



USU Board of Trustees Virtual Regular Meeting

Friday, September 26, 2025, at 8:00 AM MDT to 12:40 PM MDT

<https://usu.zoom.us/j/83930128584?pwd=4QF1MtKbZrdsBOUa7TPPDvon0zBMSg.1>

Agenda

- | | |
|--|-----------------|
| 1. Call to Order | 8:00 AM |
| Presenter: Chair Tessa White | |
| 1.1. Welcome Trustees: Brett Hugie and Luke Johnson | |
| 2. Closed Session | 8:05 AM |
| 3. President's Report | 8:50 AM |
| Presenter: President Al Smith | |
| 4. ACTION AGENDA | |
| 4.1. Approve: Formation of Nonprofit Foundation for ASPIRE Beyond Research Services | 9:05 AM |
| Presenters: Dean David Jones, Professor Regan Zane | |
| 4.2. Provisional Approval: Presidential Expenditure Related Policies | 9:30 AM |
| Presenters: Trustee Ryan Dent, Vice President Dave Cowley | |
| 4.2.1. Policy 3311: Employee Gifts and Awards | |
| 4.2.2. Policy 5001: Procurement | |
| 4.2.3. Policy 5005: Charitable Donations | |
| 4.2.4. Policy 5302: Travel | |
| 4.2.5. Policy 5304: Meals and Entertainment | |
| 4.3. Approve: New Center for Civic Excellence | 9:45 AM |
| Presenter: Executive Vice Provost Paul Barr | |
| 4.4. Approve: Real Property Gift, Dammeron Valley, Utah | 9:55 AM |
| Presenter: Vice President Dave Cowley | |
| 4.5. Ratify: USU Board of Trustees Executive Committee Members | 10:05 AM |
| Presenter: Chair Tessa White | |
| 5. BREAK | 10:10 AM |
| 6. REPORTS | |
| 6.1. Committee Reports | 10:20 AM |
| 6.1.1. Executive | |
| Presenter: Chair Tessa White | |
| 6.1.2. Audit, Risk, and Compliance | |
| Presenter: Trustee Ryan Dent | |

6.1.3. Research and Academic Approval

Presenter: Vice Chair Gina Gagon

6.1.4. Athletics

Presenter: Trustee Clark Whitworth

6.1.5. Student Success

Presenter: Trustee David Huntsman

6.2. USU Program Report (USHE)

Presenter: USHE Associate Commissioner for Academic Affairs TJ Bliss

10:50 AM

7. STRATEGIC AGENDA

7.1. USU Performance Metrics Process and Preparation Discussion

Presenter: Chief Data Analytics Officer Jeff Aird

11:05 AM

8. CONSENT AGENDA

11:25 AM

8.1. Approve: 8.22.25 USU Board of Trustees Retreat Minutes

8.2. Approve: 8.23.25 USU Board of Trustees Regular Meeting Minutes

8.3. Approve: Policies

8.3.1. Athletics Policy: Abusive Coaching Practices (USU Logan)

8.3.2. Athletics Policy: Abusive Coaching Practices (USU Eastern)

8.4. Approve: Expedited Tenure for Bettina Willie

8.5. Approve: Programs

8.5.1. CAS-ART-Master of Arts in Motion Design

8.5.2. CEHS-TEAL-Masters in Elementary Teaching

8.5.3. CEHS-TEAL-Masters in Secondary Teaching

9. Trustee Training: Conflict of Interest

Presenter: Vice President Mica McKinney

11:30 AM

10. Trustee Training: Title IX

Presenters: Civil Rights and Title IX Office Susan Young and Cody Carmichael

11:40 AM

11. ADJOURN

12:40 PM

12. INFORMATION AGENDA:

12.1. June 2025: Report of Investment

12.2. Fall 2025: USU Advancement Report

12.3. USU Policy 2400: Campus Closure

12.4. USU Policy 4202: Course Fees

12.5. USU Policy Directive: Student Code Articles I, II, III, and V

12.6. USHE Board of Trustees Summit: Wednesday, October 22, 2025, University of Utah

12.7. Upcoming USU Board of Trustees Regular Meeting: Friday, November 7, 2025

President's Report

SEPTEMBER 26, 2025



Message from Utah State University Interim President Al Smith

Dear Trustees,

It has been a busy and emotional start to the academic year. The first week of the semester opened with Utah State University hosting memorial services for two local police officers. We mourned with our local communities and public safety representatives from throughout the state and nation, honoring these officers' selfless commitment to service and community.

The start of the semester was also met with joy and the promise of new beginnings. Our Connections luminary held on several of our campuses ushered in the promise of a new cohort of USU students who will shape our institutional history as members of our academic community. We also celebrated our new Carolyn & Kem Gardner Learning & Leadership Building with a ribbon cutting. This addition to our Huntsman School of Business will advance our experiential learning and student engagement efforts, benefiting students across campus and the state.



Student engagement is particularly critical as it relates to developing skills that enable civil discourse and productive democratic engagement. Accordingly, we continue our work to reenvision general education, and we are hosting a variety of events that address and reinforce peacemaking, civil discourse, and development of community. With the backdrop of the recent tragic event at Utah Valley University, we are again stepping forward to bring together our community. We will continue to champion free speech, viewpoint diversity, and our principles of community as we work to educate the next generation of Utah leaders and fulfill the promise of our land-grant mission.

Finally, building upon our summer accomplishments, we have recently received news that we have met all requirements of our 2020 Department of Justice resolution agreement. This represents significant efforts by a number of teams across campus and is welcomed news as we enter a new chapter for USU. This chapter will be marked, among many other transitions, with a growing national athletics footprint as we enter the Pac-12. I am pleased to share that we have successfully hired Cameron Walker as our new vice president and director of athletics, and I have great expectations for his leadership. He joins a strong team of leaders at USU with whom I have the great pleasure of working with daily to meet the needs of our students and the state of Utah.

Thank you for your unwavering support in our pursuit of excellence and impact in higher education and our communities.

Sincerely,

A handwritten signature in blue ink, reading "Alan L. Smith".

Alan L. Smith

Academic Enterprise

UNDERGRADUATE AFFAIRS

Strategic Enrollment Management – Utah State University is in the process of starting or re-launching partnerships with school districts across the state to allow data sharing for direct admissions and scholarship purposes. An Admissions Pathways Collaborate group is being established to facilitate transfer pathways for Salt Lake Community College, Bridgerland Technical College and Snow College.

In response to a rise in fraudulent college applications across the country, USU staff are actively exploring identity verification and fraud prevention solutions to strengthen the integrity of our processes.

Center for Academic Belonging & Learning Excellence – The U.S. Department of Education has awarded USU two TRIO Student Support Services (SSS) grants to improve college retention and graduation rates on the Logan and Blanding campuses. The Logan proposal received a perfect score. The grants, amounting to \$1.8M for Logan and \$1.5M for Blanding, will be paid out over the next five years and represent more than four decades of continuous awards for USU's SSS programs.

Student Orientation & Transition Services – Over 3,100 students enrolled in USU 1010: Connections on the Logan campus this fall, representing approximately 76% of first-year fall students as of the start of the semester. An additional 240 students took the course at the Eastern, Blanding, and Tooele campuses.

Student Affairs – To comply with ADA Title II regulations for digital content, the Disability Resource Center and Digital Accessibility Services have implemented the following innovative solutions:

- Developed an application that leverages student employee downtime to crowdsource alternative text for images in 3,587 courses.
- Created a tool to efficiently identify and send 2,688 course videos to a third-party vendor for captioning.
- Utilized AI and custom programming to add accessibility features to more than 177,000 files in over 8,000 courses.



ACADEMIC AFFAIRS

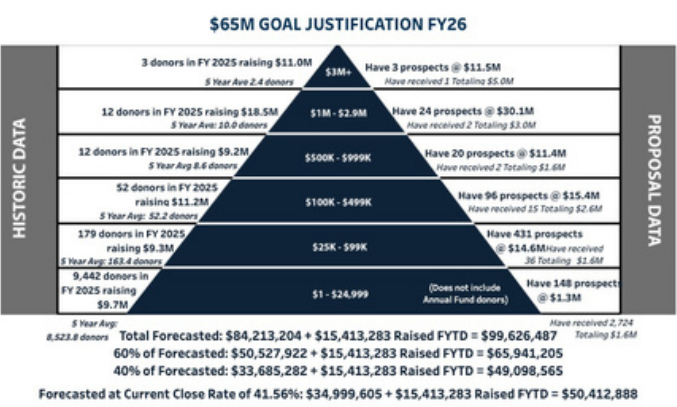
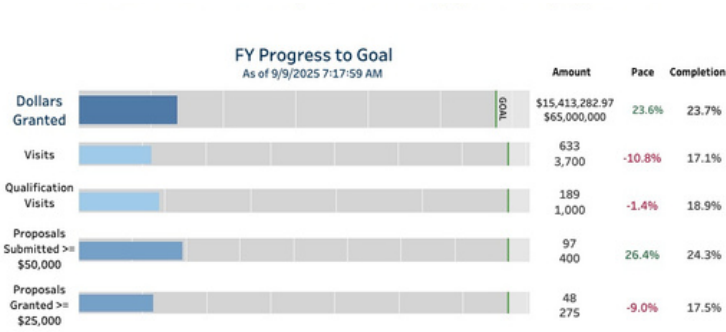
University Honors Program – The University Honors Program rebuilt its first-year application in ServiceNow and has partnered with the admissions office to share data, integrate USU's Involvement Scholarship questions, and expand institutional applicant pools. The primary goal is to increase the number of highly motivated and engaged students who apply and enroll at USU, leading to increased institutional student success rates.

Empowering Teaching Excellence – The 12th annual Empowering Teaching Excellence (ETE) Conference was a major success, reinforcing USU's leadership in innovative teaching. With 485 registrants and 61 unique sessions, the conference strengthened our teaching culture by providing faculty with practical strategies to enhance student achievement. The event also recognized the dedication of our educators by awarding 80 Teaching Scholar and Master Teacher Certificates, celebrating a commitment to sustained professional growth and excellence in teaching.



Advancement & USU Foundation

USU Elevated Through Philanthropy & Engagement



RECENT EVENTS

USU Foundation Board Updates – Sylvia Jones, a marketing relationship manager with Wells Fargo in Macon, Georgia, was named chair of the Foundation Board. Kent Bracken, an information technology project management consultant in Evanston, Illinois, was named vice chair.



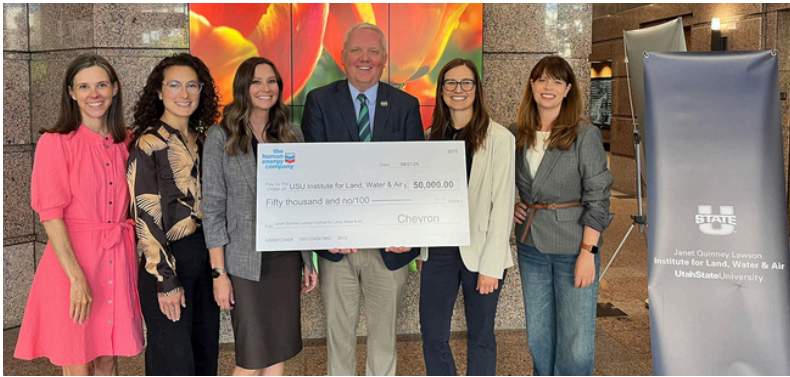
Additionally, within the last year, Katie Hansen, Eric Laub, Heather Mason and Bret Wursten joined the Foundation Board as new members.

[Read about the changes here.](#)

AGGIE IMPACT STORIES

[Alan and Jeanne Hall Fund Choral Music Endowment Honoring Craig Jessop at USU](#)

[Proud Partners in Utah's Future: Chevron and USU's Janet Quinney Lawson Institute for Land, Water & Air](#)



Aggie Athletics

Athletics – Interim Athletics Director Sandy Barbour and Interim Deputy Athletics Director Clare Conaty continue to guide the department through this time of transition while also serving as advisors for intercollegiate athletics at Huron.

Cross Country – The Utah State men's and women's cross country teams each placed second at the Utah State Alumni Challenge held at the Steve and Dona Reeder Cross Country Course on August 30. Junior Natalie Swain was named Mountain West Women's Athlete of the Week for her performance, finishing first among collegiate runners and second overall in the women's 5K.

Football – The Bronco Mendenhall era opened with a 28-16 victory over UTEP on Saturday, August 30, elevating USU to 16-1 in the last 17 home openers. Junior kicker Tanner Rinker was named Old Trapper Mountain West Special Teams Player of the Week for his performance during the game, and graduate quarterback Bryson Barnes was also named Brulsworth Trophy Walk-On of the Week, finishing 19-of-28 for 233 yards and one touchdown, adding 29 rushing yards and 15 carries with one touchdown.



On August 14, senior wide receiver Kahuna Davis was named to the 2025 Polynesian College Football Player of the Year Watch List.

Soccer – The team earned a 1-0 victory in its August 14 season opener over future Pac-12 rival Washington State with a 77th-minute goal from sophomore Austin Miller. Graduate goalkeeper Taylor Rath was named Mountain West Defensive Player of the Week on August 18 for her performance against Washington State.

The Aggies set an attendance record of 2,027 on Thursday, August 28 against Utah. The match ended in a 1-1 draw.

Volleyball – Utah State achieved a 3-0 sweep over Hawaii at the Rainbow Wahine Volleyball Classic, earning their first victory of the 2025 campaign. Senior middle blocker Tierney Barlow led with a .385 hitting percentage and at least 13 kills in all three matches.

Barlow was named Mountain West Offensive Player of the Week on September 2 and was named to the All-Mountain West Preseason Team alongside sophomore setter Kaylie Kofe.

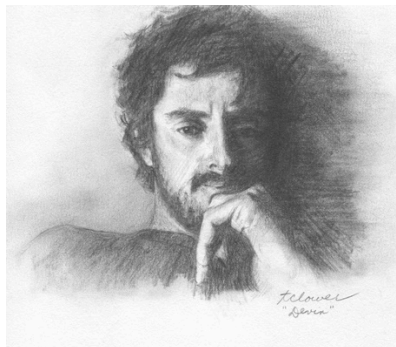
USU was picked to finish first in the Mountain West Preseason Coaches' Poll.



USU Extension

Improving the Lives of Individuals, Families & Communities in Utah

In August, the **USU Equine Experience** provided a **Valor Detachment** that performed a grand entry at the Porcupine Roundup Rodeo in Paradise, Utah. The mounted drill team is made up of veterans and active-duty military personnel who ride to bring awareness to veteran suicide. The team always rides with one riderless horse to honor veterans who have died by suicide. This ride also included a riderless horse to honor the fallen Tremonton-Garland officers.



In recognition of International Overdose Awareness Day, the **Nora Eccles Harrison Museum of Art** and USU Extension hosted **A Light to Remember**. The event featured the opening reception of *Faces of Drug Addiction: Real People, Real Stories*, a new art exhibition created by the [Into Light Project](#) featuring original portraits and stories of people in Utah who have died from overdose or related causes.

USU Extension recently collaborated with the Utah Department of Agriculture and Food to award more than **\$566,000 to boost Utah food systems** through the **Business Builder Award Program**. The program is part of a regional effort to build capacity for food producers and processors by supporting infrastructure, innovation, and market access. Twelve food and farm businesses across the state were recipients of the award.



The Utah Women & Leadership Project, affiliated with USU Extension, recently published [new research](#) showing that **Utah has the nation's widest gender pay gap**, with women earning 27% less than men for full-time work and losing an average of \$755,000 over the course of their careers. The report examines the unique economic, cultural, and structural factors that contribute to Utah's especially wide gap.

USU Extension horticulturist **Katie Wagner** recently discussed why **fall leaf colors will likely not be as vibrant this year** on [KSL Channel 5](#). Wagner attributed the less-vibrant colors primarily to low moisture levels throughout the state, with many trees already exhibiting “marginal leaf burn”—a result of the leaf being unable to fully hydrate the entire blade. Though the colors may not be as bright, Wagner encouraged Utahns to go enjoy them.



Going back to school can present a unique set of challenges, particularly for those who live in stepfamilies. **Brian Higginbotham**, USU Extension associate vice president and professor, appeared on Fox 13, sharing **tips to smooth the transition for stepfamilies**.

The National Conservation Foundation recently announced that **Jeff Barnes**, volunteer for the Utah Envirothon, a youth program affiliated with USU Extension 4-H, has been **inducted into the NCF-Envirothon Hall of Fame**. The award recognizes his decades of service, leadership, and dedication to environmental education.



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:

Monument Valley Academic Building (figure 1) – The new facility on the USU Monument Valley Campus is comprised of over 10,000 square feet of new academic space, providing nursing/health profession, computer, welding, and general classrooms, as well as offices, conference rooms, and student service areas. Completion scheduled for Winter 2025.

College of Veterinary Medicine Building (figure 2) – This state-of-the-art building will serve as a central hub for up to 320 veterinary students, faculty, and researchers, providing a comprehensive environment for learning, research, and practical training in veterinary medicine. Completion scheduled for Summer 2026.

Administrative Services Building – This new addition to the existing IT Services building will provide space for Human Resources and allow for the relocation of the Environmental Health & Safety Department. Completion scheduled for Fall 2026.



Figure 1. Monument Valley Academic Building



Figure 2. College of Veterinary Medicine Building

The Skyroom Restaurant – Following a complete remodel, the Skyroom is reopening this month, marking a new era for the restaurant originally established in 1953. The new open-kitchen concept will serve a diverse menu with options ranging from salmon fillet and New York steak to wood-fired artisan pizzas. The famous all-you-care-to-eat salad and soup bar and the Aggie nut roll will also make a return. Guests can enjoy their meal from unique seating options, including the open mountain views of the veranda (figure 3) or the 12-seat community "chef's table" directly in front of the culinary line (figure 4).



Figure 3. Veranda, the Skyroom Restaurant



Figure 4. Culinary line, the Skyroom Restaurant

Government & External Affairs



Governor Cox/Lieutenant Governor Henderson Executive Retreat – USU was honored to host Governor Cox and Lieutenant Governor Deidre Henderson and their executive staff for their annual summer retreat. Many attendees brought their families to enjoy various activities, including a dinner at the American West Heritage Center, mountain biking, hiking, water sports, and a musical performance featuring members of the Summer Lyric Repertory Company.



Congressional Staffers Visit – USU hosted staffers from the offices of our House representatives during their August recess. Attendees enjoyed a diverse lineup of tours and meetings with programs around campus.



USHE Legal Retreat – VP Wiser met with government affairs specialists from degree-granting institutions around the state to discuss the lay of the legislative land at the annual retreat.



Gardner Building Ceremony – The Office of Government & External Affairs coordinated official visits from Congressman Blake Moore, Attorney General Derek Brown, and other state and local elected officials at the Gardner Building ribbon cutting.



Institute of Government & Politics – The IOGP has wrapped up for the summer. This year, ten interns participated in the D.C. area.



University Marketing & Communications

Utah State Today Highlights

USU Chemists Detail New Approach to Synthetic Catalysis for Carbon-Nitrogen Bond Formation	8, 015 views
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In the Media & Faculty Expertise

Wildland fire science expert talks about wildfire causes and this year's fire season	Yahoo!
Feeding hungry students: Why a Utah State Professor is giving away a cash prize to ease campus food insecurity	Deseret News
As the West gets hotter and drier, new research says certain types of logging may fuel more destructive fires	Salt Lake Tribune



Institutional News

NWCCU Reaffirms USU's 7 -Year Accreditation, Gives Commendations
USU Cuts Ribbon on New Carolyn & Kem Gardner Learning & Leadership Building
University Statement on TPUSA Student Club Event



View on TikTok

Social Media –

- 1.3M views on posts across all platforms in the last four weeks
- @usuaggielife had the highest engagement rate of all Utah universities on Instagram

Institutional Advertising/Marketing –

- USU Impact Report Campaign: 277,898 impressions, 3,123 clicks
- Aggie Impact ads began running on KUTV's high school football game of the week and Friday Night Lights

Trademark and Licensing – The Trademark Licensing Office was recognized by the Rocky Mountain Veteran's Center at the Salute to Heroes event for its collaboration with Operation Hat Trick

Recruitment Marketing –

- Created nine *Your Future, Your Way* videos featuring student success profiles at nine different campuses
- Completed Salesforce marketing journeys and communications plan for Logan, Eastern, and Blanding
- Completed new student guides and parent handbooks for Logan, Eastern, Blanding, and regional campuses.
- Completed comprehensive recruitment toolkits for each recruiter throughout the system.

