaries of the program and contributed to our institution's national reputation—such as in 2020, when Honors played an active role in earning USU the coveted Carnegie Community-Engaged Institution designation. Over the past decade, the UHP has left its mark on USU's faculty code (policy 405); the general

A. TEN-YEAR IMPACT AND FUTURE GROWTH POTENTIAL

education curriculum, including team teaching and activities outside the classroom that model civil discourse and engaged citizenship; four optional transcript designations that recognize student work in research, community engagement, global engagement, and Honors; mentoring and leadership-training models adapted by University Advancement and the Institute of Government and Politics; and national scholarship and fellowship advising, which has led to 16 Goldwater Scholars, three Truman Scholars or finalists, and two Udall Honorable Mentions.

The UHP has also been recognized for national leadership in honors education. As the program's Executive Director, Dr. Miller has served a three-year elected term on the National Collegiate Honors Council's (NCHC) Board of Directors, in addition to publishing a book and five research essays on honors education (featuring USU as a case study), co-chairing the NCHC Publications Board, delivering 11 national conference presentations featuring USU Honors innovations, and serving on multiple NCHC committees. In 2024, Dr. Miller was named an NCHC Fellow in honor of notable contributions to honors education at both the institutional and national levels.

The many strengths of the UHP as a key contributor to USU's land-grant mission were put to the test when the global COVID pandemic fundamentally disrupted learning for over a year and a half. The UHP rose to this challenge and proved its resilience with both creativity and compassion, pivoting quickly and nimbly to virtual delivery of course content, programming, and an extensive array of student-support services while maintaining an impressive record of outputs, outcomes, and impacts of the highest caliber. Not only did the UHP sustain a stable Honors student population in excess of 600, a steady graduation rate in the first year after the pandemic, and both broad and deep faculty engagement, but it also successfully expanded its base of donors, alumni, and friends and significantly grew—by as much as a factor of two—key programming suitable for virtual delivery statewide, including Honors Book Labs and co-curricular events.

The record is clear: when faced with a challenge, the UHP adjusts and identifies ways to grow and improve, using external threats or imperatives as catalysts for innovation. It is not surprising, then, that the UHP now bears all the hallmarks of a mature, stable, and resilient program poised for significant and fundamental transformation.

This past year, the UHP's self-study and external review by a team trained and appointed by the National Collegiate Honors Council resulted in a final report that called for just such a transformation. Addressing a central goal of its 2021-2024 Strategic Plan, the UHP completed and shared a comprehensive self-study using the NCHC's *Shared Principles and Practices of Honors Education*, a nationally recognized assessment tool. The program hosted a site visit by the NCHC review team: Dr. Patricia Smith, Dean of the Honors College at the University of Central Arkansas, and Dr. Daniel Roberts, Dean of the Honors College at Virginia State University. The visit included two full days (October 16-17, 2023) of meetings with students, faculty, staff, alumni, and administrators (see Table A-1). The reviewers submitted a detailed final report, which the NCHC delivered on December 22, 2023, to USU's President, Provost, and Honors Executive Director.

A. TEN-YEAR IMPACT AND FUTURE GROWTH POTENTIAL

The report makes one central recommendation, based on the program's current administrative and curricular strengths:

*"The University Honors Program
is well-positioned to transition from a program to a college."*

The other recommendations follow from this key idea. The report emphasizes that the transition to a college would allow:

- strategic partnerships with USU Admissions, colleges, and statewide campuses to grow and diversify the pool of highly motivated applicants likely to graduate on time from USU with a bachelor's or associate degree;
- cross-college, statewide collaboration on interdisciplinary and experiential-learning initiatives, major events, and high-impact student support opportunities, including more robust and comprehensive national scholarship and fellowship advising;
- development of a broader resource base of Honors teaching faculty through joint appointments and/or an Honors Faculty Fellows program;
- expansion of the Honors curriculum and programming to foreground and scaffold progress on learning outcomes and create a deep sense of Honors identity and belonging from admission through graduation;
- capacity to foster alumni relations and increase advancement opportunities; and
- possibility of building or repurposing a larger, more functional space where a growing number of Honors students, faculty, and staff can work together as a community.

The report concludes that the UHP has "done everything it needs to lay the foundation for a strong honors college" through "the extraordinary work that has already been accomplished in the last decade." While this work may not demand the transition from program to college, it has quite clearly paved the way for such a transition, should it become an institutional priority.

The UHP's impressive record of supporting our current student population speaks for itself. The visibility, resources, and reputation of a USU Honors College would potentially incentivize up to 500 highly motivated new students annually to enroll at USU. This change could gradually increase the percentage of Honors students in USU's statewide undergraduate population from its current 2.8% to between 7-10%, growth that would expand access to a USU Honors education and match the numbers of our peer institutions more closely.

We are proud of the work that USU faculty, students, staff, and administrators have carried out to build USU's mature and healthy University Honors Program, and we are prepared to grow that program strategically and thoughtfully, if and when the time comes.

A. TEN-YEAR IMPACT AND FUTURE GROWTH POTENTIAL

Table A-1. USU stakeholders participating in the University Honors Program NCHC external review and site visit, October 16-17, 2023.

Affiliation or Honors Role	Name	Title
Office of the President	Elizabeth Cantwell	President
Office of the Provost	Laurens Smith	Provost
	Janet Anderson	Senior Vice Provost
	Paul Barr	Vice Provost
	Janis Boettinger	Vice Provost—Global Engagement
	Pamela Dupin-Bryant	Vice Provost—Statewide Campuses
	Andi McCabe	Assistant Provost
	Grant Baer	Financial Officer
Office of Research	Lisa Berreau	Vice President
	Alexa Sand	Associate Vice President
Office of Diversity, Equity, and Inclusion	Jane Irungu	Vice President
University Honors Program	Kristine Miller	Executive Director
	Andreas Leidolf	Program Coordinator
	Amanda Adison	Academic Advisor
	Kelli Palma	Academic Advisor
	Jennifer Cortez	Program Assistant
Caine College of the Arts	Nicholas Morrison	Dean
College of Engineering	Jagath Kaluarachchi	Dean
College of Science	Michelle Baker	Dean
S.J. and Jessie E. Quinney College of Natural Resources	Linda Nagel	Dean
Council of Academic Associate Deans	Janet Anderson	Senior Vice Provost
	Jared Colton (ChaSS)	Associate Dean
	Thomas Fronk (ENGR)	Associate Dean
	Peter Howe (QCNr)	Associate Dean
	Harrison Kleiner	Associate Vice Provost
	Brynja Kohler (CoS)	Associate Dean
	Sylvia Read (CEHS)	Associate Dean
	Mateja Savoie-Roskos (CAAS)	Associate Dean
	Chad Simon (HSB)	Associate Dean

A. TEN-YEAR IMPACT AND FUTURE GROWTH POTENTIAL

Table A-1. Continued.

Affiliation or Honors Role	Name	Title
Council of Academic Associate Deans	Richard Walker (CCA)	Associate Dean
Department of Animal, Dairy and Veterinary Sciences	Abby Benninghoff	Interim Head
Department of Psychology	Scott Bates	Head
Statewide Campuses	Ritch Etchberger	Interim Vice President
	Pamela Dupin-Bryant	Vice Provost
	Benjamin Burger	Associate Professor
	Nikole Eyre	Senior Lecturer
	Jason Olsen	Associate Professor
Honors Faculty Advisory Board	Seth Archer (ChaSS)	Assistant Professor
	Vijay Kannan (HSB)	Professor
	Katie Kraus (CAAS)	Assistant Professor
	Geno Schupp (QCNr)	Professor
	Pamela Dupin-Bryant	Vice Provost
	Benjamin Burger	Associate Professor
	Nikole Eyre	Senior Lecturer
	Jason Olsen	Associate Professor
Honors Faculty	Laura Gelfand (Art + Design)	Professor
	Julia Gossard (History)	Associate Professor and Associate Dean
	Rose Judd-Murray (ASTE)	Assistant Professor
	Jessica Lucero (Social Work)	Associate Professor and Head
Departmental Honors Advisors	Sara Freeman (Biology)	Assistant Professor
	Keri Holt (English)	Professor
Honors Students	Landon Corbett (CEHS)	Honors Ambassador/UTF
	Rebecca Ivans (ChaSS/QCNr)	Honors Peer Advisor/HSAB member
	Radayah Kaplan (CCA)	Honors Ambassador/RA/UTF
	Mia Knight (CEHS)	HSAB member
	Spencer Mullen (CoS)	Honors student
	Kade Robison	HSAB member
	Kai Li Tullis	Honors student
Honors Alumni	Laurel Alder (Liberal Arts and Science 1991)	
	Nathan Alder (History 1991)	

A. TEN-YEAR IMPACT AND FUTURE GROWTH POTENTIAL

Table A-1. Continued.

Affiliation or Honors Role	Name	Title
Honors Alumni	Vivian Baji (Environmental and Natural Resource Economics/Economics 2016)	
	Jeff Carr (English 2009)	
	Katie Kraus (Nutrition and Dietetics 2013)	
Office of the Registrar	Fran Hopkin	Registrar
Office of Enrollment	Katie Jo North	Executive Director
Office of Student Financial Support	Craig Whyte	Executive Director
Office of Advancement	Matthew White	Vice President
	Michael Bowen	Interim Associate Vice President
Office of Housing Service	John Bostock	Executive Director
Office of Residence Life	Whit Milligan	Director
Center for Community Engagement	Kate Stephens	Director
	Nelda Ault-Dyslin	Assistant Director
USU <i>Connections</i>	Jennifer Grewe	Director
	Elizabeth Vargis	Associate Professor
Office of Academic Belonging and Learning Excellence	Heidi Kesler	Executive Director
	Denise Stewardson	Associate Professor

B. PROGRAM OVERVIEW

1. Honors Mission, Vision, and Values

Mission

The University Honors Program supports a community of highly motivated students who recognize the personal and professional value of putting learning into practice. The program prepares students for the future by building their skills in research and discovery, clear and effective communication, and collaborative problem-solving for the common good. The Honors Program exemplifies Utah State University's land-grant mission as a premier land- and space-grant institution committed to excellence, access, and inclusion, and the university therefore guarantees the program the budget, faculty and staff, physical space, and administrative support necessary to sustain a robust Honors Program at the heart of the USU Aggie experience.

Vision

In keeping with USU's land- and space-grant mission, the program aims to recognize and develop the potential of students to become global citizens and positive change agents, even when students do not yet see that potential in themselves. Our vision is to build an increasingly active and engaged community of students, faculty, alumni, staff, and stakeholders who represent the best that Utah State University has to offer.

Values

The University Honors Program shares with USU the following values:

Access and Belonging—We value all USU students, ensure broad access to our skill- and confidence-building curriculum, and guide students with different perspectives and experiences as they learn to communicate with clarity and respect.

Student Success—We value the experience and success of all students, and we support student success by communicating both the broad purpose and value of an honors education and the specific requirements for graduation from USU with University Honors.

Research and Discovery—We value undergraduate research and discovery, and we challenge students to ask questions, discover solutions, and collaborate with others to broaden the impact of their discoveries.

Community Engagement—We value local and global community engagement, and we build opportunities and incentives for such work into our curriculum and programming.

Academic and Professional Development—We value academic growth and professional development, and we support students both academically and financially as they discover their passions and take important steps toward achieving their personal and professional goals.

B. PROGRAM OVERVIEW

2. Leadership

The end of the 2023-2024 fiscal year marked a decade of leadership in the University Honors Program by Dr. Kristine Miller, whose role as Director began on July 1, 2014. Her creative, collaborative development of this university-wide Honors Program, publications and presentations on honors education, and past and current service with the National Collegiate Honors Council—including as a Board of Directors member from 2020-2022—continue to distinguish USU as a national leader in honors education.

3. Personnel

In addition to the Executive Director, the University Honors Program employs four 1.0 FTE professional staff members in these roles: Academic Advisor Senior, Academic Advisor II (position added in September 2023), Program Coordinator II, and Program Assistant III. See Table B-1 for a list of personnel employed during the reporting period.

Table B-1. Utah State University Honors Program personnel in FY 2023-2024.

Position	Name	FTE	Dates in Role
Executive Director	Dr. Kristine Miller	1.0 ^a	07/01/2014 – present
Academic Advisor Senior	Amanda Adison	1.0	10/01/2019 – present
Academic Advisor II	Kelli Palma	1.0	09/06/2023 – present
Program Coordinator II	Andreas Leidolf	1.0	04/01/2018 – present
Program Assistant III	Jennifer Cortez	1.0	02/01/2021 – present

^a In this period, Dr. Miller's appointment to the Honors Program accounted for 75% of her role at USU, with 25% allocated to the Department of English for her position as Professor of English.

Honors Program staff participated in numerous professional development activities over the past year. The program's Academic Advisor Senior attended the USU Advising Conference; completed training on the academic operations platform *Coursedog*, advanced Microsoft Excel training, and Allies and Trans Allies on Campus training; began work toward an Advising Excellence Certificate; and participated in five webinars offered through USU's Student Achievement Collaborative.

The Academic Advisor II completed new advisor, general education, peer advisor supervisor, proactive advising, advising with athletics, Aggie First Scholars, Achieve, and Trans Allies on Campus training; attended USU's Religious Inclusive Excellence Symposium and the USU Advising Conference; completed the Advising Excellence Certificate; participated in appreciative advising professional development activities.

The Program Coordinator participated in the 2023 Biennial Conference of the National Association of Fellowships Advisors in New Orleans, LA.

The Program Assistant attended the 2024 Conference on Community-Engaged Scholarship and Teaching, "Community Voices Amplified", in Moab, UT.



Honors by the Numbers



University Honors Program

C. PARTICIPANTS

In FY 2023-2024, the University Honors Program:



Served an Honors student population of **689**, with **564 active students** from **all eight** of USU's undergraduate colleges, **five** statewide campuses, **49 of 56** USU departments, and **95 of 144** academic majors and programs.



Welcomed **173 new first-year** and **29 current/transfer** students to the program.



Graduated 32 students with University Honors.



Involved **234 USU faculty** and staff from **46 departments/programs** and **six statewide campuses** in teaching and other academic activities, including mentoring, advising, service, and assessment.



Engaged with **49 Honors alumni** through alumni-student programming and mentoring.



Expanded its statewide reach from **six to eight campuses**.

C. PARTICIPANTS

1. Student Participants

In FY 2023-2024, the University Honors Program (UHP) served a population of 689 students, including 564 actively attending (equivalent to 3.2% of the undergraduate student population on USU's main Logan campus) and 125 on temporary leave of absence. Compared to the USU main-campus population, a smaller percentage (7%) of all enrolled Honors students identified as belonging to an underrepresented racial or ethnic minority (URM) or being first-generation college students (11%) or veterans (1%, Table C-1). As in the previous reporting period, the percentage of URM and first-generation students among newly admitted first-year Honors students tracked institutional numbers more closely; among current/transfer students admitted to the UHP, the percentages of URM and first-generation students exceeded those at the institutional level by as much as a factor of two.

Table C-1. Demographics of University Honors Program and USU Logan campus general student population for FY 2023-2024.

	Total #	Male (%)	Female (%)	Non-binary (%)	URM ^a (%)	1 st Gen (%)	Veteran (%)
Total Honors Population (enrolled)	564	191 (34%)	368 (65%)	5 (1%)	42 (7%)	62 (11%)	5 (1%)
<i>USU Comparison^b</i>	17,467	8,464 (48%)	8,872 (51%)	131 (1%)	1,548 (9%)	2,835 (16%)	506 (3%)
First-year Honors	173	56 (32%)	116 (67%)	1 (1%)	13 (8%)	21 (12%)	2 (1%)
Honors Current/Transfer	29	9 (31%)	19 (66%)	1 (3%)	8 (28%)	7 (24%)	N/A
<i>USU Comparison^b</i>	3,467	1,410 (41%)	2,018 (58%)	39 (1%)	309 (9%)	535 (15%)	72 (2%)
Honors Graduates	32	11 (34%)	21 (66%)	0 (3%)	1 (3%)	3 (9%)	N/A

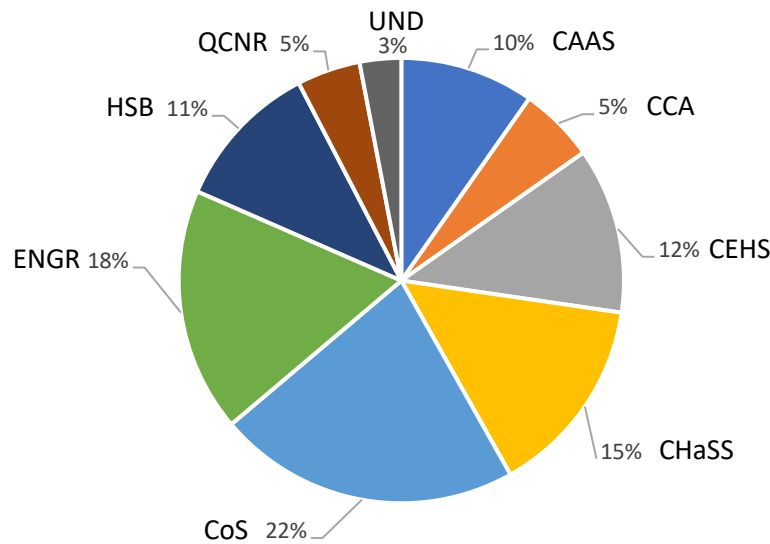
^a Includes students self-identifying as Hispanic/Latinx, Black or African American, American Indian or Alaska Native, and Native Hawaiian or Other Pacific Islander.

^b Logan campus only, full-time four-year Bachelor-degree-seeking only.

Continuing a four-year trend, the largest number of Honors students in one college (124) came from USU's College of Science (CoS, Fig. C-1A). CoS Honors students make up 22% of the entire UHP student population, comparable to last year. This percentage is significantly higher than that of the College of Engineering (ENGR, 18%) and the College of Humanities and Social Sciences (CHaSS, 15%), which have the next-largest Honors student populations, with the Emma Eccles Jones College of Education and Human Services (CEHS), the Jon M. Huntsman School of Business (HSB), and the College of Agriculture and Applied Sciences (CAAS) all accounting for 10-12% of the Honors student population.

C. PARTICIPANTS

(A) Honors Students



(B) USU Students

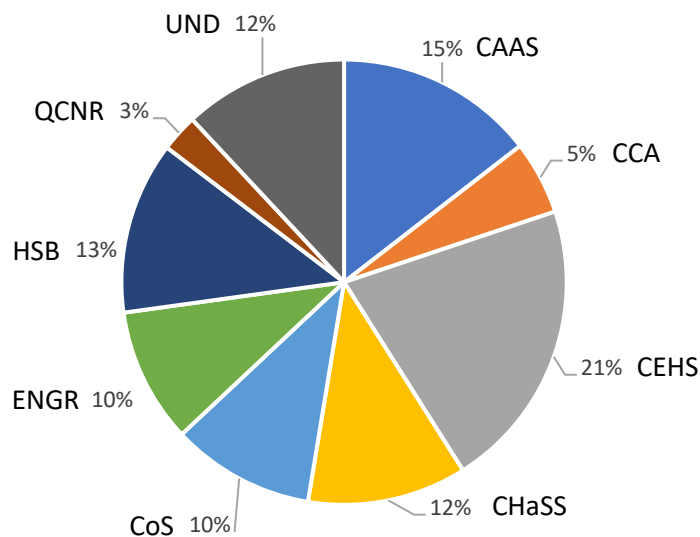


Figure C-1. FY 2023-2024 Honors (A) and USU Logan Campus (B) student population by college: CAAS = College of Agriculture and Applied Sciences; CCA = Caine College of the Arts; CEHS = Emma Eccles Jones College of Education and Human Services; CHaSS = College of Humanities and Social Sciences; CoS = College of Science; ENGR = College of Engineering; HSB = Jon M. Huntsman School of Business; QCNR = S.J. and Jessie E. Quinney College of Natural Resources; UND = Undeclared.

C. PARTICIPANTS

As in previous years, the smallest percentages of Honors students came from the Caine College of the Arts (CCA) and the S.J. and Jessie E. Quinney College of Natural Resources (QCNR), each with 5% of the UHP's total student population. Figure C-1B shows the student breakdown by college for USU's general student population on the Logan campus.

The most notable discrepancy between USU's general and the Honors Program's student populations is a substantially larger percentage of undeclared students in the general population, which complicates a potential comparison. Still, the student population in Honors appears to consist disproportionately of students who have settled on a major, with students from CoS and ENGR significantly overrepresented in Honors, students from CHaSS somewhat overrepresented, and students from CAAS and CEHS significantly underrepresented.

Students in the UHP came from 49 academic departments or programs (out of USU's total of 56) and 95 majors (USU total:144).

This year, Honors welcomed 173 first-year students, a 6% decrease from FY 2022-2023. The ratio of female to male Honors first-year students remains notably high, particularly when compared to the incoming student population on USU's Logan campus, and the percentage of students reporting their gender as non-binary tracks USU's percentage (Table C-1).

The UHP graduated 32 students this year, representing 6% of the total Honors student population and 17% of the 2020 first-year cohort that would graduate within four years in 2024 (Table C-1, Figure G-1, Table H-1), a slight increase over the previous reporting period. Almost two-thirds of this year's graduates were female (Table C-1), which is consistent with long-term trends in the program. For a comparison of the UHP's completion rate over time, see Figure G-1.

2. Faculty and Staff Participants

In FY 2023-2024, the University Honors Program actively engaged 234 USU faculty, staff, and graduate mentors/instructors in teaching and related academic activities, including mentoring, advising, program assessment and advocacy, and other work (Table H-2). That number represents a significant increase over the previous reporting period (+16%) and is comparable to pre-pandemic levels of faculty engagement with Honors.

As in previous years, faculty and staff participated in the full range of available Honors academic activities, including teaching Honors courses and honors sections of departmental courses (Tables E-4, E-5), USU 1010 (H) *Connections* (Table E-3), and USU 1050 (H) *Habits of Mind* for Aggie First Scholars (Table E-5); leading Honors Book Labs (reading and discussion groups, Table E-6); working with students on Honors Mentoring Agreements and Honors Capstone Projects; guiding national scholarship applicants; serving as Departmental Honors Advisors (DHA, Table H-3); reviewing admissions and scholarship applications, including those for national and international

C. PARTICIPANTS

scholarships; and engaging in program evaluation, assessment, and advocacy as members of the Honors Faculty Advisory Board (Table H-4).

Over a quarter of these faculty and staff members engaged in more than one way with the University Honors Program. As in the previous reporting period, faculty participants were distributed quite evenly across academic ranks. Honors-engaged faculty belonged to 46 departments or other academic units from all eight USU undergraduate colleges and USU Libraries. The largest proportion of Honors-engaged faculty came from CHaSS (24%), followed by CoS (17%), CEHS (13%), and CAAS (12%). The percentage of engaged faculty from the remaining four colleges ranged from 6-9% (Figure C-2).

In FY 2023-2024, Honors also piloted a new program, in collaboration with the Office of the Provost, designed specifically to engage early-career faculty in their first (35) or second year at USU (57). These new faculty came from all eight undergraduate colleges and University Libraries, as well as several statewide campuses. The Honors Early Career Faculty Engagement Program (ECFEP) consisted of four carefully designed activities intended to introduce new faculty to Cache Valley, Logan, the USU campus community broadly, and Honors in particular. The ECFEP had 28 participants over the course of fall 2023 term and has generated a number of tangible outcomes since that time (see Section E, Part 19).

3. Alumni Participants

The University Honors Program draws on the professional expertise and positive attachment of a group of 1,299 alumni. In FY 2023-24, the program actively engaged with 11 former Honors Aggies in the Honors Alumni Mentoring Program (AMP) for juniors and seniors; a further 21 alumni participated in the Honors Alumni Connect program designed for first- and second-year Honors students. In addition, four recent UHP graduates shared their perspectives as part of a Zoom panel on “The Value of Completing an Honors Capstone” with an audience of 15 current Honors students working on their Honors Capstone Projects (Table E-7). Honors also hosted two lunch discussions with Honors alumni this year: one with Viviane Baji (Natural Resource Economics, 2016) and the second with Dr. Jodi Barker Ream (Physics, 2009); 20 current Honors students attended these events. In addition, Honors alum Morgan Graham (English, 2019) collaborated with the Honors Executive Director to develop and lead an Honors Gratitude Workshop that was attended by eight Honors students. Honors alum Nate Alder (1991, History) delivered a keynote address at the 2024 Honors Medallion Ceremony celebrating our 2023-2024 Honors graduates. Several recent Honors alumni participated in an Instagram Q&A for incoming first-year students facilitated by the Honors Postgraduate Fellow, who is also a graduate of the UHP.

Figure C-3 provides a breakdown of Honors alumni by time since graduation: 15% of these alumni are recent graduates (<5 years), 18% are early-career professionals (5-10 years), and 66% are mid/late career professionals (>10 years).

C. PARTICIPANTS

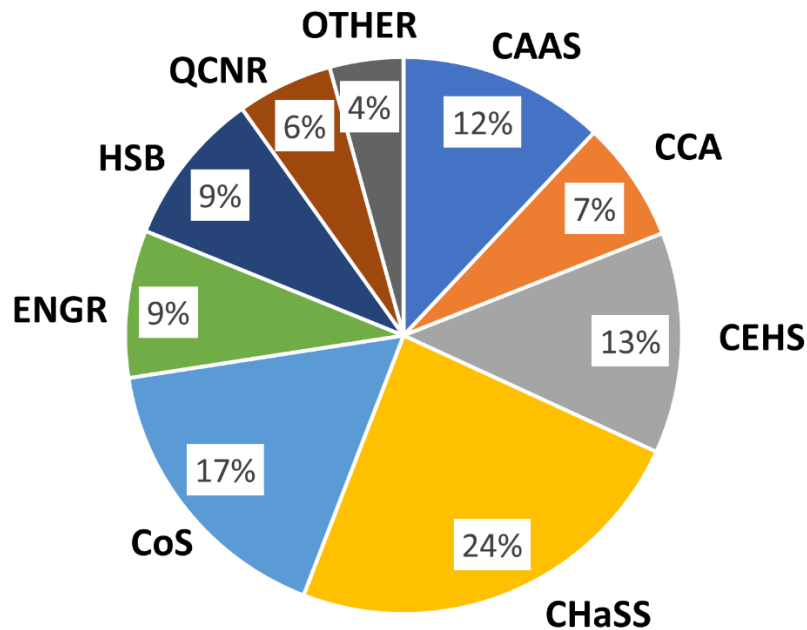


Figure C-2. FY 2023-2024 Honors-engaged faculty, staff, and other mentors/instructors by college: CAAS = College of Agriculture and Applied Sciences; CCA = Caine College of the Arts; CEHS = Emma Eccles Jones College of Education and Human Services; CHaSS = College of Humanities and Social Sciences; CoS = College of Science; ENGR = College of Engineering; HSB = Jon M. Huntsman School of Business; QCNR = S.J. and Jessie E. Quinney College of Natural Resources.

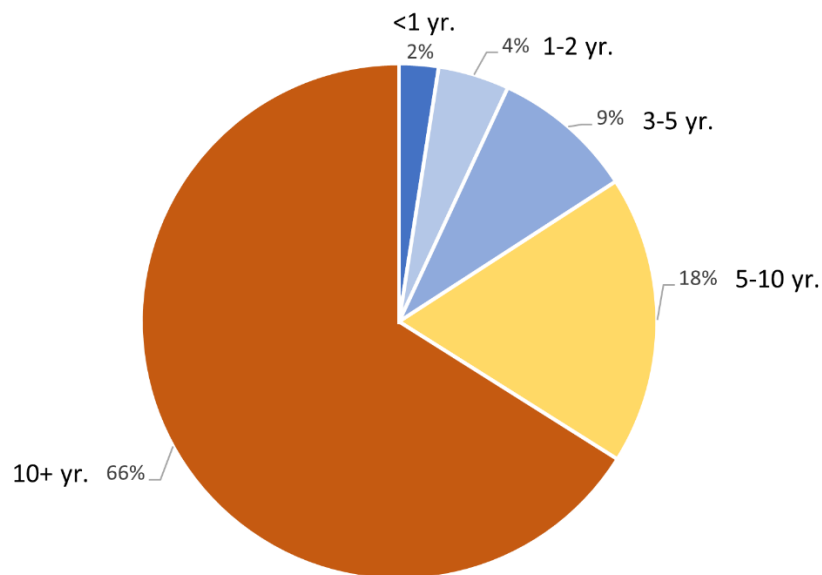


Figure C-3. Time since USU graduation of USU Honors alumni in FY 2023-2024.

C. PARTICIPANTS

4. Statewide Participation

In FY 2023-2024, the University Honors Program continued to expand its statewide population of students and faculty to eight different campuses while also making a substantial amount of UHP programming accessible to USU's extensive network of statewide sites. This sustained effort resulted again this year in a measurable increase in statewide student and faculty participation in the Honors Aggie experience.

After a gradual start with an initial cohort of four students in 2021-22, the UHP now includes 18 students on five statewide campuses: five in Brigham City, six in Kaysville, one in Salt Lake City, one in the Uintah Basin, and five at USU Eastern in Price.

The UHP has expanded recruiting efforts by participating in the Brigham City Bash and the Southeast Utah Career and Job Expo in Blanding; facilitating Honors Book Lab experiences for prospective Honors students in Blanding and the Uintah Basin; and involving faculty on the Blanding, Brigham City, Price, and Uintah Basin campuses in contacting/messaging prospective students. Honors received three applications from statewide students on three different campuses in spring 2024—all three were admitted to the program, and two will be joining our cohort of incoming first-year students in fall 2024.

With the help of faculty liaisons on each of the three former statewide pilot campuses (Brigham City, Uintah Basin, and USU Eastern Price), the UHP has continued to build cohorts of engaged faculty at these sites and involve these faculty members in a range of academic activities. More broadly, the program has intentionally included faculty on all statewide campuses in its calls for both leading Honors Book Labs and participating in the first-year admissions review process.

Ten statewide faculty members (including one ECFEP participant) who represent six statewide campuses, four colleges, and seven academic departments, served in FY 2023-2024 as Departmental Honors Advisors (Table H-3), Honors Book Lab leaders (Table E-6), Honors first-year admissions and scholarship reviewers, and/or mentors of Honors Capstone Projects or Honors Mentoring Agreements (HMAs). The UHP also continued to maintain statewide representation on the Honors Faculty Advisory Board (Table H-4) in FY 2023-2024.

D. PARTNERS

In FY 2023-2024, the University Honors Program:



Partnered with **40 USU** and **42 external collaborators** from a wide range of offices and organizations in the local and national communities.



Provided **\$1,100** in **sponsorship funds** to support community programming by **six** on-campus partners.



Maintained memberships in **six professional organizations**.

D. PARTNERS

The University Honors Program initiates productive, mutually beneficial partnerships on campus and within the wider local, national, and global communities with the goals of creating opportunities for students and faculty, advancing best educational practices, and extending the reach and impact of USU Honors beyond the boundaries of our program. The UHP and staff have also maintained memberships and active involvement in several national and regional organizations and professional societies, both to build recognition of USU Honors beyond the institution and to participate in the continued exchange of knowledge and best practices in honors education.

1. USU Partners

Ongoing Partnerships:

Advising—The Honors Academic Advisor continued collaboration with University Advising (focused on the development and implementation of advising best practices) and coordinated advising for the University Honors Program with major advising across campus to promote better student outcomes.

Aggies Think, Care, Act—As a member of the ATCA committee, the Executive Director continued to represent the program at monthly meetings and share updates to help build collaboration on inclusive programming between academic and student-services units.

Allies on Campus—The Executive Director, Coordinator, both Academic Advisors, and Program Assistant have completed Allies training. The Executive Director and both Academic Advisors have also completed Trans Ally training.

Center for Community Engagement—The UHP continued its productive collaboration with the CCE to promote the Community-Engaged Scholar transcript designation and to seek community-engaged learning (CEL) designations on select honors courses. The Honors Program Assistant continued to explore potential collaboration on service projects and partnered with CCE's Christensen Office of Social Action and Sustainability on "Spring into Service" and "Loaves and Fishes" service projects. The Executive Director continued as a member of the Advisory Committee on Community Engagement.

Center for Instructional Design and Innovation—The UHP collaborated with CIDI staff to improve structured Honors-in-Practice programs offered through Canvas, including the Alumni Mentoring Program, Honors Alumni Connect, and the Honors Leadership Academy.

Center for Intersectional Gender Studies and Research—The UHP collaborated with center staff to cross-promote events.

Christensen Office of Social Action and Sustainability—The UHP collaborated with COSAS to implement the "Loaves and Fishes" service project and to cross-promote events.

Department of Biology—The UHP collaborated with the Department of Biology to offer two Honors sections of BIOL 1615/1625: Biology Lab.

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Department of Engineering Education—The UHP collaborated with the Department of Engineering Education to offer an Honors section of ENGR 3080: Technical Writing for Engineers.

Department of English—The UHP collaborated with the Department of English to offer three Honors sections of the required ENGL 2010: Intermediate Writing course.

Department of Kinesiology and Health Science—The UHP collaborated with the Department of Kinesiology and Health Science to offer four Honors sections of Physical Education courses.

Department of Mathematics and Statistics—The UHP collaborated with the Department of Mathematics and Statistics to offer two Honors sections of mathematics courses.

Housing Services—The UHP continued its productive collaboration with Housing Services in resolving questions about Honors House and navigating student demand. The Executive Director engaged the Housing Services Executive Director in an ongoing conversation about Honors space on the USU Main Campus, and Honors collaborated with Housing to build a new office space for its new academic advisor in LLC Building A.

Institute of Government and Politics—The UHP collaborated with the IOGP to place students in internships, cross-promote events, and begin initial planning for an Honors Study Abroad trip.

Latin Dance Club—The UHP collaborated with the Latin Dance Club to implement the “Salsa and Salsa” social activity.

Latinx Cultural Center—The UHP collaborated with the Latinx Cultural Center to develop and implement student programming, including a “Salsa and Salsa” social event, now in its third year.

Mentoring and Encouraging Student Academic Success (MESAS) Program—The UHP continued its partnership with MESAS to communicate the benefits of Honors and to create pathways into the program for MESAS participants. The Executive Director continued annual meetings with the Faculty Advocate for the MESAS program to ensure clear communication about Honors with these students.

Office of Academic Belonging and Learning Excellence—The UHP has worked with the Office of Academic Belonging and Learning Excellence, particularly the Aggie First Scholars program, to identify first-generation Honors students and has used that information to inform both future recruiting/retention efforts and shared programming. The program offered two Honors sections of USU Habits of Mind courses: USU 1050 (H): *First-Generation Student Success* and USU 1030 (H): *Resilience*.

Office of Admissions—The Executive Director and staff continued to work with Admissions to refine a targeted recruitment and messaging plan for the UHP, coordinate the recruitment of highly motivated students across colleges, and train recruiters, ambassadors, and tour guides to incorporate information about the UHP into their scripts and tours. The program participated in numerous recruiting events,

D. PARTNERS

including four statewide open houses, two transfer open houses, and several on-campus events.

Office of Analysis, Assessment, and Accreditation—The Executive Director collaborated with staff from AAA in an effort to report Honors student demographics more accurately and to generate valid and meaningful comparisons with the USU general student population.

Office of Diversity, Equity, and Inclusion—The UHP collaborated with DEI on running a series of Book Labs on free speech and on the development of a “Contrapower in Higher Education” toolkit. The program also sponsored and promoted several events as part of Black History Month in 2024.

Office of Global Engagement—The UHP continued its productive collaboration with the OGE to promote and help fund study abroad experiences for Honors students and to build pathways toward the Global Engagement Scholar transcript designation.

Office of Research—The UHP continued to work with the OR to recruit and admit Undergraduate Research Fellows (URF), participate in URF programming and cohort activities, coordinate research funding matches with Undergraduate Research and Creative Opportunities (URCO) grants, develop and model best practices for research mentoring at USU, hire and oversee a Goldwater Scholarship Faculty Mentor, and once again host the annual Honors Capstone Poster Showcase as part of Student Research Symposium. The Executive Director also continued service on the USU Undergraduate Research Advisory Board (URAB). Office of Research staff mentored one Honors Mentoring Agreement.

Queer Student Alliance—The UHP collaborated with QSA for a third year to plan and implement a “Spring into Service” project open to all (Honors and non-Honors) students.

Residence Life—The UHP partnered with Residence Life to provide theme housing for Honors students. This work included recruiting residents, assisting with Resident Assistant (RA) training, and combined programming. Residence Life staff also supervised an Honors Mentoring Agreement in FY 2023-2024.

Student Financial Support—The UHP partnered with the Office of Student Financial Support to administer Honors scholarships through the new award system ScholarshipUniverse and to synchronize its awarding timeline with that of the institution.

Student Orientation and Transition Services—UHP staff coordinated with Aggie Orientation staff to communicate the value of Honors to all incoming students (Honors and non-Honors). The program also collaborated with SOTS and the faculty *Connections* committee to staff and identify peer mentors for Honors *Connections* sections, train faculty and peer mentors, make participation in this transition-to-college program mandatory for all first-year Honors students, and tune the *Connections* curriculum to the needs of highly motivated Honors students.

University Advancement—The UHP continued work with University Advancement and the development officer for central programs. The program also engaged in strategic

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advancement planning in response to the National Collegiate Honors Council's team site visit and external review report. The UHP collaborated with Advancement to coordinate and update its alumni database and participated once again this year in "A Day of Giving."

University Libraries—UHP staff worked with reference librarians to archive students' Honors Capstone Projects in Digital Commons. The program also coordinated with the library to maintain an Honors study room and equipment and to host the second annual Honors Capstone Poster Showcase as part of the spring Student Research Symposium. A University Libraries faculty member serves on the Honors Faculty Advisory Board.

University Marketing and Communications (UMAC)—The Executive Director and UHP staff worked with UMAC to create a targeted Honors recruitment plan and identify and market USU's educational strengths to highly motivated students. The program also worked with UMAC to develop marketing materials (posters, web content, and social media images) for the annual Honors Last Lecture.

Utah State University Student Association—The UHP participated in USUSA Homecoming events. USUSA staff also supervised an Honors Mentoring Agreement in FY 2023-2024.

New Partnerships:

Caine Dairy Teaching and Research Center—Caine Dairy staff supervised an Honors Mentoring Agreement in FY 2023-2024.

Department of Music—UHP staff collaborated with the Department of Music to host a music recital that worked as a group Honors Mentoring Agreement.

Department of Theatre Arts—The UHP sponsored an Honors Book Lab designed to complement the performance of the play *Floyd Collins* and helped cross-promote the play.

Edith Bowen Laboratory School—Edith Bowen staff supervised an Honors Mentoring Agreement in FY 2023-2024.

Extension—Extension faculty and staff supervised two Honors Mentoring Agreements in FY 2023-2024.

Huntsman Scholar Program—HSP staff supervised two Honors Mentoring Agreements in FY 2023-2024.

Small Enterprise Education and Development Program—SEED staff supervised an Honors Mentoring Agreement in FY 2023-2024.

Sink Hollow Literary Magazine—Sink Hollow faculty supervised an Honors Mentoring Agreement in FY 2023-2024.

Undergraduate Math Club—The Math Club faculty advisor supervised an Honors Mentoring Agreement in FY 2023-2024.

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2. Sponsorships

Black History Month—The University Honors Program provided financial sponsorship for this event.

College of Humanities and Social Sciences—The UHP provided financial sponsorship for the "Reproductive (In)Justice" Speaker Series.

Native American Student Council—The UHP provided financial sponsorship for the 47th Annual "Echoing Traditional Ways" Powwow.

QCNR Colloquia Series—The UHP provided financial sponsorship for a seminar "Dams that Save: Law, Beavers, and the Making of the Yukon" presented by Dr. Bathsheba Demuth.

Spooky Pup Fest—The UHP provided financial support for this Cache Humane Society fundraiser organized by the HONR 1330: *The Dog in Arts* class.

Transforming Communities Institute—The UHP helped fund participant incentives for a community-engaged study to assess USU student well-being.

3. External Partners

The following individuals or organizations mentored USU Honors students completing projects for Honors Mentoring Agreements or Honors Capstone Projects, or partnered with the University Honors Program on student programming (* = new partner for FY 2023-2024):

- 60Decibels*
- AIDIA, Logan, UT
- Amarillo Society for the Prevention of Cruelty to Animals, Amarillo, TX*
- Bayer, Soda Springs, ID*
- Bench Animal Hospital, Boise, ID*
- Best Friends Animal Sanctuary, Kanab, UT*
- Brigham Young University, Provo, UT*
- Charity Navigator, Saddle Brook, NJ*
- Cook and Sautter Foot and Ankle Specialists, Logan, UT*
- Copper View Animal Hospital, Riverton, UT*
- Denver District Attorney's Office, Denver, CO*
- Ellis Elementary School, Logan, UT*
- English Language Center of Cache Valley, Logan, UT*
- Evercore Partners*
- Four Paws Rescue, Logan, UT*
- Hillcrest Elementary School, Logan, UT*
- Howe Dental, Roy, UT*
- Idaho Milk Products, Jerome, ID*
- Idaho National Laboratory, Idaho Falls, ID
- Idaho Reptile Zoo, Boise, ID*

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- Interventional Spine and Pain Management, Bountiful, UT
- Kiewit Corporation, Omaha, NE
- KWS Seeds Inc., Bloomington, MN*
- L3Harris Technologies, Melbourne, FL*
- Logan Regional Hospital, Logan, UT*
- Mathnasium, Logan, UT*
- Mount Sinai Health System, New York City, NY*
- Osborne, Robbins and Buehler, PLLC, Salt Lake City, UT
- Performance Engineers, Salt Lake City, UT*
- Quail Pointe Veterinary Hospital, Clinton, UT
- Salt Lake City Engineering Department, Salt Lake City, UT
- Sorenson Impact Center, Salt Lake City, UT*
- Sunshine Terrace Foundation, Logan, UT*
- The Black Piper Artists' Collective*
- The Family Place, Logan, UT*
- The Shipwreck Survey Field School*
- Trinity Industries, Inc., Frisco, TX
- U.S. Congress, United States House of Representatives, Washington, D.C.
- U.S. Congress, United States Senate, Washington, D.C.*
- University of Utah Health, Salt Lake City, UT*
- Utah Fertility Center*
- Utah Historical Society, Salt Lake City, UT*

4. Professional Affiliations and Engagement

The University Honors Program maintains active affiliations with the following organizations:

Association of Public and Land-Grant Universities Council on Honors Education (APLU CoHE)—The Executive Director actively participates in programming offered by this recently formed group of honors deans and directors from public and land-grant institutions.

Honors Education at Research Universities (HERU)—The UHP maintained its affiliation with other honors educators in the HERU group in FY 2023-2024.

NACADA: The Global Community for Academic Advising—The UHP's two Academic Advisors maintained membership in NACADA in FY 2023-2024.

National Association of Fellowships Advisors (NAFA)—The UHP maintained membership in NAFA in FY 2023-2024, and the Honors Program Coordinator attended the 2023 NAFA Biennial Conference in New Orleans, LA, USA.

National Collegiate Honors Council (NCHC)—The UHP maintained institutional membership in NCHC in FY 2023-2024. The Executive Director continued service as elected co-chair of the NCHC Publications Board after having previously served as a member; continued service on the NCHC Governance Committee, and continued

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service on the editorial board of the *Journal of the National Collegiate Honors Council*. The Executive Director also attended the 2024 NCHC Annual Conference in Chicago, IL, collaborating and presenting on two panel/roundtable discussions.

Western Regional Honors Council (WRHC)—The UHP maintained membership in WRHC in FY 2023-2024.

E. PROGRAMMING



ESSENTIAL ACTIVITIES: The University Honors Program facilitated review of **365 applications** with the input of **71 faculty** and is on track to admit a cohort of **180** incoming **first-year students** in fall of 2024.

The UHP provided professional and peer advising to its student population in **792 advising appointments**.



ACADEMIC PROGRAMS: The UHP offered and/or financially supported **six HONR-prefix courses**, **13 Honors sections** of departmental courses, and **38 Honors Book Labs**.

Honors students completed **85 Honors Mentoring Agreements**, **32 Honors Capstone Projects**, and attended and reflected on **508 co-curricular** events.



ENGAGEMENT: The UHP delivered **24 events** to **1069 student participants**.



PROFESSIONALIZATION: The UHP engaged **34 students** in formal **mentoring** with its alumni and provided professional development to **28 student employees**.

E. PROGRAMMING

ESSENTIAL ACTIVITIES

Defined as the annually recurring tasks that sustain the long-term health of the University Honors Program, these essential activities provide critical services to current and prospective students.

1. Recruiting

UHP staff and student employees participated in 24 in-person recruiting events in FY 2023-2024 (Table E-1), engaging 772 prospective Honors students, as well as 270 of their family members, in conversations about the benefits of an honors education at USU.

Recruiting and informational events on the Logan campus also allowed UHP staff and student employees to engage with 78 current and incoming students (and, in some cases, their family members) to answer questions or simply start a conversation about the program.

2. Admissions

The University Honors Program received 365 first-year applications in FY 2023-2024 (Table E-2), a 10% increase from the previous reporting period. The average high school GPA of applicants was 3.89; the average ACT score of students who chose to submit this score (given USU's and the UHP's test-optional admissions) was 28.5 Both of these scores represent slight decreases over the previous year, which is in keeping with the program's clearly articulated emphasis on a growth mindset over academic scores.

The UHP organized the holistic review of these applications by a group of 71 USU faculty members who represented all eight undergraduate colleges and University Libraries. Based on this review, 348 students were invited to join the program (95% of applicants, compared to 98% of applicants in the previous reporting period). The UHP aims to make an honors education accessible to all students who demonstrate a growth mindset and strong potential to benefit from the program's structured experiential-learning curriculum. The applicants denied admission to the UHP did have noticeably lower GPAs and test scores (Table E-2). Still, given the holistic nature of the program's review process, the reviewer's assessment of these students was likely impacted more by perceived fit and potential to excel in an environment that requires self-motivation and some constructive, guided risk-taking. This year's admissions process resulted in a first-year class for FY 2024-2025 of 214 students (+6%), 34 of whom deferred enrollment (Table E-2).

E. PROGRAMMING

Table E-1. University Honors Program recruiting events in FY 2023-2024.

Event Name	Location	Date	Staff	Student Employees	Students Contacted		Family Contacted	
					I	P	I	P
Day on the Quad	USU (Quad)	08/30/2023	1	10	31	104	0	0
QCNr Opening Social	USU (QCNr Patio)	08/30/2023	0	3	5	28	0	0
Undergraduate Research Fair	USU (Engineering Quad)	09/06/2023	0	2	5	11	0	0
CHaSS Experiential Learning Fair	USU (TSC)	09/09/2023	0	1	6	5	0	0
High School Counselor Conference ^a	USU (West Stadium Complex)	09/13/2023	2	0	0	0	0	0
Brigham City Bash	Brigham City, UT	09/15/2023	1	0	1	8	2	3
CAAS Day on the Patio	USU (CAAS Patio)	09/20/2023	0	1	0	10	0	0
Senior Preview Day	USU (TSC)	09/29/2022	0	3	0	24	0	16
Open House—Layton	Layton, UT	10/17/2023	2	2	0	40	0	29
Open House—Provo	Provo, UT	10/18/2023	1	3	0	30	0	26
Open House—Logan	USU (TSC)	10/23/2023	1	5	0	69	0	50
Open House—Salt Lake City	West Jordan, UT	10/24/2023	0	3	0	61	0	46
SLCC Transfer Open House	Taylorsville, UT	11/01/2023	1	0	0	7	0	0
Snow College Transfer Open House	Ephraim, UT	11/02/2023	1	1	0	62	0	1
CHaSS Experiential Learning Fair	USU (TSC)	11/09/2023	0	1	6	5	0	0
College Access and Inclusion Day 1	USU (TSC)	11/14/2023	0	2	0	83	0	3
College Access and Inclusion Day 2	USU (TSC)	11/15/2023	0	2	0	77	0	1
Club Fest	USU (TSC)	01/09/2024	0	2	1	22	0	0
Involvement Day	USU (TSC)	03/01/2024	0	3	0	12	0	4
ENGL 1010 Classroom Visit	USU (EBB)	03/20/2024	0	2	12	0	0	0
A-Day	USU (TSC)	03/22/2024	0	3	11	14	8	20
Southeast Utah Career and Job Expo	Blanding, UT	03/22/2024	1	0	0	24	0	0
Junior Preview Day 1	USU (TSC)	03/28/2024	2	0	0	37	0	39
Junior Preview Day 2	USU (TSC)	03/29/2024	0	4	0	39	0	32

^a Honors engaged with 41 high school counselors at this event.

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Table E-2. Demographics of FY 2023-2024 Honors applicant and admission pools.

Category	Total	Male (%)	Female (%)	Non-Binary (%)	URM ^a (%)	1 st Gen (%)	Veteran (%)
First-year Applicants	365	126 (35%)	234 (64%)	5 (1%)	22 (6%)	42 (12%)	16 (4%)
<u>Accepted</u>	348	118 (34%)	226 (65%)	4 (1%)	22 (6%)	38 (11%)	16 (5%)
<i>Admitted</i>	180	50 (28%)	126 (70%)	4 (2%)	12 (7%)	23 (13%)	8 (4%)
<i>Deferred</i>	34	32 (94%)	2 (6%)	0	1 (3%)	4 (12%)	0
<i>Declined</i>	134	36 (27%)	98 (73%)	0	9 (7%)	11 (8%)	8 (6%)
<u>Not Accepted</u>	17	8 (47%)	8 (47%)	1 (6%)	0	0	0
Current/Transfer Applicants	29	9 (31%)	19 (66%)	1 (3%)	8 (28%)	7 (24%)	N/A
<i>Accepted</i>	29	9 (31%)	19 (66%)	1 (3%)	8 (28%)	7 (24%)	N/A
<i>Admitted</i>	29	9 (31%)	19 (66%)	1 (3%)	8 (28%)	7 (24%)	N/A

^a Includes students self-identifying as Hispanic/Latinx, Black or African American, American Indian or Alaska Native, and Native Hawaiian or Other Pacific Islander.

The UHP saw a slight decrease this year, as it did last year, in the percentage of applicants who self-identified as URM (6%, -4%), with the percentage of first-generation college student applicants remaining stable (Table E-2) in this reporting period. Those numbers are in line with long-term averages, and they match or exceed the percentage at which these groups are represented across the institution. As in previous years, the program's holistic and inclusive admissions process once again ensured that these students' applications, like those of all students, were given full consideration, resulting in 100% of URM applicants and 90% of first-generation applicants being offered a place in the UHP; significantly, over 60% of URM and 70% of first-generation students chose to accept this invitation.

The UHP also received 29 applications from current USU and transfer students during this reporting period. All 29 applicants were offered admission, and all accepted the offer to join the program. These students are typically referred by faculty (recommendation letters are required) and identified as outstanding performers once at USU or at their previous institutions. These current/transfer admits continue to be a more diverse group than more traditional high school applicants, thus adding significantly and meaningfully to our Honors Aggie community and embodying the program's values.

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3. Orientation

In FY 2023-2024, USU Student Orientation and Transition Services once again offered a complete summer Aggie Orientation program, allowing the University Honors Program to both conduct an early morning Honors Orientation session and participate in the afternoon Aggie Information Fair. The UHP successfully engaged with 88 of our admitted incoming students and 79 of their family members over the course of 11 early morning half-hour information sessions conducted by UHP staff. An additional 15 students participated in a virtual orientation session held over Zoom in early August. Program staff also planned and implemented, on August 2-4, 2023, an Instagram Q&A event featuring the Honors Postgraduate Fellow and four Honors student and alumni volunteers; this event reached 260 students, with eight questions asked and answered.

The UHP booth at the afternoon Aggie Information Fair, run by Honors staff and up to two student employees, was primarily visited by prospective students curious about the program. Over the course of eleven information fairs, we talked with 77 incoming first-year non-Honors students and 43 of their family members. In addition, 67 of our incoming first-year students and 31 of their family members used this opportunity to follow up, engage, and seek answers to any remaining questions.

4. Honors *Connections*

The University Honors Program again collaborated with USU 1010 *Connections* to provide a meaningful transition-to-college experience for 147 incoming first-year Honors students, 81% of the incoming Honors cohort (USU comparison: 74%). An additional 14 Honors students enrolled in non-Honors *Connections* sections (typically required for marching band members or student athletes) or took regular USU *Connections* at one of our statewide campuses, bringing the total participation of Honor students to 89%. All six Honors *Connections* sections were assigned Honors student peer mentors, giving new students both Honors faculty and student guides as they began their time at USU and in Honors (Table E-3).

Table E-3. USU *Connections* Honors sections taught in FY 2023-2024.

Section Number	Instructor	Peer Mentor	Enrollment
091	Chad Simon	Grace McConkie	28
092	Elizabeth Vargis ^a	Canon Breckenridge	23
093	Amanda Dawson	Meghan Hatfield	19
094	Mateja Savoie-Roskos	Carlie Prinster	25
095	Karen Beard	Aimee Schaelling	22
096	Christine Cooper-Rompato ^a	Emily Andres	30

^a FY 2022-2023 Honors *Connections* instructor.

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5. Learning Communities: Honors House

The University Honors Program once again collaborated with USU Housing Services and Residence Life to provide an academically based learning community for up to 96 Honors students in Building C of the Living Learning Community complex. In coordination with Residence Life, the number of Resident Assistants (RA) serving this Honors student population was reduced from four to two in FY 2023-2024, with each RA serving two floors. As in previous years, RAs were Honors students themselves and received specialized training from Honors staff so that they were equipped to engage and support Honors residents as effectively as possible.

6. Advising and Mentoring

The University Honors Program's two academic advisors and two peer advisors completed 792 advising appointments in FY 2023-2024 in a variety of formats (virtual, phone, and in-person). That number includes 99 appointments with incoming first-year students not shown on the graph below. The UHP requires advising each semester, and to ensure student engagement, the program ties this requirement to good standing in Honors and priority registration. The distribution of appointments by month is shown in Figure E-1. Not surprisingly, the bulk of advising takes place in the fall, as students prepare to register for spring classes, and in late spring, as students approach graduation and registration for the following fall semester. It is noteworthy that advising nevertheless continues to be a year-round activity.