Operational Management

Navigating the Future: Operational Modernization in Action

HUMAN RESOURCES

Manager Portal – On September 1, HR launched a new Manager Portal on ServiceNow to help supervisors see more employee data at a glance. The portal also indicates when performance check ins, compliance training, and telework agreements need to be completed and/or updated.

Employee Appreciation Day – Preparations are ongoing for USU's annual employee appreciation day, scheduled for October 3. Employees can enjoy lunch and various activities at Maverick Stadium in Logan or various statewide locations. For more information, visit <https://www.usu.edu/hr/ead>.

Improving USU Employment – HR is strengthening efforts to support lower wage earners by establishing a salary floor for new hires in lower salary grades and communicating expectations to management at USU. Additionally, they are preparing RFPs on various benefit plans and seeking improved efficiencies and services for all benefited employees.

KEY MILESTONES & UPDATES

OneUSU CRM – Phase one of the OneUSU CRM initiative is live, marking a major milestone in modernizing student recruitment and engagement. The first phase introduces two core tools:

- **Salesforce Marketing Cloud** delivers targeted, branded undergraduate enrollment communications
- **Blackthorn Events** is a separate platform integrated with Salesforce that streamlines recruitment event registration and tracking

Together, these systems allow Recruitment and Admissions to provide faster, more personalized outreach, simplified event sign-ups, and consistent Aggie branding across all touchpoints.

Meanwhile, USU's IT team is building integrations with Banner to ensure data accuracy and prepare for phase two, which will launch in January 2026. This next phase will include a learner portal where prospective students can apply, track their status, receive decisions, and respond to offers, creating a more modern application experience.

Looking ahead, OneUSU CRM will expand beyond Recruitment and Admissions to include departments such as Orientation, Advising, Financial Aid, and University Advancement, creating a fully connected campus ecosystem.

To follow the initiative's progress and view the full roadmap, visit crm.usu.edu.



Research Enterprise

Research Security – USU has launched a research security program to strengthen protections around federally funded research and comply with recent federal mandates, including NSPM-33 (2021) and the CHIPS & Science Act (2022). While there have been no known incidents of foreign interference at USU, these measures are designed to safeguard research data and intellectual property while maintaining the international collaborations essential to USU's research enterprise. The new program emphasizes research security training, awareness of federal restrictions on certain foreign talent recruitment programs, and enhanced IT safeguards.

All USU personnel involved in federally sponsored research should review the Research Security Program [webpage](#) to identify, depending on the source of their funding, the requirements that may apply to them. Notably, a number of federal agencies—NSF, DOE, NIH, and USDA—have recently released requirements for their awardees to complete [research security training](#). The DOE requirement is effective as of May 2025, and the NSF and NIH requirements will become effective in October 2025. The Office of Research is still determining the effective date of USDA's training requirement.

The Office of Research will continue to update its webpage as federal agencies announce new research security requirements. Contact compliance@usu.edu with any questions.



Beneath the Surface

Friday, February 6, 2026

Loveland Living Planet Aquarium
12033 Lone Peak Pkwy
Draper, Utah 84020

Join Utah State University in Celebrating 50 Years of Undergraduate Research

Come experience a magical night at the Loveland Living Planet Aquarium, as University Advancement and the Office of Research take you beneath the surface to showcase amazing discoveries led by our student researchers. From the arts and sciences, to engineering and business, explore fun and interactive research activities while enjoying dinner in beautiful surroundings.



Research
UtahStateUniversity



For event questions, contact Joey McKnight at stewardship@usu.edu or 435-797-8275.

Statewide Enterprise

Actively Exploring New Avenues to Enhance Services & Contribute to the University's Mission

CAMPUS & COMMUNITY HIGHLIGHTS

- Drawing on community feedback, USU Moab recently launched a new round of non-credit **facilities maintenance courses**, offering 7-week sessions in basic construction, plumbing, electrical, and HVAC. Participants can choose individual topics or complete the full series.
- USU Moab kicked off their **Paint the Town Blue** campaign to raise community visibility. A \$1,000 scholarship will be awarded to a student in the name of the business that best showcases their Aggie spirit.
- USU Brigham held an open event this month for all those grieving in their community. The event, **Coming Together in the Face of Loss**, invited participants to join one another in learning more about the effects of trauma.
- USU Uintah Basin hosted its **Annual Fall Carnival and BBQ** in August, welcoming over 180 students and family members.
- **Central Cove Preschool** held an open house highlighting its **partnership with USU** to expand early childhood education in Uintah County. USU Uintah Basin has faculty offices and an adult education classroom at the site and will contribute academic leadership and faculty expertise through the involvement of Shirlene Law and Dr. Lisa Boyce.
- **Chevron has gifted \$100,000** to USU Delta to support higher education and workforce training scholarships aligning with the development of the nearby ACES clean energy facility.

FACULTY, RESEARCH & ACADEMIC PROGRAMS

- This fall, **USU Moab revamped its CNA course** into two 7-week hybrid sessions, combining online lectures with on-campus labs that will enhance accessibility for local students.
- Seven students completed **USU Tooele's new Connections course**.
- This summer, seven USU Uintah Basin students **studied abroad at Oxford University**, exploring the British Empire's legacy in Asia in a course led by professors Clayton Brown and Dr. Ravi Gupta.
- **Dr. Tim Riesen** (USU Salt Lake) is leading a \$750,000 federal **study on customized employment** for individuals with significant support needs. Alongside Dr. Audrey Juhasz, he and the Center for Employment & Inclusion will define CE practices and compare outcomes with traditional supported employment.

STUDENT SUCCESS & ENGAGEMENT

- Five students completed all three classes of USU Tooele's **summer criminal justice program**. Four of the five students went on to enroll at USU (three in Tooele, one in Logan).
- USU's **2025 re-enrollment campaign** engaged with over 800 inactive students with 80+ credits, leading to 38 students returning (13 in Summer, 23 in Fall). The [Ivory Foundation Completion Scholarship](#) awarded more than \$151,000 to 36 of these students. The other two students were able to reapply to USU and immediately apply for graduation.





MEMORANDUM

To: USU Board of Trustees

Date: September 22, 2025

Re: Supplement for Motion to Approve Creation of the ASPIRE Nonprofit

SUMMARY OF EXECUTIVE COMMITTEE DISCUSSION

The Executive Committee of the USU Board of Trustees met on September 22, 2025, to review the Motion to Approve Creation of the ASPIRE Nonprofit. After reviewing the materials and discussing key items, the Executive Committee unanimously approved the decision to pass the motion on to the full Board meeting and recommends the motion for positive consideration.

A summary of key points discussed at the Executive Committee meeting are highlighted below:

- What will action of the Board of Trustees accomplish?
 - ASPIRE will gain greater operational agility and autonomy for its beyond research role while maintaining strong academic partnership with USU and partner universities for research.
- What is the proposed legal structure and why is that structure recommended?
 - USU is proposing to restructure ASPIRE into a nonprofit corporation as a wholly owned and controlled subsidiary of USU. This is based on the ownership, revenue, and activities outlined for ASPIRE and USU's experience with similar structures, such as SDL.
- Why was the proposed organization structure for ASPIRE decided to be a wholly owned subsidiary?
 - A wholly owned subsidiary structure ensures alignment with USU's mission, governance, and compliance standards. It allows ASPIRE operational flexibility while maintaining oversight and minimizing risk to USU.
- What is the revenue growth model for ASPIRE under the new structure?
 - ASPIRE has raised over \$192 million in announced funding to date and has grown to an annual operating budget in 2025 of \$25.7 million. All existing awards will stay at USU with subawards to ASPIRE for work performed by ASPIRE.
 - Without the new structure, it is expected that USU will have to scale back on beyond research efforts and revenue will significantly decrease. With the new structure, it is expected that existing levels of revenue will be sustained and that new revenue sources will support a targeted growth rate of 10%.
- Who will own intellectual property (IP) and how will it be managed?
 - USU will own IP developed at USU, ASPIRE will own IP developed at APSIRE, and USU and ASPIRE will jointly own IP developed together. In addition, the same relationship will exist for ASPIRE's additional partner universities.
 - The universities will continue to perform the core research mission for ASPIRE, and new IP development from research results is expected at USU and the partner universities.
 - Commercialization of IP developed by USU, the other partner universities, and ASPIRE will be handed through IP management plans and agreements and may



lead to licensing technologies to industry partners or creation of new spin-out companies from the partnership. Any new legal structures for for-profit ventures will be created as needed.

- Do the partner universities support the new structure?
 - Yes, the Deans' Council for ASPIRE with representation from the partner universities has been discussing this transition for the past two years. The partners are supportive and plan to have a long-term relationship with ASPIRE and USU.
- Would faculty tenure be affected by participating in ASPIRE?
 - Faculty tenure is not directly impacted. Faculty will continue core research under university governance, while ASPIRE handles beyond-research activities. Faculty may benefit from increased research funding and collaboration opportunities from large development and demonstration projects through ASPIRE.
 - Faculty who participate with ASPIRE will not receive extra compensation from ASPIRE, but would continue to be paid from USU. Participation in ASPIRE may provide opportunities to fund further faculty research activities and summer salary.
- How will ASPIRE's growth impact USU?
 - ASPIRE's growth will enhance USU's research productivity, student learning experiences, and national reputation. It will also attract new funding and industry partnerships, reinforcing USU's leadership in electrified transportation.



MEMORANDUM

To: USU Board of Trustees Executive Committee
Date: September 10, 2025
Re: Motion to Approve Creation of the ASPIRE Nonprofit

EXECUTIVE SUMMARY

ASPIRE is a multi-university research center headquartered at USU with a focus on intelligent electrified transportation systems and their role in the electric grid of the future. It was founded in 2020 as an NSF Engineering Research Center and has grown to over 400 participants across 10 universities with more than 70 industry and innovation partners. ASPIRE has raised \$192 million since 2020, employs more than 60 staff, and has leading roles in public-private partnership projects deploying advanced technologies across five states.

ASPIRE has accomplished its initial mission and continued to grow in impact, with growth in demand for its efforts, capabilities and services well beyond its initial role as a university engineering research center. This growth has led USU and the ASPIRE team to reconsider the best structure to sustain its growth trajectory and its impact for USU, Utah and the nation. Therefore, USU is proposing to restructure ASPIRE into a nonprofit corporation as a wholly owned and controlled subsidiary of USU to operate (i) as a supporting organization to USU (within the meaning of IRC § 509(a)(3)), and (ii) as a governmental entity as both a public corporation and instrumentality of USU.

With this restructure, USU and ASPIRE's partner universities will continue to perform the core research mission of ASPIRE and the new nonprofit corporation will focus on the "beyond research" efforts of ASPIRE including technology development, demonstration and deployment. The new nonprofit will be ASPIRE's corporate headquarters and the front door of ASPIRE. The nonprofit will support its continued presence at USU and ASPIRE's partner universities, e.g., as ASPIRE@USU, ASPIRE@Purdue, etc., through cooperative research agreements that engage with faculty campus directors and ASPIRE Student Association (ASA) clubs at each campus. This change will enable greater operational agility, expanded partnerships, and diversified funding streams while maintaining strong academic partnership and collaboration.

The proposed transition in corporate structure leverages existing revenue sources and a broad base of growing revenue from other federal agencies, industry partners, and donations. The restructure requires no new financial resources from USU and risks to USU and ASPIRE are minimal and managed through detailed operating agreements and Board of Directors oversight. Through this proposed transition, both USU and the College of Engineering will continue to serve as core partners and beneficiaries, ensuring that ASPIRE's growth strengthens the university's academic mission and industry leadership.

Under the proposed plan, USU would provide the same level of services to ASPIRE related efforts as it has already committed to for the duration of ASPIRE's NSF grant through 2030 with annual review to consider any changes. USU would retain ownership of ASPIRE Headquarter Building (EVR Facility) throughout the period of the bond on the facility and continue to make



bond payments through 2030 according to the existing payment distribution and schedule at USU (where existing ASPIRE related grants cover the VPR and College commitments). USU would transfer equipment associated with the EVR building and operations at ASPIRE to the ASPIRE nonprofit, where ASPIRE would be responsible for all operation, maintenance, safety, and management of the equipment at the building.

The urgency to move forward with the new corporate structure is three-fold: (1) Need: ASPIRE is at a critical junction where the decision will determine its near-term path, to sustain and chart future growth or to scale back. (2) Opportunity: A portion of ASPIRE's funding includes a unique and highly competitive \$50 million 10-year grant from NSF that serves as a flexible start-up fund to launch it into a large self-sufficient program with broad societal impact. As ASPIRE just entered its sixth year this month, it has the opportunity to leverage the next five years to complete the transition and solidify its nonprofit structure as a robust and self-sufficient program. ASPIRE needs to show progress on this path at its annual review meeting with NSF in November 2025. (3) Momentum: ASPIRE's leadership team, industry leaders from its advisory boards, and USU leadership have been developing this transition plan into a nonprofit structure for the past two years leading up to this critical junction. The team has tremendous momentum and stakeholder support at this time to begin a successful transition. Delaying the transition start would add significant risk in lost momentum and NSF support.

The benefits to USU of moving forward with the new corporate structure for ASPIRE include growth in research productivity and funding through joint research projects with ASPIRE, new experiential learning opportunities with ASPIRE for students across the state, and strengthened statewide and national reputation through the transformational impacts in the transportation and electric utility industries of ASPIRE in partnership with USU.

The primary threats of not moving forward include lost momentum while ASPIRE scales back on larger staff-led "beyond research" programs to focus on faculty research while competitors fill the gaps that ASPIRE lacks the capacity to support, ASPIRE's university consortium weakens and partners splinter and form their own variants of ASPIRE as the NSF program sunsets, and state funding diminishes as ASPIRE's reputation and impact reduce.

ASPIRE has engaged USU legal counsel to evaluate the legal and regulatory complexities of the transition and to draft the necessary documents in alignment with state law, federal tax requirements, and university compliance policies. Ongoing discussions with university leadership have ensured that the proposed structure supports the University's mission and governance expectations, while also defining reciprocal services and oversight.

In weighing the benefit and limited and managed risk, it is recommended that the Board approve the creation of the separate nonprofit corporation, approve the appointment of Board members to the corporation, approve the USU-ASPIRE Operating Relationship Agreement, and approve the transfer of USU-owned equipment to ASPIRE.



SUMMARY OF ASPIRE RESTRUCTURING

This memo details the motivation for restructuring, the intended activities of the new structure as a professional-led and university partnered corporation, and the restructuring timeline. It also provides a summary assessment of key risks, threats, opportunities and costs associated with creating and sustaining the new corporate structure. The necessary agreements and legal documents required to proceed with the creation of the new nonprofit corporation are outlined and summarized and attached.

This summary provides an outline of (1) impetus for restructuring and activities in the new structure, (2) the process and timeline for restructuring, (3) assessment of threats, opportunities, ASPIRE responses, and risks to USU (4) costs, (5) agreements and documents required for the restructuring, and (6) motion to approve.

1. Impetus and activities in the new structure

Impetus:

Over the past ten years, USU and its university partners have developed ASPIRE into an internationally recognized program that tackles urgent and complex challenges in the practical and viable transition to electrified transportation systems. The impetus for restructuring stems from ASPIRE's growth in scale, scope, and external engagement. ASPIRE is recognized as one of the largest and most successful NSF Engineering Research Centers and was highlighted in NSF's FY2026 budget request to congress. The Center is best known for its advanced charging solutions, including wireless charging and electric roads, intelligent grid controls, and systems level electrification modeling and planning tools.

These efforts are vital to addressing air quality and economic development in Utah, partner states, and across the nation – resulting in ASPIRE's influence contributing to significant proposal submissions and over \$200 million in awards for the state of Utah to carry out electrification related initiatives across state agencies and organizations. ASPIRE's vision is to continue to grow as trusted guide and resource for society on this important path forward. This role includes being:

- (1) the champion for technology innovation and cross-industry transformations,
- (2) a “one-stop-shop” public service provider to break down barriers for technology advancement, and
- (3) a catalyst for workforce development.

ASPIRE operates as a collaborative program in close partnership with core universities, industry partners, stakeholders and broader communities.

ASPIRE's Mission and Vision reflect its views on the important role that energy, electrification and e-mobility will play on bringing a better and brighter future for generations to come. ASPIRE's work is grounded in research, yet there is the recognition that research alone is not enough. To truly accelerate change, ASPIRE has expanded its beyond research activities through experiential learning opportunities for students, active engagement with communities, workforce development initiatives, and a broad base of services related to electrification and development of public-private-partnership (P3) technology pilots and deployments. In light of these expanded initiatives and the center's continued growth (currently comprised of 450 faculty, students, and



staff), ASPIRE has recognized that it has grown beyond its roots and cannot sustain its growth trajectory under its existing financial and corporate structure.

ASPIRE seeks to restructure into a new corporate entity as a university owned and controlled subsidiary, nonprofit corporation with USU as its sole member and operating in compliance with all University policies and applicable state and federal requirements (reference Articles of Incorporation). Governance will be exercised by a Board of Directors in accordance with the Bylaws, while the USU-ASPIRE relationship will be formally defined through the Operating Relationship Agreement.

By strategically aligning the final five years of NSF funding and with the momentum of Utah's electrification program (S.B. 125) designating ASPIRE as the lead research center for strategic planning for the state's electrified transportation, ASPIRE is positioned to demonstrate immediate value, expand its partnerships with industry and government, and continue to secure the diversified funding base needed for long-term growth and impact. Transitioning from a university-led center to a professional, staff-led corporation that leverages university faculty expertise creates a unique opportunity to respond to the rapidly growing field of electrified transportation and provides numerous benefits including:

- Stakeholders from industry, government, and community will see growth in ASPIRE's ability to respond as a one-stop-shop in a timely and professional manner to their needs, ranging from new technology solutions to engineering and software services, market and policy advocacy, and workforce development.
- Universities will benefit in reputation, draw leading faculty and students, increase research funding, and minimize risk and administrative burden from the beyond research side of ASPIRE, while students will gain unmatched experiential learning opportunities.
- Utah's economy will be strengthened through ASPIRE's growth and industry investment, creating new jobs and solidify the state (and USU's) position as the nation's epicenter for energy and electrification innovation.

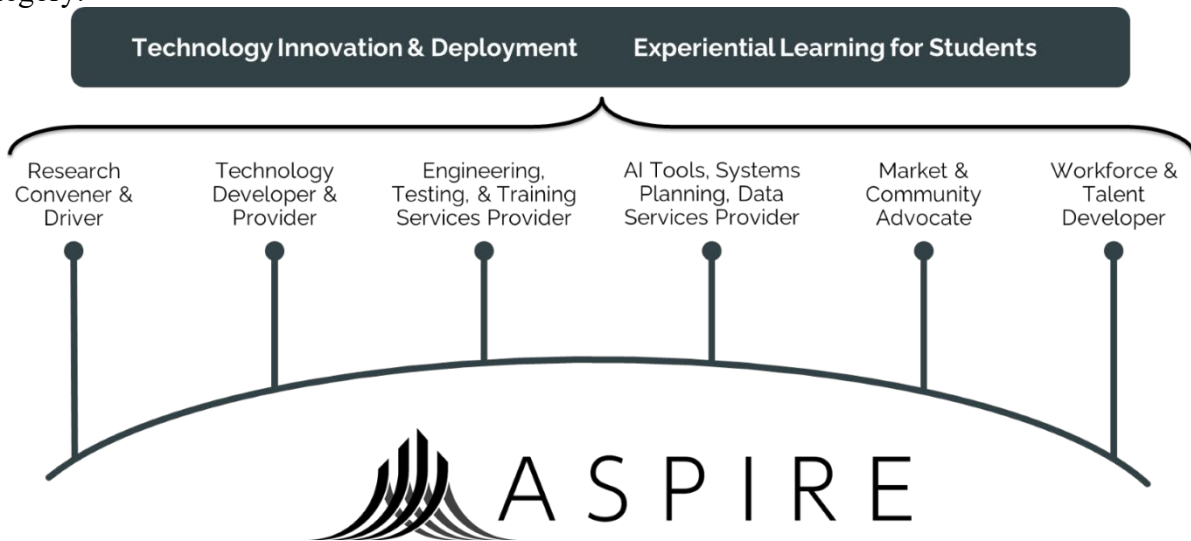
Activities in the new structure

The new structure is intended to be the front door and face of ASPIRE as a one-stop shop for stakeholders. ASPIRE will maintain cooperative agreements with university partners, including an Operating Relationship Agreement with USU. The following test will be used when considering how and where funding flows from revenue sources and which activities are performed by ASPIRE or its university partners:

- (1) University: efforts are best supported by faculty and student researchers, research labs, or academic training programs; USU and ASPIRE's university partners will continue to perform the core research mission of ASPIRE.
- (2) ASPIRE: efforts are best supported by professional staff, systems testbeds and public-private-partnership (P3) pilots, and professional training programs; new nonprofit corporation perform the "beyond research" efforts of ASPIRE including technology development, demonstration and deployment.