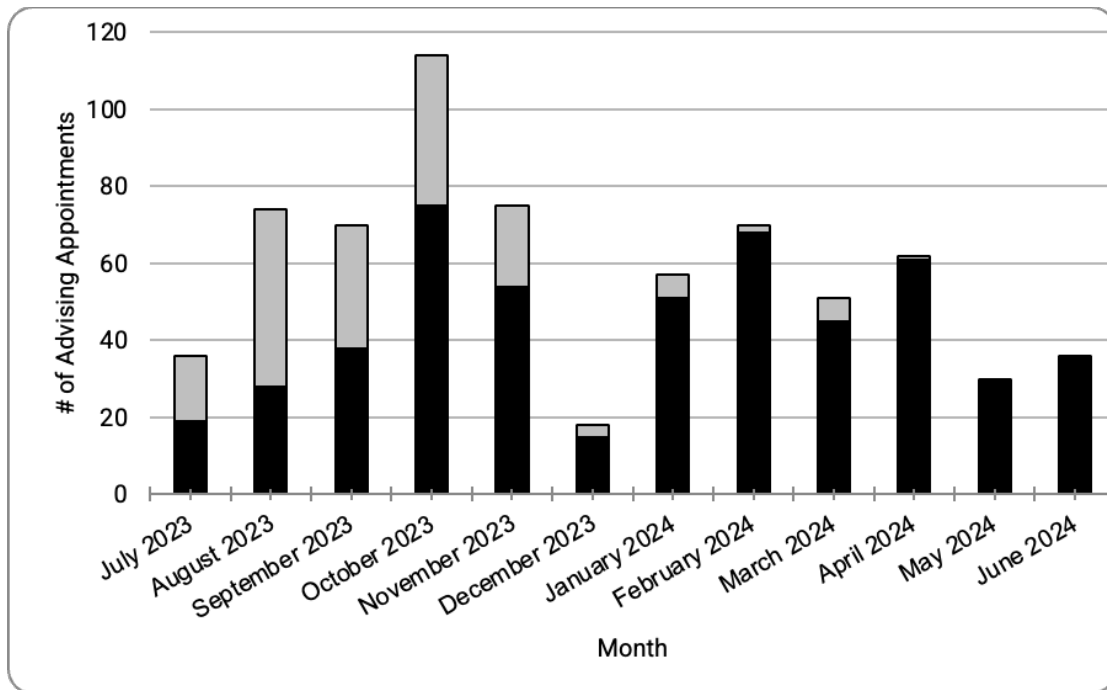


Figure E-1. Honors academic advising appointments by month in FY 2023-2024. Black = academic advisor appointments; grey = peer advisor appointments.

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UHP Advising also instituted a quiz—administered through Canvas and worth 1 Honors point—for its incoming first-year students. Intended to promote retention and group advising/support, the quiz guides students through key requirements so that have a better understanding of the Honors curriculum and more agency in moving through that curriculum successfully. In FY 2023-2024, 154 of 173 (89%) first-year Honors students accessed the quiz, with 136 (79%) completing and passing the quiz.

7. Website

The University Honors Program's website (honors.usu.edu) continues to be one of the program's key modes of communication with prospective and current students, faculty, alumni, and stakeholders. In addition to providing information about mission, vision, and goals; UHP requirements; and student opportunities, the website highlights opportunities for alumni engagement and thus promotes positive attachment to the program. The website serves as a portal for students submitting admissions applications, applying for leadership positions and funding, and scheduling advising appointments, as well as for faculty submitting proposals to teach for the UHP or requesting documentation of faculty work for inclusion in promotion and tenure dossiers.

In FY 2023-2024, the UHP website received 80,694 page views (+18% over FY 2022-2023) by 41,092 visitors (+138%). After the site's home page, the five top-viewed pages were the Honors first-year student application page (8,249 views), application home page (8,147 views), Honors Book Labs page (6,263 views), Honors Courses page (4,878 views), and "What is Honors?" page (3,715 views).

8. Social Media

As in previous years, the University Honors Program maintained an active social media presence in FY 2023-2024, with activities focused primarily on Instagram and X (formerly Twitter).

Instagram—The UHP made 151 posts (+1%) to its Instagram account, which resulted in 755 page visits (-71%). The Honors Instagram account reached 4,365 unique accounts and had 1,095 followers (+168% over FY 2022-2023), receiving 5,265 likes. The UHP also facilitated three Instagram takeovers by current Honors students: Mia Knight (CAAS HSAB representative), Rebecca Ivans (Honors peer mentor), and Jentrie Gilliland (HSB HSAB representative and Honors ambassador). These three takeovers had a combined reach of over 1,500 users.

X—The UHP posted 137 times, receiving 7,258 impressions and 97 likes on this platform. In FY 2023-2024, the Honors X account had 402 followers.

Facebook—In FY 2023-2024, several units on campus, including the UHP, began experiencing difficulty working with Meta to maintain a non-personal Facebook account. The UHP was unable to resolve these issues and has thus discontinued use of the Honors Facebook account over the past year.

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9. Fundraising and Development

In FY 2023-2024, the University Honors Program worked once again with USU Advancement and Alumni Relations to create messaging for USU's annual mail and "A Day of Giving" campaigns, with a focus on soliciting donations for the Honors Access and Inclusion Scholarship. The Executive Director also attended USU's Founder's Day dinner on March 7, 2024, at the request of Advancement.

Program staff facilitated communication between Honors student scholarship winners and the donors who supported them. In addition, the UHP timed the mailing of its annual holiday card to alumni and stakeholders with the university's annual year-end giving campaign, contacting current and former students' parents, as well as Honors alumni. As a result of these development and fundraising activities, the program received 130 gifts (+37%) from 65 donors (+25%), totaling \$82,005 (+31%).

ACADEMIC PROGRAMS

The University Honors Program's curriculum includes four types of core activities that guide students in building portfolios of outstanding undergraduate work and reflecting on their personal and professional growth as they progress toward graduation with University Honors. These activities include Honors coursework, Honors-in-Practice experiential learning projects, required Honors Capstone Projects, and attendance at and reflection upon academically oriented co-curricular events (on campus, in the community, or via Zoom/broadcast). The embedded reflection at each stage of the curriculum ensures that every Honors student can clearly articulate the value and trajectory of their undergraduate academic experience, and thus helps students to develop the self-aware personal and professional narrative that defines the USU Honors educational experience.

10. Honors Courses

Honors Introductory Experiences (USU General Education (GE) Breadth)—In FY 2023-2024, the University Honors Program funded the teaching of four Honors Introductory Experience (HIE) courses designed for first- and second-year students; all four of these courses were taught in FY 2023-2-24 for the first time in the program's regular three-year cycle for HIE courses.

Enrolling a total of 98 students, these courses met two of USU's GE Breadth requirements (Table E-4): Humanities (BHU) and Creative Arts (BCA). Selected by both the Honors Faculty and Student Advisory Boards as outstanding experiential-learning opportunities, these courses featured hands-on interdisciplinary experiences designed to introduce first-year Honors students to college-level work. With enrollments capped at 25, the classes allowed for meaningful mentoring interactions between students and faculty and between students and the Honors Undergraduate Teaching Fellow (UTF) assigned to each course.

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Honors Think Tanks (USU GE Depth)—In FY 2023-2024, the UHP offered two team-taught, cross-disciplinary Think Tank courses: *Discernible Divides*, which was taught for the first time this year and will return in FY 2024-2025 for a second iteration, and *Experiences of Colonialism*, which—although also taught for the first time, will not return next year due to one instructor accepting a position at another institution. Like all Honors Think Tanks, these courses cross-listed sections that met two different USU GE Depth requirements, and these sections met together and featured the combined expertise of two faculty members from different disciplines. Although students enroll in only one section in the discipline of their choice, they all complete the same coursework and thus meet learning outcomes for both Honors and USU GE. Both sections also carried a Communication Intensive designation and fulfilled those requirements for all registered students. The Think Tanks allowed 45 Honors students to earn their choice of DHA or DSS credit while enjoying an innovative, interdisciplinary, team-taught approach to meeting USU’s GE requirements (Table E-4).

Departmental Honors Sections—In addition to the Honors GE courses selected through a competitive committee review process and taught by outstanding Honors faculty, the UHP also offered sections of required courses in some disciplines (Table E-5). As in the previous year, these sections were offered by the College of Engineering and the Departments of Biology, English, Kinesiology and Health Science, and Mathematics and Statistics, in collaboration with the UHP. The program also once again collaborated with the Office of Academic Belonging and their Aggie First Scholars program to offer two Honors “Habits of Mind” sections (one of USU 1050 *First-Generation Student Success* and the other of USU 1030 *Resilience*), with a combined enrollment of 15 Honors students. Overall, Honors sections of departmental courses enrolled a total of 189 students.

Honors Sections of Non-Honors Courses—In FY 2023-2024, two faculty members approached Honors with the idea of setting up a 0-credit Honors section cross-listed with an existing non-Honors class. These sections are intended to provide Honors students with an experience similar to a group Honors Mentoring Agreement (formerly known as a “course contract”). As with any Honors course, students earn Honors points at the rate of one point per credit (3 points for a 3-credit course). After reviewing both the overarching concept and specific course proposals with the Honors Faculty and Student Advisory Boards, both courses were approved and will be taught as a pilot in fall 2024 (BIOL 3060) and spring 2025 terms (ART 4820).

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Table E-4. Honors Introductory Experience and Think Tank courses taught in FY 2023-2024.

Course Number	Course Title	Term	USU Gen Ed	Instructor(s)	Enrollment
HONR 1320	<i>Living in a Brave New World: Philosophy and Technology</i>	Fall 2023	BHU	Dr. Rachel Robison-Greene	26
HONR 1330	<i>The Dog in Arts</i>	Fall 2023	BCA	Dr. Laura Gelfand	23
HONR 3020/3030 X	<i>Discernible Divides: Visualizing Patterns of Persecution, Inequality, and Agency Through Data and Art</i>	Fall 2023	DHA (CI)/ DSS (CI)	Dr. Colby Tofel-Grehl/Prof. Raymond Veon	13/8
HONR 1320	<i>Why Poetry Matters: The Ethics and Aesthetics of Modern World Poetry</i>	Spring 2024	BHU	Dr. David Richter	24
HONR 1330	<i>(Un)Desirable Enchantments: The Visual Rhetorics of Inequality in Fantasy and Science Fiction Art</i>	Spring 2024	BCA	Prof. Raymond Veon	25
HONR 3020/3030 X	<i>Experiences of Colonialism in Latin America Through Archaeology and Literature</i>	Spring 2024	DHA (CI)/ DSS (CI)	Dr. Anna Cohen/ Dr. Felipe Valencia	17/7

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Table E-5. Honors sections of departmental courses taught in FY 2023-2024.

Course Number	Course Title	Term	Instructor(s)	Enrollment
PE 1520 (H) Section 001	<i>Honors Hiking</i>	Summer 2023	Dr. Jesse Jones	4
BIOL 1615 (H) Section 001	<i>Biology I Laboratory</i>	Fall 2023	Lauren Lucas	23
ENGL 2010 (H) Section 045 (CL2)	<i>Intermediate Writing: Research Writing in a Persuasive Mode</i>	Fall 2023	Russ Winn	22
ENGL 2010 (H) Section 050 (CL2)	<i>Intermediate Writing: Research Writing in a Persuasive Mode</i>	Fall 2023	Ashley Wells	23
MATH 1220 (H) Section 004 (QI)	<i>Calculus II</i>	Fall 2023	Dr. Nathan Geer	11
PE 1116 (H) Section 002	<i>Roundnet</i>	Fall 2023	Ian Morgan	16
USU 1050 (H) Section 003	<i>Habits of Mind: First- Generation Student Success</i>	Fall 2023	Denise Stewardson	6
BIOL 1625 (H) Section 001	<i>Biology II Laboratory</i>	Spring 2024	Lauren Lucas	14
ENGL 2010 (H) Section 013 (CL2)	<i>Intermediate Writing: Research Writing in a Persuasive Mode</i>	Spring 2024	Deanna Allred	23
ENGR 3080 (H) Section 002 (CI)	<i>Communication for Engineering</i>	Spring 2024	Melissa Scheaffer	7
MATH 2210 (H) Section 001 (QI)	<i>Multivariable Calculus</i>	Spring 2024	Dr. Zilong Song	13
PE 1057 (H) Section 013	<i>Honors Yoga</i>	Spring 2024	Camilla Adair	11
PE 1430 (H) Section 004	<i>Honors Judo</i>	Spring 2024	Sarah Shaw	7
USU 1050 (H) Section MB1	<i>Habits of Mind: Resilience</i>	Spring 2024	Dr. Derrik Tollefson	9

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11. Honors in Practice (HIP)

The University Honors Program has developed an innovative, flexible system to award Honors points for completion of each assignment within the Honors curriculum. Rather than enrolling in a suite of required Honors courses for academic credit, students can both take courses that fulfill USU GE requirements and apply their classroom knowledge in a range of high-impact activities, including research, creative work, professional-development programs, internships, study abroad experiences, and community or global engagement. Students propose, document, and reflect upon this work for Honors points that mark their progress in enhancing required major/minor work with professional development and experiential learning.

Honors Mentoring Agreements (HMA)—These formal agreements between students and faculty propose and document the completion of at least 20 hours (typically substantially more) of mentored experiential learning beyond the classroom. Each HMA is overseen and ultimately approved or rejected by three faculty members: a primary mentor, the Departmental Honors Advisor, and the UHP's Executive Director. HMA experiences can include research, creative work, study abroad, internships, service projects, or Honors Excel (graduate) courses taken with faculty and departmental permission. In FY 2023-2024, 91 (+60% over the previous reporting period) Honors students pursued or completed 149 (+100%) HMAs, engaging with 73 (+38%) USU faculty and 46 (+250%) other non-USU professional mentors in the process. Eighty-five of these HMAs were completed by 63 students and subsequently approved by the UHP this year.

The program supported student engagement with this high-impact learning practice by featuring highlights of a diverse range of exceptional HMAs on social media on six occasions in the period between September 2023 and March 2024. The UHP also held one HMA Showcase in person and on Zoom, allowing students considering an HMA to hear from peers who have already completed one.

Structured Honors-in-Practice Programs—In addition to the mentoring agreements structured by students and faculty, the UHP itself structures some HIP experiences for students. Students earn points over the course of a semester or year in these UHP-run programs, which include the Honors Alumni Mentoring Program, the Honors Alumni Connect Program, the Honors Leadership Academy, and service on the Honors Student Advisory Board.

Honors Book Labs—This curricular innovation allows faculty and Honors students the opportunity to read and discuss books in small cross-disciplinary groups (no more than five students per lab). The labs meet four times for an hour per week in the second through fifth weeks of each term. Faculty and students alike enjoy the opportunity to talk with people outside their disciplines about books of mutual interest, without grades or faculty evaluation of students (Honors awards one point per successfully completed Book Lab experience, based on student reflections). Faculty have led these labs as teams, taken field trips, invited guest speakers, or tied their labs to campus speaker series or visitors. Thirty faculty from 19 academic departments across seven colleges

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and University Libraries, as well as one friend of Honors, led 38 Book Labs serving 180 students in FY 2023-2024 (Table E-6). Those numbers represent a 12% and 20% increase, respectively, over the previous reporting period. For the first time in FY 2023-2024, Honors also supported two Book Labs for prospective (non-) Honors students on the Blanding and Uintah Basin campuses; these labs were designed to introduce students at these statewide sites to the UHP and the program's many opportunities and benefits.

Table E-6. Honors Book Labs conducted in FY 2023-2024.

Book Title	Term	Faculty Leader(s)	Students
<i>Becoming a Data Head: How to Think, Speak, and Understand Data Science, Statistics, and Machine Learning</i> (by Alex J. Gutman and Jordan Goldmeier)	Summer 2023 (July)	Dr. Jia Zhao	4
<i>Engage in Public Scholarship: A Guidebook on Feminist and Accessible Communication</i> (by Alex D. Ketchum)	Summer 2023 (July)	Erica Finch	5
<i>How to Not Be Wrong: The Power of Mathematical Thinking</i> (by Jordan Ellenberg)	Summer 2023 (July)	Dr. Mario Harper	5
<i>Sapphistries: A Global History of Love Between Women</i> (by Leila J. Rupp)	Summer 2023 (July)	Raymond Veon	5
<i>Waverly</i> (by Sir Walter Scott)	Summer 2023 (July)	Dr. James Pitts	4
<i>A Dominant Character: The Radical Science and Restless Politics of J.B.S. Haldane</i> (by Samanth Subramanian)	Fall 2023	Dr. Zachariah Gompert	5
<i>An Immense World: How Animal Senses Reveal the Hidden Realms Around Us</i> (by Ed Yong)	Fall 2023	Dr. Sara Freeman	5
<i>Artificial Unintelligence: How Computers Misunderstand the World</i> (by Meredith Broussard)	Fall 2023	Dr. LuEttaMae Lawrence	5
<i>Homosexuality and Civilization</i> (by Louis Crompton)	Fall 2023	Raymond Veon	5
<i>Lessons of the Lost: Finding Hope and Resilience in Work, Life, and the Wilderness</i> (by Scott C. Hammond)	Fall 2023	Dr. Scot Allgood	4
<i>Lightning Flowers: My Journey to Uncover the Cost of Saving a Life</i> (by Katherine E. Standefer)	Fall 2023	Dr. Katherine Potter	4

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Table E-6. Continued.

Book Title	Term	Faculty Leader(s)	Students
<i>Real Artists Don't Starve: Timeless Strategies for Thriving in the New Creative Age</i> (by Jeff Goins)	Fall 2023	Dr. Jeiran Hasan	5
<i>The Future of the Responsible Company: What We've Learned from Patagonia's First 50 Years</i> (by Vincent Stanley and Yvon Chouinard)	Fall 2023	Chase Anderson	5
<i>The Homeboy Way: A Radical Approach to Business and Life</i> (by Thomas Vozzo)	Fall 2023	Dr. Ryan Seedall	4
<i>The Invention of Nature: Alexander von Humboldt's New World</i> (by Andrea Wulf)	Fall 2023	Dr. James Pitts	5
<i>The Structure of Scientific Revolutions</i> (by Thomas S. Kuhn)	Fall 2023	John Redfield	3
<i>Thinking, Fast and Slow</i> (by Daniel Kahneman)	Fall 2023	Dr. Joseph Tainter	4
<i>Tracing Time: Seasons of Rock Art on the Colorado Plateau</i> (by Craig Childs)	Fall 2023	Dr. Alexa Sand	5
<i>Underland: A Deep Time Journey</i> (by Robert MacFarlane)	Fall 2023	Dr. Doris McGonagill	5
<i>1984</i> (by George Orwell)	Spring 2024	Dr. Colin Flint	5
<i>Babel: Or the Necessity of Violence: An Arcane History of the Oxford Translators' Revolution</i> (by R.F. Kuang)	Spring 2024	Katie Luder and Rachel Lawyer	5
<i>Darwin's Backyard</i> (by James Costa)	Spring 2024	Dr. James Pitts	5
<i>Don't Mean Nothing</i> (by Susan O'Neill)	Spring 2024	Dr. Molly Cannon and Dr. Susan Grayzel	5
<i>Free Speech: What Everyone Needs to Know</i> (by Nadine Strossen)	Spring 2024 (February)	Dr. Chris Babits	4
<i>Free Speech: What Everyone Needs to Know</i> (by Nadine Strossen)	Spring 2024 (April)	Dr. Chris Babits	5
<i>Heart Berries</i> (by Terese Marie Mailhot)	Spring 2024	Dr. Amanda Katz	5
<i>Our Changing Menu: Climate Change and the Foods We Love and Need</i> (by Michael P. Hoffmann, Carrie Konlinka-Loehr, and Danielle L. Eisman)	Spring 2024	Dr. Michelle Burrows	5
<i>The Creative Act: A Way of Being</i> (by Rick Rubin)	Spring 2024	Dr. Michael Dixon	5
<i>The Missing Morningstar and Other Stories</i> (by Stacie Shannon Denetsosie)	Spring 2024	Dr. Danielle Ross	5
<i>The Pink Line: Journeys Across the World's Queer Frontiers</i> (by Mark Gevisser)	Spring 2024	Raymond Veon	4

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Table E-6. Continued.

Book Title	Term	Faculty Leader(s)	Students
<i>The Rebellious Life of Mrs. Rosa Parks</i> (by Jeanne Theoharis)	Spring 2024	Dr. Victoria Grieve	5
<i>The Truth About Stories: A Native Narrative</i> (by Thomas King)	Spring 2024	Dr. Travis Franks	5
<i>Trapped! The Story of Floyd Collins</i> (by Robert Murray and Roger Brucker)	Spring 2024	Mary Heers	5
<i>Won't Lose the Dream: How an Upstart Urban University Rewrote the Rules of a Broken System</i> (by Andrew Gumbel)	Spring 2024	Dr. Katie Kraus	5
<i>Fahrenheit 451</i> (by Ray Bradbury)	Summer 2024 (June)	Dr. Wayne Hatch	5
<i>Free Speech: What Everyone Needs to Know</i> (by Nadine Strossen)	Summer 2024 (June)	Dr. Chris Babits	5
<i>Sapphistries: A Global History of Love Between Women</i> (by Leila J. Rupp)	Summer 2024 (June)	Raymond Veon	5
<i>The Design of Everyday Things: Revised and Expanded Edition</i> (by Don Norman)	Summer 2024 (June)	Dr. Mario Harper	5

The UHP supports this high-impact learning experience by hosting showcases that introduce upcoming labs, purchasing books for all participants, and evaluating student reflections for Honors points at the end of each term's session. In FY 2023-2024, a spring Book Lab showcase was held on November 15, 2023, and a summer/fall showcase was held April 16, 2024, both via Zoom webinar to allow statewide participation. Each showcase drew an audience of 45-50 Honors students.

12. Honors Capstone Projects

The University Honors Program continued a very successful one-credit/one-point Honors Capstone Preparation and Proposal course (HONR 3900), which guides students through the process of developing their Honors Capstone Proposals. Taught by Honors Executive Director Dr. Kristine Miller, this course asks students to read and reflect upon prior capstone projects and proposals, draft ideas for their own projects, pitch their ideas to their peers and professor, meet with faculty to focus and develop those ideas, and submit capstone proposals in preparation for their own required Honors capstone projects. Offered in fall and spring—and for the first time in summer of 2024—this course served 52 students in FY 2023-2024.

To provide ongoing support to Honors students working on their capstone projects, the UHP continued to run the Capstone Support Group, first instituted in FY 2017-2018 as a series of inspirational and logistical meetings tied to a set of reference materials in

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Canvas. Students participated in four activities over the course of the 2023-2024 academic year, with program faculty and staff, current students, and recent Honors graduates facilitating conversations that allowed students to share progress and setbacks on their own capstone work, to hear from recent Honors graduates on the value of their capstone experiences, and to receive guidance on navigating the capstone process toward completion and graduation with University Honors.

Fifty-four faculty mentored 62 Honors students working on capstone projects this year. Thirty-two of these students completed capstones and graduated with University Honors during FY 2023-2024 (Table H-1); the remainder are ongoing or have been discontinued. Spring 2024 Honors graduates Marcus Hayden (Biochemistry) and Jordan Lockwood (Theatre Arts—Education Emphasis) were nominated by their mentors and selected by the Honors Faculty Advisory Board as winners of the program's annual Joyce Kinkead Outstanding Honors Capstone Awards, each of which carries a \$500 cash prize.

All graduating students were invited to present their capstone work at the second annual Honors Capstone Showcase, held in concert with the Spring Student Research Symposium and organized in collaboration with the Office of Research. Eighteen students participated and had their poster presentations judged by USU faculty. Gracie Shippen (Management) won the Best Poster Award, and Cassandra Ivie (Psychology) received the Runner-up Award for Best Poster. All audience members, including current Honors students, students enrolled in the HONR 3900: Honors Capstone Preparation and Proposal course, and the general public, were invited to vote online for a People's Choice Poster Award, which was awarded in a tie to both Alyssa Gaither (Civil Engineering) and Kristin Leutgeb (Biology).

13. Co-curricular Engagement

Honors students participate in, reflect upon, and earn Honors points for attending co-curricular events on and off their respective campuses. In FY 2023-2024, 339 Honors students (+56% from the previous reporting period) submitted 508 co-curricular reflections (+2%) for Honors points after attending in-person or virtual events. Anecdotal evidence, based on advisor and director observation of submissions, suggests that the significant increase in participants reflects a higher-than-usual engagement with this activity among first-year students.

In weekly co-curricular messaging to students, the University Honors Program advertised a total of 436 co-curricular events, and the UHP itself hosted 24 such events (Table E-7) that drew participation of over 1,000 students. These Honors events included the 48th Annual Honors Last Lecture, featuring Dr. Colin Flint from the Department of Political Science; Honors showcases on Honors Mentoring Agreements and Honors Book Labs; and several alumni activities, including both in-person professional talks over lunch and virtual professional-development panels.

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Table E-7. Co-curricular events organized by Honors in FY 2023-2024.

Event	Date
Honors Fall Student Social	9/12/2023
Honors Scavenger Hunt	9/26-10/6/2023
48th Annual Honors Last Lecture: Dare to Build Global Peace (Dr. Colin Flint)	10/4/2023
<i>Honors Cares: A Marvelous Adventure</i> (Jennifer Cortez) ^a	10/21/2023
HMA Showcase (Katelyn Bennett, Alexis Brown, Owen Graham, Rebecca Ivans, Elliot Roberts, Jacob Sagers, and Brooke Stanton)	10/26/2023
<i>Honors Cares: Loaves and Fishes</i> (Jennifer Cortez) ^b	11/3-11/4/2023
Spring Honors Book Lab Showcase	11/15/2023
Alumni Lunch: Central Arizona Project (Viviane Baji, Natural Resource Economics, 2016)	11/28/2023
Fall Honors Thank-a-Thon	12/4-12/14/2023
Honors Student-Faculty Holiday Social	12/6/2023
Fall Honors Brain Break	12/11-12/15/2023
<i>Honors Cares: Ice Skating</i> (Marina Brawand)	1/23/2024
Alumni Panel: The Value of Completing an Honors Capstone (Jacob Alder, Economics, 2020; Alyssa Quinn, English, 2016; Paul Consalvo, Civil Engineering, 2020; and Kyleigh Tyler, Animal, Dairy, and Veterinary Science, 2019)	1/31/2024
Donuts with the Director	2/15/2024
3rd Annual Salsa & Salsa (Jennifer Cortez) ^c	2/21/2024
Honors Music Recital ^d	3/5/2024
<i>Honors Cares: Spring Into Service</i> (Jennifer Cortez) ^e	3/19/2024
Honors Gratitude Workshop (Dr. Kristine Miller; Morgan Graham, English, 2019)	4/2/2024
Alumni Lunch: Psyche Asteroid Mission (Dr. Jodie Barker Ream, Physics, 2009)	4/8/2024
Honors Capstone Showcase ^f	4/10/2024
Spring Honors Thank-a-Thon	4/15-5/1/2024
Summer and Fall Honors Book Lab Showcase	4/16/2024
Spring Honors Brain Break	4/24-4/30/2024
Honors Medallion Ceremony	5/1/2024

Events planned and implemented in collaboration with ^a The Family Place, ^b COSAS and the Loaves and Fishes Community Meal, ^c Latinx Cultural Center and Latin Dance Club, ^d USU Department of Music, ^e USU Queer Student Alliance, ^f Office of Research and University Libraries.

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ENGAGEMENT, ENRICHMENT, AND COMMUNITY BUILDING

The University Honors Program does far more than administer an effective program that results in desired outputs and outcomes. Many of the UHP's resources are devoted to activities that engage our participants, enrich their USU and Honors experience, and build community. While the UHP has continued some of the virtual events that proved effective and engaging during the pandemic, the program has fully returned to holding its signature community-building efforts in their original in-person formats.

14. Weekly *Honors in the Know* Messaging

In FY 2023-24, the University Honors Program generated 65 email campaigns in Mailchimp: 33 for students and 32 for Honors-engaged faculty and staff. Delivered each Monday morning, these weekly messages featured important program announcements, deadlines, and job/internship opportunities; summarized both in-person and virtual Honors events and co-curricular activities across the USU system; and featured contact information for program staff, administration, and peer advisors.

The student messages were sent to an average of 643 recipients and had a 50% open and an 11% click rate, rates that are, respectively, about 1.5 and 3 times the industry averages for large electronic mail campaigns in an educational setting. The faculty messages went to an average of 457 recipients, getting a 51% open and 10% click rate. Overall, the UHP's weekly *Honors in the Know* messaging reached an average of 286 users and engaged a minimum of 61 of those users, on average, at any given time.

15. Honors Holiday Card

As in previous years, the University Honors Program sent a holiday card to our partners, stakeholders, alumni, friends, faculty, and students (Figure E-2). Using a design by Honors alum Marina Brawand (Economics—Managerial Emphasis/Kinesiology—Pre-physical Therapy Emphasis, 2023), the UHP sent 875 physical cards, as well as 1,328 digital cards in December 2023.



Figure E-2. 2023 University Honors Program Holiday Card (design by Honors alum and Postgraduate Fellow Marina Brawand, Economics—Managerial Emphasis/Kinesiology—Pre-physical Therapy Emphasis, 2023).

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16. Student, Faculty, and Faculty-Student Socials

The University Honors Program held four socials in FY 2023-2024: a student-only social to celebrate the beginning of fall term (September 12, 2023); a student-faculty holiday social (December 6, 2023); an end-of-term social for Honors graduates and their families, current Honors students, and faculty mentors (May 1, 2024); and an end-of-academic year faculty appreciation social (April 23, 2024). These catered events were well attended, drawing over 100 guests on average.

17. Honors Cares

Now in its fourth year, the *Honors Cares* event series shifted its focus from mental and physical health and well-being to a combination of 1) relaxing, accessible, non-academic activities designed to welcome students and 2) service projects in collaboration with community partners. Over the course of two terms, the UHP held four events involving over 60 students (Table E-7).

18. Student-organized Social Events

In FY 2023-2024, members of the Honors Student Advisory Board were charged with community building and Honors engagement within their respective colleges. Three HSAB members organized in-person or virtual events, including a Business and Honors Social in the Jon M. Huntsman School of Business organized by Jentrie Gilliland (March 6, 2024); a hybrid “Sow and Serve Challenge” service project in the College of Agriculture and Applied Sciences organized by Mia Knight (March 18-April 6, 2024); and a video game night in the Emma Eccles Jones College of Education and Human Services organized by Jacey Hopkin (April 8, 2024).

19. Early Career Faculty Engagement Program

The University Honors Program piloted an Early Career Faculty Engagement program (ECFE) in fall 2023, in collaboration with the Office of the Provost. The program was specifically designed to engage faculty in their first year at USU and thus focused primarily on faculty currently participating in USU’s Tenure Academy. But participation was open to all, with those in their first year automatically included in all communications, and those in their second year receiving an invitation to opt in.

The ECFE program included four activities carefully designed to introduce new faculty to Cache Valley, Logan, the USU community, and especially the UHP. Faculty were 1) invited by Honors students for a one-on-one conversation over free Aggie ice cream, where they were also presented with an Honors T-shirt; 2) given the opportunity to attend the 48th Annual Honors Last Lecture as an Honors student’s guest, with reserved seating near the front of the auditorium; 3) challenged to a fall hike with Honors staff, including naturalist interpretation and a picnic lunch; and 4) encouraged to attend a special “Behind the Book Lab” event to hear from experienced faculty about leading these popular Honors reading groups and invited to select a book from a previous Book Lab as a keepsake.

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Considering the expedited schedule on which this program was conceived, planned, and implemented, it proved surprisingly successful. Of the 54 faculty members who received our communications (all 35 first-year faculty and 19 of 57 second-year faculty), 28 engaged with the program in some way, most by joining an Honors student for ice cream and a chat about Honors. Since the conclusion of the program in January of 2024, seven of these new faculty have decided to lead an Honors Book Lab, three have mentored an Honors Mentoring Agreement (HMA), five have participated in the holistic review of first-year student applications to Honors, and one is already serving as a Departmental Honors Advisor (DHA). Given this initial success, the UHP intends to continue the program—with some modifications—in FY 2024-2025.

20. Honors Graduation Celebration

The 2024 Honors Medallion Ceremony was held in the Ellen Eccles Conference Center (ECC) Auditorium on May 1, 2024. The ceremony featured representatives from the USU Provost's Office, all eight USU undergraduate colleges, and the Honors Faculty Advisory Board, as well as an alumni guest speaker, Nathan D. Alder (History, 1991), and 29 of our 32 FY 2023-2024 Honors graduates and their capstone mentors. The ceremony was also attended by an audience of 150 people. A reception in honor of our graduates—open to our graduates, their families, and all Honors students and faculty—was held on the north lawn of the ECC after the ceremony.

21. 48th Annual Honors Last Lecture

The 48th Annual Last Lecture, entitled "Dare to Build Global Peace," was presented by Dr. Colin Flint, from the Department of Political Science on October 4, 2023. Dr. Flint was nominated by an Honors student and selected by a committee of Honors students to deliver his imagined "last lecture" to an audience of 175 students, faculty, and community members. The lecture was delivered in person at the Russell/Wanlass Performance Hall with a reception in the lobby following the talk.

22. Honors Brain Break

In keeping with the *Honors Cares* focus on accessible activities designed to offer respite from academic work, this finals-week series of food and socializing featured a mixture of relaxing activities and healthy snacks to encourage students to take short, intentional breaks from their studies in a casual and supportive atmosphere. The Fall Brain Break (December 11-15, 2023) featured a series of open houses with snacks, cider, and hot chocolate in the Living Learning Community (LLC), as well as the opportunity to pick up complimentary tickets for sleigh rides at the American West Heritage Center. The Spring Brain Break (April 24-30, 2024) invited students to play video and board games and enjoy snacks with their peers in the LLC. Combined, these two series of events were attended by over 50 Honors students.

23. Friend of Honors Award

Each year, the University Honors Program recognizes one individual for long-standing, continuous, and sustained support of the program—frequently in ways that are not

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immediately apparent or visible to others. The 2024 Friend of Honors award was presented to Dr. Alexa Sand, Associate Vice President for Research and Professor of Art History in the Department of Art + Design, for her many years of contributions to building and strengthening a university-wide Honors Program. This work includes but is not limited to recruiting Honors faculty and students, advocating for the value of Honors at USU, reviewing admissions and scholarship applications, working to support and strengthen the collaboration between the UHP and the Office of Research, and generally being a reliable and accessible supporter of the program in roles both public and less visible.

PROFESSIONALIZATION

In addition to engaging curious students and equipping them with the academic skills to think critically and communicate clearly, the University Honors Program prepares students for the next steps on their educational or career paths. The following comprehensive list of programming attests to the importance of professionalization in the UHP's curriculum. Evidenced by student reflections, alumni responses, and faculty feedback, these activities have been tremendously effective and well-received by students, alumni, and faculty.

24. Alumni Mentoring

Honors Alumni Connect (HAC)—Now in its fourth year, this semester-long program serves as an introduction to alumni mentoring for first- and second-year students and thus as a gateway to the year-long Alumni Mentoring Program (AMP) for juniors and seniors. In fact, of 58 students who completed the program from 2020-2023, twelve have since participated in the AMP. The University Honors Program recruited 23 alumni in fall 2023 and matched 21 of them with the 23 students who applied to be part of this program. Twenty-two students (96%) successfully completed the requirements of the program.

Alumni Mentoring Program (AMP)—In its ninth year, the highly impactful Honors Alumni Mentoring Program once again paired current Honors students with Honors alumni and offered the pairs a structured, collaborative, curriculum-based mentoring experience. As in 2022-2023, the UHP limited participation to students in their third and fourth years.

After receiving 30 expressions of interest from alumni, UHP staff were able to match the 11 student applicants with 11 alumni mentors representing a variety of employment sectors and career stages. Of the 11 student participants, one had previously completed HAC. The percentage of students completing all program requirements (73%) was comparable to the previous year. Student reflections on the experience continued to provide clear evidence that those who complete the program have a high-impact, valuable experience. The consistently high return rate of alumni to the program (65%) also indicates that the AMP is a reliably rewarding and meaningful experience for our mentors.

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25. National Scholarship Mentoring and Application Support

The University Honors Program coordinates student applications for prestigious national scholarships and fellowships, with the exception of international scholarships like Fulbright, Boren, and Gilman (which are coordinated by the Office of Global Engagement) and the National Science Foundation Graduate Research Fellowship Program (which is coordinated by the College of Science Writing Center). In FY 2023-2024, through a collaboration between the Office of Research and the UHP, Dr. Ryan Berke from the Department of Mechanical and Aerospace Engineering was hired to lead USU's Goldwater Scholarship preparation experience by mentoring a cohort of students from STEM fields over the course of fall term and then working with a faculty review committee, including the UHP's Executive Director and the Vice President for Research, to review applications and select four USU nominees (Sophia Hessami, Jacey Hopkin, Kade Robison, and Zachary Zito) from among eight finalists. Sophia Hessami was ultimately selected by the Goldwater Foundation to be a 2024 Goldwater Scholar.

The Honors Program Coordinator, who coordinates fellowship advising for the University Honors Program, also provided mentoring and logistical support for USU's nomination of one Gaither Junior Fellows nominee (Cristina Chirvasa) and one Udall nominee (Brayden Monson).

26. Student Employment

Undergraduate Teaching Fellows (UTF)—With dedicated support from the Office of the Provost, the University Honors Program once again selected UTFs to assist in each of its Honors General Education courses (both Honors Introductory Experiences (Breadth) and Think Tanks (Depth)). Five Honors students were hired and assigned to six courses, based on faculty recommendations and a competitive application process (Table E-8). In addition to USU's standard trainings for all employees, these students received from the UHP valuable training, mentoring, and professional development in the areas of peer mentoring, instructional technology and Canvas, and identification of students of concern.

Peer Advisors—The UHP matched a monetary commitment from the Office of the Provost to establish two peer advisor positions to support our student population. The UHP was able to retain both peer advisors from the previous year in these positions for FY 2023-2024 (Table E-9). In addition to the standard trainings for all USU employees, the Honors Academic Advisor engaged these peer advisors in valuable mentoring, training, and professional development in student advising, Box usage, and Canvas navigation. Both peer advisors also completed the Certified Peer Educator training program, a nationally recognized training that supports students working in peer-educator roles. Peer advisors kept regular virtual and in-person office hours to assist in Honors student advising and peer mentoring, providing 630 hours of support to our students, including 173 peer-advising appointments.

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Table E-8. Honors Undergraduate Teaching Fellow (UTF) appointments in FY 2023-2024.

UTF Name	Course Number	Course Title	Semester
Thornley, Rebecca	HONR 1320	<i>Living in a Brave New World: Philosophy and Teaching</i>	Fall 2023
Kaplan, Radeyah	HONR 1330	<i>The Dog in Arts</i>	Fall 2023
Hatfield, Meghan	HONR 3020/3030	<i>Discernible Divides: Visualizing Patterns of Persecution, Inequality, and Agency through Data and Art</i>	Fall 2023
Ward, Eden	HONR 1320	<i>Why Poetry Matters: The Ethics and Aesthetics of Modern World Poetry</i>	Spring 2024
Harris, Hazel	HONR 1330	<i>(Un)Desirable Enchantments: The Visual Rhetorics of Inequality in Fantasy and Science Fiction Art</i>	Spring 2024
Kaplan, Radeyah	HONR 3020/3030	<i>Experiences of Colonialism in Latin America through Archaeology and Literature</i>	Spring 2024

Table E-9. Honors Peer Advisor appointments in FY 2023-2024.

Name	Semester(s)	# of Advising Hours
Ivans, Rebecca	Fall 2023, Summer 2024	285
Sagers, Jacob	Fall 2023 – Summer 2024	345

Office Assistants—The UHP employed one Honors student, Carlie Prinster, as an Office Assistant to support our professional staff in their routine daily work.

Honors Postgraduate Fellow—This position continued to benefit both the UHP and the Postgraduate Fellow in FY 2023-2024. Designed as a professional bridge for recent Honors graduates, the role allows the Honors Postgraduate Fellow to work closely with the Executive Director and Honors staff on collaborative projects, including writing and editing of weekly *Honors in the Know* messaging, website content, and social media content; constructing, implementing, and analyzing surveys; editing and building of Canvas content; and planning of student-engagement and cohort-building activities. Savannah Daines (Human Biology, 2021) transitioned out of this role after two years, training two new postgraduate fellows recruited in summer of 2023, Camille Bassett (Global Communication, 2023) and Marina Brawand (Economics—Managerial Emphasis/Kinesiology—Pre-physical Therapy Emphasis, 2023), who each served in

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fall 2023 and spring 2024 terms. Camille Bassett will return for a second year in this position in FY 2024-2025.

27. Student Leadership

Honors Student Advisory Board (HSAB)—The University Honors Program contributed to the professional development of nine students (Table H-5) by inviting them to represent their eight colleges on the HSAB. An additional position reserved for representation of statewide campuses remained unfilled in FY 2023-2024. Collectively, these representatives participated in leadership activities focused on engagement and retention of current Honors students in their respective colleges and on statewide campuses; collaborated with their counterparts on the Honors Faculty Advisory Board to plan and implement these activities; participated in the Early Career Faculty Engagement Program as ambassadors for the program; took part in the National Collegiate Honors Council external review and site visit and offered their perspectives on the final report; engaged in discussions about new programs to engage with alumni and USU Athletics; and consulted with the Executive Director on the Honors curriculum and requirements, including a change in GPA requirements and the development of an Associate with Honors pathway at USU.

Service on the HSAB is integrated within the Honors curriculum as Honors-in-Practice work. Board members earn three Honors points upon successful documentation in Canvas of their required engagement in Honors social and recruiting activities, fulfillment of the HSAB role, and submission of a comprehensive reflection about how their HSAB experience met Honors learning outcomes. Students may reapply for a second year on the HSAB, and those selected can earn an additional 1.5 points for their work in this second year. The opportunity for a second year of service ensures continuity and preservation of institutional memory on the HSAB, and in FY 2023-2024, two HSAB representatives completed a second year of service. Similarly, three HSAB members will return for a second year in FY 2024-2025.

Honors Last Lecture Committee—The UHP invited seven students to serve on the selection committee for the 2024 Honors Outstanding Professor (Table H-6). This student-run committee was responsible for reviewing nominations and offering the selected faculty member feedback from a student's perspective on the lecture's theme and title. This year's award went to Dr. Laura Gelfand from the Department of Art + Design in the Caine College of the Arts. Dr. Gelfand will deliver the 49th Annual Honors Last Lecture, "The Future is Unwritten: Be Passionate," on October 23, 2024.

Honors Leadership Academy (HLA)—Now in its fifth year, the HLA is designed for first- and second-year students who aspire to become leaders in Honors and beyond. As they engage in a year-long curriculum, participants are trained in four key areas:

- Honors Ambassador—learning and sharing Honors benefits with others
- Honors Peer Educator—learning and showing peers how to navigate Honors requirements
- Honors Community Builder—joining and creating Honors community

E. PROGRAMMING

- Honors Publicist—following and promoting Honors in social and other media

The UHP received 43 applications for HLA in FY 2023-2024 and accepted 22 students to participate in the program. As in the previous year, the curriculum was offered in a series of independent modules to encourage students to complete all four training modules but to allow some flexibility to complete and earn Honors points for only those modules that were of particular interest to them.

Of the 22 members of this year's HLA cohort, 18 (82%) completed at least one module; 14 (64%) completed two or more modules; eight (36%) completed three or more modules; and five (23%) completed all four modules (Table H-7). Collectively, these students form a talented and engaged pool from which Honors (and the institution more broadly) can draw future student leaders for service as ambassadors, peer educators, community builders, and publicists. In fact, four 2023-2024 HLA graduates have already been appointed as Honors Ambassadors or UTFs for FY 2024-2025.

28. Thank-a-Thon

As in previous years, the University Honors Program took the end of the semester as an opportunity to encourage students to thank the faculty, staff, alumni, and donors who have made a difference in their lives. The importance and power of expressing gratitude is a recurring theme in the UHP's preparation of students for the next stage of their educational and career paths, and the program supports this value with regular gratitude workshops that teach students how to write high-impact thank-you notes. Both the fall (December 4-14, 2023) and spring (April 15 to May 1, 2024) thank-a-thons were run as hybrid events, allowing students the choice to either pick up physical thank-you cards from the UHP office or express their gratitude by email. In FY 2023-2024, Honors students wrote 145 such thank-you notes.

STATEWIDE PROGRAMMING

Now in its fourth year, the statewide reach of the University Honors Program continues to grow. The UHP is now open to students on all statewide campuses, and UHP staff and administration actively recruit statewide students to apply to the program, encourage statewide faculty to engage with current and prospective Honors students on their campuses, and deliver curricular programming in hybrid and online formats across the entire Honors curriculum.

In FY 2023-2024, the UHP made progress in the following key areas:

Essential Activities

- The UHP participated in statewide recruiting events by staffing booths at the **Brigham City Bash** and the Southeast Utah Career and Jobs Expo in **Blanding**.
- The program shared admissions information and flyers with recruiters and advisors on the Blanding, Brigham City, **Uintah Basin**, and **USU Eastern Price** campuses.
- The UHP solicited three statewide student applications for fall 2024, representing three campuses: **Salt Lake City**, Uintah Basin, and USU Eastern Price.

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- The program recruited four faculty members on the Uintah Basin, USU Eastern Price, and **Tooele** campuses to participate in a holistic review of Honors admissions applications for students coming to USU in FY 2024-2025.
- The UHP expanded the statewide Honors student cohort from 14 to 18, representing six campuses: Brigham City, **Kaysville**, Salt Lake City, Uintah Basin, and USU Eastern Price; and admitted two new statewide students for fall 2024.
- The program offered a virtual orientation option that was attended by incoming first-year students on statewide campuses.
- The UHP expanded USU 1010 (H) *Connections* to include a first-year cohort at USU Eastern Price.
- The program offered regular academic advising to statewide students via Zoom or phone.

Academic Programs

- The UHP supported two Honors Book Labs for nine prospective Honors students on the Blanding and Uintah Basin campuses.
- Two statewide faculty members on the **San Juan County** and USU Eastern Price campuses supervised two students' Honors Mentoring Agreements.
- One statewide faculty member on the Tooele campus mentored an Honors Capstone Project.
- The UHP continued to highlight virtual and statewide co-curricular opportunities in weekly *Honors in the Know* messaging.
- The program maintained statewide representation on the Honors Faculty Advisory Board.
- The UHP recruited statewide faculty to serve not only as campus liaisons between the program and a particular statewide campus but also as Departmental Honors Advisors in USU departments housed on the Logan campus, which serve all campuses across the state. One faculty member on the Uintah Basin campus was the DHA for all students in the Department of Geosciences.
- Honors involved one statewide faculty member in the 2023-2024 review of student applications for Honors scholarships.

F. FUNDING

In FY 2023-2024, the University Honors Program allocated almost 70% of its spendable (non-salary) budget to student participants via scholarships and awards, research funding, and other miscellaneous funding. Most of the remainder was earmarked for faculty and their academic departments to support the development and teaching of academic courses.

This funding included:



\$22,150 in **scholarship** and award funds to 33 Honors students, with **\$25,500** committed for FY 2024-2025 to an additional 35 Honors students.



26 undergraduate **research** awards totaling **~\$11,500** to 22 Honors students, plus **five URCO matches**.



Over **\$10,000** in **miscellaneous** academic and professionalization funding to support mentoring, Honors Book Labs, and engagement or enrichment experiences.



15 study abroad awards to 18 students totaling **\$11,000**.



~\$42,000 in **student wages**, allowing Honors students to gain professional experience as teaching fellows, peer mentors, peer advisors, ambassadors, office assistants, and postgraduate fellows.



~\$65,000 in direct funding to academic departments and Honors-engaged faculty to support **six Honors courses** and **six departmental Honors sections**.

F. FUNDING

1. Student Funding

Scholarships and Awards— The University Honors Program distributed all \$21,500 in scholarship funds awarded in the previous fiscal year to 33 recipients in FY 2023-2024. Honors also awarded \$25,500 in scholarships to 27 students in FY 2023-2024 for the coming academic year (+25% over FY 2022-2023, Table F-1) through a competitive application and review process. The Honors “Dare to Know” Book Award, available to students at all levels of the program, was awarded to 23 students (+53%). The Honors Access and Inclusion Scholarship, first awarded in FY 2021-2022, was again the focus of Honors development efforts this fiscal year and was awarded to three current Honors students. Due to significant donations to the Joseph G. and Karen W. Morse Endowed Scholarship Fund in FY 2023-2024, the UHP was able to both maintain a past increase in the award amount (from \$750 to \$1,000 in FY 2021-2022) and expand the number of awards from three to five.

Two spring 2023 Honors graduates, Marcus Hayden (Biochemistry) and Jordan Lockwood (Theatre Arts, Education Emphasis), earned Joyce Kinkead Outstanding Honors Capstone Awards, each of which carries a \$500 cash prize.

Students presenting at the second annual Honors Capstone Showcase competed for three poster awards. Gracie Shippen (Management) was awarded the Best Poster Award (\$250); Cassandra Ivie (Psychology) won the Runner-Up Award for Best Poster (\$100); and Alyssa Gaither (Civil and Environmental Engineering) and Kristin Leutgeb (Biology) each won a People’s Choice Award (\$150).

Research and Creative Work Funding—The number of Honors student research and creative funding applications continued to grow in FY 2023-2024, nearly returning to pre-pandemic levels. The UHP granted 26 undergraduate research and creative awards, totaling over \$11,500, to 22 students engaged in the pursuit and/or presentation of research or creative work. Of those awards, over \$8,500, or roughly 75%, was disbursed in this fiscal year (Table H-8). In addition, the UHP also provided five funding matches totaling \$2,250 for the Undergraduate Research and Creative Opportunities (URCO) Grant Program as part of the UHP’s ongoing partnership with USU’s Office of Research (Table H-9).

Study Abroad Funding—The UHP received 15 applications for study abroad funding in FY 2023-2024, awarding all 15 applicants for a total of almost \$11,000 in support (Table H-10). With the help of this funding, Honors students participated in international academic and experiential-learning programs in Argentina, Australia, Cuba, Greece, Italy, Japan, Kenya, Mexico, Nepal, New Zealand, Peru, Spain, Tanzania, the Turks and Caicos Islands, and the United Kingdom.

F. FUNDING

Table F-1. Honors academic scholarships and awards to students in FY 2023-2024

Scholarship/Award	Amount	Recipient	Graduation Year/Major(s)
Helen B. Cannon Award (Humanities and Social Sciences)	\$2,000.00	Rebecca Baker	2025, Music
Lawrence O. Cannon Award (STEM)	\$2,000.00	Mallory Bingham	2025, Chemistry
Douglas D. Alder Scholarship (Leadership)	\$1,000.00	Jacey Hopkin	2025, Biology/Psychology
Elaine Alder Service Scholarship	\$1,000.00	Sophia Hessami	2025, Biological Engineering
Joseph G. and Karen W. Morse Scholarship	\$1,000.00	April Buys	2026, Biochemistry
	\$1,000.00	Sophia Christensen	2025, Political Science
	\$1,000.00	Ethan Loertscher	2026, Animal, Dairy, and Veterinary Science
	\$1,000.00	Elijah Moss	2025, English
	\$1,000.00	Kade Robison	2026, Biological Engineering
Joyce Kinkead Outstanding Honors Capstone Award (STEM)	\$500.00	Marcus Hayden	2024, Biochemistry
Joyce Kinkead Outstanding Honors Capstone Award (Humanities and Social Sciences)	\$500.00	Jordan Lockwood	2024, Theatre Arts (Education Emphasis)
Honors Access and Inclusion Scholarship	\$1,000.00	Emily Broadhead	2027, Interior Architecture and Design
	\$1,000.00	Ryley Cottrell	2027, Law and Constitutional Studies
	\$1,000.00	Isabella DeJesus	2025, Biology/Biochemistry
"Dare to Know" Book Award	\$500.00	Andrew Barber	2026, English
	\$500.00	Benjamin Berlin	2025, Global Communication/ Economics
	\$500.00	Zachary Brady	2025, English
	\$500.00	Canon Breckenridge	2025, Mechanical Engineering
	\$500.00	Lily Dawson	2027, Interior Architecture and Design

F. FUNDING

Table F-1. Continued.

Scholarship/Award	Amount	Recipient	Graduation Year/Major(s)
"Dare to Know" Book Award	\$500.00	Chloe Francis	2024, Conservation and Restoration Ecology
	\$500.00	Hailey Hendrickson	2026, Exploratory
	\$500.00	Jay Jenkins	2027, Mechanical Engineering
	\$500.00	Marissa Jennings	2027, Animal, Dairy, and Veterinary Science
	\$500.00	Mia Knight	2025, Dietetics
	\$500.00	Brayden Monson	2025, Mechanical Engineering
	\$500.00	Lydia Peck	2027, Biology
	\$500.00	McKenzie Pedersen-Campbell	2025, Law and Constitutional Studies
	\$500.00	Kelly Plewe	2027, Political Science
	\$500.00	Kennedy Price	2026, Wildlife Ecology and Management
	\$500.00	Ethan Shaw	2025, Theatre Arts/Chemistry
	\$500.00	Ronan Spencer	2027, Political Science
	\$500.00	Heidi Sundberg	2025, Accounting/Nursing
	\$500.00	Jordan Taft	2025, Environmental Planning
	\$500.00	Avery Truman	2026, Environmental Studies/Geography
	\$500.00	Ella Whitesides	2027, Environmental Studies
	\$500.00	Georgia Wilde	2027, Dietetics
	\$500.00	Zachary Zito	2025, Physics/Philosophy

Honors Book Lab Funding—To support student participation in 38 Honors Book Labs (Table E-6) in FY 2023-2023, the program purchased books for 180 students as well as some faculty members for a total expenditure of \$3,884.47.

Student Wage Support—The UHP contributed to the professional development of 28 Honors students by offering them relevant and meaningful employment in our program. In total, The UHP allocated almost \$42,000 to support two Honors Peer Advisor positions, one Honors Office Assistant, two Honors Postgraduate Fellow positions, and six UTF positions for all Honors courses offered in fall 2023 and spring 2024 (Table H-11). That number includes support from the Provost's Office for UTFs and Peer Advisors in the amount of \$12,238.40, bringing the UHP's contribution to almost \$30,000, over \$20,000 of which was spent in FY 2023-2024. While the Postgraduate

F. FUNDING

Fellows are not current undergraduate students, the continuation of student support during the one- or two-year bridge period immediately following graduation is an essential part of the UHP's holistic approach to student professional development and support.

2. Funding to Faculty and Departments

The University Honors Program supported instruction for six Honors courses, three each in fall 2023 and spring 2024, with \$40,000 (Table E-4). The program also supported the teaching of 1) two Honors sections of USU Habits of Mind courses: 1050 (H): *First Generation Student Success* and USU 1030 (H): *Resilience*; and 2) four Honors sections of physical education courses: PE 1520 (H) Honors Hiking in summer 2023, PE 1116 (H) Roundnet in fall 2023, and PE 1057 (H) Honors Yoga and PE 1430 (H) Honors Judo in spring 2024 (Table E-5).

Dr. Abby Benninghoff (Animal, Dairy, and Veterinary Sciences) and Dr. Amanda Dawson (Theatre Arts) received Joyce Kinhead Distinguished Honors Capstone Mentor Awards, each of which carries a \$500 honorarium, for their work with the graduates winning outstanding capstone awards this year.

The UHP also provided partial financial support for the position of a faculty mentor for the Goldwater Scholarship cohort in the amount of \$3,750.