In considering its business model and activities, ASPIRE held a series of virtual and in-person leadership workshops over the past two years in partnership with its Executive Advisory Board and facilitated by professional consultants. Through these efforts, the leadership team worked through the who, what and why of ASPIRE today, over the next five years, and into the next decade and beyond. The team evaluated the market gaps and needs and unique strengths of ASPIRE, reviewed ASPIRE's finances, and considered financial models. The recommendation was to form a non-profit with cooperative agreements with partner universities and stakeholders to cover the broad base of services needed to accomplish the mission under a single brand. It was also anticipated that over time the non-profit would support partners in creation of multiple more narrowly focused for-profit entities that maintain ongoing relationships with ASPIRE.

The team lumped the targeted activities for the new structure into seven categories as shown in the feather chart below. ASPIRE has existing activities and identified paths for growth in each category.



Research Convener & Driver: In this role, ASPIRE serves as the conduit to bring research funding to its university partners and technology solutions to its industry partners. ASPIRE staff work closely with stakeholders and researchers to chart technology roadmaps, define grand challenges, influence government policy, and raise research funding to fill identified gaps. Activities include stakeholder engagement, university seminars, partner workshops, research conferences, technology showcases, and proposal and project management.

Technology Developer & Provider: In this role, ASPIRE serves to support translation of technology to practice. This service offers its university partners a professional program, already linked to the faculty and their technologies, with engineering staff and systems level testbeds and P3 pilots to scale bench level solutions to full scale demonstration. This technology incubator service also hosts researchers who need trained staff and facilities to scale their technology and connect with stakeholders. Similarly, ASPIRE offers this service to industry partners who are looking for support to further develop their technologies. In this category, ASPIRE is currently supporting multiple P3 pilots to translate technologies for university partners USU and Purdue



and industry partners Electreon, ENRX, and Kenworth.

Engineering, Testing, & Training Services Provider: In this role, ASPIRE offers its unique staff expertise and lab facilities as an engineering, testing, and training service center for industry. Activities in this category differ from technology development above in that ASPIRE is contracted for specific engineering related support rather than partnering for technology translation. These services are intended to catalyze industry growth and encourage competition by making the facilities and the wealth of knowledge built up by the ASPIRE team available to industry, thus lowering barriers to entry into the market.

Examples of existing activities in this area include aspects of the P3 pilots listed above, support of SAE standards development by hosting industry partners at ASPIRE's EVR facility for performance and emissions testing, providing consulting services and training on engineering knowledge from ASPIRE's deployed systems, and building, characterizing, and/or evaluating engineering prototypes for industry. ASPIRE has 5 existing contracts and 7 pending with industry in this area, with significant growth expected.

AI Tools, Systems Planning, Data Services Provider: This role is similar to the one above but on the software and planning side of electrification. ASPIRE has built up extensive capability in AI-based software modeling, visualization, systems analysis and planning, and data services handling for electric grid and transportation systems. Examples of existing activities in this area include ASPIRE's lead role in the statewide Utah Intelligent Electrified Transportation planning program, systems reliability and operations dashboard development for the Utah Transit Authority, and deployment and operation of pilot projects with Rocky Mountain Power. The software and planning area for ASPIRE has proven to be among the fastest growing with significant potential for revenue and brand building.

Market & Community Advocate: In this role, ASPIRE carries the banner for innovation and advanced technology and serves as the champion to drive society toward solutions that address stakeholder needs. Examples of existing activities expected to expand include the biennial international CERV conference hosted by ASPIRE, federal, state, and local agency committee meetings, congressional briefings, industry conferences and events, community engagement programs and partnerships with community organizations, surveys, listening sessions, and focus group discussions, newsletters, press releases, social media and web development.

Workforce & Talent Developer: In this role, ASPIRE serves as the champion to ensure that workforce needs are recognized and met across the industries impacted by transformations in electrification, and it fills gaps between secondary education, 2-year and technical colleges, university programs and industry. Examples of existing activities and pending contracts include roadmap development of workforce and training needs based on market adoption models of new technologies, consortium building and coordination among state education partners to address workforce needs, specialized curriculum development and courses for industry partners, pre-apprenticeship programs and mobile training units to bridge high schools to trade schools and colleges, and community engagement and outreach programs to support pathways into state education programs.



2. Process and timeline for restructuring ASPIRE

Over the past year, ASPIRE leadership and its stakeholders have explored the viability and practicality of transitioning ASPIRE - an already major, ongoing program, to a professional staff-led program that leverages university faculty expertise. After careful consideration, legal counsel, and strategic advice from university and industry partners, ASPIRE initiated the formal process of restructuring.

Process:

- Exploration, Planning, Structuring, and Legal Formation
 - Determine feasibility of restructuring
 - University and legal alignment of new corporate entity
 - Develop business plan
 - Develop operational transition plan
 - Plan and establish financial infrastructure
- Obtain Support and Proper Approvals
 - USU Administration
 - USU Board of Trustees
 - University Consortium
- Establish the Nonprofit Corporation
 - Prepare documents and secure Board of Directors (governance) and Incorporators
 - File Articles of Incorporation with the State of Utah
 - Apply for Employer Identification Number (EIN)
 - File for 501(c)(3) status with the IRS
- Transition Programs and Staff
 - Use the next five years (NSF ERC sunset) to transition existing programs while pursuing new revenue sources that sustain ASPIRE on its growth trajectory.
 - Existing staff will be transitioned incrementally, over time as appropriate to the new corporate structure.
 - It is anticipated that in the first 6 months, approximately six (6) new full-time employees will be hired through the new structure, and existing employees would likely transition to the new structure in FY27.
- Full Implementation and Growth
 - Strategic growth plan for and implementation of beyond research initiatives.
 - Diversify funding streams (philanthropy, grants, industry partnerships, fee-based services).

Performance and accountability evaluations in tandem with USU and nonprofit board audits, reviews and reports.

Timeline:

October 15, 2025: If approved by the Board of Trustees, ASPIRE will initiate the state (Articles of Incorporation) and IRS (Form 1023 for 501(c)(3)) filings to establish the nonprofit corporation.

- Utah Incorporation Review – 2-14 days after filing
- EIN – 1 day after applying
- IRS Form 1023 Review – 6-8 months (estimated) after filing



- Determination Letter (status granted) - 8 months (estimated) after filing

November 2025 – April 2026: Incremental Transition

- Coordinate HR systems and protocol with USU.
- Hiring of new full-time staff to assist with initial transition and expansion of beyond research programs and building revenue streams.
- Establish banking and accounting, develop financial controls, and prepare for university/board audits.
- Finalize agreements with the university for transferring and sharing resources.
- Prepare branding and marketing for launching communication and fundraising campaigns.
- Translate the business plan into a 12–18 month action plan with milestones.
- Prepare and negotiate commitments from university partners; prepare and sign cooperative agreements with each university.
- Reengage and plan expansion of student programs; strategize implementation of workforce development initiatives and offerings.

July 1, 2026: Nonprofit status and official launch

- Officially launch the nonprofit structure.
- Begin to transition existing employees and hiring of new employees as needed.
- Secure Utah State Tax Identification Numbers, Accounts, and Exemptions.
- Convene the board, adopt bylaws formally, establish committees, and document roles/responsibilities.
- Grant transition - transfer existing grants/contracts from USU (upon funder approval); begin pursuing grants under the nonprofit's name.
- Maintain strategic direction, expand beyond research and pilot programs, procure sponsored projects and service contracts, implement metrics and evaluation, and align on long-term vision, fundraising strategy, and growth trajectory.

3. Threats, Opportunities, ASPIRE Response, and USU Risk of restructuring

The following section outlines key strategic, operational, and programmatic considerations associated with ASPIRE's transition to a wholly owned and controlled nonprofit of USU. Each identified threat includes potential opportunities, ASPIRE's planned response, and residual risks to USU. This framework is intended to provide a clear, high-level view of challenges and mitigation strategies, supporting informed decision-making and oversight of ASPIRE's growth and long-term sustainability.

- **Threat:** *Financial sustainability and revenue diversification* - ASPIRE could face instability if unable to sustain sufficient revenue and on-going operational capital.
 - **Opportunity:** Transitioning to a nonprofit model enables the pursuit of new revenue sources, e.g. federal, state, philanthropic, and industry funding opportunities not currently available to the current university-led center.
 - **ASPIRE Response:** Continue to grow beyond research brand as a trusted industry-wide guide and consortium lead, becoming a staple in the sector. Scale revenue streams to \$50M+ per year within 10 years through diversified streams



- including contract services, state and federal awards, training programs, donations, and consortium services (industry and individual membership fees, conference fees, and informational products). Launch a fundraising campaign with USU Advancement and other university partners.
- **Risk to USU:** Very low potential risk as funding through transition period is already secured and will meet overhead and operational costs of ASPIRE and USU services. Governance of ASPIRE will review financial forecasts regularly with ASPIRE leadership and Board of Directors and an annual financial evaluation of USU provided services will be completed.
 - **Threat: *External Economic and Funding Environment*** – Major federal or state grant reductions, coupled with broader economic downturns, could constrain available resources and limit industry investment in ASPIRE activities.
 - **Opportunity:** Positioning as a nonprofit corporation with national and international reach increases flexibility to engage with a broader base of sponsors and adapt to shifts in the funding landscape. As a result, research funding and reputation for USU and partner universities grows.
 - **ASPIRE Response:** Continue building financial resilience through diversified sources and strong reserve planning; align staffing/investment with cash flow; provide university faculty with turnkey partnerships, linking faculty with industry, government, and professional hardware and software resources and full-time staff support; enable reciprocal funding between university research and nonprofit programs; and conduct annual fiscal reviews with the Board of Directors, Officers, and financial staff to ensure accountability and early intervention in the event that revenue generation falls short.
 - **Risk to USU:** Minimal risk to USU, as there are no direct financial expectations tied to ASPIRE's nonprofit structuring and long-term sustainability on the part of USU. ASPIRE's diversified funding approach, reserve planning, and regular financial reviews are designed to mitigate the effects of grant reductions and economic downturns. These mechanisms ensure that the fluctuations in external funding have limited impact on USU and its supporting services.
 - **Threat: *Maintaining the Status Quo*** - ASPIRE has come to a pivotal moment in its growth capacity, if the Center remains in its current structure, there is a real risk that the beyond research program will need to scale back as NSF ERC program wraps up. This will result in competitors filling the gaps that ASPIRE lacks capacity to support. Additionally, ASPIRE may lose much of its full-time staff and the Center would be forced to fall back to smaller scale and siloed faculty research activities.
 - **Opportunity:** Create a university-controlled nonprofit corporation leading and expanding beyond research initiatives, while scaling ASPIRE's national influence.
 - **ASPIRE Response:** Restructure to a nonprofit corporation to allow ASPIRE to secure diversified funding to maintain beyond research programs, sustaining national-scale initiatives and competitive positioning and ability to offer competitive career pathways and opportunities to retain staff. The structure can also support centralized coordination across faculty, ensuring sustained

collaboration and preventing a reversion to siloed research. The ASPIRE facilities will also offer additional faculty resources, equipment, and professional support to magnify research efforts for USU and the College of Engineering.

- **Risk to USU:** If the current structure persists, reduced capacity and growth of the beyond research program could limit USU's ability to participate in cross-university collaborations, narrowing the university's national visibility and influence in the electrified transportation field. ASPIRE resources would become limited for enhanced faculty and student cross-functional research, networks and reach.
- **Threat: Administrative and Legal Complexity in Establishing the New Structure –** Restructuring as a wholly owned, university-controlled nonprofit corporation is a major undertaking which, if not carefully managed, could cause disruptions, create legal liabilities, or erode stakeholder confidence during the transition.
 - **Opportunity:** Create a modern, professional governance and administrative framework that supports sustainable growth and industry credibility.
 - **ASPIRE Response:** Taking lead from USU legal counsel, aligning with USU leadership and the University's mission, learning from peer institutions, and cautious, phased progression will be key to making the transition successful. USU has leveraged lessons learned from past programs in drafting the legal documents for ASPIRE, and USU has committed to supporting ASPIRE with services in alignment with its existing commitments to NSF through 2030 with annual review, which will greatly reduce risk and disruption during the transition.
 - **Risk to USU:** While delays or missteps in configuring setup could slow progress through the transition, there is no real risk to USU.
- **Threat: Governance & Compliance Threats –** Establishing a wholly owned, university-controlled nonprofit involves complex governance and compliance challenges, including maintaining IRS 501(c)(3) and state nonprofit status, clarifying ownership of intellectual property, and managing potential conflicts between the nonprofit board and the University.
 - **Opportunity:** Implement a robust governance and compliance framework that strengthens credibility with sponsors, partners, and regulators.
 - **ASPIRE Response:** Streamline governance and compliance by engaging with legal and financial advisors early to ensure proper governance, reporting, and adherence to IRS requirements and state nonprofit requirements; draft clear IP and commercialization policies and agreements aligned with USU ownership principles, and conduct annual reviews with the Board of Directors to confirm compliance, resolve disputes early, and protect USU's and ASPIRE's rights to research outputs; develop agreements aligned with USU principles, clearly defining governance and operating agreements specifying decision rights, reporting, and Board oversight; and conducting regular communication to help resolve potential conflicts early and ensure alignment between ASPIRE's priorities and USU's mission.



- **Risk to USU:** As the proposed sole member of the nonprofit corporation, USU may assume some additional governance responsibilities, but with well-defined governance and administration frameworks and USU-aligned agreements in place, the risk to USU is minimal.
- **Threat: *Operation and Infrastructure Threats*** - Transitioning to a nonprofit structure may disrupt ongoing operations, including delays in contract or grant transfers, loss of administrative support previously provided by the university (HR, IT, compliance), and potential attrition of key staff and faculty unwilling to transition.
 - **Opportunity:** Design and develop streamlined administrative and operational systems that increase efficiency, flexibility, and scalability for professional staff and program growth.
 - **ASPIRE Response:** Implement a phased transition plan with legal review of contracts, dedicated administrative capacity, and shared USU provided services agreements – that are evaluated annually - to maintain operational stability. Align grant transfer processes with clear timelines, establish contingency and bridge funding, and provide robust staff transition support, including transparent communication and opportunities for input to minimize disruptions and retain key talent.
 - **Risk to USU:** Potential disruptions to research or program continuity are considered minimal and would primarily rest with the nonprofit rather than the University. As the ASPIRE nonprofit would function under the direction of USU and aims to work closely with USU administrative support services, the overall risk to the University is expected to be very low.
- **Threat: *Nonprofit underperforming or faltering*** - Transitioning to a university-controlled nonprofit introduces operational and financial uncertainty. The nonprofit must establish its own financial, compliance, and administrative infrastructure, and risks underperforming in revenue generation, cost management, and competitive funding. Competitors in larger regions may further limit funding opportunities.
 - **Opportunity:** Establish a high-performing non-profit with clear financial systems with competitive positioning that leverages demand for technologies from USU and partner universities. Shape and promote industry standards around ASPIRE technologies, increasing credibility, adoption, and influence in the electrified transportation sector.
 - **ASPIRE Response:** Implement strong financial oversight, clear performance metrics, and defined university–nonprofit agreements—reinforced by annual reviews of operations and finances—to ensure transparency, protect the University from undue burden, allow timely intervention if performance falters, maintain ASPIRE’s focus on solving market problems valued by industry, and support investments in facilities and knowledge that set it apart from other centers.
 - **Risk to USU:** In the event that the nonprofit should dissolve, USU, as the owner of ASPIRE, will receive any ASPIRE assets and equipment, either transitioned to the ASPIRE at the creation of the nonprofit or procured by ASPIRE thereafter. USU will have discretion on how such assets will be distributed. Professional



staff within ASPIRE will be managed according to available funding and as directed by Officers and Board of Directors.

- **Threat: Reputation Risk** - The transition can create uncertainty about ASPIRE's affiliation, authority, and mission. External stakeholders—federal agencies, private sponsors, industry collaborators, and the public—may not immediately understand the nonprofit's status at USU. This can lead to hesitation in funding or partnerships, misperceptions about USU's commitment to the research area, and possible reputational impact based on the performance of ASPIRE.
 - **Opportunity:** Strengthen ASPIRE brand and clearly communicate it as a university-affiliated, industry-leading nonprofit.
 - **ASPIRE Response:** Implement a clear and strategic communication plan emphasizing university affiliation and oversight, governance structure, and mission alignment to maintain stakeholder confidence.
 - **Risk to USU:** Misperceptions regarding affiliation and authority could temporarily cause hesitation among partners or funders, but these effects are expected to be minimal and mitigated and monitored through clear communications and review with the Board of Directors.
- **Threat: Statewide Program Fragmentation** - ASPIRE's State of Utah electrified transportation program could sunset and statewide energy and electrification programs could be dispersed to other agencies or universities.
 - **Opportunity:** Maintain leadership in statewide electrification program and centralize initiatives under a university-controlled nonprofit to maximize impact and influence. Develop service agreements with agencies and organizations that maintain ASPIRE's edge into planning and development of smart infrastructure systems.
 - **ASPIRE Response:** Restructure into a corporate nonprofit that will allow ASPIRE to appropriately invest in its employees, researchers, partners and stakeholders, thereby continuing to support state-funded programs, driving meaningful environmental impact, contributing to workforce development, translation of technology to market with industry partnership, and investing in the growth and resilience of the state's economy.
 - **Risk to USU:** If statewide programs fragment, USU could lose strategic influence, visibility, and leadership in Utah's electrification initiatives. This risk is reduced by forming the new nonprofit structure.
- **Threat: Consortium Weakening and Partner Drift** - Without growth of the beyond-research program, the ASPIRE university consortium risks weakening. Faculty engagement may decrease, and partner universities could form independent variants of ASPIRE to address regional needs, undermining collaboration and national impact.
 - **Opportunity:** Strengthen the university consortium by expanding beyond research programs, increasing faculty engagement, and offering unique value through coordinated initiatives.
 - **ASPIRE Response:** Form the nonprofit corporate structure that will allow partner universities to leverage the potential and strength of ASPIRE, which as a result,



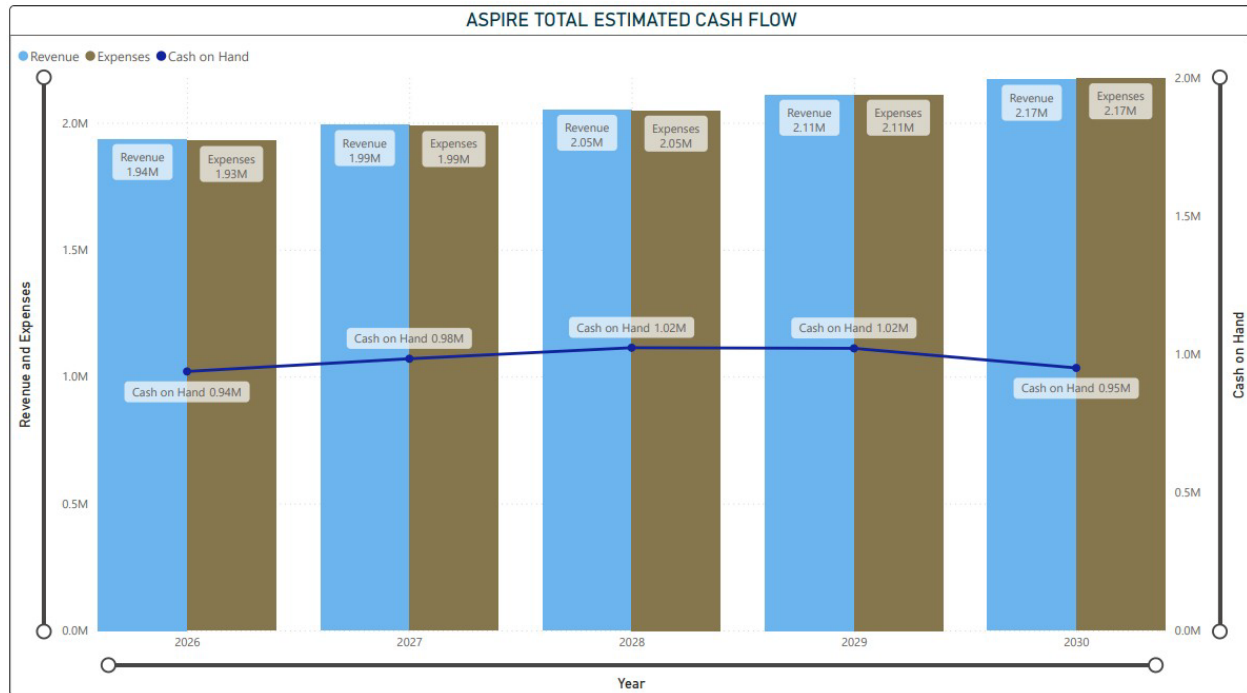
would benefit university partners in reputation, faculty and student recruitment, and research funding. University partners will also have reduced risk and program burden from the beyond research side of ASPIRE. ASPIRE will flourish as a professional service organization for a broad base of stakeholders. Faculty and students will focus on what they do best while leveraging the might and visibility of ASPIRE.