G. OUTPUTS AND OUTCOMES

In FY 2023-2024, Honors students generated a substantial number of relevant outputs and outcomes fully or partially attributable to their participation in the University Honors Program:



32 Honors Capstone Projects deposited in electronic format by USU Libraries in Digital Commons



94 presentations, involving **73 Honors student authors**, at international, national, regional, state, or local conferences; and **3 publications** in professional journals



62 optional transcript designation awards, including University Honors, Undergraduate Research, Global Engagement Scholar, and Community-Engaged Scholar



51 awards and honors at the national, university, college, or departmental levels; **62 Honors students earned A-Pins** in fall 2023 and/or spring 2024 terms; and **416 earned a place on their college's Dean's List** in summer 2023, fall 2023, and/or spring 2024 term

G. OUTPUTS AND OUTCOMES

OUTPUTS

1. Student Capstones

Bee, N. 2023. Instrumentality: How We Develop Relationships with Objects and People. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Blotter, K. 2024. The Evaluation of Compound X in a Mouse Model of Chikv Disease. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Butikofer, J. 2024. A Review and Critical Analysis of Yoga Asanas and Mindfulness Meditation in Pain Management for Individuals with Rheumatoid Arthritis: A Design of a Prospective 10-Week Yoga Intervention. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Christensen, M. 2024. What is Biological Engineering? – A Magazine. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Cook, M. 2024. Travels in Ireland. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Cooney, J. 2024. Simulating Ice Nucleus Properties Under Electric Fields. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Corbett, L. 2024. Development of Systems for Processing and Managing Donations for the William A. Burnard Warming Center. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Davies, K. 2024. How Variation in Activity Time and Distance from Water Sources Affects Feral Horse (*Equus ferus*) Vulnerability to Cougar Predation in Southern Nevada. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Gaither, A. 2024. The Environmental Impact of the Pedestrian Crossing at 600 S. on U.S. Highway 89/91. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Haag, D. 2024. Testing Resilience of Microalgae Biofilms When Exposed to Simulated and Real Hydrothermal Liquefaction Aqueous Phase. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Hayden, M. 2024. Cocoa Polyphenols Modulate the Gut Microbiome in a Site-Specific Manner in Mice. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Howe, R. 2024. Inflammatory vs. Degenerative Targeted Physical Therapy against Medial Epicondylitis in Golfers. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Hull, K. 2023. Comparing City Park Perspectives: Users vs. Organizers. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Ivie, C. 2024. Serving as the Collegiate Mentor for Utah 4-H Stem and Agriscience Ambassadors. Honors Capstone Project, Utah State University, Logan, Utah, USA.

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Lee, A. 2024. Unwritten Journeys: An Exploration of Perspectives on Improvisation Within and Beyond Music Therapy Practice. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Leutgeb, K. 2024. Chemical-Mediated Mate Attraction in Colver Root Curculio (*Sitona hispidulus*), A Below Ground Pest. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Lewin, K. 2024. Music and Emotion: Using Music as an Apparatus for Connection. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Lockwood, J. 2024. It Started on a Stage. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Lonardo, I. 2024. An Investigation of Protein Arginine Methyltransferase 1 Substrate Recognition Using Ribonucleoprotein Modifications. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Manwill, E. 2024. Effects of Humidity on Native and Non-native Cavity Nesting Solitary Bees. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Merighe, P. 2024. Correlation of LPBF Laser Power and Scan Speeds with the Quasi-static Tensile Properties of SS316L. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Miner, S. 2023. Ethics, Fashion, and Film of the 1950s and 60s. Honors Capstone Project, Utah State University, Logan, Utah, USA

Morley, J. 2023. Mechanical Properties of Natural *Osmia lignaria* Silk and Recombinant Expression of the Silk Proteins. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Ottley, C. 2024. USU Student Association Elections Public Relations and Marketing. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Roth, L. 2024. Evaluating Taxonomic Approaches: A Comparative Study of Educational Frameworks Applied to Mathematics Assessments. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Shippen, G. 2024. Optimizing Nonprofit Impact: A Comprehensive Approach to Donor Data. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Smith, T. 2024. Navigating Uncertainty in Tax Strategy Surrounding the Tax Cuts and Jobs Act Sunset. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Stanger, H. 2024. Enhancement of Favipiravir with Compound X in a Hamster Model of Yellow Fever Virus. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Suess, J. 2024. What Drives a Firm to Sustainability? Honors Capstone Project, Utah State University, Logan, Utah, USA.

Taylor, A. 2024. Building Community Through Athletic Activities. Honors Capstone Project, Utah State University, Logan, Utah, USA.

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White, J. 2024. An Analysis of Lyrical Repetition and Popularity in Popular Music Genres. Honors Capstone Project, Utah State University, Logan, Utah, USA.

Withers, S. 2024. Variable Drought Impacts on Stream Habitat Across the Northwestern US. Honors Capstone Project, Utah State University, Logan, Utah, USA.

2. Student Presentations—Poster Presentations (Honors student in bold)

Baldauf, S. 2024. Unwrapping the Past: Zooarchaeological Mummified Artifact Research. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Barnett, E. 2024. Vanilla Flavoring in Nondairy Ice Creams. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Bennett, K. 2023. Effects of Oxygen Level on Bovine Oocyte Maturation and Embryo Development. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Billings, A., Leutgeb, K., and Brawand, K. 2023. Arthropod Community Structure Across the Riparian to Upland Gradient. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Bono, J. 2024. Solid State Transformers Are Critical for a Smarter, More Efficient Electrical Grid. Research on Capitol Hill, Salt Lake City, Utah, USA.

Boyer, C., Archibald, D., Collings, L., and Davis, S. 2023. Predator Effects of Herbivory on Plants. Fall Student Research Symposium, Logan, Utah, USA.

Bradford, P. 2024. A.I. May Be Able to Measure the Capacity of Used Electric Vehicle Batteries. Research on Capitol Hill, Salt Lake City, Utah, USA.

Chambers, C. 2023. The Romanticization of Ophelia's Death in Art (19th Century-Present). Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Chirvasa, C. 2024. Out of the Closet: Exposing Inequalities Amongst Queer Musicians. University Honors Program Capstone Showcase, Logan, Utah, USA.

Chirvasa, C., Kulmatiski, A., Holdrege, M., and Beard, K. 2024. Understanding How Changes in Precipitation Intensity Will Affect Vegetation in the Western U.S. National Conference on Undergraduate Research, Long Beach, California, USA.

Chirvasa, C. 2024. What Can We Do to Decarbonize Cache Valley? Research on Capitol Hill, Salt Lake City, Utah, USA.

Christensen, M., Christensen, M., Corry, C., and Peterson, K. 2024. Portable Laparoscopic Demonstration Device for Xenacor Saberscope. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Christensen, M. 2024. The Effects of Diesel Exhaust Particles on the Human Respiratory Tract Cells. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

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Christensen, M. 2024. What is Biological Engineering? - A Magazine. University Honors Program Capstone Showcase, Logan, Utah, USA.

Cook, M. 2023. Travels in Ireland. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Cooney, J. 2024. Simulating Atmospheric Ice Under Electric Fields. University Honors Program Capstone Showcase, Logan, Utah, USA.

Cooney, J. 2024. Electric Fields in the Atmosphere Might Cause More Snow Crystals. Research on Capitol Hill, Salt Lake City, Utah, USA.

Corbett, L. 2024. Development of Systems for Processing and Managing Donations for the William A. Burnard Warming Center. University Honors Program Capstone Showcase, Logan, Utah, USA.

Dabb, A. 2024. Targeted Treatment of Cytomegalovirus. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Davies, K. 2024. How Variation in Activity Time at Water Sources Affect Feral Horse (*Equus ferus*) Vulnerability to Cougar Predation in Southern Nevada. University Honors Program Capstone Showcase, Logan, Utah, USA.

Decker, G. 2024. Wave Properties of the 2019 Southern Sudden Stratospheric Warming Event. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Dixon, J. 2024. Repeatability of Fecal Egg Counts in Wild Horses. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Fielding, J., Lawson, B., Kellar, L., and Burrows, M. 2023. Analyzing Effects on Adhesion and Viability of ECM Proteins in HUVEC Culture. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Gaither, A. 2024. The Environmental Impact of the Pedestrian Crossing at 600 S on Highway 89/91. University Honors Program Capstone Showcase, Logan, Utah, USA.

Haag, D. 2024. Testing Resilience of Microalgae Biofilms When Exposed to Hydrothermal Liquefaction Aqueous Phase. University Honors Program Capstone Showcase, Logan, Utah, USA.

Hammer, S. 2024. Themes and Ideas of Violence in Children's Folklore. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Hatfield, M. 2023. Choral Repertoire: Promising New Directions for Music Theory Teaching. Society for Music Theory National Conference, Denver, Colorado, USA.

Hatfield, M. 2024. Using Warm Ups to Teach Repertoire. Western American Choral Directors Association Conference, Pasadena, CA, USA.

Hayden, M. 2024. Cocoa Polyphenols Modulate the Gut Microbiome in Site-Specific Manner in Mice. University Honors Program Capstone Showcase, Logan, Utah, USA.

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Hessami, S. 2023. Validating an Integrated Microfluidic Model of Subretinal Tissue. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Hessami, S. 2024. An Integrated Microfluidic Model of Subretinal Tissue to Study Age-Related Macular Degeneration. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Hessami, S. 2024. Developing an Integrated Microfluidic Model of Subretinal Tissue. Association for Research in Vision and Ophthalmology, Seattle, Washington, USA.

Howe, R. 2024. Targeted Physical Therapy Against Medial Epicondylitis. University Honors Program Capstone Showcase, Logan, Utah, USA.

Ivie, C. 2024. Serving as the Collegiate Mentor for Utah 4-H Stem and Agriscience Ambassadors. University Honors Program Capstone Showcase, Logan, Utah, USA.

Jenson, B. 2024. Sugar Rush: Amalga, Utah Was Settled for Sugar Beet Farming but Couldn't Support Itself. Research on Capitol Hill, Salt Lake City, Utah, USA.

Jones, I. 2024. Characterization of Functionally Graded Regolith-Metal Powder Mixtures for Additive Manufacturing in Space. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Lawson, B., Kellar, L., Burrows, M., Perkins, S. and Wheeler, E. 2024. The Optimization of Subcritical Water Hydrolysis of Microalgae Biomass for Clean Meat Production. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Leutgeb, K. 2024. Chemical-Mediated Mate Attraction in Clover Root Curculio: *Sitona hispidulus* (F.), a Below Ground Pest. University Honors Program Capstone Showcase, Logan, Utah, USA.

Lockwood, J., and Minshew, R. 2023. What is the Impact of Dramaturgy? Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Loertscher, E. 2024. Effect of Medium on Epigenetics in Fertilized and Cloned Embryos. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Lonardo, I., and Aviles, S. 2023. The Various Roles of Medical Interpreters. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Lonardo, I. 2024. Health is Reliant on Proper Cellular Communication, Which Starts at Protein Recognition. Research on Capitol Hill, Salt Lake City, Utah, USA.

Lundahl, L. 2024. Offshore Wind Farm Pycnocline Mixing from Varied Flow Types. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Manwill, E. 2024. Effects of Humidity on Native and Non-native Cavity Nesting Solitary Bees. University Honors Program Capstone Showcase, Logan, Utah, USA.

Merighe, P. 2023. Correlation of Laser Powder Bed Fusion Laser Parameters to Mechanical Properties of 3D-Printed Stainless Steel. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

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Merighe, P. 2024. Correlation of AM LPBF Processing Parameters to Grain Morphology of SS316L. University Honors Program Capstone Showcase, Logan, Utah, USA.

Mills, J. 2024. Investigating the Geomorphic Controls on the Luminescence Properties of Quartz. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Monson, B. 2023. Radiant Light: Characterizing Thick Glass Optical-Distortions for Transparent Radiation Shielding. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Monson, B. 2024. Distortions Through a Radiation-Shielding Window: Making Nuclear Materials. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Moore, G. 2024. Using Technician Statistics for Productive Animal Care. National Conference on Undergraduate Research, Long Beach, California, USA.

Moore, G. 2024. Using Technician Statistics for Productive Animal Care. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Mullen, S., and Merrill, J. 2023. Bridging the Gap: Overcoming Inherent Challenges Through Cultural Competence in Medical Interpretation. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Mullen, S., Broadbent, T., and Beutel, A. 2024. La Lengua: Sociolinguistic Perceptions and Impacts of the Spanish Language in the United States. Spring Student Research Symposium, Logan, Utah, USA.

Ottley, C. 2024. Exploring Book Banning Conversations on Social Media. National Conference on Undergraduate Research, Long Beach, California, USA.

Peck, A. 2024. Altitude Normalization of Thermospheric Neutral Densities from Satellite Observation. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Peterson, L. 2024. The Evolution of Early English Block Prints. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Robison, K. 2024. Mitochondrial Targeting: A Novel Approach to Optimizing Cytomegalovirus Treatment. National Conference on Undergraduate Research, Long Beach, California, USA.

Robison, K. 2023. Optimizing Cytomegalovirus Treatment Through Mitochondrial Targeted Antioxidant Delivery. Fall Research Symposium, Utah State University, Logan, Utah, USA.

Robison, K. 2024. Antioxidant Combinatory Cytomegalovirus Treatment. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Roth, L. 2023. Evaluating Taxonomic Approaches: A Comparative Study of Educational Frameworks Applied to Mathematics Assessments. The Society for the

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Advancement of Chicanos/Hispanics and Native Americans in Science National Diversity in Stem Conference, Portland, Oregon, USA.

Sagers, J. 2024. Who Supports Democracy in the Post-Arab Spring Maghreb? Midwest Political Science Association Conference, Chicago, Illinois, USA.

Shippen, G. 2024. Optimizing Nonprofit Impact: A Comprehensive Approach to Donor Data Management. University Honors Program Capstone Showcase, Logan, Utah, USA.

Smith, T. 2024. Navigating Uncertainty in Tax Strategy Due to the Tax Cuts and Jobs Act Sunset. University Honors Program Capstone Showcase, Logan, Utah, USA.

Suess, J. 2024. What Drives a Firm to Sustainability? University Honors Program Capstone Showcase, Logan, Utah, USA.

Taylor, A., and Sturges, B. 2024. Latinx Participation in the Outdoors. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Taylor, A. 2024. Building Community Through Athletic Activities. University Honors Program Capstone Showcase, Logan, Utah, USA.

Teeples, T. 2024. Characterization of Oligomeric InaD, a Key Protein from the *Shigella flexneri* T3SS. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Wallace, S. 2024. Lady Macbeth, High Schooler: Young Adult (YA) Retellings of Shakespeare. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Ward, J. 2024. The Joys of Latin Music and Dance! Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Withers, S. 2024. Variable Drought Impacts on Stream Habitat Across the Northwestern US. University Honors Program Capstone Showcase, Logan, Utah, USA.

3. Student Presentations—Oral Presentations (Honors student in bold)

Bee, N. 2023. Instrumentality: How We Develop Relationships with Objects and People. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Berrigan, L. 2024. Ultraviolet Digital Gradient Sensing (UV-DGS) as an Alternative to Heat Resistant Paints for High Temperature Digital Image Correlation. Society for Experimental Mechanics Annual Conference, Vancouver, Washington, USA.

Brady, Z. 2024. *Mortui Vivos Docent*. National Undergraduate Literature Conference, Weber State University, Ogden, Utah, USA.

Brady, Z. 2024. Favorite Color. Sigma Tau Delta Centennial Convention, St. Louis, Missouri, USA.

Brady, Z. 2024. The Queer Forest in *Then the War* with Carl Phillips. Sigma Tau Delta Centennial Convention, St. Louis, Missouri, USA.

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Chambers, C., Polizzotto, S., and Harris, C. 2024. Theatre for the Very Young. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

Chirvasa, C., Williams, T., and Petit Bon, M. 2023. Climate Change Effects on Plant Functional Traits in the Alaskan Subarctic. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Chirvasa, C., Williams, T., and Petit Bon, M. 2024. Climate Change Effects on Plant Functional Traits in the Alaskan Subarctic. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Hull, K. 2023. Comparing City Park Perspectives: Users vs Organizers. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Jenson, B. 2023. Sugar Rush: The Boom and Crash of Amalga, Utah in the Early 20th Century. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Judson, M. 2024. The Impact of Augustine's Theory of Evil on Latter-Day Saint Teachings. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Lewin, K. 2024. Connection and Isolation: A Musical Exploration of Emotion. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Lindeman, C. 2024. Sunshine: Learning to Exist in the Moment. National Undergraduate Literature Conference, Weber State University, Ogden, Utah, USA.

McConkie, G. 2024. Exploring Public Choice: From Theory to Practice. Public Choice Outreach Conference, Fairfax, Virginia, USA.

Monson, B. 2024. Characterizing Optical Distortion. Society for Experimental Mechanics Annual Conference, Vancouver, Washington, USA.

Moss, E. 2024. Saleem Sinai's Messy Exploration of Self: Structure in *Midnight's Children*. National Undergraduate Literature Conference, Weber State University, Ogden, Utah, USA.

Sagers, J. 2024. Declining Democracy Amid Historical Legacies: Democratization Across the Maghreb. Four Corners Conflict Network Political Science Conference, Albuquerque, New Mexico, USA.

Suisse, E. 2023. Chinese Teaching Methods. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Taylor, A. 2023. Building Community Through Athletic Activities. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Taylor, A. 2024. Impact of Athletics United. Utah Conference on Undergraduate Research, Utah Valley University, Orem, Utah, USA.

Thompson, M. 2024. Assessing the Influence of "Small Town Feel" on Wellbeing in Utah. Spring Student Research Symposium, Utah State University, Logan, Utah, USA.

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Waddoups, P. 2023. Samuel Beckett, the Body, and Philosophy. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

Waddoups, P. 2024. Samuel Beckett, the Body, and Philosophy. National Undergraduate Literature Conference, Weber State University, Ogden, Utah, USA.

White, J. 2023. An Analysis of Lyrical Repetition and Popularity in Popular Music Genres. Fall Student Research Symposium, Utah State University, Logan, Utah, USA.

4. Student Publications (Honors student in bold)

Brady, Z. 2024. Chamonix. *Scribendi* 38:64-65.

Rossi, V., Nielson, S.E., Ortolano, A., **Lonardo, I.**, Haroldsen, E., Comer, D., Price, O.M., Wallace, N., and Hevel, J. 2024. Oligomerization of Protein Arginine Methyltransferase 1 and its Effect on Methyltransferase Activity and Substrate Specificity. *Protein Science* 33(8):e5118. <https://doi.org/10.1002/pro.5118>

Truman, A., Ash, D., Bodell, M., Harvey, J., Lloyd, C., Miller, E., Myers, L., Potter, H., Spence, W., Tuite, A., Vasquez, I., Villastrigo, N., and Corbett, L. 2024. Is the Pen Mightier than the Laptop? Digital Natives and Their Preferred Writing Tools. *Young Scholars in Writing* 21:83-100.

5. Honors Program Staff Presentations (Honors staff in bold)

Miller, K., Cognard-Black, A., Bryan, V., Coleman, L., and Dotter, A. 2023. Publications Board Authors Roundtable. National Collegiate Honors Council Annual Conference, Chicago, Illinois, USA.

Miller, K., Torda, E., Engel, S., McIntyre, C., Pérez, S., and Smith Law, L. 2023. Paths to NCHC Leadership. National Collegiate Honors Council Annual Conference, Chicago, Illinois, USA.

6. Honors Program Staff Publications

Miller, K. *In preparation*. Honors, First-generation Students, and the Value of Higher Education. In: A. Dotter. ed. *Belonging in Honors*. National Collegiate Honors Council Monograph Series. Lincoln, Nebraska, USA.

Miller, K. 2023. Building an Honors Community that Values and Celebrates Faculty. *Journal of the National Collegiate Honors Council* 24(2):15-20.

7. Program Awards and Grants

National Collegiate Honors Council Program Review Grant (2023)—\$500

OUTCOMES

8. Graduation

During FY 2023-2024, 32 students successfully completed all requirements for graduation with University Honors. This number represents 6% of this year's Honors

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student population and 17% of the 2020 ($t-4$) first-year Honors cohort, a slight increase over the previous reporting period. Figure G-1 illustrates the University Honors Program's completion rate based on four-year cohorts between 2005 and 2024. Formerly run with different graduation requirements for each department, Honors was renamed in 2014 as the University Honors Program, a university-wide program with shared requirements across disciplines.

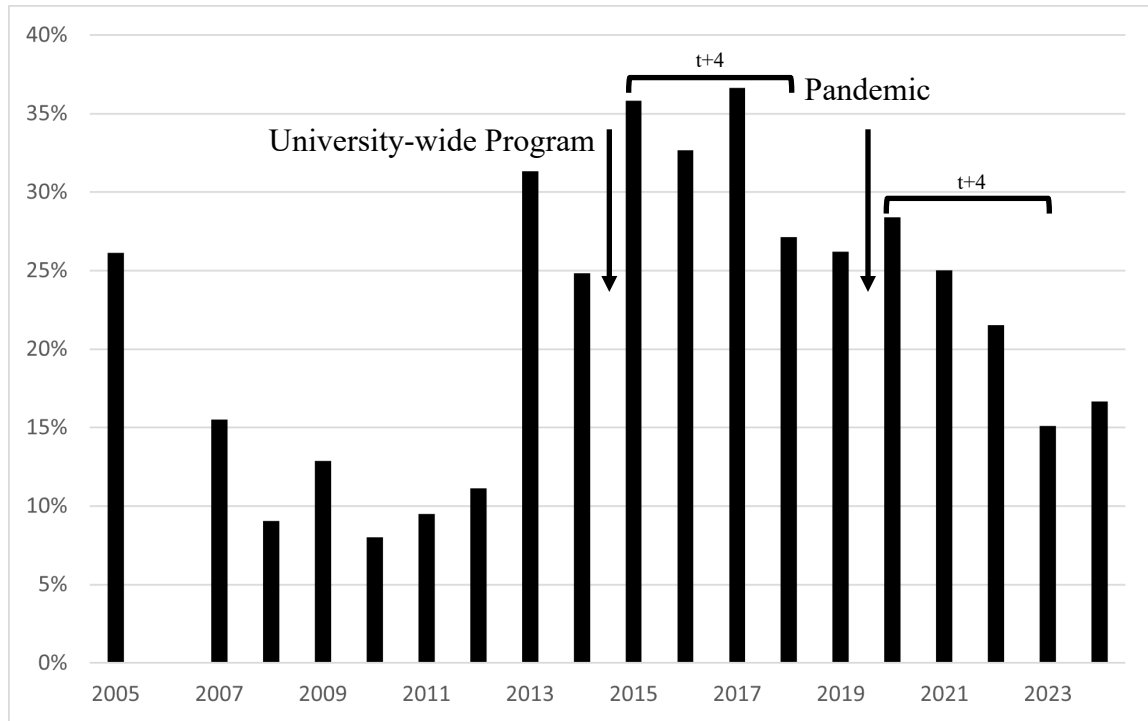


Figure G-1. Honors Program completion rate (graduation with Honors) at time t as a percentage of incoming first-year students at time $t-4$.

9. Academic Action, Support, and Discontinuation

Academic Action and Support—In an effort to support students and help them grow as they take academic risks, the University Honors Program's advising staff proactively communicates with students about their progress in the program through supportive messaging with non-threatening language tuned to each student's stage in their undergraduate career. Internally, these messages are noted in the student's advising file as "academic action." Because students are required to meet a cumulative USU GPA threshold (3.25, which students are also allowed to petition) to graduate with University Honors, these messages treat single-term grades realistically and frame those grades within the larger picture of progress toward graduation with Honors. The Honors Academic Advisors also offer students resources for taking action themselves to improve their academic performance. Beginning in spring 2024 term, the GPA threshold for graduation with Honors was changed from 3.50 to 3.25, reflecting both national trends in honors education and the UHP's commitment to access and

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balancing holistic admissions review with a holistic approach to graduation GPA requirements.

In fall 2023, the UHP sent “academic action” messages to 52 students whose GPAs had fallen below 3.00 for the current semester. In addition, 60 students received supportive messages from their Honors Academic Advisor because their cumulative USU GPA had dropped below a threshold determined by their year in the program: 3.00 for students after their first year (14 academic action messages), 3.34 for second-year students (24 academic action messages), 3.44 for third-year students (15 academic action messages), and 3.50 for fourth-year students/students in their final year (seven academic action emails).

In response to the spring 2024 change in the GPA threshold for graduation with University Honors, Honors Academic Advisors recalibrated the triggers for “academic action” messages while simultaneously reframing them as “academic support” messages. Three students whose GPAs had fallen below 2.75 for the current semester received these messages. In addition, 32 students received supportive messages from the UHP because their cumulative USU GPAs had dropped below a revised threshold determined by their year in the program: 2.75 for students after their first year in the program (14 academic support messages), 3.00 for second-year students (14 academic support messages), 3.20 for third-year students (two academic support invitations), and 3.25 for fourth-year students/students in their final year (two academic support messages).

Discontinuation—The UHP generally does not involuntarily remove students from the program for failure to meet GPA requirements, schedule regular advising appointments, and/or earn Honors points. This approach means that students must take ownership of the disenrollment decision-making process. In FY 2023-2024, 175 students voluntarily withdrew from the program for a variety of reasons, with over half citing insufficient time to complete Honors requirements or the Honors Capstone Project. That total also includes eight students who transferred to another institution, one student who withdrew from USU, and 11 students graduating earlier than initially planned. An additional 20 students were “removed” from the program due to their admission having expired. These students either did not enroll at USU after acceptance into the program or did not return to USU from a leave of absence.

10. Transcript Designations

University Honors—Every student who successfully completes the University Honors Program’s requirements earns a University Honors transcript designation. In FY 2023-2024, 32 Honors students graduated with University Honors. In addition, the UHP awarded the University Honors designation to one student posthumously (*):

Baxter, Hannah*	Bee, Nathaniel	Blotter, Kaitlyn
Butikofer, Jamie	Christensen, Morgan	Cook, Melissa
Cooney, Joseph	Corbett, Landon	Davies, Katelyn

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Gaither, Alyssa	Haag, Davis	Hayden, Marcus
Howe, Rylie	Hull, Kalli	Ivie, Cassandra
Lee, Abigail	Leutgeb, Kristin	Lewin, Kimberly
Lockwood, Jordan	Lonardo, Isabella	Manwill (Kofford), Elleke
Merighe, Patrick	Miner, Sara	Morley, Jackson
Ottley, Carter	Roth, Lily	Shippen, Gracie
Smith, Tate	Stanger, Hunter	Suess, Julia
Taylor (Burton), Alyssa	White, Joshua	Withers, Sophia

Undergraduate Research—All students seeking the Undergraduate Research transcript designation must complete a minimum of two semesters of undergraduate research, scholarship, or creative activity supervised by a faculty mentor, present their work in a recognized venue, and submit to the Office of Research an application for this transcript designation. In FY 2023-2024, 26 Honors students earned an Undergraduate Research designation, representing 81% of the Honors graduate cohort. This reflects the ongoing effort by Honors advising staff to inform and motivate students to seek the designation.

Bee, Nathaniel	Blotter, Kaitlyn	Christensen, Morgan
Cooney, Joseph	Corbett, Landon	Davies, Katelyn
Gaither, Alyssa	Hayden, Marcus	Hull, Kalli
Ivie, Cassandra	Leutgeb, Kristin	Lewin, Kimberly
Lockwood, Jordan	Lonardo, Isabella	Manwill (Kofford), Elleke
Merighe, Patrick	Miner, Sara	Morley, Jackson
Ottley, Carter	Roth, Lily	Shippen, Gracie
Smith, Tate	Stanger, Hunter	Taylor (Burton), Alyssa
White, Joshua	Withers, Sophia	

Global Engagement Scholar—The UHP offers its students the opportunity to ground their Honors work in topics of global concern. Focusing on both academic understanding and practical application, Global Engagement Scholars are students who have learned to think deeply and engage thoughtfully with the international issues that shape their disciplines. The Global Engagement Scholar transcript designation communicates to future employers and/or graduate programs the student's commitment to international communication and understanding. Honors students seeking this transcript designation must demonstrate foreign language competence, accumulate 15 credits/points of internationally focused coursework (with a minimum of

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6 credits earned in study abroad) or other Honors-in-Practice work in an area of global concern, complete a pre- and post-experience reflection, and make a returning traveler presentation during the Global Engagement Scholarship Symposium. Many Honors students choose to complete an Honors Capstone Project that demonstrates substantial engagement with global issues in the student's discipline and the UHP and OGE allow this work to count for up to 5 of the 15 required credits of internationally focused coursework. In FY 2022-2023, one Honors student, Sara Miner, earned the Global Engagement Scholar designation.

Community-Engaged Scholar—The UHP also offers students the opportunity to ground their Honors work in community-engaged learning. Focusing on both classroom learning and community practice, Community-Engaged Scholars (now Christensen Community Scholars) are students who have used the skills of their disciplines to think deeply and engage thoughtfully with local and global issues. This transcript designation communicates to future employers and/or graduate programs the student's commitment to connect academic work with their communities. Honors students seeking this designation must complete two courses designated as community-engaged learning or two service-based HMAs, can partially fulfill the co-curricular requirement of logging 200 hours of community service through USU's AggiePulse platform by completing up to two additional service-based HMAs, and complete an Honors Capstone Project that develops and implements a sustainable service project in response to a specific community-identified need. To meet requirements for this transcript designation, the written part of the Honors Capstone Project must include a community-engaged learning portfolio that documents all of the student's community-engaged learning experiences at USU and a reflection that articulates specifically and in detail on the relationship between the capstone and the student's academic discipline. For Honors students, this reflective writing must be substantial and also meet the requirements for an Honors Capstone Project. An optional track allows students interested in international service to pursue this designation with a Peace Corps Prep focus. In FY 2023-2024, three Honors students, Landon Corbett, Kalli Hull, and Cassandra Ivie, earned the Community-Engaged Scholar designation.

Overall, the 32 students comprising the 2023-2024 cohort of Honors graduates earned 62 optional transcript designations, including all four designations available at USU.

11. Student Awards and Honors

International, National, and State Awards and Honors

Cristina Chirvasa, 2024 Gaither Junior Fellows Nominee

Sophia Hessami, 2024 Goldwater Scholar

Jacey Hopkin, 2024 Goldwater Scholar Nominee

Brayden Monson, 2024 Udall Scholarship Nominee

Kade Robison, 2024 Goldwater Scholar Nominee

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Zachary Zito, 2024 Goldwater Scholar Nominee

University Awards and Honors

Emma Barnett, Outstanding Undergraduate Poster Presentation, Physical Sciences, Spring Student Research Symposium

Jaron Bono, Recipient Undergraduate Research and Creative Opportunities Grant, Fall 2023

Christina Chirvasa, Recipient, Undergraduate Research and Creative Opportunities Grant, Summer 2024

Cristina Chirvasa, 2023 Peak Summer Research Fellow

Cristina Chirvasa, Peak Prize: Undergraduate Researcher of the Year, USU 2024 Robins Awards

Morgan Christensen, Recipient, Undergraduate Research and Creative Opportunities Grant, Spring 2024

Davis Haag, Outstanding Undergraduate Poster Presentation, Engineering, Spring Student Research Symposium

Noelani Hadfield, First Place in Undergraduate Poetry, USU Creative Writing and Art Contest, 2024

Sophia Hessami, Recipient, Undergraduate Research and Creative Opportunities Grant, Spring 2024

Jordan Lockwood, Recipient, Undergraduate Research and Creative Opportunities Grant, Fall 2023

Elleke Manwill (Kofford), Outstanding Undergraduate Poster Presentation, Life Sciences, Spring Student Research Symposium

Brayden Monson, 2023 Peak Summer Research Fellow

Brayden Monson, Recipient, Undergraduate Research and Creative Opportunities Grant, Fall 2023

Michelle Norman, Recipient, Undergraduate Research and Creative Opportunities Grant, Spring 2024

Kade Robison, Recipient, Undergraduate Research and Creative Opportunities Grant, Fall 2023

Lily Roth, Recipient, Undergraduate Research and Creative Opportunities Grant, Summer 2023

Alyssa Taylor (Burton), 2023 Peak Summer Research Fellow

Rachel Tong, Recipient, Undergraduate Research and Creative Opportunities Grant, Spring 2024

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Zachary Zito, Recipient, Undergraduate Research and Creative Opportunities Grant, Spring 2024

Zachary Zito, 2023 Peak Summer Research Fellow

College Awards and Honors

Cristina Chirvasa, Undergraduate Researcher of the Year, S.J. and Jessie E. Quinney College of Natural Resources

Morgan Christensen, Grand Challenge Scholar, College of Engineering

Morgan Christensen, Salutatorian, College of Engineering

Arden Fayard, Caine Scholar for Excellence, Caine College of the Arts

Meghan Hatfield, Caine Arts Summer Research Grant, Caine College of the Arts

Meghan Hatfield, Inclusive Excellence Student, Caine College of the Arts

Campbell Helton, Caine Scholar for Excellence, Caine College of the Arts

Joshua (Autumn) Jensen, College of Science Undergraduate Research Minigrant, College of Science

Kimberly Lewin, Caine Scholar for Excellence, Caine College of the Arts

Jordan Lockwood, Caine Scholar for Excellence, Caine College of the Arts

Isabella Lonardo, Legacy of Utah State Nominee, College of Science

Sarah Polizzotto, Caine Scholar for Excellence, Caine College of the Arts

Jacob Sagers, College of Humanities and Social Sciences Faculty-Student Summer Mentorship Grant

Alyssa Taylor (Burton), College of Humanities and Social Sciences Faculty-Student Summer Mentorship Grant

Eden Ward, Undergraduate Teaching Fellow of the Year, University Honors Program

Sophia Withers, Undergraduate Teaching Fellow of the Year, College of Science

Zachary Zito, Scholar of the Year, College of Humanities and Social Sciences

Departmental Awards and Honors

Mallory Bingham, Harris O. and Eleanor Y. Van Orden Award in Inorganic Chemistry, Department of Chemistry and Biochemistry

April Buys, Irving Condie Frost Award in Organic Chemistry, Department of Chemistry and Biochemistry

Morgan Christensen, Outstanding Senior, Department of Biological Engineering

Jordan Lockwood, Talent of the Year, Department of Theatre Arts

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Isabella Lonardo, Undergraduate Research Award, Department of Chemistry and Biochemistry

Bella Nielsen, Outstanding Junior, Department of Mechanical and Aerospace Engineering

Kade Robison, Outstanding Junior, Department of Biological Engineering

Mark Soulier, Outstanding Pre-Professional, Department of Electrical and Computer Engineering

H. APPENDIX

Table H-1. List of FY 2023-2024 Honors graduates.

Name	College	Major(s)	Designation
Baxter, Hannah ^a	CAAS	Bioveterinary Science	University Honors
Bee, Nathaniel	CoS	Biology	University Honors
Blotter, Kaitlyn	CoS	Public Health (Industrial Hygiene Emphasis)	University Honors
Butikofer, Jamie	CHaSS, QCNR	Philosophy, Environmental Studies	University Honors
Christensen, Morgan	ENGR	Biological Engineering	University Honors
Cook, Melissa	CHaSS	English (Literature Emphasis)	University Honors
Cooney, Joseph	CoS	Physics	University Honors
Corbett, Landon	CEHS	Kinesiology	University Honors
Davies, Katelyn	QCNR	Wildlife Ecology and Management	University Honors
Gaither, Alyssa	ENGR	Civil Engineering	University Honors
Haag, Davis	ENGR	Biological Engineering	University Honors
Hayden, Marcus	CoS	Biochemistry	University Honors
Howe, Rylie	CoS	Biology	University Honors
Hull, Kalli	QCNR	Environmental Studies	University Honors
Ivie, Cassandra	CEHS	Psychology	University Honors
Lee, Abigail	CCA, CEHS	Music Therapy, Psychology	University Honors
Leutgeb, Kristin	CoS	Biology	University Honors
Lewin, Kimberly	CCA	Music (String Performance Emphasis)	University Honors
Lockwood, Jordan	CCA	Theatre Arts (Education Emphasis)	University Honors
Lonardo, Isabella	CoS	Biochemistry	University Honors
Manwill, Elleke	CoS	Biology (Human Biology Emphasis)	University Honors
Merighe, Patrick	ENGR	Mechanical Engineering	University Honors
Miner, Sara	CHaSS	Liberal Arts	University Honors
Morley, Jackson	CoS	Biochemistry	University Honors
Ottley, Carter	CHaSS	Journalism (Public Relations Emphasis)	University Honors
Roth, Lily	CoS	Mathematics/Statistics Education (Composite)	University Honors
Shippen, Gracie	HSB	Management (Operations and Supply Chain Management Emphasis)	University Honors
Smith, Tate	HSB	Accounting	University Honors

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Table H-1. Continued.

Name	College	Major(s)	Designation
Stanger, Hunter	CoS	Biology (Human Biology Emphasis)	University Honors
Suess, Julia	HSB	Management (Operations and Supply Chain Management Emphasis), International Business	University Honors
Taylor, Alyssa	CCA	Music Therapy (Pre-Med)	University Honors
White, Joshua	CoS	Statistics (Actuarial Science Emphasis)	University Honors
Withers, Sophia	QCNR	Wildlife Ecology and Management	University Honors

^a Degree and University Honors transcript designation awarded posthumously.

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Table H-2. List of FY 2023-2024 Honors-engaged faculty, staff, and other mentors/instructors.

Name	College	Department or Program
Adair, Camilla	CEHS	Kinesiology and Health Science
Allgood, Scot	CEHS	Human Development and Family Studies
Allred, Deanna	CHaSS	English
Allred, Kristyn	HSB	N/A
Anderson, Chase	CAAS	Technology, Design and Technical Education
Anderson, D. Andy	CoS	Biology
Anderson, Douglas	HSB	N/A
Archer, Seth	CHaSS	History
Ashfield, Michael ^a	CHaSS	Communication Studies and Philosophy
Ault, Alexis	CoS	Geosciences
Ault-Dyslin, Nelda	N/A	Center for Community Engagement
Babits, Chris	CHaSS	History
Baker, Michelle	CoS	Biology
Bakker, Sara	CCA	Music
Ball, Austin	ENGR	Civil and Environmental Engineering
Bandley, Giselle	N/A	Center for Community Engagement
Bates, Scott	CEHS	Psychology
Bayless, Anne	CCA	Music
Beard, Karen	QCNr	Wildland Resources
Beck, Russ	CHaSS	English
Becker, Kendall	QCNr	Watershed Sciences
Belmont, Patrick	QCNr	Watershed Sciences
Belmont, Shannon	QCNr	Environment and Society
Benninghoff, Abby	CAAS	Animal, Dairy, and Veterinary Sciences
Berke, Ryan	ENGR	Mechanical and Aerospace Engineering
Berreau, Lisa	CoS	Chemistry and Biochemistry
Berrett, Matt	N/A	Space Dynamics Laboratory
Bilicka, Katarzyna	HSB	Economics and Finance
Blau, Benjamin	HSB	Economics and Finance
Boardman, Kirsten	CAAS	Animal, Dairy, and Veterinary Sciences

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Table H-2. Continued.

Name	College	Department or Program
Boettinger, Janis	CAAS	Plants, Soils, and Climate
Bosworth, Ryan	CAAS	Applied Economics
Bray, Amanda	CEHS	Kinesiology and Health Science
Britt, David	ENGR	Biological Engineering
Brown, David	CoS	Mathematics and Statistics
Buhusi, Mona	CEHS	Psychology
Bulthuis, Kyle	CHaSS	History
Bunnell, Matt	CAAS	Aviation Technology
Burger, Benjamin ^b	CoS	Geosciences
Burrows, Michelle ^a	CAAS	Applied Sciences, Technology, and Education
Call, Richie	CCA	Theatre Arts
Cannon, James	HSB	School of Accountancy
Cannon, Molly	CHaSS	Sociology and Anthropology
Carey, Jon	CEHS	Kinesiology and Health Science
Chen, Chen ^a	CHaSS	English
Chenette, Timothy	CCA	Music
Ciciurkaite, Gabriele	CHaSS	Sociology and Anthropology
Cohen, Anna	CHaSS	Sociology and Anthropology
Cooper Rompato, Christine	CHaSS	English
Coster, Daniel	CoS	Mathematics and Statistics
Crawford, Dustin	CHaSS	English
Culver, Lawrence	CHaSS	History
Dawson, Amanda	CCA	Theatre Arts
Dehler, Carol	CoS	Geosciences
Depew, Briggs	HSB	Economics and Finance
Dickenson, Nicholas	CoS	Chemistry and Biochemistry
Dixon, Michael	HSB	Management
Dorsch, Travis	CEHS	Human Development and Family Studies
Ellsworth, Joel	ENGR	Mechanical and Aerospace Engineering
Erey, Aysel	CoS	Mathematics and Statistics
Eyre, Nikole ^b	CHaSS	English

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Table H-2. Continued.

Name	College	Department or Program
Ferguson, John	HSB	Management
Finch, Erica ^a	N/A	Libraries
Fisher, Russell	HSB	N/A
Fjeldsted, Paul	HSB	Economics and Finance
Fletcher, Annalise	CEHS	Communicative Disorders and Deaf Education
Flint, Colin	CHaSS	Political Science
Fox, Allison	CCA	Music
Francis, Anne	CEHS	Kinesiology and Health Science
Francis, David	CAAS	Technology, Design and Technical Education
Franks, Travis	CHaSS	English
Freeman, Sara	CoS	Biology
French, Susannah	CoS	Biology
Furse, Joseph	CoS	Applied Sciences, Technology, and Education
Geer, Nathan	CoS	Mathematics and Statistics
Gelfand, Laura	CCA	Art + Design
Glaittli, Kristina	ENGR	N/A
Goelzhauser, Greg	CHaSS	Political Science
Gompert, Zachariah	CoS	Biology
Gossard, Julia	CHaSS	History
Graham, Shane	CHaSS	English
Grayzel, Susan	CHaSS	History
Grieve, Victoria	CHaSS	History
Grimmer, C.R. ^a	CHaSS	English
Guth, Jordy	N/A	Facilities
Hammill, Edd	QCNR	Watershed Sciences
Hardcopf, Rick	HSB	Management
Harper, Mario	CoS	Computer Science
Hasan, Jeiran ^a	CCA	Music
Hatch, Wayne	CoS	Biology
Hevel, Joanie	CCA	Theatre Arts

H. APPENDIX

Table H-2. Continued.

Name	College	Department or Program
Hills, Nancy	CCA	Theatre Arts
Holland, Daniel	HSB	Marketing and Strategy
Howe, Peter	QCNR	Environment and Society
Hurst, Brett	CAAS	Animal, Dairy, and Veterinary Sciences
Izumi, Yurika	CHaSS	World Languages and Cultures
Jackson, Ryan	CoS	Biology
Jessop, Craig	CCA	Music
Johnson, Jeannie	CHaSS	Political Science
Jones, Jesse	CEHS	Kinesiology and Health Science
Jones, Justin	CoS	Biology
Jordan, Kerry	CEHS	Psychology
Julander, Justin	CAAS	Animal, Dairy, and Veterinary Sciences
Kamineni, Abhilash	ENGR	Electrical and Computer Engineering
Kannan, Vijay	HSB	Management
Katz, Amanda ^{a, b}	CHaSS	History
Kaundal, Amita	CAAS	Plants, Soils, and Climate
Keady, Darcy	CEHS	Human Development and Family Studies
Kettenring, Karin	QCNR	Watershed Sciences
Kim, Tae ^a	CEHS	Psychology
Kim, Yong	HSB	Data Analytics and Information Systems
Knuppe, Austin	CHaSS	Political Science
Kohler, Brynja	CoS	Mathematics and Statistics
Kouraytem, Nadia	ENGR	Mechanical and Aerospace Engineering
Koven, Mark	CAAS	Applied Sciences, Technology, and Education
Kraus, Katie	CAAS	Nutrition, Dietetics and Food Sciences
Kunz, Robb	CHaSS	English
Kwiatek, Stephen	CEHS	Special Education and Rehabilitation Counseling
Lajos, Jessi ^a	CoS	Mathematics and Statistics
Lawrence, LuEttaMae ^a	CEHS	Instructional Technology and Learning Sciences
Lawyer, Rachel	N/A	Libraries
Lefevor, Tyler	CEHS	Psychology

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Table H-2. Continued.

Name	College	Department or Program
Lewis, Hannah ^b	CoS	Mathematics and Statistics
Lilly, Amanda ^a	CEHS	Communication Studies and Philosophy
Lindstrom, Erika	N/A	Inclusion Center
Liu, Ying	CAAS	Animal, Dairy, and Veterinary Sciences
Lucas, Lauren	CoS	Biology
Lucero, Jessica	CHaSS	Social Work
Lund, Marie	CEHS	Teacher Education and Leadership
Madden, Gregory	CEHS	Psychology
Malmendier, Andreas	CoS	Mathematics and Statistics
Marquez-Velarde, Guadalupe	CHaSS	Sociology and Anthropology
Martini, Silvana	CAAS	Nutrition, Dietetics and Food Sciences
Mason, Patrick	CHaSS	History
McGonagill, Doris	CHaSS	World Languages and Cultures
McLennan, Caitlin	QCNR	Environment and Society
Miller, Kristine	CHaSS	English
Monson, Amy	CAAS	Aviation Technology
Monson, Debra	CHaSS	Journalism and Communication
Moon, Todd	ENGR	Electrical and Computer Engineering
Morgan, Ian	CEHS	Kinesiology and Health Science
Morrison, Nicholas	CCA	Music
Murphy, Mollie	CHaSS	Communication Studies and Philosophy
Nelson, Michaelann ^b	CHaSS	English
Nischwitz, Claudia	CoS	Biology
Norton, Jeanette	CAAS	Plants, Soils, and Climate
Olsen, Jason ^b	CHaSS	English
Olson, Kevin	CCA	Music
O'Shay, Sydney	CHaSS	Communication Studies and Philosophy
Palsson, Craig	HSB	Economics and Finance
Park, Joonsun	CEHS	Kinesiology and Health Science
Patel, Dave	HSB	Dean's Office
Peacock, Anthony	CHaSS	Political Science

H. APPENDIX

Table H-2. Continued.

Name	College	Department or Program
Peak, David	CoS	Physics
Peterson, Justin	N/A	Residence Life
Peterson, Shannon	CHaSS	Political Science
Pitts, James	CoS	Biology
Pokharel, Binod	CAAS	Plants, Soils, and Climate
Potter, Katherine	CoS	Geosciences
Pynn, Shannon ^a	CEHS	Kinesiology and Health Science
Reali, Virginie	CHaSS	World Languages and Cultures
Redfield, John	CAAS	Technology, Design and Technical Education
Reiher, Stephen	CHaSS	Journalism and Communication
Rice, John	ENGR	Civil and Environmental Engineering
Richter, David	CHaSS	World Languages and Cultures
Ricketts, Jeremy	CHaSS	English
Roberts, Nicholas	ENGR	Mechanical and Aerospace Engineering
Robison-Greene, Rachel	CHaSS	Communication Studies and Philosophy
Romney, Alexander	HSB	Marketing and Strategy
Rosenberg, Dory	LIB	Student Learning and Academic Empowerment
Ross, Danielle ^b	CHaSS	History
Ross, Robert	CHaSS	Political Science
Ryan, Joshua	CHaSS	Political Science
Sand, Alexa	CCA	Art + Design
Savoie-Roskos, Mateja	CAAS	Nutrition, Dietetics and Food Sciences
Schaeffer, Robert	CoS	Biology
Scheaffer, Melissa	ENGR	Engineering Education
Scheiner, Steve	CoS	Chemistry and Biochemistry
Schneider, Maryann	CAAS	Nutrition, Dietetics and Food Sciences
Schupp, Eugene	QCNR	Wildland Resources
Seedall, Ryan	CEHS	Human Development and Family Studies
Shaw, Sarah	CEHS	Kinesiology and Health Science
Shen, Tsung-Chen	CoS	Physics
Shuai, Fei	HSB	School of Accountancy

H. APPENDIX

Table H-2. Continued.

Name	College	Department or Program
Simon, Chad	HSB	School of Accountancy
Sims, Ronald	ENGR	Biological Engineering
Singleton, Patrick	ENGR	Civil and Environmental Engineering
Sinor, Jennifer	CHaSS	English
Sleipness, Ole	CAAS	Landscape Architecture and Environmental Planning
Song, Zilong	CoS	Mathematics and Statistics
Sorenson, Thomas	N/A	Office of Research
Soukhakian, Fazilat	CCA	Art + Design
Stewardson, Denise	CAAS	Technology, Design and Technical Education
Stoner, David	QCNr	Wildland Resources
Studenka, Breanna	CEHS	Kinesiology and Health Science
Sung, Dae Han	ENGR	Mechanical and Aerospace Engineering
Tainter, Joseph	QCNr	Environment and Society
Taylor, Jeffrey	ENGR	Mechanical and Aerospace Engineering
Thomas, Brent	CoS	Mathematics and Statistics
Thompson, Brennan	CEHS	Kinesiology and Health Science
Thornton-Kurth, Kara	CAAS	Animal, Dairy, and Veterinary Sciences
Thunell, Andy	HSB	Marketing and Strategy
Tofel-Grehl, Colby	CEHS	Teacher Education and Leadership
Tollefson, Derrik	CHaSS	Social Work
Torre, Charles	CoS	Physics
Tsugawa, Marissa	ENGR	Engineering Education
Turner, Rachel ^b	CEHS	Teacher Education and Leadership
Twede, Jason ^b	CHaSS	Sociology and Anthropology
Valencia, Felipe	CHaSS	World Languages and Cultures
Van Vliet, Stephan	CAAS	Nutrition, Dietetics and Food Sciences
Vargis, Elizabeth	ENGR	Biological Engineering
Veblen, Kari	QCNr	Wildland Resources
Veon, Raymond	CCA	Art + Design
Walker, Andrew	CEHS	Instructional Technology and Learning Sciences
Wallentine, John	CAAS	Animal, Dairy, and Veterinary Sciences

H. APPENDIX

Table H-2. Continued.

Name	College	Department or Program
Walsworth, Timothy	QCNR	Watershed Sciences
Walters, Jayme	CHaSS	Social Work
Watkins, Jacob	ENGR	Biological Engineering
Watson, Daniel	CoS	Computer Science
Wells, Ashley	CHaSS	English
Wengreen, Heidi	CAAS	Nutrition, Dietetics and Food Sciences
Wheaton, Kristen	CHaSS	English
Wheeler, Greg	CoS	Mathematics and Statistics
Whitaker, Matt	CHaSS	English
White, Stephanie	CCA	Theatre Arts
Wilkey, Lacey	HSB	School of Accountancy
Williams, Tiffany	CEHS	Nursing
Winn, Russell	CHaSS	English
Wytsalucy, Reagan ^b	CAAS	Extension
Young, Matthew	CoS	Mathematics and Statistics
Zhan, Jixun	ENGR	Biological Engineering
Zhao, Jia	CoS	Mathematics and Statistics
Zhao, Yucheng	CoS	Physics
Zhou, Anhong	ENGR	Biological Engineering

^a Participant in the fall 2023 Early Career Faculty Engagement Program.

^b Statewide faculty.

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Table H-3. List of FY 2023-2024 faculty Departmental Honors Advisors (DHA).

Department/Area	Name
<i>College of Agriculture and Applied Sciences</i>	
Animal, Dairy and Veterinary Sciences	Thornton-Kurth, Kara
Applied Economics	Bosworth, Ryan
Applied Sciences, Technology and Education	Furse, Joseph
Aviation Technology	Bunnell, Matt
Landscape Architecture and Environmental Planning	Sleipness, Ole
Nutrition, Dietetics and Food Sciences	Kraus, Katie
Plants, Soils and Climate	Norton, Jeanette
Technology, Design and Technical Education	Koven, Mark
<i>Caine College of the Arts</i>	
Art, Art History, Interior Design	Soukhakian, Fazilat
Music, Music Education, Music Therapy	Bakker, Sara
Theatre Arts	White, Stephanie
<i>Emma Eccles Jones College of Education and Human Services</i>	
Communicative Disorders and Deaf Education	Fletcher, Annalise
Human Development and Family Studies	Keady, Darcy
Kinesiology and Health Science	Studenka, Breanna
Instructional Technology and Learning Sciences	Walker, Andrew
Nursing	Williams, Tiffany
Psychology	Bates, Scott
Special Education and Rehabilitation	Kwiatek, Stephen
Teacher Education and Leadership	Lund, Marie
<i>College of Humanities and Social Sciences</i>	
Anthropology	Cohen, Anna
Communication Studies	Lilly, Amanda

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Table H-3. Continued.

Department/Area	Name
English	Franks, Travis
History/Religious Studies	Archer, Seth (through Fall 2023) Culver Lawrence (since Spring 2024)
International Studies, Law and Constitutional Studies, Political Science	Goelzhauser, Greg
Journalism and Communication	Monson, Debra
Philosophy	Robison-Greene, Rachel
Social Work	Lucero, Jessica
Sociology	Ciciurkaite, Gabriele
World Languages and Cultures	McGonagill, Doris
<i>College of Engineering</i>	
Biological Engineering	Vargis, Elizabeth
Civil and Environmental Engineering	Rice, John
Electrical and Computer Engineering	Moon, Todd
Mechanical and Aerospace Engineering	Ellsworth, Joel
<i>College of Science</i>	
Biochemistry and Chemistry	Jackson, Ryan
Biology and Public Health	Gompert, Zach Pitts, James
Computer Science	Harper, Mario
Geology	Burger, Benjamin
Mathematics and Statistics	Brown, David
Physics	Shen, Tsung-Chen
<i>Jon M. Huntsman School of Business</i>	
Accounting	Cannon, James
Data Analytics and Information Systems	Kim, Yong

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Table H-3. Continued.

Department/Area	Name
Economics and Finance	Palsson, Craig
Management	Hardcopf, Rick
Marketing and Strategy	Romney, Alexander
<i>S.J. and Jessie E. Quinney College of Natural Resources</i>	
College of Natural Resources Coordinator	Schupp, Eugene
Environment and Society	Tainter, Joseph
Watershed Sciences	Belmont, Patrick
Wildland Resources	Veblen, Kari
<i>Statewide Campuses</i>	
Brigham City	Eyre, Nikole
USU Eastern Price	Turner, Rachel
Uintah Basin	Burger, Benjamin

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Table H-4. FY 2023-2024 Honors Faculty Advisory Board (HFAB).

College or Academic Unit	Name
Caine College of the Arts	Gelfand, Laura
College of Agriculture and Applied Sciences	Kraus, Katie
College of Engineering	Vargis, Elizabeth
College of Humanities and Social Sciences	Archer, Seth (through Fall 2023) Flint, Colin (since Spring 2024)
College of Science	Freeman, Sara
Emma Eccles Jones College of Education and Human Services	Bates, Scott
Jon M. Huntsman School of Business	Kannan, Vijay
S.J. and Jessie E. Quinney College of Natural Resources	Schupp, Eugene
University Libraries	Rosenberg, Dory
Office of Research	Sand, Alexa
Statewide Campuses	Olsen, Jason

Table H-5. FY 2023-2024 Honors Student Advisory Board (HSAB).

College	Name
Caine College of the Arts	Polizzotto, Sarah
College of Agriculture and Applied Sciences	Knight, Mia
College of Engineering	Robison, Kade
College of Humanities and Social Sciences	Ivans, Rebecca (Fall 2023) Thornley, Rebecca (Spring 2024)
College of Science	Tong, Rachel
Emma Eccles Jones College of Education and Human Services	Hopkin, Jacey
Jon M. Huntsman School of Business	Gilliland, Jentrie
S.J. and Jessie E. Quinney College of Natural Resources	Withers, Sophia
Statewide Campuses	N/A

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Table H-6. FY 2023-2024 Annual Honors Last Lecture Selection Committee.