- **Risk to USU:** Weakening consortium ties could reduce national influence, limit collaborative opportunities, and fragment the university's network of research partnership. This risk is reduced by forming the new nonprofit structure.

4. Costs

Since its inception as an NSF Engineering Research Center in 2020, ASPIRE has experienced significant growth having received over \$192 million in committed funding, cumulative expenses exceeding \$81.8 million at USU, and a current annual operating budget surpassing \$25.7 million in FY 2025. The ASPIRE team has evaluated revenue and expenses over the past five years and developed an initial cash flow analysis estimate. Results from the model starting at year 1 of the new structure are shown below. These results are a baseline from nominal growth assumptions on existing revenue sources. The model is also built to run scenario analysis for expanded growth opportunities and new funding sources, including the fundraising campaign. These results can be added as part of ongoing strategic planning discussions with the Board of Directors. The results show total estimated revenue, expenses, and cash flow on hand for ASPIRE. They do not differentiate how funds split between USU and the new nonprofit structure. It is expected that this split will occur gradually, with \$1 million to \$2 million in the nonprofit in its first year and growing more than \$10 million by year five. It is also expected that university research funding will grow as a result of the success of ASPIRE and its partnership with USU faculty, replacing funding to USU that transitions to the nonprofit ASPIRE.

While certain costs are projected as part of the transition to a university-owned nonprofit corporation, these costs will be borne by ASPIRE and its external funding sources. USU will not incur additional financial obligations or liabilities as a result of the restructuring. Annual financial reviews with the Board of Directors will ensure continued accountability and that the nonprofit corporation operates without creating burden or risk to USU.



5. Agreements and Documents Required for the Restructuring

ASPIRE will require the execution of the following legal documents and agreements (attached).

- Articles of Incorporation
 - Parties: ASPIRE, Incorporators (Board of Directors), and USU
 - Terms (summarized):
 - USU agrees to incorporate ASPIRE as (i) a supporting organization to USU and (ii) as a governmental entity as both a public corporation and instrumentality of USU
 - USU will be the sole member of the Corporation
 - ASPIRE will operate as a supporting organization of USU to perform scientific research and services relating to intelligent electrification and transportation system.
 - The Corporation will be governed by a Board of Directors, as set forth in the Bylaws. The number of directors constituting the Board of Directors will be at least 3, with the exact number determined by USU.
 - In the event of the dissolution of the Corporation, the remaining net assets are to be distributed to Utah State University. If Utah State University cannot receive the remaining net assets, then those assets shall be distributed, as determined by the Board of Directors, to an organization or organizations of similar purposes.
- Operating Relationship Agreement
 - Parties: ASPIRE, USU
 - Terms (summarized):
 - ASPIRE is incorporated as a wholly owned and controlled subsidiary of USU



- Administration and cooperation – USU representation on ASPIRE’s board, key personnel from USU departments (e.g. HR, finance, fundraising, etc.) to meet from time to time to align goals and objectives, regular review of agreement, and ASPIRE structure as cooperative entity of partnered universities.
- Policies, finance, budgets, revenue, overhead rates – each Party is subject to its own policies, agency, budget, revenue, and overhead rates; property transfers should be done through written contracts; ASPIRE’s budget and audits reviewed annually by ASPIRE Officers and Board of Directors.
- Human Resources Management – USU and ASPIRE set their own standards for hiring, pay, and termination of employees; contracts for services are bidirectional for USU and ASPIRE with appropriate overhead applied; joint appointments are bidirectional and primary employer (either USU or ASPIRE) is reimbursed for pay and benefits (without overhead applied) by the other Party; In recognition of the planned, phased restructuring process of ASPIRE, certain employees may hold temporary joint appointments with both USU and ASPIRE during the transition period. For employees that move from USU to ASPIRE, or ASPIRE to USU, each Party will hold in effect the transitional employee’s service date and benefits so as not to adversely impact such benefits including but not limited to benefits, retirement packages, or similar; an ASPIRE staff member may be a USU adjunct faculty; USU and ASPIRE will coordinate regarding student employees who work at both USU and ASPIRE.
- Employee Benefits – Benefits for ASPIRE employees will remain the same as currently offered through USU through at least the 2030 transition period and evaluated annually. ASPIRE employees are afforded all campus and academic benefits, insurance and financial benefits while ASPIRE assumes financial responsibility associated with such benefits.
- Contracts and Grants – USU and ASPIRE allow for the issuance of agreements between Parties for work or services to be performed by one Party on behalf of the other Party; Parties recognize that certain contracts or grants may contain requirements that may be better supported by ASPIRE’s operations..
- USU Services to ASPIRE - Parties agree that their collaboration will be reciprocal in nature. USU agrees to make available certain, reasonable, administrative and operational services to ASPIRE at no cost – as currently being provided by USU. This arrangement will remain in place over the next five years – through 2030 (as part of the phasing out of the NSF ERC and phasing into new corporate nonprofit) and reviewed annually. USU services provided for a cost will be paid by ASPIRE at negotiated and agreed established rates. Services provided by USU are outlined in Section 8 the Operating Agreement.
- ASPIRE Services to USU - ASPIRE will provide access to its resources, equipment and facilities to USU and its employees and students. The cost for use of these resources or facilities for USU employees and students will be at the internal rate of the established service center. This internal



USU rate is to cover management of equipment including but not limited to calibration, maintenance, inventory/reservation management, and safety. Access and usage are provided to USU in accordance with ASPIRE's policies, procedures, and applicable agreements. Further ASPIRE professional staff resources will be available to USU, either through contracted agreements or service center applications, to support design, development, testing, and technology translation/commercialization efforts.

- Facilities and Equipment – USU and ASPIRE will afford the use of their facilities and equipment on an as-needed basis according to the Party's policies and procedures. Test vehicles located and used at the ASPIRE Facility will remain part of the University and State fleet and will remain subject to USU and State risk management and insurance policies throughout the transition period to 2030, at which time it will be re-evaluated.
 - **ASPIRE Facilities** — USU will retain ownership of ASPIRE Headquarter Building (Facility) throughout the period of the bond on the facility. USU will continue to make bond payments according to the existing payment distribution and schedule at USU. If the overhead return to the VPR or College of Engineering are insufficient in any given year to cover their respective portions of the bond payment, ASPIRE will cover the remaining portion of the payment. This arrangement will be reviewed annually by the Board of Directors and reconsidered as determined appropriate. ASPIRE will assume full responsibility for ASPIRE Headquarters Building and for all equipment within.
 - Land lease — USU will retain ownership of the land on which the ASPIRE Headquarters Building is located. ASPIRE will be permitted to occupy and operate the facility without cost under this agreement, and no land lease or rental payment shall be required. This arrangement shall remain in effect through the transition period ending in 2030 and shall be evaluated annually by the Parties.
 - Insurance and Liability — ASPIRE will maintain insurance coverage under the University's risk management and insurance program, as administered by the State of Utah, for at least the duration of the transition period to 2030, which will be reviewed annually. To the extent permitted by law, each Party agrees to defend, indemnify, and hold harmless the other Party, its officers, employees, students, and agents from and against any claims, demands, damages, or liabilities arising out of its own use of the facilities.
 - Compliance — ASPIRE will comply with all applicable federal, state, and local laws, rules, and regulations. USU



- and its employees will comply with ASPIRE policies, procedures, and safety requirements.
- Access — Each Party may use the other's facilities and equipment as needed, subject to the owning Party's policies and without disrupting operations. ASPIRE retains primary authority over access, scheduling, and alignment with its programs and obligations for its facility, with conflicts resolved through good-faith discussions. ASPIRE may restrict or deny access to its facility for safety, security, maintenance, or confidentiality, with timely notice to USU. Entry to ASPIRE's Facility will use USU's card system, with ASPIRE responsible for managing access rights, compliance, and administration, along with ASPIRE having full authority to administer cards for and control access to its facility, and USU providing technical support to maintain the USU card system.
 - Cost of Use — The using Party will pay the established internal rate. The costs will be negotiated and supported by service center procedures or a negotiated agreement. Where specific activities result in extraordinary costs, the Parties will negotiate in good faith to establish an equitable arrangement.
 - **ASPIRE Equipment** — ASPIRE requests that USU transfer all equipment to ASPIRE that was procured by USU on ASPIRE related contracts and programs for operations at the ASPIRE Facility (as outlined in Appendix B of the Operating Relationship Agreement). This equipment will be operated and maintained by ASPIRE and made available to USU at an internal rate that is reviewed by the Board of Directors. Only individuals who complete ASPIRE-required training, certifications, or safety briefings may use specialized equipment. ASPIRE will maintain training records and has sole authority to grant or revoke access. Some equipment use, leasing, or joint management may require additional agreements between the Parties. Additionally, USU may entrust USU owned equipment to ASPIRE to be housed within the ASPIRE Facility at any time for which ASPIRE will be responsible for maintaining and managing and will implement a service center internal rate for its use, to be evaluated annually. No 3rd parties including universities or private sponsors will have ownership or rights to any ASPIRE assets.
 - **Export Control** — Each Party agrees to comply with applicable United States export control laws and regulations, including the U.S. Export Administration Regulations (EAR) or International Traffic in Arms Regulations (ITAR), and maintain their respective export-control offices. ASPIRE may utilize USU's export-control office and services at no cost



for the transition period through 2030, at which time such services will be evaluated.

- Intellectual Property — Intellectual property conceived or developed by USU personnel will reside with USU. Title to all intellectual property conceived or developed by ASPIRE personnel will reside with ASPIRE. Each Party may use or access the intellectual property of the other Party only through separate mutual written agreement(s).
- Conflicts of Interest — USU and ASPIRE agree to administer and manage conflicts of interest in keeping with their respective policies and procedures.
- Insurance — ASPIRE will remain covered under USU's insurance policies, covering business operations and property, along with applicable State risk management. This coverage will be reviewed annually through the transition period ending 2030.
- Miscellaneous — USU and ASPIRE agree to the Choice of Law and Venue, Government Records Access and Management Act, Governmental Immunity, and Notice terms outlined in the Operating Relationship Agreement.
- Bylaws
 - Parties: ASPIRE, Board of Directors, and USU
 - Terms (summarized):
 - Membership – USU is the sole member.
 - Governance Structure – Roles, powers, and responsibilities of the board, standard of conduct, compensation (no compensation for directors, but reasonable compensation for director's attendance), officers and agents
 - Meetings – Rules for frequency, notice, quorum, and voting at board or committee meetings.
 - Committees – Authority, structure, and procedures for committees or advisory groups.
 - Execution of instruments – checks, deposits, and contracts.
 - Financial Oversight – Budget approval, fiscal management, audits, and spending authority.
 - Conflict of Interest – Disclosure and management procedures for potential conflicts.
 - Amendments – How bylaws can be changed.
 - Dissolution – Procedures for winding down, handling assets, and compliance with laws.
- Conflict of Interest Policy (to accompany IRS filing Form 1023)
 - Parties: ASPIRE, USU, and Board of Directors
 - Terms/Provisions (summarized):
 - Duty to Disclose – Requires directors, officers, or key employees to disclose potential conflicts before decisions are made.
 - Procedures for Addressing Conflicts – Outlines how the board reviews disclosures, determines if a conflict exists, and documents the process.



- Recusal/Abstention – Requires conflicted individuals to leave discussions and abstain from voting on matters where they have an interest.
- Documentation – Mandates that disclosures and board decisions are recorded in meeting minutes.
- Compensation & Benefits – Provides special rules for decisions involving compensation of directors, officers, or employees.
- Annual Statements – Requires covered persons to sign yearly affirmations that they have read, understand, and will comply with the policy.
- Periodic Review – Establishes regular reviews to ensure compliance and alignment with IRS requirements.

6. Motion to Approve

- The creation of the ASPIRE nonprofit corporation
- The appointment of the initial members to the Board of Directors of the corporation
 - USU Executive Vice President / Chief Operating Officer
 - USU Vice President for Finance / Chief Financial Officer
 - USU Vice President for Research
 - Member of USU Board of Trustees
- The transfer of USU equipment to ASPIRE
 - List of Equipment outlined in Appendix B of the Operating Relationship Agreement



ASPIRE

Nonprofit Corporation Overview

Core Partner Institutions



UtahState
University

Lead Institution



THE UNIVERSITY OF TEXAS
AT EL PASO



PURDUE
UNIVERSITY



University of Colorado
Boulder

Affiliated Partner Institutions



COLORADO STATE
UNIVERSITY



Cornell University

UCCS
University of Colorado
Colorado Springs

VT
VIRGINIA TECH.

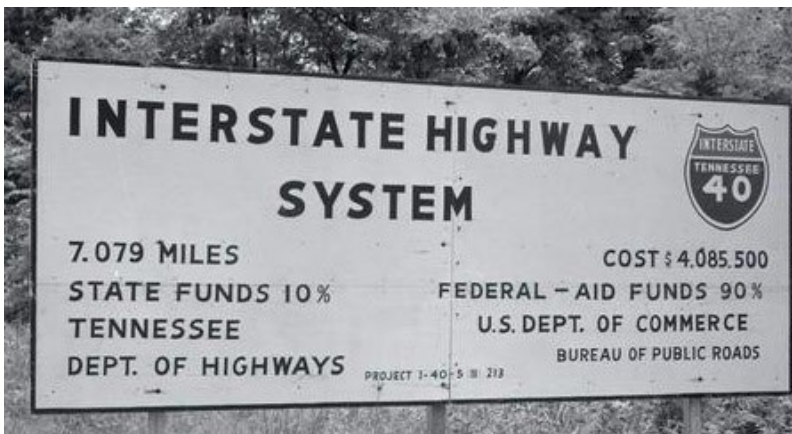
THE UNIVERSITY
UTAH

Systems Perspective

Practical Deployment



We've been here before!



ASPIRE's Vision

ASPIRE is a multi-disciplinary effort **across ten Universities** and over **sixty partners**.



University of Colorado
Boulder



Utah State
University



THE UNIVERSITY
OF AUCKLAND
NEW ZEALAND



PURDUE
UNIVERSITY



THE
UNIVERSITY
OF UTAH

Colorado
State
University



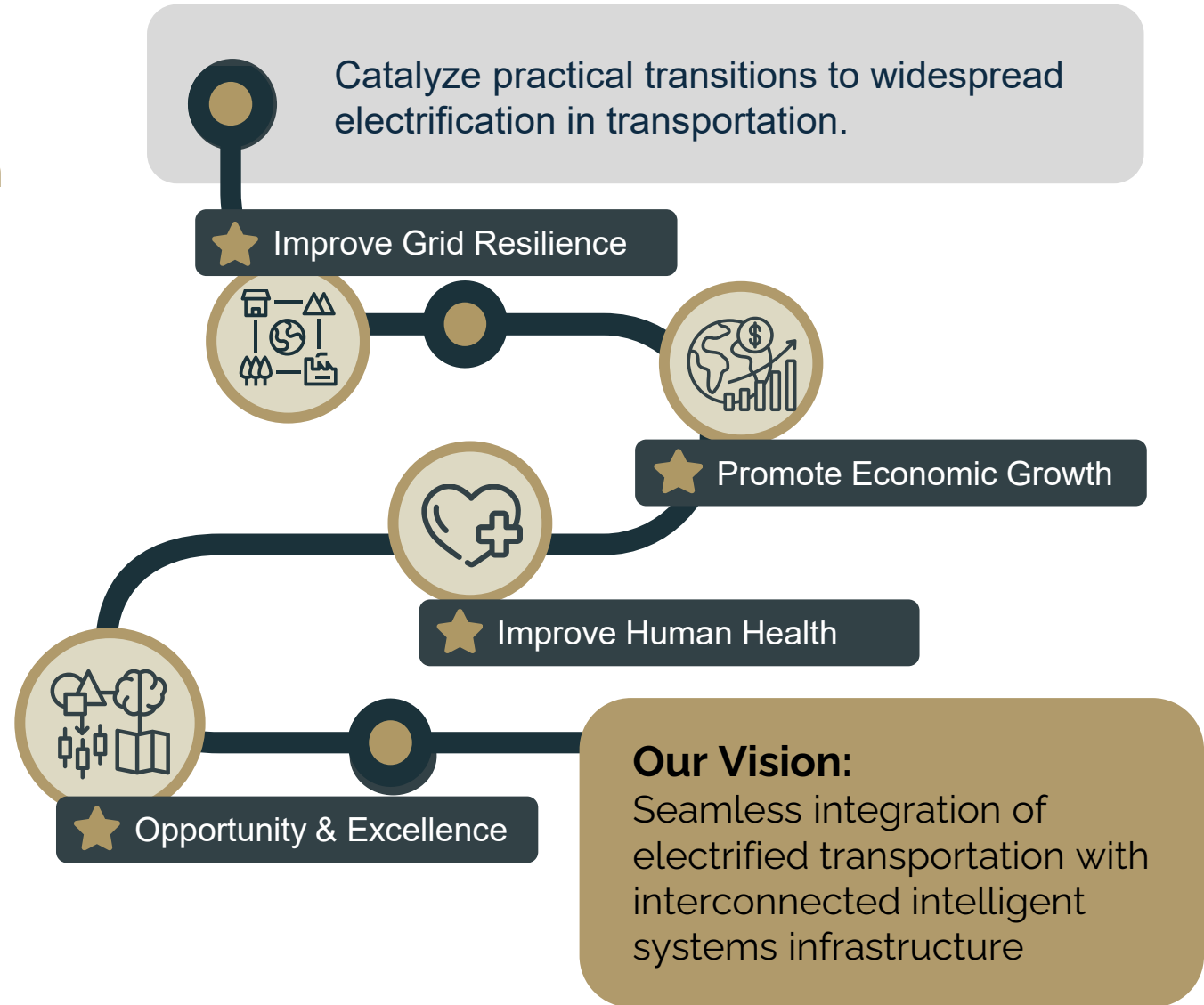
University of Colorado
Colorado Springs



Cornell University



VIRGINIA TECH.





Utah Inland Port

Port electrification: wireless megawatt truck charging and in-motion wireless charging.