Name	College
Sagers, Jacob (Chair)	College of Humanities and Social Sciences
Schmidt, Jane (Secretary)	Undeclared
Castellanos Santa Rosa, Ileana	College of Agriculture and Applied Sciences
Davies, Katelyn	S.J. and Jessie E. Quinney College of Natural Resources
Harris, Hazel	Caine College of the Arts
Staheli, Zara	Jon M. Huntsman School of Business
Wessman, Emily	College of Science

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Table H-7. FY 2023-2024 Honors Leadership Academy Graduates.

Name	Number of Modules Completed	College
Berry, Chandler	4	College of Science
Borgmann, Finley	4	College of Engineering
Bowden, Sophia	2	Jon M. Huntsman School of Business
Broadhead, Emily	4	Caine College of the Arts
Caldwell, Emilie	3	College of Engineering
Christensen, Abigail	3	Emma Eccles Jones College of Education and Human Services
DeLeeuw, Isabelle	1	College of Science
Eastman, Grace	2	N/A (Exploratory)
Green, Michael	2	College of Science
Greene, Henry	2	College of Humanities and Social Sciences
Jennings, Marissa	4	College of Agriculture and Applied Sciences
Lomax, Hunter	2	College of Agriculture and Applied Sciences
Nguyen, Naya	1	College of Agriculture and Applied Sciences
Olmer, Callum	1	College of Science
Sadler, Gracie	3	College of Agriculture and Applied Sciences
Spencer, Ronan	1	College of Humanities and Social Sciences
Staheli, Zara	2	Jon M. Huntsman School of Business
Tullis, Kai Li	4	N/A (Exploratory)

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Table H-8. Recipients of Honors Research Fund awards in FY 2023-2024.

Name	Title/Description of Research or Activity
Baker, Rebecca	Travel—ICEBERG Intensive: Professional Opportunity for Performance, Mentorship, Recording, and Publication of New Original Music
Baldauf, Sascha	Research—Mummified Zooarcheological Research
Brady, Zachary	Travel—Sigma Tau Delta Centennial Convention, St. Louis, MO, USA
Brady, Zachary	Travel—National Undergraduate Literature Conference, Ogden, UT, USA
Cazier, X	Travel—AASECT Annual 2024 Conference, St. Louis, MO, USA
Hatfield, Meghan	Travel—Society for Music Theory National Conference, Denver, CO, USA
Hessami, Sophia	Travel—Association for Research in Vision and Ophthalmology Annual Meeting, Seattle, WA, USA
Ivans, Rebecca	Travel—Internship in Senator Romney's DC Office, Washington, D.C., USA
Ivans, Rebecca	Travel—Internship in Senator Romney's DC Office, Washington, D.C., USA
Kartchner, Caleb	Travel—Model United Nations Conference SUN MUN, Orlando, FL, USA
Lewin, Kimberly	Travel—Utah Conference on Undergraduate Research, Orem, UT, USA
Lindeman, Charlotte	Travel—National Undergraduate Literature Conference, Ogden, UT, USA
Lonardo, Isabella	Research—Publication in Protein Science
McConkie, Grace	Research—Exploring Public Choice: From Theory to Practice
Monson, Brayden	Research—Characterizing Optical Distortion
Moore, Grace	Travel—Utah Conference on Undergraduate Research, Orem, UT, USA/National Conference on Undergraduate Research, Long Beach, CA, USA
Norman, Michelle	Research—Grand Canyon Western Ranch Field Work
Norman, Michelle	Research—Reevaluating the Drumian Carbon Isotope Excursion (DICE) in Western-Central Utah
Ottley, Carter	Travel—National Conference of Undergraduate Research, Long Beach, CA, USA
Robison, Kade	Travel—National Conference of Undergraduate Research, Long Beach, CA, USA
Roth, Lily	Travel—SACNAS National Diversity in STEM Conference, Portland, OR, USA
Sagers, Jacob	Travel—Midwest Political Science Association Conference, Chicago, IL, USA
Sagers, Jacob	Travel—Four Corners Conflict Network Political Science Conference, Albuquerque, NM, USA
Sanchez, Ariela	Travel—Model United Nations Conference SUN MUN, Orlando, FL, USA
Shaw, Ethan	Travel—Kingsmen Shakespeare Festival, Thousand Oaks, CA, USA
Tong, Rachel	Research—Corticotropin-Releasing Factor (CRF) and Partner Loss in Coyotes

H. APPENDIX

Table H-9. Undergraduate Research and Creative Opportunities (URCO) grant program Honors matching funds in FY 2023-2024.

Name	Title/Description of Research
Bono, Jaron	Novel Method for Direct Identification of Magnetic Core Losses in Wireless Charging Pads for Electric Vehicles
Christensen, Morgan	The Effects of Diesel Exhaust Particles on the Human Respiratory Tract Cells
Hessami, Sophia	Mimicking the Effects of Oxidative Stress to Study Abnormal Blood Vessel Growth in the Subretinal Layer
Norman, Michelle	Reevaluating the Drumian Carbon Isotope Excursion (DICE) in Western-Central Utah
Robison, Kade	Cytomegalovirus Antioxidant Treatment

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Table H-10. Recipients of Honors Study Abroad Fund awards in FY 2023-2024.

Name	Title/Description (Location)
Armstrong, McKinley	Art, Architecture, and Film (Italy)
Baldauf, Sascha	Maritime Archeology on Salt Cay (Turks and Caicos Islands, UK)
Case, Jeremy	Ecology and Environmental Stewardship (Kenya, Tanzania)
Clemens, Chloe	Small Enterprise Education and Development XP Global Experience (Mexico)
Dunlap, Alette	Waseda University Study Abroad Program (Japan)
Hendrickson, Taylor	Study Abroad at Elisava in Barcelona (Spain)
Hobbs, Conner	Small Enterprise Education and Development XP Global Experience (Peru)
Hutchinson, Elizabeth	The Mediterranean Diet (Greece)
Kaplan, Radeyah	Art, Architecture, and Film (Italy)
McConkie, Grace	Cuba and the U.S.—People, Power, and Politics (Cuba)
McInay, Janessa	Trekking and Water Service Project (Nepal)
Plewe, Kelly	Politics and International Relations at Nottingham Trent University (UK)
Rust, Natalie	Intercultural Communication, Language, and Literature (Argentina)
Spencer, Ronan	International Leadership (Australia, New Zealand)
Sundberg, Heidi	Global Business and Entrepreneurship (Spain)

H. APPENDIX

Table H-11. Honors student employment in FY 2023-2024.

Position	Name (Term)
Honors Student Peer Advisor	Ivans, Rebecca (Summer-Fall 2023, Summer 2024) Sagers, Jacob (Summer 2023-Summer 2024)
Honors Post-Graduate Fellow	Daines, Savannah (Summer-Fall 2023) Bassett, Camille (Summer 2023-Summer 2024) Brawand, Marina (Fall 2023-Spring 2024)
Honors Student Office Assistant	Prinster, Carlie (Fall 2023-Summer 2024)
Honors Ambassador	Baldauf, Sascha (Summer 2024) Bouck, William (Summer 2024) Brady, Zachary (Summer 2024) Broadhead, Emily (Summer 2024) Chirvasa, Cristina (Summer 2023-Summer 2024) Cole, Morgan (Summer 2023-Summer 2024) Corbett, Landon (Summer 2023-Spring 2024) DeJesus, Isabella (Summer 2023-Summer 2024) Gilliland, Jentrie (Summer 2023-Summer 2024) Jennings, Marissa (Summer 2024) Johnson, Caroline (Summer 2023-Summer 2024) Kaplan, Radeyah (Summer-Fall 2023) Loertscher, Ethan (Summer 2023-Summer 2024) Ottley, Carter (Summer 2023-Spring 2024) Pedersen-Campbell, McKenzie (Summer 2024) Sagers, Jacob (Summer 2023-Spring 2024) Tullis, Kai Li (Summer 2024) Withers, Sophia (Summer 2023-Spring 2024)
Honors <i>Connections</i> Peer Mentor	Andres, Emily Breckenridge, Canon Hatfield, Meghan McConkie, Grace Prinster, Carlie Schaelling, Aimee
HONR 1320 UTF (Fall)	Thornley, Rebecca

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Table H-11. Continued.

Position	Position
HONR 1330 UTF (Fall)	Kaplan, Radeyah
HONR 3020/3030 UTF (Fall)	Hatfield, Meghan
HONR 1320 UTF (Spring)	Ward, Eden
HONR 1330 UTF (Spring)	Harris, Hazel
HONR 3020/3030 UTF (Spring)	Kaplan, Radeyah

ITEM FOR INFORMATION

RE: Bad Debt Write-off for Fiscal Year Ending 30 June 2024

The attached information is submitted for the Trustees' consideration. The material received the appropriate administrative review and approval.

EXECUTIVE SUMMARY

This document and the attached schedule provide a summary of the write-offs for FY 2024 for tuition/fees, auxiliaries and other entities, as well as a comparative analysis for FY 2022 and FY 2023.

Tuition/Fees

The write-off for tuition/fees of \$733,450 is \$208,388 more than FY 2023 and \$578,040 more than FY 2022.

Auxiliaries and Other Entities

The bad debt write-off for auxiliaries and other entities of \$228,975 is \$119,209 more than FY 2023 and \$130,298 more than FY 2022.

Auxiliaries and other entities were asked to submit accounts for write-off approval. Normal collection efforts, including statements, telephone calls, collection letters, and collection agencies have been used as warranted before the accounts were submitted for write-off approval.

**BAD DEBT WRITE-OFF RECOMMENDATIONS
SHORT-TERM LOANS, RETURNED CHECKS
AND TUITION/FEES
Fiscal Year Ending 30 June 2024**

Program	Approximate Annual Dollar Volume	Bad Debt Expense		Percent of Approximate Annual Dollar Volume	Funding Source
		Number Of Accounts	Amount		
Short-term Loans	\$400	0	\$0	0%	B
Returned Checks	\$47,335	0	\$0	0%	A
Tuition/Fees	\$227,533,859	397	\$733,450	0.32%	C

Note A: The bad debt expense for returned checks is funded from service charges.

Note B: The bad debt expense for short-term loans is written off against the interest earned on loans and when necessary the principal balance of the individual loan funds.

Note C: The bad debt expense for tuition and fees is written off against the tuition and fee revenue.

THREE-YEAR COMPARATIVE FIGURES									
Program	Bad Debt Expense						Percent of Approximate Annual Dollar Volume		
	2022		2023		2024		2022	2023	2024
	No. of Accounts	Amount	No. of Accounts	Amount	No. of Accounts	Amount			
Tuition/Fees	159	\$155,411	361	\$525,063	397	\$733,450	0.07	0.23	0.32

COMPARATIVE SCHEDULE OF BAD DEBT WRITE-OFF RECOMMENDATIONS
AUXILIARIES, SERVICES, AND OTHER
Fiscal Year Ending June 30, 2024

	<u>FY 2022</u>	<u>FY 2023</u>	<u>FY 2024</u>	<u>Three -Year Total</u>	<u>Three -Year Average</u>
<u>Auxiliaries</u>					
Campus Store	8,617	1,899	6,448	16,964	5,654.80
Parking	-	7,167	11,430	18,597	6,199.00
Dining Services - Catering	-	43	26	69	23.00
Dining Services - Meal Plans	4,356	12,323	25,849	42,528	14,175.96
Housing	26,452	29,443	53,322	109,217	36,405.77
Total Auxiliaries	<u>39,426</u>	<u>50,875</u>	<u>97,075</u>	<u>187,376</u>	<u>99,212.99</u>
<u>Other</u>					
Statesman Newspaper	850	-	-	850	283.33
Health Center	1,799	892	-	2,691	896.97
Veterinary Diagnostic Lab	1,838	2,383	2,287	6,508	2,169.17
Shingo Institute	32,838	34,547	106,400	173,785	57,928.18
College of Ed Med Clinic - Sorenson Clinics	16,373	10,299	8,613	35,285	11,761.76
Fine Arts Instruction	-	203	558	761	253.67
ASPIRE Research Center	-	5,000	-	5,000	1,666.67
Real Property	-	1,453	-	1,453	484.33
IDRPP - Stride	-	2,414	30	2,444	814.67
Bastian Ag Ctr Events	-	1,700	5,110	6,810	2,270.00
Library & Production (USUE)	155	-	232	387	128.86
USUE Athletic Club	-	-	8,670	8,670	2,890.00
Admissions Application Fees	4,600	-	-	4,600	1,533.33
Institute of Government & Politics	800	-	-	800	266.67
Total Other	<u>59,252</u>	<u>58,891</u>	<u>131,900</u>	<u>250,043</u>	<u>94,483</u>
Grand Total	<u><u>98,677</u></u>	<u><u>109,766</u></u>	<u><u>228,975</u></u>	<u><u>437,418</u></u>	<u><u>193,696</u></u>

8 November 2024

ITEM FOR INFORMATION

RE: Leased Space Report

The attached annual facility Leased Space Report is submitted to the Board of Trustees for information.

EXECUTIVE SUMMARY

The attached annual facility Leased Space Report is a listing of all facility leases of significance by the University as of 30 June 2024.

Utah System of Higher Education

FORM L-1: LEASED SPACE

Institution: Utah State University

Prepared by: June Connelly

Due Date: August 28, 2024

Submission Date: August 28, 2024

Annual Facility Detail

Location - Dept./Project	Gross Square Feet	Annual Cost Per Square Foot Net or Full Service	Annual Cost	Terms in Months and Expiration Date	Source of Funding	Escalation	Monthly Lease Payment	Type of Space	Changes to Lease Report		
									Action	Square Footage	Expenditure
Blanding - Montezuma Creek Seminary Building - 375 North 400 West - USU Eastern San Juan Campus	2,354	\$2.55	\$6,000	12 mo. 6/30/25	USU Blanding	None	\$500	Classroom/Office			
Blanding - Nursing Program - San Juan County Bldg, 804 N 400 W	5,789	\$0.00	\$0	60 mo. 6/15/26	USUE	None	\$0	Classroom/Office			
Brigham City, Life Span Learning Center - DFCM, 265 West 1100 South, Brigham City UT	35,034	\$5.74	\$201,004	12 mo. 6/30/25	State line item & Other funds appropri.	Review annually	\$16,750	Classroom/Office			
Brigham City, Life Span Learning Center - DFCM, 265 West 1100 South, Brigham City UT	1,955	\$5.74	\$11,227	12 mo. 6/30/25	State line item & Other funds appropri.	Review annually	\$936	Laboratory			
Brigham City, Life Span Learning Center - DFCM, 265 West 1100 South, Brigham City UT	10,740	\$2.00	\$21,480	12 mo. 6/30/25	State line item & Other funds appropri.	Review annually	\$1,790	Storage			
Brigham City, Life Span Learning Center - DFCM, 265 West 1100 South, Brigham City UT	1,745	\$2.00	\$3,490	12 mo. 6/30/25	State line item & Other funds appropri.	Review annually	\$291	Office/Other			
Brigham City, IDRPP Up-to-3 Early Learning Intervention - Reeder Holdings - 10 South 400 East, Brigham City UT	2,253	\$6.30	\$14,190	36 mo. 6/30/25	State line item & Other funds appropri.	2% annually	\$1,182	Classroom/Office			
Brigham City Hangar 23 Ground Lease, Brigham City Airport	18,111	\$0.43	\$7,703	240 mo. 1/31/44	Other funds	Annually based on CPI	\$642	Hangar	Add		
Castle Dale, 15 E 600 N Downstairs Unit, IDRPP-SW Early Learning Intervention	1,200	\$5.00	\$6,000	36 mo. 10/01/25	Other funds	None	\$500	Classroom/Office			
Cedar City, Regional Field Office - 621 N 400 W, UCC Program	3,200	\$8.63	\$27,600	36 mo. 1/31/25	Other funds	None	\$2,300	Office/Other			

Annual Facility Detail

Location - Dept./Project	Gross Square Feet	Annual Cost Per Square Foot Net or Full Service	Annual Cost	Terms in Months and Expiration Date	Source of Funding	Escalation	Monthly Lease Payment	Type of Space	Changes to Lease Report		
									Action	Square Footage	Expenditure
Logan, Cache County 4-H - Bridgerland Tech College - 1410N 1000W, Rm 1910	2,741	\$0.00	\$1	12 mo. 12/31/24	Grant	None	\$0	Classroom/Office			
Logan, 1770 North Research Parkway, Ste 140, North Logan - USU Small Business Development Ctr	1,281	\$13.45	\$17,223	12 mo. 3/31/25	Other funds	Escalates 3% annually	\$1,435	Classroom/Office			
Moab, 1105 South Hwy 191, Unit 1 R.C. Leasing - IDRPP SW Early Intervention	1,200	\$14.00	\$16,800	36 mo. 6/30/25	Grant	\$1200 annually	\$1,400	Classroom/Office			
Moab, 1181 S Highway 191, Bldg #3, UCC Program	1,200	\$23.00	\$27,600	12 mo. 12/31/25	Other funds	None	\$2,300	Office/Other			
Nephi - Juab County School District Office-346 East 600 North, Nephi, UT Academic and Institutional Services	2,788	TBD	TBD	60 mo. 6/30/25	Other funds	None	TBD	Classroom			
Orem/Provo Education Center, Central Park West Bldg, 1875 South State - Regional Campus	3,507	\$1,936.00	\$67,893	120 mo. 6/30/26	Other funds	Escalates 2.5% annually	\$5,658	Classroom/Office			
Orem, 1426 E 750 N #201 Utah County Extension Office	4,840	\$21.11	\$102,160	12 mo. 12/31/24	Other funds	2% annually	\$8,513	Office			
Price, USU Eastern Prehistoric Museum - 155 E. Main Street	23,787	\$0.00	\$0	300 mo. 6/30/39	Other funds	None	\$0	Classroom/Other			
Price, Carbon County Airport - 3095 East Airport Rd.	2,756	\$21.77	\$60,000	month to month	Other funds	None	\$5,000	Classroom/Office			
Price, Creekview Plaza 760 W. Price River Drive	8,750	\$12.91	\$112,963	72 mo. 5/31/28	Other funds	3% annually	\$9,414	Classroom/Office			
Roosevelt, 57 N 100 E - USU Extension	2,900	\$8.28	\$24,000	12 mo. 10/31/24	Grant	None	\$2,000	Office			
Salt Lake City, Wells Fargo Bldg., 299 South Main Street, Development Office	2,305	\$5.93	\$13,680	Month-to-month	Other funds	None	\$1,140	Office/Other			
Vernal, Maeser Business Park, 2574W 500N, Bldg 2 Unit 2 - IDRPP Utah Assistive Technology Program	1,940	\$7.11	\$13,800	24 mo. 8/31/25	Grant	\$600 annually	\$1,150	Office/Other			

Annual Facility Detail

Location - Dept./Project	Gross Square Feet	Annual Cost Per Square Foot Net or Full Service	Annual Cost	Terms in Months and Expiration Date	Source of Funding	Escalation	Monthly Lease Payment	Type of Space	Changes to Lease Report		
									Action	Square Footage	Expenditure
Washington DC, 211 Richmond Hwy, Apt. 602N - CP One Owner - CHASS	1,294	\$30.11	\$38,964	6 mo. 12/14/23	Other funds	None	\$3,247	Residential	Delete	(1,294)	-\$3,247
Washington DC, 211 Richmond Hwy, Apt. 508S - CP One Owner - CHASS	1,442	\$28.11	\$40,536	6 mo. 10/31/23	Other funds	None	\$3,378	Residential	Delete	(1,442)	-\$3,378
Washington DC, 211 Richmond Hwy, Apt. 515N - CP One Owner - CHASS	1,294	\$30.32	\$39,228	6 mo. 11/6/23	Other funds	None	\$3,269	Residential	Delete	(1,294)	-\$3,269
TOTAL	146,406	\$5.97	\$873,541				\$72,795			(4,030)	-\$9,894

Notes:

EXECUTIVE SUMMARY

USU POLICY 533: Public Safety, Response, and Reporting

Category: Operating Policies

Subcategory: General

Covered Individuals: Students, Faculty, Staff, and Visitors

Responsible Executive: Vice President of Operational Strategy

Policy Custodian: Executive Director of Public Safety

Background

Utah State University values and prioritizes the safety of its campus, and this policy ensures compliance with various safety regulations and laws, such as the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (“Clery Act”).

USU Policy 533 is an existing University Policy, and the proposed substantive changes are accomplishing the following:

- updating the policy to reflect current systems utilized for campus safety alerts;
- updating the policy to reflect current University practices; and
- authorizing and establishing the USU Clery Committee.

Key Provisions of the new TAMT Policy:

- Updates the policy to reflect current systems utilized for campus safety alerts.
- While the Clery Committee previously existed and was doing the work to prepare the Annual Safety Report required by the Clery Act, the changes now appropriately authorize the Clery Committee to do so.
- Updates the legal citations and definitions to a few terms that have changed in recent legislation.

****Portions of Section 2.11 and Section 2.12 were erroneously left off the prior version. This submission includes those portions.****



University Policy 533: Public Safety, Response, and Reporting

Category: Operating Policies

Subcategory: General

Covered Individuals: USU Students, Staff, Faculty, and Campus Visitors

Responsible Executive: Vice President of Operational Strategy

Policy Custodian: Executive Director of Public Safety

Last Revised: 2024/08/14; 2023/08/16; 2018/01/12

Previous USU Policy Number: 533

533.1 PURPOSE AND SCOPE

The purpose of the Public Safety, Response, and Reporting policy is to provide the framework for creating a safe and secure environment for students, faculty, staff, and campus visitors. This Policy also outlines the University's response to reports of crime and defines reporting guidelines while complying with federal and state laws regarding safety on campus.

533.2 POLICY

2.1 Reporting of Crimes and Other Emergencies

2.1.1 Student Reporting of Crimes

Students and others who become aware of criminal actions or other emergencies on campus should report these activities for assistance, to prevent crime, to help the University make timely warning reports, to improve safety, and for purposes of including the activities in the Annual Security Report ("ASR"). Reports may be in any form desired, including via telephone, in writing, or in person.

To report an emergency, individuals should call 911.

Logan Campus: To report a non-emergency crime, individuals should call the Utah State University Police Department at (435) 797-1939. Additionally, individuals may report an emergency or a crime using an emergency phone located in select parking lots and public areas on campus, located in select parking lots and public areas on campus, or in person at the USU Police Department located at 1250 North 800 East, Logan, Utah. USU Police respond to reports in accordance with law enforcement protocol and may make referrals to other USU organizations when appropriate.

Price Campus: To report a non-emergency crime, individuals should call the USU Police Department at (435)-637-0893. Individuals may also report an emergency or crime in person at the USU Police Department located at 530 N. 300 E., Price, Utah. USU Police respond to reports in accordance with law enforcement protocol and may make referrals to other USU organizations when appropriate.

Statewide Campuses: To report crimes on or near any other USU statewide campus, contact the local law enforcement agency with jurisdiction for the area where the crime occurred. For a more complete list, see the Annual Security Report.

Criminal actions and other prohibited conduct may also be reported to the individuals or offices listed below:

- USU Office of Student Affairs;
- USU Department of Human Resources;
- USU Residence Life;
- Campus Security Authorities (CSAs); and
- USU Office of Equity.

Information on how to report to these offices can be found online or by contacting each office directly. Reports made to these persons or offices and not made to the USU Police may be included in the statistical report in the ASR but may not necessarily be investigated by USU Police.

Although the University strongly encourages all members of the University community to report crimes to law enforcement, it is the victim's choice whether or not to make such a report, and the victim has a right to decline involvement with law enforcement or other campus officials, subject to reporting requirements in Section 2.1.2. The University will assist any victim in notifying law enforcement if the victim desires to do so.

2.1.2 Campus Security Authority's Responsibility to Report

Any Campus Security Authority who becomes aware of an alleged or actual crime that is required to be reported under the Clery Act and which occurs within the Clery Geography must report all information known about the crime to USU Police in accordance with his/her Clery Act obligations.

2.1.3 Reporting Crimes on a Voluntary, Confidential Basis

To the greatest extent possible, the University seeks to support individuals who have been the victim of or witnessed a crime and who may be concerned about identifying information being shared with others. The University encourages those who have been the victim of sexual violence or other crimes to talk to someone about what happened to get needed support. However, certain policies and laws may prevent the University from guaranteeing confidentiality, as more fully described below.

1. Under USU Policies 305 – Discrimination based on Protected Characteristics, 339 – Title IX Sexual Misconduct in an Employment or Education Program or Activity, and 339A – Non-Title IX Sexual Misconduct, unless specifically exempted, all employees are Reporting Employees and are required to report information to the Office of Equity regarding discriminatory harassment, which includes reports of sexual assault, dating violence, domestic violence, stalking, etc.
2. All employees who are Campus Security Authorities, as defined herein, must report criminal activities in accordance with this Policy and the Clery Act.
3. The USU Police Department, the Office of Equity, and other University authorities must comply with applicable law to determine whether certain crimes must be investigated or disclosed to others. The University may be required to disclose information beyond the University under federal law, state law, or court order.
4. Disclosure of information is always limited to those who need to know to keep the campus community safe and comply with the applicable laws.
5. Individuals who witness or are the victim of a crime but are concerned about identifying information being shared with others should make those concerns known before reporting to a University employee. Reporting Employees who are responsible for reporting such

information should alert individuals of their reporting responsibilities as soon as possible. If the employee is required to make a report to other University officials, Reporting Employees should communicate the desires of the witness or victim regarding confidentiality. Additionally, USU has designated certain employees as Confidential Resources, and those employees are not required to report to

the University and can be connected to an individual who is a witness of or a victim of a crime that is concerned about identifying information being shared.

6. Even if confidentiality or no action on a report of a crime is requested, the occurrence of a crime (which does not contain personal identifying information) will be included in the University's Annual Security Report, and the information available will be evaluated to determine if there is a pattern of crime with regard to a particular location, method, or suspect. In appropriate circumstances, USU Public Safety will alert the campus community of the occurrence of the crime (but not personal identifying information) pursuant to Section 2.7 of this Policy.
7. Individuals may file an anonymous report of a crime. However, such anonymous reports are not considered notice by the University and may limit the ability of the USU Public Safety to provide specific assistance or to investigate or solve a crime.
8. Professional and pastoral counselors are not required to report crimes disclosed to them for inclusion in USU's Annual Security Report when acting in their profession or pastoral counseling capacity. However, professional and pastoral counselors are encouraged, if and when they deem it appropriate, to inform the individuals they are counseling of how to report crimes on a voluntary, confidential basis for inclusion in USU's Annual Security Report and disclosure of crime statistics.

2.1.4 Preservation of Evidence

It is important to preserve evidence that may assist in proving the alleged criminal offense occurred or may help obtain a protective order. As time passes, evidence may dissipate, become lost, or unavailable, thereby making investigations, possible prosecutions, disciplinary proceedings, or obtaining protection from abuse orders related to the incident more difficult. If a victim chooses not to make a complaint regarding the incident, the victim nevertheless should consider speaking with the USU Police Department or other law enforcement to preserve evidence if the victim changes the victim's mind at a later date.

2.1.5 False Accusations

Individuals who intentionally and knowingly make false accusations of criminal activity or provide false information to University officials in connection with an accusation and/or investigation of criminal activity are subject to discipline under University policy as well as criminal and/or civil penalties under applicable law.

2.2 Daily Crime Log and Annual Security Report

2.2.1 Daily Crime Log

The USU Police Department shall keep a daily crime log in accordance with the requirements of the Clery Act for the University.

2.2.2 The Annual Security Report (ASR)

In order to comply with the Clery Act and Utah Code, the University prepares and distributes the ASR, which also acts as the University's annual campus safety plan. The Executive Director of Public Safety or appointed designee will fill the role of Chief Clery Compliance Officer and shall prepare and distribute the ASR, which include a disclosure of crime statistics, disciplinary referrals, and other information required by the Clery Act for the most recent calendar years. The Clery Committee prepares this report in cooperation with the USU Public Safety Department, Campus Security Authorities, and local law enforcement agencies.

The Chief Clery Compliance Officer will carefully analyze all crimes reported. All crimes subject to the Clery Act will be accurately reported and published annually in the ASR. The ASR will include statistics by location for the three most recent calendar years that occurred on USU's Clery Geography.

2.2.2.1 Collection of Statistics from Local Law Enforcement Agencies

Prior to the preparation of the ASR, the Chief Clery Compliance Officer will undertake a good faith effort to collect crime statistics from any law enforcement agency having jurisdiction over Non- Campus Property that is subject to reporting under the Clery Act. This includes any criminal activity by students at non-campus locations of student organizations officially recognized by the University, including student organizations with non-campus housing.

2.2.2.2 Distribution of the ASR

The Chief Clery Compliance Officer shall distribute the ASR annually in accordance with the requirements of the Clery Act. Appropriate notice will be provided to current students and employees, incoming students and employees, and prospective students and employees.

2.2.3 The Clery Committee

As part of USU's commitment to compliance with the Clery Act and campus safety, the Clery Committee has been formed to advise the Chief Clery Compliance Officer. Membership of the Clery Committee shall include, at minimum, a representative from each of the following:

- USU Police Department/Public Safety;
- USU's Clery Compliance Officer;
- Office of Student Conduct;
- Office of Residence Life;
- Office of General Counsel;
- Student Health and Wellness Center;
- Emergency Management;
- Office of Equity; and
- Human Resources.

The Chief Clery Compliance Officer or designee shall chair the Clery Committee and can add or remove members from other areas and departments of the University on an as-needed basis.

2.3 Security of and Access to Campus Facilities Building Access

Utah State University manages building access according to the building type and purpose and

considers security in the maintenance of campus facilities. Residence halls are locked twenty-four hours per day, except for some common areas open to the general public. Access to the residence halls is restricted to residents, their guest(s), and other approved campus community members.

2.4 Campus Law Enforcement

2.4.1 Enforcement Authority

USU Police Department officers are fully trained and certified peace officers in the State of Utah and have the same arrest, detention, and police authority as any other peace officer in the State of Utah. See Utah

Code Ann. § 53-13-101, *et seq.* Additionally, USU Police Department officers have the authority to enforce USU regulations and policies. See Utah Code Ann. § 53B-3-105.

2.4.2 University Police and Other Law Enforcement Agencies' Relationship

USU Police Department works closely with the Logan City, North Park, Smithfield, Price, Carbon County, and Cache County law enforcement agencies. The USU Police Department has primary jurisdiction over USU campuses, including University housing and various event centers. USU Police Department shares responsibilities with local law enforcement agencies for roadways adjoining the Logan campus. Off-campus offices, clinics, and remote campus sites receive police services from the local jurisdictions in which the sites are located. The University endeavors, where possible, to enter into Memoranda of Understanding with state and local law enforcement agencies regarding reporting and investigation of alleged criminal offenses.

2.5 Alcoholic Beverages and Illegal Drugs

Possession, use, and sale of alcoholic beverages and illegal drugs by students and employees is addressed in USU's Student Code and USU Policy 313 – Drug and Alcohol-Free Workplace; Drug and Alcohol Testing. USU Police Department enforces state alcohol laws—including those regarding underage drinking—and federal and state drug laws.

2.6 Emergency Response and Evacuation

First responders, the first responders' on-duty supervisor, the USU Police Chief, and/or University Communications are responsible for carrying out the actions described in the Public Safety Emergency Response & Evacuation procedures located in the Public Safety building.

2.6.1 Confirmation Process

In the event of a significant emergency or dangerous situation on campus involving an immediate threat to the health or safety of students or employees, those with immediate information regarding the event (First Responders) will contact the Chief of Police or designee, who will confirm the existence of the emergency situation. In consultation with First Responders, as needed, the Chief of Police or designee will determine the appropriate segment or segments of the campus community to receive a notification and will determine the content of the notification.

2.6.2 Campus Alerts

Upon confirmation of a significant emergency or dangerous situation involving an immediate threat to the health or safety of students or employees on campus, the University will utilize multiple avenues

for alerting the campus community. These may include but are not limited to contacting media, posting alerts on the USU homepage (<http://www.usu.edu>), other websites, electronic bulletin boards on campus, and/or sending alerts through phone, email, and text messaging via the Aggie Alert campus alert system. Students, faculty, and staff should update their notification settings in myid.usu.edu.

The University Emergency Team, without delay and taking into account the safety of the community, will determine the content of the notification and initiate the campus alert systems unless issuing such a notification will, in the professional judgment of responsible authorities, compromise efforts to assist a victim or to contain, respond to, or otherwise mitigate the emergency.

2.6.3 Disseminating Information to the Larger Community

USU may disseminate emergency information to the larger community in a variety of ways. Some non-university organizations located in close proximity to USU's campus may receive notifications sent via the campus alert systems. Additionally, information received by USU Police Dispatch may be shared with Cache County Dispatch Services or the Price Communications Center. The University may also place information about emergencies online on its homepage (<http://www.usu.edu>). University Media and Communications Department may disseminate information to various news media outlets.

2.6.4 Follow-up Messages/Notifications

Follow-up messages/notifications will be disseminated in the same manner the original message/notification was administered. Follow-up messages/notifications will occur during the emergency and when the emergency is terminated.

2.6.5 Testing Emergency Response and Evacuation Procedures

USU will test the emergency response and evacuation procedures on at least an annual basis. USU will publicize its emergency response and evacuation procedures in conjunction with this test and will document, for each test, a description of the exercise, the date and time of the exercise, and whether the exercise was announced or unannounced. The documentation will be published with the ASR. Emergency response and evacuation procedures are also published in the Public Safety Policies and Procedures, available in the Public Safety building.

2.7 Timely Warnings

USU shall provide timely warnings to the campus community when certain crimes (as defined within the Clery Act and federal law) are reported to Campus Security Authorities or local law enforcement agencies, considered by USU to represent a threat to students and employees, and where notification will aid in the prevention of similar crimes. Anyone with information warranting a timely warning should report the circumstances to the USU Police Department. USU may issue these warnings but is not limited to via postings on campus, through the campus alert systems, local news media, or other ways. Timely Warnings will withhold personally identifying information (*i.e.*, names and identifying information of victims).

Determinations regarding the need for a Timely Warning will be made by the USU Police Chief or designee on a case-by-case basis. The USU Police Chief will create procedures to guide when and how Timely Warnings are made. Timely Warnings may not need to be made when USU follows its emergency notification procedures, as described herein, regarding the same circumstances. USU will provide adequate follow-up notifications to the community as needed.

2.8 Missing Student Notification

If a member of the campus community has reason to believe that a student who resides in on-campus

housing is missing, the individual should immediately notify the USU Police Department at (435)-797-1939 (Logan) or (435)-637-0890 (Price). USU Police will generate a missing person report and initiate an investigation. If someone believes a student living in off-campus housing is missing, they should notify local law enforcement agencies.

2.8.1 Reporting a Missing Student

When a student has been missing for twenty-four (24) hours, students, employees, or other individuals must report this to the USU Police Department at (435)-797-1939 (Logan) or (435) 637-0890 (Price). Any other person to whom a missing student report is made should immediately refer the matter to the USU Police Department.

2.8.2 Emergency Contact

Students who reside in on-campus student housing facilities may designate an emergency contact of their choice. USU will notify this contact person within twenty-four (24) hours of the disappearance of the student. This emergency contact is confidentially registered and accessible only to authorized campus officials and law enforcement personnel in furtherance of a missing person investigation.

2.8.3. Students Under 18

If a student is under eighteen years of age and not emancipated, the law requires USU to notify a custodial parent or guardian within twenty-four (24) hours of determining that the student is missing. In addition to the custodial parent or guardian notice, USU will notify any contact person designated by the student.

2.9 Fire Safety

USU has created fire safety education and training programs for students and employees, including procedures that students and employees should follow in the case of a fire. Fire safety policy and procedures are located in the Public Safety building and in the Housing and Resident Life buildings.

The USU Fire Marshal and Housing and Residence Life staff provide training to employees and housing residents regarding emergency evacuation procedures and general fire safety and conduct fire drills or fire safety programs. When requested and/or mandated, all occupants must immediately evacuate a residence hall. Interfering with or noncompliance with the fire drill may result in disciplinary action, including a monetary fine. The USU Fire Marshal also requires employees and on-campus residents to keep hallways, stairwells, and balconies clear of obstructions at all times to facilitate proper access and egress.

2.10 Dating Violence, Domestic Violence, Sexual Assault, and Stalking

2.10.1 Procedures for Reporting a Complaint

Reports of Dating Violence, Domestic Violence, Sexual Assault, or Stalking should be reported as described above, and the complainant should consider seeking medical attention and other help as needed. Reports of Dating Violence, Domestic Violence, Sexual Assault, and Stalking should also be reported to the Office of Equity.

2.10.2 Written Explanation of Procedures

When Dating Violence, Domestic Violence, Sexual Assault, or Stalking is reported to USU, whether the offense has occurred oncampus or off campus, USU will provide the student or employee with a written explanation of the reporting options, services, and accommodations that may be available for victims and procedures for University disciplinary action, if applicable.

2.10.3 University Policies and Processes

Acts of violence, including Sexual Assault, Dating Violence, Domestic Violence, Stalking, and other violent, threatening, or destructive acts, may violate one or more of USU policies, including but not limited to USU Policy 303 – Affirmative Action/Equal Opportunity, USU Policy 305 – Discrimination based on Protected Characteristics, USU Policy 339 – Title IX Sexual Misconduct in an Employment or Education Program or Activity, USU Policy 339A – Non-Title IX Sexual Misconduct, USU Policy 342 – Violence in the Workplace, and USU Policy 407 – Academic Due Process: Sanctions and Hearing Procedures.

These policies set standards of conduct for students, faculty, and staff and describe the processes for responding to claims that violate these standards.

Acts that are claimed to be motivated by discriminatory intent (animus based on sex/gender/sexual orientation/gender identity, race/ethnicity, religion, age disability, and other protected classifications) follow the rights and processes described in the aforementioned policies regardless of the status of the accused as staff, faculty, or student, with appeal rights through the policies described above. In all instances, informal procedures may be used, but ultimately, formal hearings are available to resolve these disputes. The steps involved, including how to make a complaint, anticipated timelines, and decision-making processes, are described in said policies.

In addition, standards of review, time frames, supportive measures, accommodations, individual protective orders, resources, and retaliation processes and procedures related to Dating Violence, Domestic Violence, Sexual Assault, and Stalking are found within USU Policies 303 – Affirmative Action/Equal Opportunity, 305 – Discrimination based on Protected Characteristics, 339 – Title IX Sexual Misconduct in an Employment or Education Program or Activity, 339A – Non-Title IX Sexual Misconduct, 342 – Violence in the Workplace, and 407 – Academic Due Process: Sanctions and Hearing Procedures.

2.11 Education and Prevention Programs

USU will make available educational programs and campaigns regarding campus security that are designed to prevent Domestic Violence, Dating Violence, Sexual Assault, and Stalking, in accordance with the Clery Act, on a regular basis and, at a minimum, annually. Educational programming consists of primary prevention and awareness programs for all incoming students and new employees, as well as ongoing awareness and prevention campaigns for students and employees as described by the Clery Act. These programs and campaigns are designed to:

1. inform students and employees about campus security procedures and practices and to encourage students and employees to be responsible for their own security and the security of others;
2. inform students and employees about the prevention of crimes;
3. identify and promote awareness of domestic violence, dating violence, sexual assault, and stalking as prohibited conduct;
4. define what behavior constitutes domestic violence, dating violence, sexual assault, and stalking according to federal and state law;
5. define what behavior and actions constitute consent to sexual activity;
6. describe safe and positive options for bystander intervention that an individual may carry out to prevent harm or intervene when there is a risk of domestic violence, dating violence, sexual assault, or stalking against a person other than the bystander;
7. provide information on risk reduction so that students and employees may recognize warning signs of abusive behavior and how to avoid potential attacks;
8. provide an overview of information contained in the ASR in compliance with the Clery Act and
9. describe procedures the University will follow when dating violence, domestic violence, sexual assault, and stalking are reported, rights and options regarding procedures victims should follow, confidentiality, services, and accommodations that may be available to victims, and procedures for University disciplinary actions, if applicable.

2.12 Sex Offender Registry

The Federal Sex Offender Registration and Notification Act (“SORNA”), enacted in 2006, requires convicted sex offenders to register with the jurisdiction in which they reside. Offenders are required to submit to the registry if they are working, volunteering, or attending Utah State University. For additional information relating to the sex offender registry requirements in Utah, please see the Utah Department of Corrections.

533.3 RESPONSIBILITIES

3.1 Chief Clery Compliance Officer

The Chief Clery Compliance Officer is responsible for chairing the Clery Committee, under the direction of the Executive Director of Public Safety, and ensuring the annual ASR and campus safety plan is appropriately prepared in accordance with the Clery Act and federal and state laws. The Chief Clery Compliance Officer has the ability to add or remove members, not from the minimum group but from other departments or agencies, as needed.

3.2 Clery Committee

As part of USU’s commitment to compliance with the Clery Act and campus safety, the Clery Committee has been formed to advise the Chief Clery Compliance Officer. The Clery Committee is responsible for:

- reporting and review of Clery-reportable offenses;
- review of campus safety alerts and procedures;
- review and compilation of the annual ASR;
- review of policies relating to Clery compliance;
- review of Campus Security Authority designations; and
- review of Campus Security Authority training materials.

The Clery Committee, at minimum, will receive annual training to stay abreast of best practices and current issues involving campus safety.

533.4 REFERENCES

- 20 USC § 1092(f), Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (“Clery Act”)
- [34 C.F.R. Part 668, Violence Against Women \(“VAWA”\), Final Rule & VAWA Reauthorization Act of 2013](#)
- [FBI UCR Program: National Incident-Based Reporting System](#)
- [Higher Education Opportunity Act \(Public Law 110-315\) \(“HEOA”\)](#)
- [Utah Code Ann. § 76-5-106, Harassment](#)
- [Utah Code Ann. § 76-5-406, Sexual offenses against the victim without consent of victim— Circumstances](#)
- [Utah Code Ann. § 76-9-702.1, Sexual Battery](#)
- [Utah Code Ann. § 77-36-1 et seq., Cohabitant Abuse Procedures Act](#)
- [Utah Code Ann. §78B-7-401 et seq., Dating Violence Protective orders](#)

533.5 RELATED USU POLICIES

- USU Student Code Article II-1, [Responsibility of Students](#)

- USU Student Code Article II-3, [Confidential Resources and Requests for Confidentiality](#)
- USU Student Code Article II-4, [Amnesty for Seeking Medical Attention and Reporting Sexual Misconduct](#)
- USU Student Code Article V, Section V-3, [University Standards of Student Conduct](#)
- USU Policy 305: [Discrimination based on Protected Characteristics](#)
- USU Policy 311: [Setting Expectations and Managing Performance](#)
- USU Policy 313: [Drug and Alcohol-Free Workplace; Drug and Alcohol Testing](#)
- USU Policy 321: [Respectful Workplace](#)
- USU Policy 500: [Threat Assessment Management Plan](#)

533.6 DEFINITIONS

- **Aggravated Assault.** Means an unlawful attack by one person upon another for the purpose of inflicting severe or aggravated bodily injury. This type of assault usually is accompanied by the use of a weapon or by means likely to produce death or great bodily harm. Simple assaults are excluded.

This definition is based upon federal law contained or referenced within the Clery Act and may differ from Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for purposes of Clery Act Reporting.

- **Annual Security Report (“ASR”).** The annual report of crime statistics and other campus information must be prepared and distributed in accordance with the Clery Act.
- **Arson.** Means any willful or malicious burning or attempt to burn, with or without intent, to defraud a dwelling house, public building, motor vehicle, aircraft, personal property of another, etc. Only fires determined through investigation to have been willfully or maliciously set are classified as arson. Once an investigation is completed, for purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for purposes of Clery Act Reporting.
- **Burglary.** Means the unlawful entry of a structure to commit a felony or a theft. Attempted forcible entry is also included. This definition is based upon the federal laws contained or referenced within the Clery Act and may differ from Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for purposes of Clery Act Reporting.
- **Business Day.** Means Monday through Friday, excluding any day when the University is closed.
- **Bystander Intervention.** A bystander is an individual who observes violence or witnesses the conditions that perpetuate violence.
- **Campus.** Means:
 - a. Any building or property owned or controlled by the University and within the same reasonably contiguous geographic area and used by the University in direct support of, or in a manner related to, the University’s educational purposes, including residence halls; and
 - b. Any building or property that is within or reasonably contiguous to the area identified in paragraph (a), that is owned by the University but controlled by another person, is frequently used by students and supports University purposes (such as food or another retail vendor).
- **Campus Security Authority (“CSA”).** Means:
 - a. any employee of Utah State University’s Public Safety Department;
 - b. any individual or individuals who have responsibility for campus security but who are

not employees of the Public Safety Department, such as an individual who is responsible for monitoring entrance into University property;

- c. any individual or organization specified in Section 2.1 of this Policy as individuals to which students and employees should report criminal offenses; and
 - d. an official of the University who has significant responsibility for student and campus activities, including, but not limited to, student housing, student discipline, and campus judicial proceedings. If such an official is a pastoral or professional counselor as defined herein, the official is not considered a CSA when acting as a Pastoral or Professional Counselor.
- **Clery Geography.** For the purpose of collecting statistics on the crimes required for submission to the U.S. Department of Education and inclusion in the University's Annual Security Report, Clery Geography includes:
 - a. buildings and property that are part of the University's campus;
 - b. the University's non-campus buildings and property; and
 - c. public property within or immediately adjacent to and accessible from the campus.

For the purposes of maintaining the crime log, Clery Geography includes locations identified in this definition and areas within the patrol jurisdiction of the Public Safety Department.

- **Coercion.** Means the act of pressuring another person into doing something against their will without physical force, whether through manipulation, intimidation, or the use of alcohol and drugs.
- **Consent.** For the purposes of this Policy, Consent is an affirmative agreement to do the same thing at the same time in the same way. An affirmative agreement includes an informed, freely and actively given, mutually understandable exchange of unmistakable words or actions, which indicate an affirmative willingness to participate in mutually agreed upon sexual activity. Consent can be withdrawn or modified at any time, so long as such withdrawal or modification is clearly communicated.

Consent cannot be assumed based on silence, the absence of "no" or "stop," the existence of a prior or current relationship, or prior sexual activity. There is no Consent when there is force, coercion, or incapacitation.

This definition differs from the definition provided in Utah criminal law, which can be found in Utah Code Ann. § 76-5-406.

- **Course of Conduct.** Means two or more acts, including, but not limited to, acts which the stalker directly, indirectly, or through third parties, by any action, method, device, or means follows, monitors, observes, surveils, threatens, or communicates to or about, a person, or interferes with a person's property.
- **Daily Crime Log.** A log maintained by campus police that records the date, time, general location, nature of the incident, and status of reported criminal activity in accordance with the Clery Act. Entries do not include personally identifying or specific enough information that could reveal a victim's name.
- **Dating Partner.** Means a person who is:
 - a. an emancipated person under Utah Code Section 15-2-1 or Section 80-7-101 *et seq.*; or
 - b. is 16 years of age or older; and

is, or has been, in a dating relationship with the other party. A Dating Partner does not include an

intimate partner, as defined herein. See Utah Code Ann. § 78B-7-102(5).

- **Dating Relationship.** Means a social relationship of a romantic or intimate nature, or a relationship, that has romance or intimacy as a goal by one or both parties, regardless of whether the relationship involves sexual intimacy. Dating Relationship does not mean casual fraternization in a business, educational, or social context. In determining, based on a totality of the circumstances, whether a dating relationship exists, all relevant factors shall be considered, including:
 - a. whether the parties developed interpersonal bonding above a mere casual fraternization;
 - b. the length of the parties' relationship;
 - c. the nature and the frequency of the parties' interactions, including communications indicating that the parties intended to begin a dating relationship;
 - d. the ongoing expectations of the parties, individual or jointly, with respect to the relationship;
 - e. whether, by statement or conduct, the parties demonstrated an affirmation of their relationship to others; and
 - f. whether other reasons exist that support or detract from finding that a dating relationship exists, and it is not necessary that all, or a particular number, of the factors described herein are found to support the existence of a dating relationship.

See Utah Code Ann. § 78B-7-102(11).

- **Dating Violence.** Violence committed by a person who is or has been in a social relationship of a romantic or intimate nature with the victim.
 - a. The existence of such a relationship shall be based on the reporting party's statement and with consideration of the length of the relationship, the type of relationship, and the frequency of interaction between the persons involved in the relationship.
 - b. For the purposes of this definition:
 - i. Dating Violence includes but is not limited to, sexual or physical abuse or the threat of such abuse.
 - ii. Dating Violence does not include acts covered under the definition of Domestic Violence.

For purposes of complying with the requirements of this Policy and the Clery Act, any incident meeting this definition is considered a crime for the purposes of Clery Act Reporting.

- **Disciplinary Referral.** Means the referral of any person to a University official who initiates a disciplinary action of which record is kept and which may result in the imposition of a sanction.
- **Domestic Violence.** A felony or misdemeanor crime of violence committed:
 - a. by a current or former spouse or intimate partner of the victim;
 - b. by a person with whom the victim shares a child in common;
 - c. by a person who is cohabitating with, or has cohabitated with, the victim as a spouse or intimate partner;
 - d. by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction in which the crime of violence occurred; or
 - e. by any other person against an adult or youth victim who is protected from that person's acts under the domestic or family violence laws of the jurisdiction in which the crime of violence occurred.

This definition is based upon federal law contained within the Clery Act, and differs from the definition found in Utah law. See Utah Code Ann. § 77-36-1. For the purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for the purposes of Clery Act Reporting.

- **Fondling.** The touching of the private parts of another person for the purposes of sexual gratification without the consent of the victim, including instances where the victim is incapable of giving consent because of the victim's age or because of the victim's temporary or permanent mental incapacity. This definition is based upon federal law contained within the Clery Act and may differ from the definition found in Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for the purposes of Clery Act Reporting.
- **Hate Crime.** Means a crime reported to local police agencies or to a CSA that manifests evidence that the victim was intentionally selected because of the perpetrator's bias against the victim. For purposes of this Policy, the categories of bias include the victim's actual or perceived race, religion, gender, gender identity, sexual orientation, ethnicity, national origin, and disability. This definition is based upon federal laws contained or referenced within the Clery Act, and may differ from Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for purposes of Clery Act Reporting.
- **Incest.** Sexual intercourse between persons who are related to each other within the degrees wherein marriage is prohibited by law. This definition is based upon federal law contained or referenced within the Clery Act and may differ from the definition found in Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for the purposes of Clery Act Reporting.
- **Motor Vehicle Theft.** Means the theft or attempted theft of a motor vehicle. A motor vehicle is self-propelled and runs on the surface and not on rails. Motorboats, construction equipment, airplanes, and farming equipment are specifically excluded from this definition. This definition is based upon federal law contained or referenced within the Clery Act and may differ from the definition found in Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for the purposes of Clery Act Reporting.
- **Murder and Non-Negligent Manslaughter.** The willful (non-negligent) killing of one human being by another. This definition is based upon federal law contained or referenced within the Clery Act and may differ from the definition found in Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for purposes of Clery Act Reporting.
- **Negligent Manslaughter.** Means the killing of another person through gross negligence. This definition is based upon federal law contained or referenced within the Clery Act and may differ from the definition found in Utah law. For purposes of complying with this Policy and the Clery Act, any incident meeting this definition is considered a crime for purposes of Clery Act Reporting.
- **Non-Campus Building or Property.** Means:
 - a. any building or property owned or controlled by an officially recognized student organization; or
 - b. any building or property owned or controlled by the University that is used in direct support of, or in relation to, the University's educational purposes, is frequently used by students and is not within the same reasonably contiguous geographic area of the University.
- **Pastoral Counselor.** Means a person, who is associated with a religious order or denomination, recognized by that religious order or denomination as someone who provides confidential counseling, and is functioning within the scope of that recognition as a pastoral counselor.
- **Professional Counselor.** Means a person whose official responsibilities include providing mental health counseling to members of the University's community and functioning within the

scope of the counselor's license or certification.

- **Public Property.** Means all public property, including thoroughfares, streets, sidewalks, and parking facilities, within the campus, or immediately adjacent to and accessible from the University's campus.
- **Rape.** The penetration, no matter how slight, of the vagina or anus with any body part or object, or oral penetration by a sex organ of another person, without the consent of the victim. This definition is based upon federal law contained within the Clery Act and differs from the definition found in Utah law.
- **Reasonable Person.** Means a reasonable person under similar circumstances and with similar identities to the victim.
- **Relationship Violence.** Includes Dating Violence and Domestic Violence.
- **Retaliation.** Means taking adverse action, including any action that might deter a Reasonable Person from engaging in protected activity, because the individual has made a report or complaint, testified, assisted, participated, or refused to participate in any manner in an investigation or proceeding under the University's harassment or discrimination policies. This includes action taken against a bystander who intervened to stop or attempt to stop any crime or potential crime, including discrimination and/or harassment.

Retaliation also includes intimidating, threatening, coercing, or in any way discriminating against an individual because of the individual's complaint, participation, or lack of participation. An action is generally deemed retaliatory if it would deter a Reasonable Person in the same circumstances from opposing practices prohibited by the University. USU will take immediate and responsive action to any report of Retaliation and may pursue any disciplinary action as appropriate.

- **Robbery.** Means the taking or attempting to take anything of value from the care, custody, or control of a person or persons by force or threat of force or violence and/or by putting the victim in fear. This definition is based upon federal law contained or referenced within the Clery Act and differs from Utah law. For purposes of complying with this Policy and the Clery Act, any incident that meets this definition is considered a crime for purposes of Clery Act Reporting.
- **Sexual Assault.** An offense that meets the definition of Rape, Fondling, Incest, or Statutory Rape as used in the FBI's Uniform Crime Reporting ("UCR") program. Per the National Incident-Based Reporting System User Manual from the FBI UCR Program, a sex offense is "any sexual act directed against another person, without the consent of the victim, including instances where the victim is incapable of giving consent."

This definition is based upon the federal laws contained or referenced within the Clery Act, and does differ from Utah law. Any incident meeting this definition is considered a crime for the purposes of Clery Act Reporting, but criminal prosecution of crimes must meet the definition of Utah Law. See Utah Code Ann. § 76-9-702.1.

- **Stalking.** Engaging in a Course of Conduct directed at a specific person that would cause a Reasonable Person to:
 - a. fear for the person's safety or the safety of others; or
 - b. suffer Substantial Emotional Distress; and
 - c. a person who intentionally or knowingly violates a stalking injunction issued pursuant to Utah Code Section 77-3a or a permanent criminal stalking injunction issued pursuant to Utah Code Section 76-5-106.

For purposes of complying with this Policy and the Clery Act, any incidents meeting this definition is considered a crime for the purposes of Clery Act Reporting.

- **Statutory Rape.** Includes sexual intercourse with a person who is under the statutory age of consent. This definition is based upon the laws contained or referenced within the Clery Act and may differ from Utah law.
- **Substantial Emotional Distress.** Means significant mental suffering or anguish that may, but does not necessarily require medical or other professional treatment or counseling.
- **University Emergency Team.** Means the team that consists of the University President, Provost, Vice President for Business and Finance, Vice President for University Marketing and Communication, the General Counsel, University Police Chief, and the President's appointed designees that address emergencies on USU campuses.

Information below is not included as part of the contents of the official policy. It is provided only as a convenience for readers/users and may be changed at any time by persons authorized by the president.

RESOURCES

Procedures

- None

Guidance

- None

Related Forms and Tools

- None

Contacts

- [Ellis Bruch, Executive Director of Public Safety](#)
- [Jason Brei, Chief of USU Police](#)

POLICY HISTORY

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