EVR Facility

Systems integration testbed for pre-pilot technology translation



Utah Electrification

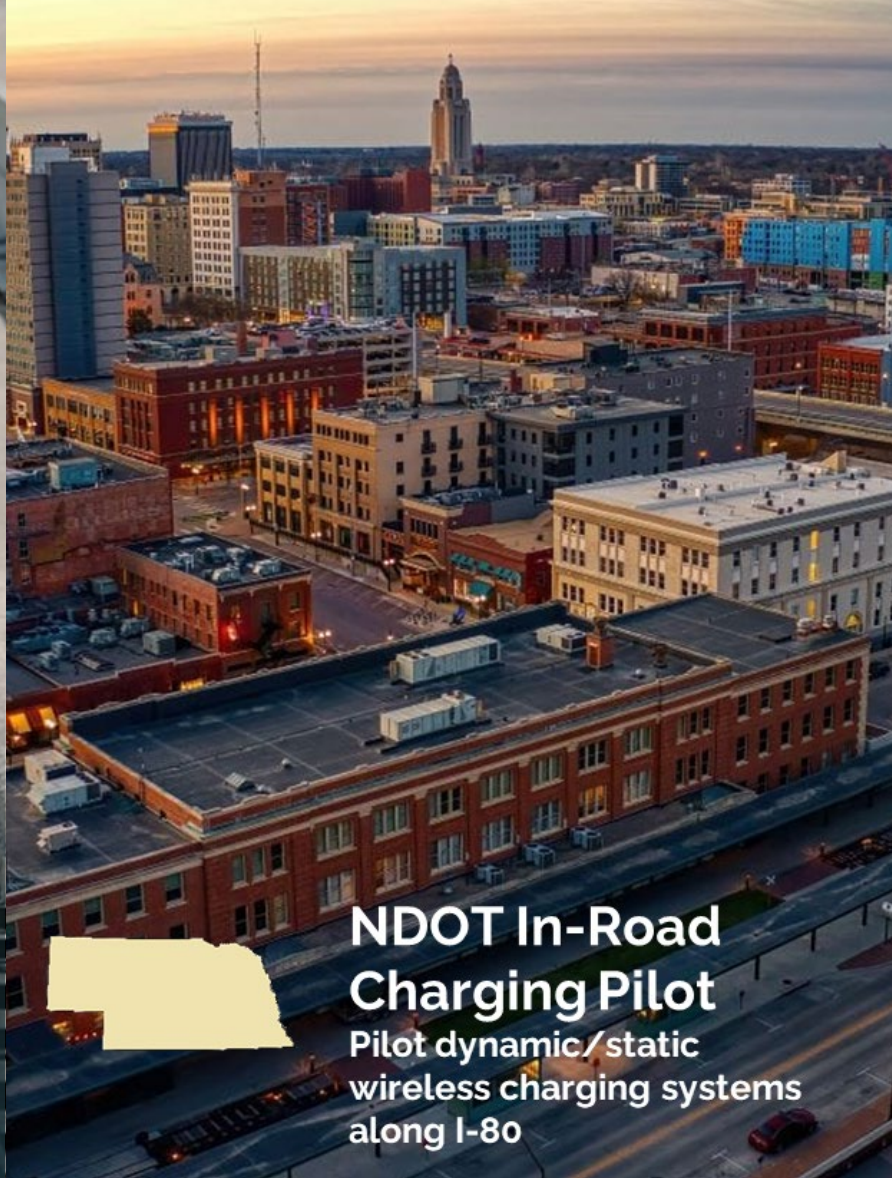
Statewide community-informed action plan & coordination of 30-year infrastructure vision.

P3 Technology Deployment Projects



Indiana US 231/52

Quarter-mile 200 kW in-motion wireless charging with P3 relationships.



NDOT In-Road Charging Pilot

Pilot dynamic/static wireless charging systems along I-80



Florida SR 516

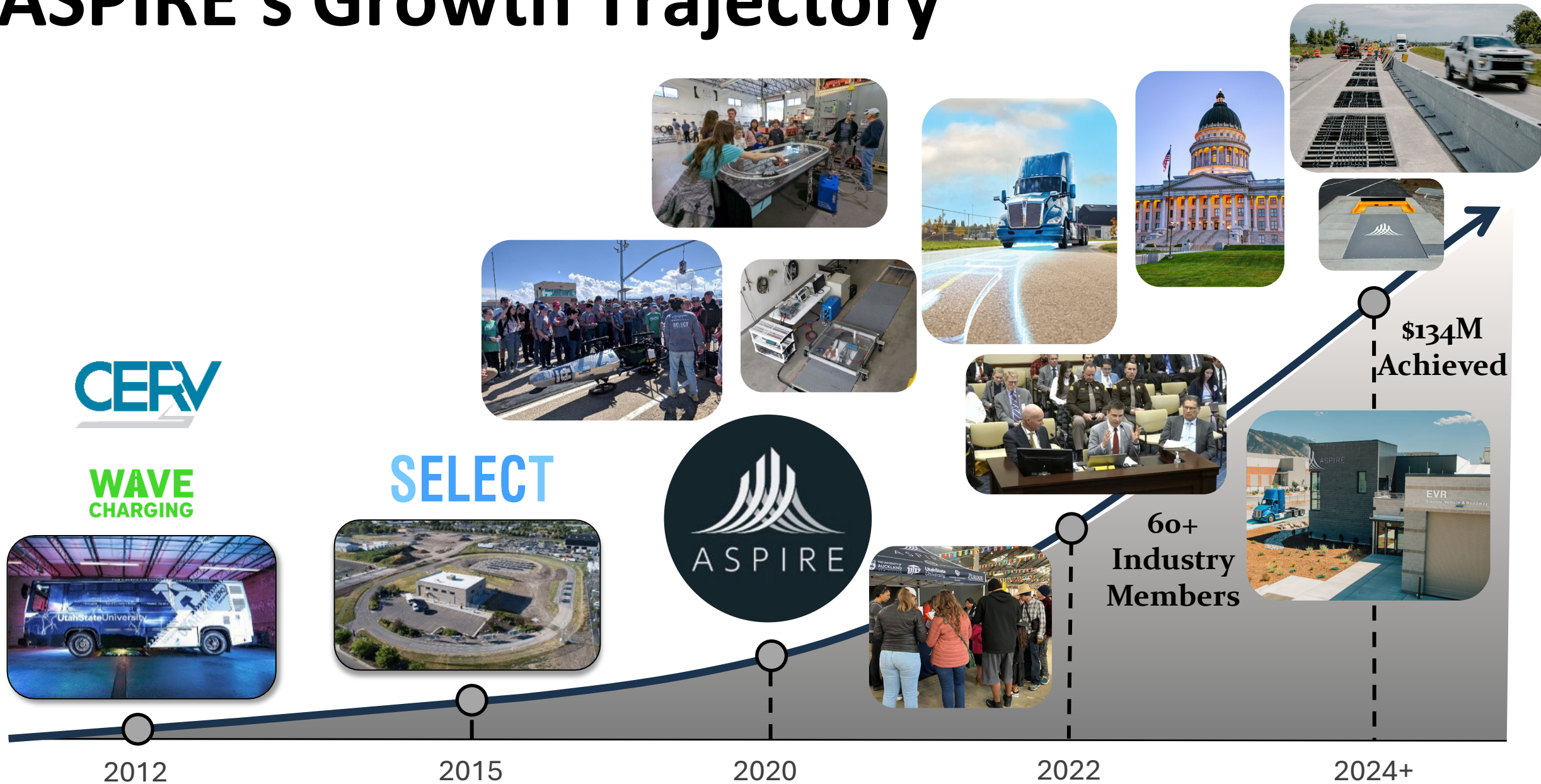
In-motion wireless charging with interoperability among vehicle classes.

P3 Technology Deployment Projects

Stakeholders Impacted



ASPIRE's Growth Trajectory





2024 Annual Report



Scan to
Read
The 2024
Annual
Report

By the Numbers

\$192 Million+

Funding Announced
Since 2020

23,000+

Attendees Reached
Through Events

440+

Faculty Students
& Staff

240+

Peer Reviewed
Publications

65+

Industry & Innovation
(IIB) Members

39

Patents
Awarded

Champion for Intelligent Cross-Industry Electrification

Technology Innovation & Deployment

Experiential Learning for Students

Research
Convener &
Driver

Technology
Developer &
Provider

Engineering,
Testing, & Training
Services Provider

AI Tools, Systems
Planning, Data
Services Provider

Market &
Community
Advocate

Workforce &
Talent
Developer



Global Potential

Images: OpenAI. (2024). ChatGPT (4o) [Large language model].



**National
Deployment**



**International
Reach**



**Standard
Bearer**
(NASA of Electrification)



**Societal
Impact**

Motivation



- With ASPIRE's success, demand for efforts, capabilities & services have grown beyond initial role
- ASPIRE employs more than 60 staff in support of development, demonstration and deployment of technologies and workforce, or “beyond research” activities
- Seeking greater operational agility, expanded partnerships, and diversified funding streams for beyond research role
 - While maintaining strong academic partnership and collaboration

Proposed Structure

- Nonprofit corporation as a wholly owned and controlled subsidiary of USU to operate
 - (i) a supporting organization to USU (within the meaning of IRC § 509(a)(3))
 - (ii) as a governmental entity as both a public corporation and instrumentality of USU



Activities at USU and ASPIRE

- USU
 - Core research mission of ASPIRE
 - Faculty-led programs with ASPIRE support
 - Campus Director and Student Association
- ASPIRE
 - Development, demonstration and deployment of technologies and workforce
 - Champion for transformations across industries
 - Staff-led programs with university support



Benefits to USU

- **Benefit of moving forward**
 - Growth in research productivity and funding
 - Experiential learning opportunities for students across the state
 - Statewide and national reputation: transformational impacts in the transportation and electric utility industries
- **Risk of not moving forward**
 - Lost momentum while ASPIRE scales back staff-led “beyond research” programs
 - Competitors fill the gaps that ASPIRE lacks capacity to support
 - University consortium weakens and partners splinter and form their own variants of ASPIRE
 - State funding diminishes with reduced reputation and impact



Financial Commitment

- Requires no new financial resources from USU beyond current commitments
 - USU will provide the same level of services to ASPIRE related efforts as it has already committed to for the duration of ASPIRE's NSF grant through 2030
 - ASPIRE will continue to pay for all services that it does today
 - Reviewed annually
- Leverages existing revenue sources and growing revenue from government agencies, industry, and donations



ASPIRE Facility and Equipment

- USU will retain ownership of ASPIRE Headquarter Building (EVR Facility) throughout the period of the bond on the facility and continue to make bond payments through 2030
- USU will transfer equipment associated with the EVR building and operations at ASPIRE to the ASPIRE nonprofit
- ASPIRE will be responsible for all operation, maintenance, safety, and management of the facility and equipment



Risk Management

- Risks to USU and ASPIRE are minimal and managed through detailed operating agreements and Board of Directors oversight
- Board oversight will ensure ASPIRE's growth strengthens the university's academic mission and leadership



Threat Analysis (see memo)

- *Financial sustainability & revenue diversification*
- *External Economic and Funding Environment*
- *Maintaining the Status Quo*
- *Administrative and Legal Complexity in Establishing the New Structure*
- *Governance & Compliance*
- *Operation and Infrastructure*
- *Nonprofit underperforming or faltering*
- *Reputation Risk*
- *Statewide Program Fragmentation*
- *Consortium Weakening and Partner Drift*



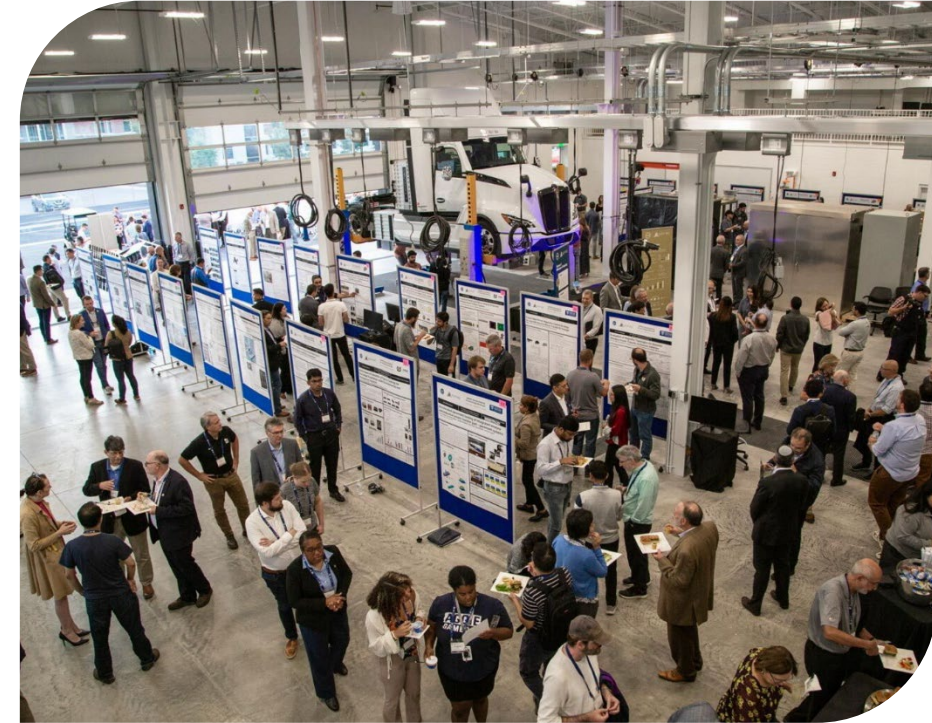
Legal Agreements

- Articles of Incorporation
- Bylaws
- Operating Relationship Agreement



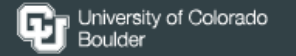
Urgency

- Need
 - At a critical junction: near-term path for growth or scale back
 - Must show NSF in Nov 2025 clarity on growth trajectory plan and institutional support
- Opportunity
 - Leverage NSF grant through 2030 as transition period for new structure leading to robust and self-sufficient program
- Momentum
 - ASPIRE's leadership team, industry leaders, and USU leadership have been developing this plan for the past two years
 - Tremendous momentum and stakeholder support at this time
 - Delaying will add risk in lost momentum and support





Core Partner Institutions



Affiliated Partner Institutions



Thank You!

Policy 3311: Employee Gifts and Awards

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USU Policy 3311: Employee Gifts and Awards

Category: Facilities, Operations, & IT

Subcategory: Finances

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller's Office, Controller

For each section below, summarize the highlights of the new policy using the suggested questions as guidelines.

BACKGROUND:

This policy provides a framework for appropriate methods and situations to recognize or award employees. The changes add clarity to the situations when it is appropriate to utilize university funds for recognition or gifts. The changes also clarify expectations for employees and those involved. These changes are necessary to align with IRS regulations.

KEY PROVISIONS OF THE NEW/REVISED POLICY:

The revisions establish the situations when it is acceptable to use university funds to purchase employee gifts. It sets standards for recognition based on length of service, maximum thresholds for the purchase amount and the tax implications for various awards. The revisions include standards for gifting non-employees. It clarifies that gifts for personal life events are not allowed. It provides specific responsibilities for supervisors, deans or vice presidents, and the controller's office. It defines De minimis and provides references to IRS publications. It removes detailed information that should reside in procedures rather than policy.

IMPLEMENTATION PLAN:

Updated procedures for Direct Pay Payments and gift cards are available online. Training for taxable gifts and awards is included within the ServiceNow form to report employee gifts. The ServiceNow form was built to follow this policy.

University Policy 3311: Employee Gifts and Awards

Category: Facilities, Operations, IT

Subcategory: Finances

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller's Office, Controller

Last Revised: 2025/MM/DD

Previous USU Policy Number: 505

3311.1 PURPOSE AND SCOPE

The University recognizes the importance of fostering and maintaining a supportive work environment. As such, departments may recognize employees with occasional gifts and awards. This policy provides guidelines regarding the value and type of gifts or awards that may be given to employees and the characteristics that make them non-taxable or taxable.

3311.2 POLICY

Department heads may authorize the purchase of gifts and awards to employees using University funds to acknowledge years of service, retirement, and other special occasions. Depending on the frequency, value, and form, gifts to employees are classified as non-taxable or taxable.

2.1 Events and Occasions

2.1.1 Length of Service

Employees may receive gifts and service awards to recognize length of service, which should be accompanied by a meaningful recognition event. The value of the gift should consider the number of years of service and should be given only after the employee has achieved at least five years of service.

2.1.2 Retirement/Separation

Employees may receive retirement/separation gifts to recognize their service to the University, which should be accompanied by a meaningful retirement/separation event. Gifts that do not exceed \$400 are non-taxable to the employee. For gifts valued over \$400, the amount exceeding \$400 is considered taxable to the employee and must be reported using the Taxable Gift and Award form in Service Now.

2.1.3 Other Special Occasions

2.1.3.1 Bereavement

Departments may purchase flowers, plants, cards, or mementos using University funds up to \$100 for the death of a current employee or immediate family member. In lieu of flowers, a donation may be made to a charitable organization or a purpose designated by the family, provided it is within the same \$100 limit and is appropriately documented.

2.1.3.2 Hospitalization

Departments may purchase flowers/plants using University funds up to \$100 for an employee who is hospitalized.

2.1.3.3 Holiday Events

Departments may purchase gifts using University funds for holiday events. The value of the gift should not exceed \$100.

2.1.3.4 Recognition Events

Departments may purchase gifts using University funds for employee recognition events. Gifts that do not exceed \$100 are non-taxable to the employee. Gifts valued over \$100 are taxable to the employee and must be reported using the Taxable Gift and Award form in Service Now.

2.1.3.5 Best Interest of the University

2.1.3.5.1 Employee

There may be other special occasions where it is in the best interest of the University to purchase a gift for an employee. In such cases, the value of the gift should not exceed \$100.

2.1.3.5.2 Non-Employee

There may be other special occasions where it is in the best interest of the University to send a gift to individuals (e.g., donors, governing board members, etc.). In such cases, the value of the gift should not exceed \$100 and should be approved by the appropriate Dean or Vice President.

2.1.4 Other

The appropriate Dean or Vice President must approve gifts given to family members of current employees. The value of the gift is taxable to the employee and must be reported using the Taxable Gift and Award form in Service Now.

2.2 Form of Gifts and Awards

De minimis gifts and awards are non-taxable to the employee when the gift or award does not exceed \$100, is given on an occasional basis, and is tangible personal property (gift may not be in the form of cash, cash equivalent, or non-USU gift card).

Cash, cash equivalents, and non-USU gift cards are taxable to the employee, as defined by the Internal Revenue Service, and must be reported using the Taxable Gift and Award form in Service Now.

2.3. Unallowable

2.3.1 Life Events

Purchasing gifts using University funds to acknowledge personal life events is not allowed (e.g., birthdays, showers, weddings, graduations).

3311.3 RESPONSIBILITIES

3.1 Transaction Coordinators

Verify that expenditures are consistent with policy requirements and documented.

3.2 Business Managers

Verify that expenditures are allowable and allocable. When a gift/award is taxable, process the 'Taxable Gift and Award' form in ServiceNow.

3.3 Department Heads

Authorize purchases of gifts and awards to employees.

3.4 Dean or Vice Presidents

Authorize purchases of gifts to non-employees and family members of employees.

3.5 Controller's Office

Monitor compliance with tax reporting requirements.

3311.4 REFERENCES

- [Internal Revenue Service Publication 5137, Fringe Benefit Guide](#)
- [Internal Revenue Service Publication 15-b, Employer's Tax Guide to Fringe Benefits](#)

3311.5 DEFINITIONS

- **De minimis** - A de minimis gift is one for which, considering its value and the frequency with which it is provided, is so small as to make accounting for it unreasonable or impractical. USU has defined de minimis to be \$100 or less.

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

- [Direct Pay Payments](#)
- [Gift Cards](#)

Related Forms and Tools

- [Taxable Gift and Award](#) form in ServiceNow

Contacts

- [Controller's Office](#)

POLICY HISTORY

Original issue date: 2006/08/15

Last revision date: 2025/MM/DD

Next scheduled review date: 2027/11/1

Previous revision dates: 2024/11/01, 2018/07/11, 2006/08/15



University Policy ~~3311~~505: Employee Gifts and Awards

Category: [Facilities, Operations, IT](#) ~~Operating~~

Subcategory: ~~General~~[Finances](#)

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller's Office, Controller

Last Revised: ~~2018/07/11~~

[Previous USU Policy Number: 505](#)

~~3311~~505.1 PURPOSE AND SCOPE

The University understands the importance of [creating and encouraging a supportive work environment](#). ~~As such, departments may recognize employees with occasional gifts and awards~~[maintaining morale by recognizing employee length of service, retirement, or other special occasions](#). This policy provides ~~specific~~ guidelines regarding the value and type of gifts or awards that may be given to employees and the characteristics that make them [non-taxable](#) or ~~non-taxable~~.

~~3311~~505.2 [POLICY](#)

[Department heads may authorize the purchase of gifts and awards to employees using University funds to acknowledge years of service, retirement, and other special occasions. Depending on the frequency, value, and form, gifts to employees are classified as non-taxable or taxable.](#)

~~NOMINAL GIFTS~~

~~2.1~~[2.1 Events and Occasions](#)

[2.1.1 Length of Service](#)

[Employees may receive gifts and service awards to recognize length of service, which should be accompanied by a meaningful recognition event. The value of the gift should consider the number of years of service and should be given only after the employee has achieved at least five years of service.](#)

[2.1.2 Retirement/Separation](#)

[Employees may receive retirement/separation gifts to recognize their service to the University, which should be accompanied by a meaningful retirement/separation event. Gifts that do not exceed \\$400 are non-taxable to the employee. For gifts valued over \\$400, the amount exceeding \\$400 is considered taxable to the employee and must be reported using the Taxable Gift and Award form in Service Now.](#)

~~Non-Taxable~~

~~To ensure that these gifts are non-taxable to the employee, departments must follow the IRS criteria outlined below:~~

- ~~1) Dollar Limit — The gift value cannot exceed \$100 per individual.~~
- ~~2) Frequency — The gift should only be given on an occasional basis.~~

- ~~3) Form of Gift — The gift must be tangible personal property. (i.e. The gift may not be in the form of cash, check, or gift card.)~~

2.2 Taxable

~~If any of the following criteria are met, the value of the gift will become taxable and must be reported to the Controller's Office.~~

- ~~1) Dollar Limit — If the gift value exceeds \$100, the entire value of the gift is taxable.~~
- ~~2) Frequency — Gifts given to an employee on a regular or routine basis are considered compensation and are taxable.~~
- ~~3) Form of Gift — Gifts given in the form of cash, check, or gift card are considered cash equivalents and are taxable.~~

505.3 LENGTH OF SERVICE / RETIREMENT AWARDS

3.1 Non-Taxable

~~To ensure that these awards are non-taxable to the employee, departments must follow the IRS criteria outlined below:~~

- ~~1) Timing — The service or retirement award may not be made within the employee's first five years of service or more frequently than every five years.~~
- ~~2) Dollar Limit — The cost or value of the award cannot exceed \$400 and should be commensurate with the number of years of services being recognized. If a service award is given in the same calendar year as a retirement award, the combined value cannot exceed \$400.~~
- ~~3) Form of Award — The award must be in the form of tangible personal property. (i.e. The gift may not be in the form of cash, check, or gift card.)~~
- ~~4) Meaningful Presentation — The award must be presented as part of a special event or celebration that marks the occasion.~~

3.2 Taxable

~~If any of the following criteria are met, all or part of the award may become taxable and must be reported to the Controller's Office.~~

- ~~1) Timing — If an award is made within the employee's first five years of service or more frequently than every five years, it will be considered an ordinary nominal gift and will become taxable if the value exceeds \$100.~~
- ~~2) Dollar Limit — If the award value exceeds \$400, any amount over \$400 is taxable.~~
- ~~3) Form of Award — Awards given in the form of cash, check, or gift card are considered cash equivalents and are taxable.~~
- ~~4) Meaningful Presentation — If the award is not presented as part of a special event or celebration that marks the occasion, it will be considered an ordinary nominal gift and will become taxable if the value exceeds \$100.~~

505.4 RELATED ITEMS

[2.1.3 Other Special Occasions](#)

[2.1.3.1 4.1 Flowers/Plants](#)[Bereavement](#)

~~A Department Head/Director may authorize the purchase of flowers, plants, cards, or mementos using University funds up to \$100 for the death funeral of a current employee or immediate family member. In lieu of flowers, a donation may be made to a charitable organization or a purpose designated by the family, provided it is within the same \$100 limit and is appropriately documented.~~

2.1.3.2 Hospitalization

Departments may purchase flowers/plants using University funds up to \$100 for an employee that is hospitalized.

2.1.3.3 Holiday Events

Departments may purchase gifts using University funds for holiday events. The value of the gift should not exceed \$100.

2.1.3.4 Recognition Events

Departments may purchase gifts using University funds for employee recognition events. Gifts that do not exceed \$100 are non-taxable to the employee. Gifts valued over \$100 are taxable to the employee and must be reported using the Taxable Gift and Award form in Service Now.

~~A Department Head/Director may authorize the purchase of flowers/plants using University funds for an employee that is hospitalized.~~

2.1.3.5 Best Interest of the University

2.1.3.5.1 Employee

There may be other special occasions where it is in the best interest of the University to purchase a gift for an employee. In such cases, the value of the gift should not exceed \$100.

2.1.3.5.2 Non-Employee

There may be other special occasions where it is in the best interest of the University to send a gift~~flowers/plants~~ to individuals (e.g. donors, governing board members, etc.). In such cases, the value of the gift should not exceed \$100 and ~~purchase of flowers/plants~~ should be approved by~~coordinated through~~ the appropriate Dean or Vice President's ~~office for review of the proposed purpose.~~

2.1.4 Other

Gifts given to family members of current employees must be approved by the appropriate Dean or Vice President. The value of the gift is taxable to the employee and must be reported using the Taxable Gift and Award form in Service Now.

2.2 Form of Gifts and Awards

De minimis gifts and awards are non-taxable to the employee when the gift or award does not exceed \$100, is given on an occasional basis, and is tangible personal property (gift may not be in the form of cash, cash equivalent, or non-USU gift card).

Cash, cash equivalents, and non-USU gift cards are taxable to the employee, as defined by the Internal Revenue Service, and must be reported using the Taxable Gift and Award form in Service Now

[2.3. Unallowable](#)

[2.3.1 Life Events](#)

[Purchasing gifts using University funds to acknowledge personal life events is not allowed \(e.g. birthdays, showers, weddings, graduations\).](#)

[3311505.35 RESPONSIBILITIES](#)

[3.1 Transaction Coordinators](#)

[Verify that expenditures are consistent with policy requirements and documented.](#)

[3.2 Business Managers](#)

[Verify that expenditures are allowable and allocable. When gift/award is taxable, process 'Taxable Gift and Award' form in ServiceNow.](#)

[3.3 Department Heads](#)

[Authorize purchases of gifts and awards to employees.](#)

[3.4 Dean or Vice Presidents](#)

[Authorize purchases of gifts to non-employees and family members of employees.](#)

[3.4 Controller's Office](#)

[Monitor compliance with tax reporting requirements.](#)

[3311.4 REFERENCES](#)

- [Internal Revenue Service Publication 5137, Fringe Benefit Guide](#)
- [Internal Revenue Service Publication 15-b, Employer's Tax Guide to Fringe Benefits](#)

[3311.5 DEFINITIONS](#)

- [De minimis - A de minimis gift is one for which, considering its value and the frequency with which it is provided, is so small as to make accounting for it unreasonable or impractical. USU has defined de minimis to be \\$100 or less.](#)

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

- <https://www.usu.edu/controllers/teams/accounts-payable/direct-payments>
- <https://www.usu.edu/controllers/teams/accounts-payable/gift-cards>

Related Forms and Tools

- [Taxable Gift and Award](#) ~~submission process~~[form](#) in ServiceNow

Contacts

- Controller's Office—~~Accounts Payable~~

POLICY HISTORY

Original issue date: 2006/08/15

Last review date: ~~2018/07/11~~[2024/11/01](#)

Next scheduled review date: [2027/11/1](#)

Previous revision dates: [2024/11/01](#), 2018/07/11, 2006/08/15



POLICY MANUAL

OPERATING POLICIES AND PROCEDURES

Number 3311

Section: Operating Policies

Sub-Section: General

Subject: Employee Gifts and Awards

Effective Date: August 15, 2006

Revision Date(s): August 15, 2006, July 11, 2018

Date of Last Revision: July 11, 2018

Previous USU Policy #: 505: Employee Gifts and Awards

OVERVIEW

The University understands the importance of maintaining morale by recognizing employee length of service, retirement, or other special occasions. This policy provides specific guidelines regarding the value and type of gifts or awards that may be given to employees and the characteristics that make them taxable or non-taxable.

3311.1 NOMINAL GIFTS

1.1 Non-Taxable - To ensure that these gifts are non-taxable to the employee, departments must follow the IRS criteria outlined below:

- (a) Dollar Limit – The gift value cannot exceed \$100 per individual.
- (b) Frequency – The gift should only be given on an occasional basis.
- (c) Form of Gift – The gift must be tangible personal property. (i.e. The gift may not be in the form of cash, check, or gift card.)

1.2 Taxable – If any of the following criteria are met, the value of the gift will become taxable and must be reported to the Controller's Office.

- (a) Dollar Limit – If the gift value exceeds \$100, the entire value of the gift is taxable.
- (b) Frequency – Gifts given to an employee on a regular or routine basis are considered compensation and are taxable.

- (c) Form of Gift – Gifts given in the form of cash, check, or gift card are considered cash equivalents and are taxable.

3311.2 LENGTH-OF-SERVICE / RETIREMENT AWARDS

2.1 Non-Taxable - To ensure that these awards are non-taxable to the employee, departments must follow the IRS criteria outlined below:

- (a) Timing – The service or retirement award may not be made within the employee's first five years of service or more frequently than every five years.
- (b) Dollar Limit – The cost or value of the award cannot exceed \$400 and should be commensurate with the number of years of service being recognized. If a service award is given in the same calendar year as a retirement award, the combined value cannot exceed \$400.
- (c) Form of Award – The award must be in the form of tangible personal property. (i.e. The gift may not be in the form of cash, check, or gift card.)
- (d) Meaningful Presentation – The award must be presented as part of a special event or celebration that marks the occasion.

2.2 Taxable – If any of the following criteria are met, all or part of the award may become taxable and must be reported to the Controller's Office.

- (a) Timing – If an award is made within the employee's first five years of service or more frequently than every five years, it will be considered an ordinary gift and will become taxable if the value exceeds \$100.
- (b) Dollar Limit – If the award value exceeds \$400, any amount over \$400 is taxable.
- (c) Form of Award – Awards given in the form of cash, check, or gift card are considered cash equivalents and are taxable.
- (d) Meaningful Presentation – If an award is not presented as part of a special event or celebration that marks the occasion, it will be considered an ordinary gift and will become taxable if the value exceeds \$100.

3311.3 RELATED ITEMS

3.1 Flowers/Plants

- (a) A Department Head/Director may authorize the purchase of flowers/plants using University funds for the funeral of a current employee or immediate family member.

- (b) A Department Head/Director may authorize the purchase of flowers/plants using University funds for an employee that is hospitalized.
- (c) There may be other occasions where it is in the best interest of the University to send flowers/plants to individuals (e.g. donors, governing board members, etc.). In such cases, the purchase of flowers/plants should be coordinated through the appropriate Dean or Vice President's office for review of the proposed purpose.

RESOLUTION

UTAH STATE UNIVERSITY

BOARD OF TRUSTEES

WHEREAS, USU Policy 3311: Employee Gifts and Awards establishes guidelines for acceptable use of University funds to acknowledge employees;

WHEREAS, the Controller desires to set standards for employee recognition based on length of service, maximum thresholds for purchase amounts, gifts for non-employees and clarify responsibilities for supervisors, deans or vice presidents, employees, and the Controller's Office;

WHEREAS, the revisions requested by the Controller are focused on providing more clarity for employees, aligning the policy with current practice and IRS regulations on fringe benefits;

WHEREAS, the President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the amendments to Policy 3311: Employee Gifts and Awards; and

WHEREAS, the amendments to Policy 3311: Employee Gifts and Awards address concerns about presidential expenditures and will be presented for public comment and receive the appropriate USU administrative review and approval required by USU Policy 1001 following provisional approval by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees provisionally approve the amendments to Policy 3311: Employee Gifts and Awards.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

Signature of Chair White or designee

Date approved

Policy 5001: Procurement

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EXECUTIVE SUMMARY

USU Policy 5001: Procurement

Category: Finances, Operations & IT

Subcategory: Finances

Covered Individuals: All USU Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Purchasing & Contract Services, Director

BACKGROUND:

The Procurement policy was last revised in 2015. This revision addresses the need to update the competitive bid threshold amount, remove procedures identified in the policy, and correct outdated references.

KEY PROVISIONS OF THE REVISED POLICY:

The competitive bid threshold amount will now be defined in Purchasing & Contract Services Rules and Procedures.

In accordance with USHE Policy R571 Purchasing, the University is required to establish a competitive bid threshold amount. The current amount, established prior to 2012, is \$5,000. Due to inflation and the general increase in costs, this amount will increase to \$10,000.

USHE policy allows institutions to define exceptions to the competitive bid threshold. Simplified the process for when purchases are expected to be greater than the Standard Competitive Bid Threshold and requires contacting Purchasing.

Added special exceptions such as delegation of procurement authority, items for re-sale, and purchases between University departments.

Includes a Responsibilities section.

University Policy 5001: Procurement

Category: Finances, Operations & IT

Subcategory: Finances

Covered Individuals: Department Purchasers

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Purchasing and Contract Services, Director

Last Revised: 2025/MM/DD

Previous USU Policy Number: 529

5001.1 PURPOSE AND SCOPE

Proper management of Utah State University procurements and associated expenditures is critical to USU's ability to achieve its mission and is required by law and the Utah System of Higher Education ("USHE").

The purpose of this policy is to establish parameters and responsibilities that promote:

- 1) maximum value for dollars expended,
- 2) open competition and impartial evaluation of alternative products and services, and
- 3) fair, ethical, and legal trade practices, which develop a strong vendor community and public trust.

5001.2 POLICY

The Department of Purchasing and Contract Services (Purchasing) is responsible for the procurement of goods and services required by the university and its organizational units, as required by law, except for purchases specifically exempted under 5001.4.

Purchasing shall establish procedures and thresholds consistent with legal, budgetary, and delivery requirements of organizational units and provide the necessary assistance to:

- 1) acquire such goods and services in a timely and economical manner,
- 2) assure compliance with all applicable state and federal laws and university regulations, and
- 3) offer consultation and advice regarding all procurement needs of the university.

2.1 Competitive Bid Threshold

USU's current competitive bid thresholds are listed in [Purchasing and Contract Services Procedures](#).

For purchases **less than** the Standard Competitive Bid Threshold, departments may select a specific vendor that best fulfills the business need without the requirement of a competitive selection process. The primary procurement methods for purchases under this threshold are P-Cards and EZ-Buy.

For purchases **greater than** the Standard Competitive Bid Threshold, Purchasing must be involved in the procurement process to facilitate the vendor selection. In these cases, departments should contact

Purchasing as early as possible in the process to allow timely vendor selection in an efficient and compliant manner.

It is against the Utah Procurement Code and this Policy for a person to knowingly divide a purchase into one or more smaller purchases with the intent to make a procurement qualify under a lower threshold.

2.2 Competitive Selection Processes (Solicitations)

When a competitive selection process is required, Purchasing will work collaboratively with departments to conduct one of the following solicitations:

- Request for Quotation (RFQ)
- Invitation for Bid (IFB)
- Request for Proposal (RFP)

Detailed descriptions of each solicitation method are listed in [Purchasing and Contract Services Procedures](#).

2.3 Barter/Trade

Barter/trade is a system of exchange by which goods or services are directly exchanged for other goods or services, with or without the exchange of additional money. Any purchases made through barter/trade must comply with this policy regarding fairness, open competition, transparency, etc.

- 1) When considering barter/trade, the option should be available to all suppliers or offerors.
- 2) All barter/trade transactions should be recorded in the University financial system as offsetting revenue and expense entries.
- 3) If the market value of a transaction, including barter/trade and cash for a good or service, is greater than the Standard Competitive Bid Threshold, departments must contact Purchasing to ensure that an appropriate procurement process is followed.

2.4 Exceptions to Standard Procurement Methods

2.4.1 Sole Source

A standard procurement method is not required when only one source exists for the procurement. A requirement for a particular proprietary good or service in and of itself does not justify a sole source procurement if there is more than one potential supplier or offeror for that good or service. The individual requesting an exception from standard procurement methods must submit a written justification to Purchasing describing the circumstances and conditions of the requested exception. This justification must be approved by the Director of Purchasing and retained with the purchase record.

Purchasing is required to publish notice of the intent to enter into a sole source procurement at least 10 days in advance of the procurement.

2.4.2 Unreasonable or Cost-Prohibitive Transitional Costs

A standard procurement method is not required when the transitional costs associated with the procurement are unreasonable or cost-prohibitive. The individual requesting an exception from the standard procurement methods must submit written justification to Purchasing describing the circumstances and conditions of the requested exception. This justification must include the results of a cost-benefit analysis and demonstrate that the transitional costs are unreasonable or cost-prohibitive and that the awarding of a contract without a standard procurement method is in the best interest of USU. This justification must be approved by the Director of Purchasing and retained with the purchase record.

Purchasing is required to publish notice of the intent to enter into a transition cost procurement at least 10 days in advance of the procurement.

2.4.3 Impractical and Not in USU's Best Interests

A standard procurement method is not required when the circumstances of a procurement are such that the standard method is impractical and not in USU's best interests. The procurements set forth in R765-571a-8(3) are deemed by USHE and USU to make the awarding of a contract through a standard procurement method impractical or contrary to USU's best interests. The individual requesting an exception from the standard procurement methods must submit written justification to Purchasing describing the circumstances and conditions of the requested exception. This justification must be approved by the Director of Purchasing and retained with the purchase record.

2.4.4 Trial Use

A standard procurement method is not required when the procurement is for trial use that meets the requirements of Utah Code Section 63G-6a-802.3. The individual requesting an exception from the standard procurement methods must submit written justification to Purchasing describing the circumstances and conditions of the requested exception and an explanation of how the trial use or testing is needed to determine whether the procurement will benefit USU. This justification and explanation must be approved by the Director of Purchasing and retained with the purchase record.

2.4.5 Emergencies

Emergency procurement is appropriate when an emergency condition exists that limits the capability of USU to obtain competition. Any emergency procurements will be made with as much competition as reasonably practical while: (a) avoiding a lapse in critical USU services; (b) avoiding harm, or a risk of harm, to the public health, safety, welfare, or property; or (c) protecting the legal interests of USU. The circumstances of an emergency procurement must be approved by the Director of Purchasing and memorialized with the purchase record.

2.5 Special Exceptions

2.5.1 Delegation of Procurement Authority

In rare cases, and by virtue of their special needs and the roles they fill at the university, some organizational units may be authorized to solicit bids and may be delegated procurement authority at a higher spend level than normally authorized. Organizational units that qualify for this exception will be identified and enter into a written memorandum of understanding with the Director of Purchasing. Other organizational units may be extended similar limited procurement exceptions as described in writing, at the discretion of the Director of Purchasing. The Director of Purchasing retains procurement authority for these organizational units and may request periodic audits of delegated purchase authority. ([LINK TO PROCEDURES/EXCEPTIONS](#))

2.5.2 Items for Re-sale

Items purchased by the University for resale to the public are exempt from competitive bid requirements.

2.5.3 Other

University organizational units may purchase goods and services from other university organizational units and other Utah public procurement units that directly produce or provide the goods and/or services (not those provided by a contractor or third party). These purchases are exempt from competitive bid thresholds.

2.6 Limitations and Restrictions on Procurement

- 1) Procuring goods or services for the personal use of any USU employee is prohibited.
- 2) Orders or commitments for procurement by University employees are not binding on the University, except as permitted by this policy. Individuals who do not comply with University policy when placing procurement orders may become personally liable to the supplier for the contract price.

2.7 Protests

An actual or prospective bidder, quoter, or proposer may file a protest with the Director of Purchasing and Contract Services, who will then follow the requirements listed in the Utah Procurement Code.

2.8 Acceptance of a Gift

All USU employees, regardless of involvement in procurement decisions, are subject to the Utah Public Officers' and Employees' Ethics Act ("Act"). Employees who violate the Act in any way, including the acceptance of any inappropriate gifts, are in violation of this policy, may be at risk of criminal penalties, and/or may be subject to University disciplinary action.

As stated in Section 67-16-5(2) of the Act, "It is an offense for a public officer or public employee to knowingly receive, accept, take, seek, or solicit, directly or indirectly, for himself or another a gift of substantial value or a substantial economic benefit tantamount to a gift:

- 1) that would tend to improperly influence a reasonable person in the person's position to depart from the faithful and impartial discharge of the person's public duties;
- 2) that the public officer or public employee knows or that a reasonable person in that position should know under the circumstances is primarily for the purpose of rewarding the public officer or public employee for official action taken..."

2.9 Conflict of Interest

In addition, USU employees are subject to USU's conflict of interest policies and the Code of Federal Regulations, which states "no employee, officer, agent, or board member with a real or apparent conflict of interest may participate in the selection, award, or administration of a contract supported by a Federal award. A conflict of interest includes when the employee, officer, or agent, or board member, any member of their immediate family, their partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from an entity considered for a contract."

2.3 RESPONSIBILITIES

3.1 Business Services

Ensures that all purchasers under their purview have complied with this policy and approves the accounting of associated purchases.

3.2 Director, Department Head, Dean, and/or Vice President

Approve purchases and ensure that their respective units comply with this policy.

3.3 Purchasing and Contract Services

Responsible for updating this policy as necessary and providing guidance, training, and assistance with acquisitions above the established competitive bid thresholds.

5001.4 REFERENCES

- Code of Federal Regulations Title II, Grants and Agreements, [Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards \(2 CFR 200\)](#)
- [Utah Office of Administrative Rules R765-571a: Procurement](#)
- Utah Procurement Code ([Utah Code 63G-6A](#))
- Utah Public Officers' and Employees' Ethics Act ([Utah Code 67-16](#))
- Utah System of Higher Education [Policy R571, Purchasing](#)

5001.5 RELATED USU POLICIES

- [USU Policy 2300: Institutional Conflicts of Interest](#)
- [USU Policy 2301: Individual Conflicts of Interest](#)
- [USU Policy 5005: Charitable Donation](#)
- [USU Policy 5304: Meals and Entertainment](#)
- [USU Policy 5315: Use of University Property](#)

5001.6 DEFINITIONS

Purchaser. The purchaser is an employee authorized to initiate purchases on behalf of USU and is required to comply with 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

- [Purchasing and Contract Services Procedures](#)

Contacts

- [Purchasing and Contract Services](#)

POLICY HISTORY

Original issue date: 2015/03/02

Last review date: 2025/MM/DD

Next scheduled review date: 2028/06/01

Previous revision dates: 2015/03/02

University Policy ~~5001~~**529**: Procurement

Category: ~~Finances~~, ~~Operations~~g & ~~IT~~

Subcategory: ~~Finances~~**General**

Covered Individuals: ~~Department Purchasers~~**All Employees**

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: ~~Purchasing and Contract Services, Director~~**Controller's Office, Controller**

Last Revised: ~~2015/03/02~~ 2025/MM/DD

Previous USU Policy Number: ~~N/A~~ 529

~~5001529.1~~ **PURPOSE AND SCOPE**~~PREFACE~~

~~Proper management of Utah State University procurements and associated expenditures is critical to USU's ability to achieve its mission and is required by law and the Utah System of Higher Education ("As an institution of the State and the Utah System of Higher Education, the University is subject to the provisions of:~~

- ~~• Utah Procurement Code (Utah Code 63G-6A),~~
- ~~• Regents Policy R571, Delegation of Purchasing Authority,~~
- ~~• Utah Public Officers' and Employees' Ethics Act (Utah Code 67-16), and~~
- ~~• Code of Federal Regulations Title II, Grants and Agreements, Part 200—Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR 200)~~

~~The University supports the values and guiding principles of public procurement outlined in Regents Policy R571, Delegation of Purchasing Authority:~~

~~**Accountability**—Taking ownership and being responsible to stakeholders for our actions...essential to preserve the public trust and protect the public interest.~~

~~**Ethics**—Acting in a manner true to these values...essential to preserve the public's trust.~~

~~**Impartiality**—Unbiased decision-making and action...essential to ensure fairness for the public good.~~

~~**Professionalism**—Upholding high standards of job performance and ethical behavior...essential to balance diverse public interests.~~

~~**Service**—Obligation to assist stakeholders...essential to support the public good.~~

~~**Transparency**—Easily accessible and understandable policies and processes...essential to demonstrate responsible use of public funds.~~

~~See USHE".~~

~~The purpose of this policy is to establish parameters and responsibilities that promote:~~

~~Regents Policy R571, Delegation of Purchasing Authority for guiding principles associated with each value.~~

~~Accordingly, while applying these values and principles, the University expects employees to use the authorized procurement processes and:~~

- ~~1) obtain~~ maximum value for ~~each~~ dollars expended,
 - ~~2) utilize~~ open competition and impartial evaluation of alternative products and services, and
 - ~~1)3) foster~~ fair, ethical, and legal trade practices, which develop a strong vendor community and ~~promote~~ public trust ~~in Utah State University and the Utah System of Higher Education.~~
- ~~For additional information, see Purchasing and Contract Services' Rules and Procedures.~~

5001529.2 POLICY

The Department of Purchasing and Contract Services (Purchasing) is responsible for the procurement of goods and services required by the university and its organizational units as required by law, except for purchases specifically exempted under 5001.4

Purchasing shall establish procedures and thresholds consistent with legal, budgetary, and delivery requirements of organizational units and provide the necessary assistance to:

- 1) acquire such goods and services in a timely and economical manner,
- 2) assure compliance with all applicable state and federal laws and university regulations, and
- 3) offer consultation and advice regarding all procurement needs of the university.

2.1 Competitive Bid Threshold

USU's current~~The~~ competitive bid thresholds are listed in Purchasing and Contract Services Procedures.
~~for USU is currently set at \$5,000~~

~~It is against Utah Procurement Code and this Policy for a person to knowingly divide a purchase into one or more smaller purchases with the intent to make a procurement qualify under a lower threshold.~~

For purchases **less than \$5,000**, the Standard Competitive Bid Threshold, departments may select a specific vendor that best fulfills the business need without the requirement of a competitive selection process. The primary procurement methods for purchases under this threshold ~~\$5,000~~ are P-Cards and EZ-Buy.

- ~~P-Cards~~ — P-Card purchases can be made up to the individual limit established for a given P-Card
- ~~EZ-Buy~~ — For requisitions entered into EZ-Buy that are less than \$5,000, the system will automatically generate a purchase order to the vendor once the requisition has been routed through the approval levels established for the index number(s) being used.

For purchases **greater than** the Standard Competitive Bid Threshold, ~~\$5,000, a competitive selection process or a sole source justification is required.~~ In these instances, Purchasing and Contract Services ~~becomes~~ must be involved in the procurement process to facilitate the vendor selection. In these cases, departments should contact Purchasing as early as possible in the process so that collaboration can begin and to allow timely vendor selection can be made in an timely, efficient, and compliant manner by using the most efficient and appropriate solicitation method (See Section 529.3 for descriptions of solicitation methods).

~~The primary procurement method for purchases greater than \$5,000 is EZ-Buy:~~

~~**EZ-Buy** For requisitions entered into EZ-Buy that are greater than \$5,000, the system will route the requisition through the approval levels established for the index number(s) being used and then forward the requisition to Purchasing and Contract Services. Once Purchasing and Contract Services confirms that the appropriate vendor selection process has been completed, the requisition receives final approval and the system generates a purchase order to the vendor.~~

It is against the Utah Procurement Code and this Policy for a person to knowingly divide a purchase into one or more smaller purchases with the intent to make a procurement qualify under a lower threshold.

2.2 Competitive Selection Processes~~Procurement and (Solicitations) Methods~~

When a competitive selection process is required, Purchasing will work collaboratively with departments to conduct one of the following solicitations:

- Request for Quotation (RFQ)
- Invitation for Bid (IFB)
- Request for Proposal (RFP)

Detailed descriptions of each solicitation method are listed in Purchasing and Contract Services Procedures.

2.3 Barter/Trade

Barter/trade ~~sometimes referred to as quid pro quo~~, is a system of exchange by which goods or services are directly exchanged for other goods or services, with or without using the exchange of additional money. Any purchases made through barter/trade must comply with this policy regarding fairness. ~~If engaging in barter/trade, all personnel shall follow procurement policy regarding fair, open competition, transparency etc.~~

- 1) When considering barter/trade, the option should be available to all suppliers or offerors.
- 2) All barter/trade transactions should be recorded in the University financial system as offsetting revenue and expense entries.
- 3) If the market value of a transaction, including barter/trade and cash for a good or service, is greater than the Standard Competitive Bid Threshold \$5,000, departments ~~must~~should contact Purchasing ~~and Contract Services~~ to ensure that an appropriate procurement process is followed.

~~2.2 Quid pro quo means, "one thing in return for another or something that is given or taken in return for something else; substitute." To avoid the "appearance of impropriety" and maintain ethical, impartial, and transparent procurement processes, Utah State University regards the use of quid pro quo as barter or trade.~~

~~Note: As outlined in USU Policy 524, Receipting of Charitable Contributions, "a gift" means "a charitable contribution ...received by Utah State University for either unrestricted or restricted use in the furtherance of the University for which the University has made no commitment of resources or services other than committing to use the gift as the donor specifies. The gift is a nonreciprocal transfer of the asset in that there is no implicit or explicit statement of exchange, purchase of services, or provision of exclusive information." Donations should be processed through Utah State University Advancement.~~

~~2.5 Procurement and Solicitation Methods~~

~~Purchasing and Contract Services is responsible for the procurement of goods and services required by the University and its organizational units.~~

Certain aspects of procurement are distributed to departments in order to create an efficient and timely purchasing process for a wide variety of goods and services needed across the University.

Procurement Methods:

	DEPARTMENTAL UNITS
P-Card	Purchases can be made up to individual P-Card limits.
EZ-Buy	EZ-Buy allows departmental units to requisition the purchase of goods and services through Purchasing and Contract Services. Purchasing and Contract Services creates and manages a purchase order to procure the goods and services requisitioned by departmental units.
Purchases using Personal Funds —(Not applicable to individual travel, see Travel Policy #515)	The University discourages the use of personal funds as a procurement method, and such funding should occur only when P-Card or EZ-Buy methods are unavailable. Requests for reimbursement are made through EZ-Buy.
Petty Cash	As a general rule, petty cash funds are not used. Petty cash funds represent idle funds and create an ongoing need for security, record keeping, and auditing. P-Cards have replaced petty cash funds.

Solicitation Methods:

	DEPARTMENTAL UNITS
Request for Quotation	Contact Purchasing and Contract Services See Section 3.2
Invitation for Bid	Contact Purchasing and Contract Services See Section 3.3
Request for Proposal	Contact Purchasing and Contract Services See Section 3.4
Sole Source Procurement	Contact Purchasing and Contract Services See Section 4.1
Emergency Purchases	Contact Purchasing and Contract Services See Section 4.2

529.3 SOLICITATIONS

3.1 Request for Information (RFI)

For purchases over \$5,000, departments may solicit specifications, price, and other information from various vendors prior to contacting Purchasing and Contract Services. Departments and Purchasing and Contract Services then use this information to develop an Invitation for Bid (IFB), or Request for Proposal (RFP).

If desired, departments may request that Purchasing and Contract Services initiate a formal RFI process.

3.2 Request for Quotation (RFQ)

RFQs are competitive solicitations for quote from two or more vendors. Utah State University may select or reject the quotes received without notice to all parties.

RFQs may include a wide range of requirements, including:

- a) availability of a procurement item;
- b) delivery schedules;
- c) industry standards and practices;
- d) product specifications;
- e) training;
- f) new technologies;
- g) cost and quantity discounts;
- h) capabilities of potential providers of a procurement item; and
- i) alternative solutions.

RFQs shall state the acceptance period for the Quote and describe the manner for submitting the Quote (e.g. phone, fax, email).

Awards should be made to the vendor with the lowest bid that meets the requirements of the RFQ.

3.3 Invitation for Bid (IFB)

Purchasing and Contract Services uses IFBs to initiate competitive sealed bid procurement. IFBs will include a purchase description, contractual terms and conditions applicable to the procurement. Purchasing and Contract Services will:

- 1) Publically advertise the IFB as outlined in the Utah Procurement Code,
- 2) Accept responses for a minimum of ten (10) days,
- 3) Follow the sealed bid process,
- 4) Open sealed bids publically in accordance with the Utah Procurement Code,
- 5) Evaluate bids based on requirements set forth, and
- 6) Award within reasonable promptness to the lowest bidder whose bid meets the requirements as set forth.

3.4 Request for Proposal (RFP)

Purchasing and Contract Services uses RFP processes instead of the IFB processes if it is determined that the RFP process will provide the best value to the University. RFPs will include scope of work, contractual terms and conditions applicable, and submittal instructions. Proposals received will be evaluated internally by a committee established to determine the vendor proposal that best meets the needs of the University as outlined in the RFP. Purchasing and Contract Services will:

- 1) Publically advertise the RFP as outlined in the Utah Procurement Code,
- 2) Accept responses for a minimum of ten (10) days,
- 3) Follow the Utah Procurement Code, and
- 4) Appoint at least three individuals to evaluate the proposals based on requirements as set forth

[5001529.43](#) EXCEPTIONS TO [STANDARD PROCUREMENT METHODS](#)[SOLICITATIONS](#)

3.1 Sole Source ~~Procurement~~

~~Sole Source Procurement is permissible if a requirement is only available from a single supplier.~~
A standard procurement method is not required when only one source exists for the procurement. A requirement for a particular proprietary ~~item~~good or service in and of itself does not justify a sole source procurement if there is more than one potential supplier or offeror for that ~~item~~good or service. The individual requesting an exception from standard procurement methods must submit a written justification to Purchasing describing the circumstances and conditions of the requested exception. ~~The Director of Purchasing and Contract Services, or designee, has the responsibility to determine whether sufficient justification exists to utilize the sole source procurement method.~~ This justification must be approved by the Director of Purchasing and retained with the purchase record.

~~Purchasing and Contract Services~~ is required to publish notice of the intent to enter into a ~~S~~sole ~~S~~source ~~P~~procurement at least for 10 days in advance of the procurement.

[3.2 Unreasonable or Cost-Prohibitive Transitional Costs](#)

A standard procurement method is not required when the transitional costs associated with the procurement are unreasonable or ~~cost prohibitive~~cost-prohibitive. The individual requesting ~~exception from the standard procurement methods must submit~~an exception from the standard procurement methods must submit a written justification to Purchasing describing the circumstances and conditions of the requested exception. This justification must include the results of a ~~cost benefit analysis and demonstrate that the transitional costs are unreasonable or cost prohibitive~~cost-benefit analysis and demonstrate that the transitional costs are unreasonable or cost-prohibitive and that the awarding of a contract without a standard procurement method is in the best interest of USU. This justification must be approved by the Director of Purchasing and retained with the purchase record.

Purchasing is required to publish notice of the intent to enter into a transition cost procurement at least 10 days in advance of the procurement.

[3.3 Impractical and Not in USU's Best Interests](#)

A standard procurement method is not required when the circumstances of a procurement are such that the standard method is impractical and not in USU's best interests. The procurements set forth in R765-571a-8(3) are deemed by USHE and USU to make the awarding of a contract through a standard procurement method impractical or contrary to USU's best interests. The individual requesting an exception from the standard procurement methods must submit written justification to Purchasing describing the circumstances and conditions of the requested exception. This justification must be approved by the Director of Purchasing and retained with the purchase record.

[3.4 Trial Use](#)

A standard procurement method is not required when the procurement is for trial use that meets the requirements of Utah Code Section 63G-6a-802.3. The individual requesting an exception from the standard procurement methods must submit written justification to Purchasing describing the circumstances and conditions of the requested exception and an explanation of how the trial use or testing is needed to determine whether the procurement will benefit USU. This justification and explanation must be approved by the Director of Purchasing and retained with the purchase record.

[3.5 Emergencies](#)~~y Purchases~~

Emergency procurement is appropriate when an emergency condition exists that limits the capability of USU to obtain competition. ~~An emergency condition is a situation which creates a threat to public health, welfare, or safety such as may arise by reason of floods, epidemics, riots, equipment failures, or such other reason as may be proclaimed by the President when the University's capability of obtaining a competitive bid is limited.~~ Any emergency procurements will be made with as much competition as reasonably practical while: (a) avoiding a lapse in critical USU services; (b) avoiding harm, or a risk of harm, to the public health, safety, welfare, or property; or (c) protecting the legal interests of USU. The circumstances of an emergency procurement must be approved by the Director of Purchasing and memorialized with the purchase record.

~~Emergency procurements will be coordinated through Purchasing and Contract Services.~~

~~5001529.4~~ SPECIAL EXCEPTIONS

4.1 Delegation of Procurement Authority

In rare cases, and by virtue of their special needs and the roles they fill at the university, some organizational units may be authorized to solicit bids and may be delegated procurement authority at a higher spend level than normally authorized. Organizational units that qualify for this exception will be identified and enter into a written memorandum of understanding with the Director of Purchasing. Other organizational units may be extended similar limited procurement exceptions as described in writing, at the discretion of the Director of Purchasing. The Director of Purchasing retains procurement authority for these organizational units and may request periodic audits of delegated purchase authority. (LINK TO PROCEDURES/EXCEPTIONS)

4.2 Items for Re-sale

Items purchased by the University for re-sale to the public are exempt from competitive bid requirements.

4.3 Other

University organizational units may purchase goods and services from other university organizational units and other Utah public procurement units that directly produce or provide the goods and/or services (not those provided by a contractor or third party). These purchases are exempt from competitive bid thresholds.

~~5001529.5~~ LIMITATIONS AND RESTRICTIONS ON PROCUREMENT

- 1) Procuring goods or services for the personal use of any USU employee is prohibited.
- 2) Orders or commitments for procurement by University employees are not binding on the University, except as permitted by this policy. Individuals who do not comply with University policy when placing procurement orders may become personally liable to the supplier for the contract price.

~~PURCHASING AND CONTRACT SERVICES RULES AND PROCEDURES~~

- ~~1) Purchasing and Contract Services will maintain detailed rules and procedures for the procurement processes supportive of this policy.~~

~~2) Utah State University departments are expected to be familiar with and follow the rules, procedures, and processes published on the Purchasing and Contract Services web site~~

~~5001.6.529.7~~ PROTESTS

An actual or prospective bidder, quoter, or proposer may file a protest with the Director of Purchasing and Contract Services who will then follow the requirements listed in the Utah Procurement Code.

~~5001529.78~~ IMPROPER ACCEPTANCE OF A GIFT

7.1 Acceptance of a Gift

All ~~University~~ USU employees, regardless of involvement in procurement decisions, are subject to the Utah Public Officers' and Employees' Ethics Act ("Act"). Employees who violate the Act in any way, including the acceptance of any inappropriate gifts, are in violation of this policy, may be at risk of criminal penalties, and/or may be subject to University disciplinary action.

As stated in ~~Utah Public Officers' and Employees' Ethics Act~~ Section 67-16-5(2) of the Act, "It is an offense for a public officer or public employee to knowingly receive, accept, take, seek, or solicit, directly or indirectly for himself or another a gift of substantial value or a substantial economic benefit tantamount to a gift:

- 1) that would tend to improperly influence a reasonable person in the person's position to depart from the faithful and impartial discharge of the person's public duties;
- 2) that the public officer or public employee knows or that a reasonable person in that position should know under the circumstances is primarily for the purpose of rewarding the public officer or public employee for official action taken..."

~~5001529.89~~ CONFLICT OF INTEREST

In addition, ~~University~~ USU employees are subject to USU's conflict of interest policies ~~of Utah State University~~ and the Code of Federal Regulations, which states "no employee, officer, ~~or agent,~~ or board member with a real or apparent conflict of interest mayust participate in the selection, award, or administration of a contract supported by a Federal award~~if he or she has a real or apparent conflict of interest. Such a~~ conflict of interest includes~~would arise~~ when the employee, officer, or agent, or board member, any member of their~~his or her~~ immediate family, their~~his or her~~ partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from an entity~~firm~~ considered for a contract."

~~5001529.910~~ RESPONSIBILITIES

9.1 Business Services

Ensures that all purchasers under their purview have complied with this policy and approves the accounting of associated purchases.

9.2 Director, Department Head, Dean, and/or Vice President

Approve purchases and ensure that their respective units comply with this policy.

9.3 Purchasing and Contract Services

Responsible ~~to~~ for updating ~~e~~ this policy as necessary and providing ~~e~~ guidance, training, and assistance with acquisitions above the established competitive bid thresholds.

~~5001529.101~~ REFERENCES

-
- [Code of Federal Regulations Title II, Grants and Agreements, Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards \(2 CFR 200\)](#)
 - ~~Utah Procurement Code (Utah Code 63G-6A).~~
 - [Utah Office of Administrative Rules R765-571a: Procurement](#)
 - [Utah Procurement Code \(Utah Code 63G-6A\)](#)
 - ~~Utah Public Officers' and Employees' Ethics Act (Utah Code 67-16), and~~
 - ~~Code of Federal Regulations Title II, Utah System of Higher Education Policy R571, Delegation of Purchasing Authority~~[Grants and Agreements, Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards \(2 CFR 200\)](#)

~~5001529.11~~2 RELATED USU POLICIES

- [USU Policy 5304~~516~~](#): Meals and Entertainment
- [USU Policy 5005~~524~~](#): Charitable Donation
- [USU Policy 2300~~544~~](#): Institutional Conflicts of Interest
- [USU Policy 2301~~545~~](#): Individual Conflicts of Interest
- [USU Policy 5315~~546~~](#): Use of University Property

~~5001529.12~~3 DEFINITIONS

Purchaser. [The purchaser is an employee authorized to initiate purchases on behalf of USU and is required to comply with 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

- [Purchasing and Contract Services Procedures](#)

Contacts

- [Purchasing and Contract Services](#)

POLICY HISTORY

Original issue date: 2015/03/02

Last review date: ~~2015/03/02~~ [2025/MM/DD](#)

Next scheduled review date: ~~N/A~~ [2028/06/01](#)

Previous revision dates: 2015/03/02

POLICY MANUAL

OPERATING POLICIES AND PROCEDURES

Number 5001

Subject: Procurement Policy

Effective Date: March 2, 2015

Date of Last Revision: March 2, 2015

Previous USU Policy #: 529

5001.1 PREFACE

As an institution of the State and the Utah System of Higher Education, the University is subject to the provisions of:

- Utah Procurement Code ([Utah Code 63G-6A](#)),
- Regents [Policy R571, Delegation of Purchasing Authority](#),
- Utah Public Officers' and Employees' Ethics Act ([Utah Code 67-16](#)), and
- Code of Federal Regulations Title II, Grants and Agreements, [Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards \(2 CFR 200\)](#)

The University supports the values and guiding principles of public procurement outlined in Regents [Policy R571, Delegation of Purchasing Authority](#):

Accountability - Taking ownership and being responsible to stakeholders for our actions...essential to preserve the public trust and protect the public interest.

Ethics - Acting in a manner true to these values...essential to preserve the public's trust.

Impartiality - Unbiased decision-making and action...essential to ensure fairness for the public good.

Professionalism - Upholding high standards of job performance and ethical behavior...essential to balance diverse public interests.

Service - Obligation to assist stakeholders...essential to support the public good.

Transparency - Easily accessible and understandable policies and processes...essential to demonstrate responsible use of public funds.

See Regents [Policy R571, Delegation of Purchasing Authority](#) for guiding principles associated with each value.

Accordingly, while applying these values and principles, the University expects employees to use the authorized procurement processes and:

- 1) obtain maximum value for each dollar expended,
- 2) utilize open competition and impartial evaluation of alternative products, and
- 3) foster fair, ethical, and legal trade practices, which develop a strong vendor community and promote public trust in Utah State University and the Utah System of Higher Education.

For additional information, see [Purchasing and Contract Services' Rules and Procedures](#).

5001.2 POLICY

2.1 Competitive Bid Threshold

The competitive bid threshold for USU is currently set at \$5,000.

It is against Utah Procurement Code and this Policy for a person to knowingly divide a purchase into one or more smaller purchases with the intent to make a procurement qualify under a lower threshold.

For purchases **less than \$5,000**, departments may select a specific vendor that best fulfills the business need without the requirement of a competitive selection process. The primary procurement methods for purchases under \$5,000 are P-Cards and EZ-Buy.

P-Cards P-Card purchases can be made up to the individual limit established for a given P-Card

EZ-Buy For requisitions entered into EZ-Buy that are less than \$5,000, the system will automatically generate a purchase order to the vendor once the requisition has been routed through the approval levels established for the index number(s) being used.

For purchases **greater than \$5,000**, a competitive selection process or a sole source justification is required. In these instances, Purchasing and Contract Services becomes involved in the procurement process to facilitate the vendor selection by using the most

efficient and appropriate solicitation method (See Section 5001.3 for descriptions of solicitation methods). The primary procurement method for purchases greater than \$5,000 is EZ-Buy:

EZ-Buy For requisitions entered into EZ-Buy that are greater than \$5,000, the system will route the requisition through the approval levels established for the index number(s) being used and then forward the requisition to Purchasing and Contract Services. Once Purchasing and Contract Services confirms that the appropriate vendor selection process has been completed, the requisition receives final approval and the system generates a purchase order to the vendor.

2.2 Barter/Trade

Barter/trade is a system of exchange by which goods or services are directly exchanged for other goods or services without using money. If engaging in barter/trade, all personnel shall follow procurement policy regarding fair, open competition, transparency etc.

- 1) When considering barter/trade, the option should be available to all suppliers or offerors.
- 2) All barter/trade transactions should be recorded in the University financial system as offsetting revenue and expense entries.
- 3) If the market value of a transaction including barter/trade and cash for a good or service is greater than \$5,000, departments should contact Purchasing and Contract Services to ensure that an appropriate procurement process is followed.

Quid pro quo means, “one thing in return for another or something that is given or taken in return for something else; substitute.” To avoid the “appearance of impropriety” and maintain ethical, impartial, and transparent procurement processes, Utah State University regards the use of quid pro quo as barter or trade.

Note: As outlined in [*USU Policy 5004, Receipting of Charitable Contributions*](#), “a gift” means “a charitable contribution ...received by Utah State University for either unrestricted or restricted use in the furtherance of the University for which the University has made no commitment of resources or services other than committing to use the gift as the donor specifies. **The gift is a nonreciprocal transfer of the asset in that there is no implicit or explicit statement of exchange, purchase of services, or provision of exclusive information.**” Donations should be processed through Utah State University Advancement.

2.3 Procurement and Solicitation Methods

Purchasing and Contract Services is responsible for the procurement of goods and services required by the University and its organizational units.

Certain aspects of procurement are distributed to departments in order to create an efficient and timely purchasing process for a wide variety of goods and services needed across the University.

Procurement Methods:

	DEPARTMENTAL UNITS
P-Card	Purchases can be made up to individual P-Card limits.
EZ-Buy	EZ-Buy allows departmental units to requisition the purchase of goods and services through Purchasing and Contract Services. Purchasing and Contract Services creates and manages a purchase order to procure the goods and services requisitioned by departmental units.
Purchases using Personal Funds <i>(Not applicable to individual travel, see Travel Policy #5302)</i>	The University discourages the use of personal funds as a procurement method, and such funding should occur only when P-Card or EZ-Buy methods are unavailable. Requests for reimbursement are made through EZ-Buy.
Petty Cash	As a general rule, petty cash funds are not used. Petty cash funds represent idle funds and create an ongoing need for security, record keeping, and auditing. P-Cards have replaced petty cash funds.

Solicitation Methods:

	DEPARTMENTAL UNITS
Request for Quotation	Contact Purchasing and Contract Services See Section 3.2
Invitation for Bid	Contact Purchasing and Contract Services See Section 3.3
Request for Proposal	Contact Purchasing and Contract Services See Section 3.4
Sole Source Procurement	Contact Purchasing and Contract Services See Section 4.1
Emergency Purchases	Contact Purchasing and Contract Services See Section 4.2

5001.3 SOLICITATIONS

3.1 Request for Information (RFI)

For purchases over \$5,000, departments may solicit specifications, price, and other information from various vendors prior to contacting Purchasing and Contract Services. Departments and Purchasing and Contract Services then use this information to develop an Invitation for Bid (IFB) or Request for Proposal (RFP).

If desired, departments may request that Purchasing and Contract Services initiate a formal RFI process.

3.2 Request for Quotation (RFQ)

RFQs are competitive solicitations for quote from two or more vendors. Utah State University may select or reject the quotes received without notice to all parties.

- 1) RFQs may include a wide range of requirements, including:
 - a) availability of a procurement item;
 - b) delivery schedules;
 - c) industry standards and practices;
 - d) product specifications;
 - e) training;
 - f) new technologies;
 - g) cost and quantity discounts,
 - h) capabilities of potential providers of a procurement item; and
 - i) alternative solutions.
- 2) RFQs shall state the acceptance period for the Quote and describe the manner for submitting the Quote (e.g. phone, fax, email).
- 3) Awards should be made to the vendor with the lowest bid that meets the requirements of the RFQ.

3.3 Invitation for Bid (IFB)

Purchasing and Contract Services uses IFBs to initiate competitive sealed bid procurement. IFBs will include a purchase description, contractual terms and conditions applicable to the procurement. Purchasing and Contract Services will:

- 1) Publically advertise the IFB as outlined in the Utah Procurement Code,
- 2) Accept responses for a minimum of ten (10) days,
- 3) Follow the sealed bid process,
- 4) Open sealed bids publically in accordance with the Utah Procurement Code,
- 5) Evaluate bids based on requirements set forth, and

- 6) Award within reasonable promptness to the lowest bidder whose bid meets the requirements as set forth.

3.4 Request for Proposal (RFP)

Purchasing and Contract Services uses RFP processes instead of the IFB processes if it is determined that the RFP process will provide the best value to the University. RFPs will include scope of work, contractual terms and conditions applicable, and submittal instructions. Proposals received will be evaluated internally by a committee established to determine the vendor proposal that best meets the needs of the University as outlined in the RFP. Purchasing and Contract Services will:

- 1) Publically advertise the RFP as outlined in the Utah Procurement Code,
- 2) Accept responses for a minimum of ten (10) days,
- 3) Follow the Utah Procurement Code, and
Appoint at least three individuals to evaluate the proposals based on requirements as set forth.

5001.4 EXCEPTIONS TO SOLICITATIONS

4.1 Sole Source Procurement

Sole Source Procurement is permissible if a requirement is only available from a single supplier. A requirement for a particular proprietary item does not justify a sole source procurement if there is more than one potential supplier or offeror for that item.

The Director of Purchasing and Contract Services, or designee, has the responsibility to determine whether sufficient justification exists to utilize the sole source procurement method. Purchasing and Contract Services is required to publish notice of the intent to enter into a Sole Source Procurement for 10 days.

4.2 Emergency Purchases

Emergency procurement is appropriate when an emergency condition exists. An emergency condition is a situation which creates a threat to public health, welfare, or safety such as may arise by reason of floods, epidemics, riots, equipment failures, or such other reason as may be proclaimed by the President when the University's capability of obtaining a competitive bid is limited.

Emergency procurements will be coordinated through Purchasing and Contract Service.

5001.5 PURCHASING AND CONTRACT SERVICES RULES AND PROCEDURES

- 1) Purchasing and Contract Services will maintain detailed rules and procedures for

- the procurement processes supportive of this policy.
- 2) Utah State University departments are expected to be familiar with and follow the rules, procedures, and processes published on the Purchasing and Contract Services web site. (www.purchasing.usu.edu/html/rulesandprocedures)

5001.6 PROTESTS

An actual or prospective bidder may file a protest with the Director of Purchasing and Contract Services who will then follow the requirements listed in the Utah Procurement Code.

5001.7 IMPROPER ACCEPTANCE OF A GIFT

7.1 Acceptance of a Gift

All University employees, regardless of involvement in procurement decisions are subject to the Utah Public Officers' and Employees' Ethics Act. Employees who accept inappropriate gifts may be at risk of criminal penalties and/or may be subject to University disciplinary action.

As stated in Utah Public Officers' and Employees' Ethics Act Section 67-16-5(2), "It is an offense for a public officer or public employee to knowingly receive, accept, take, seek, or solicit, directly or indirectly for himself or another a gift of substantial value or a substantial economic benefit tantamount to a gift:

- 1) that would tend to improperly influence a reasonable person in the person's position to depart from the faithful and impartial discharge of the person's public duties;
- 2) that the public officer or public employee knows or that a reasonable person in that position should know under the circumstances is primarily for the purpose of rewarding the public officer or public employee for official action taken..."

5001.8 CONFLICT OF INTEREST

In addition, University employees are subject to conflict of interest policies of Utah State University and the Code of Federal Regulations, which states "no employee, officer, or agent must participate in the selection, award, or administration of a contract if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract."

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, USU Policy 5001: Procurement establishes parameters and responsibilities that promote maximum value for dollars expended, open competition and impartial evaluation of products and services, and fair, ethical, and legal trade practices;

WHEREAS, the Director of Purchasing and Contract Services desires to increase the competitive bid threshold due to inflation, define when exceptions may be allowed, and clarify expectations and responsibilities;

WHEREAS, the revisions requested by the Director of Purchasing and Contract Services are focused on aligning the policy with USHE rules and establishing procedures that allow organizational units to acquire goods and services in a timely manner and in compliance with all applicable state and federal laws and university regulations;

WHEREAS, the President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the amendments to Policy 5001:Procurement; and

WHEREAS, the amendments to Policy 5001: Procurement address concerns about presidential expenditures and will be presented for public comment and receive the appropriate USU administrative review and approval required by USU Policy 1001 following provisional approval by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees provisionally approve the amendments to Policy 5001: Procurement.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

Signature of Chair White or designee

Date approved

Policy 5005:Charitable Donations

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USU Policy 5005: Charitable Donations

Category: Facilities, Operations & IT

Subcategory: Finances

Covered Individuals: All University Employees

Responsible Executive: Vice President for Finance & Administrative Services

Policy Custodian: Vice President for Finance & Administrative Services

BACKGROUND:

Updates to this policy were necessary to transition content to the new policy template. It sets standards for charitable donations and establishes expectations for documentation and approval.

KEY PROVISIONS OF THE NEW/REVISED POLICY:

The revisions include adding a purpose statement for the policy, setting a general rule and criteria for charitable donations made by the University. The edits clarify that the business purpose of the donation must be documented. It clarifies that charitable contributions must serve a legitimate purpose and approved by deans or vice presidents.

IMPLEMENTATION PLAN:

USU has existing channels and processes in place for financial transactions. Any charitable contributions will be reviewed and monitored through existing financial channels. Additional documentation to justify the legitimate purpose will be required.

University Policy 5005: Charitable Donations

Category: Facilities, Operations & IT

Subcategory: Finances

Covered Individuals: All University Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Vice President for Finance and Administrative Services

Last Revised: 2025/MM/DD

Previous USU Policy Number: 527

5005.1 PURPOSE AND SCOPE

The purpose of this policy is to set a general rule regarding charitable contributions made by the University and define the criteria for determining when donation approval could be appropriate.

5005.2 POLICY

Utah State University is a public tax-exempt institution of higher education and, therefore, as a general rule, does not make charitable contributions.

However, in rare circumstances, donations can be made, with approval from the appropriate Dean or Vice President, where the expenditure serves a legitimate purpose that advances the mission of the University. In such cases, justification must be documented that supports the business purpose of the donation.

5005.3 RESPONSIBILITIES

3.1 Deans / Vice Presidents

Approve only charitable contributions that serve a legitimate purpose that advances the mission of the University.

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

Contacts

- [Vice President for Finance and Administrative Services](#)

POLICY HISTORY

Original issue date: 2014/01/29

Last revised date: 2025/MM/DD

Next scheduled review date: 2029/11/01

Previous revision dates: 2014/01/29; 2024/11/01

University Policy ~~5005~~527: Charitable Donations

Category: [Facilities, Operations & IT](#) ~~Operating Policies~~

Subcategory: ~~General~~ [Finances](#)

Covered Individuals: All University Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Vice President for Finance and Administrative Services

Last Revised: ~~2014/01/29~~

Previous USU Policy Number: N/A

~~5005~~527.1 PURPOSE AND SCOPE

[The purpose of this policy is to set a general rule regarding charitable contributions made by the University and define the criteria for determining when donation approval could be appropriate.](#)

~~5005~~527.2 POLICY

Utah State University is a public tax-exempt institution of higher education and therefore, as a general rule, does not make charitable contributions.

However, in rare circumstances, donations can be made, with approval from the appropriate Dean or Vice President, where the expenditure serves a legitimate purpose that advances the mission of the University. [In such cases, justification must be documented that supports the business purpose of the donation.](#)

~~5005~~527.3 RESPONSIBILITIES

3.1 Deans / Vice Presidents

[Approve only charitable contributions that serve a legitimate purpose that advances the mission of the University.](#)

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](#)

Related Forms and Tools

- [None](#)

Contacts

- [Vice President for Finance and Administrative Services](#)

POLICY HISTORY

Original issue date: 2014/01/29

Last revised date: 2024/11/01

Next scheduled review date: 2029/11/01

Previous revision dates: 2014/01/29

POLICY MANUAL

OPERATING POLICIES AND PROCEDURES

Number 5005

Subject: Charitable Donations

Effective Date: January 29, 2014

5005.1 Charitable Donations

Utah State University is a public tax-exempt institution of higher education and therefore, as a general rule, does not make charitable contributions. However, in rare circumstances, donations can be made, with approval from the appropriate Dean or Vice President, where the expenditure serves a legitimate purpose that advances the mission of the University.

RESOLUTION

UTAH STATE UNIVERSITY

BOARD OF TRUSTEES

WHEREAS, USU Policy 5005: Charitable Donations sets a general rule regarding charitable contributions made by the University and defines criteria for determining when donation approval is appropriate;

WHEREAS, the Vice President for Finance and Administrative Services desires to clarify that the business purpose of the donation must be documented, and adds responsibility for deans and vice presidents to only approve charitable contributions that serve a legitimate purpose that advances the mission of the University;

WHEREAS, the revisions requested by the Vice President and Administrative Services are focused on adding clarity to the policy and consistency by transitioning content to the current policy template;

WHEREAS, the President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the amendments to Policy 5005: Charitable Donations; and

WHEREAS, the amendments to Policy 5005: Charitable Donations address concerns about presidential expenditures and will be presented for public comment and receive the appropriate USU administrative review and approval required by USU Policy 1001 following provisional approval by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees provisionally approves the amendments to Policy 5005: Charitable Donations.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

Signature of Chair White or designee

Date approved

Policy 5302: Travel

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USU Policy 5302: Travel

Category: Facilities, Operations & IT

Subcategory: Finances

Covered Individuals: Employees, Students & Visitors

Responsible Executive: Vice President for Finance & Administrative Services

Policy Custodian: Controller's Office, Controller

For each section below, summarize the highlights of the new policy using the suggested questions as guidelines.

BACKGROUND:

Revisions to this policy were necessary to clarify expectations for reimbursement due to University-related travel.

KEY PROVISIONS OF THE NEW/REVISED POLICY:

- Added domestic lodging rate guidance that reimbursement will typically be at the standard room rate. If the standard or best available rate averages more than \$450 per night, justification must be documented.
- Added international lodging rate guidance that reimbursement will typically be at actual costs not to exceed the maximum allowable Federal lodging per diem rate. If reasonable accommodations cannot be secured within the maximum lodging per diem rate, reimbursement may be requested for actual expenses, not to exceed 300 percent of the maximum lodging per diem allowance.
- Added that parking at airports or off-site parking vendors will be allowed at the economy parking rate of the departure airport.

IMPLEMENTATION PLAN:

Employees will be notified of requirements during training forums, and through the FAQs section on the Travel website. The Travel Office and Purchasing will enforce the policy as approvals are requested.

University Policy 5302: Travel

Category: Facilities, Operations, IT

Sub Category: General Operations

Covered Individuals: Employees, Students, and Visitors

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller's Office, Controller

Last Revised: 2025/MM/DD

Previous USU Policy Number: 515

5302.1 PURPOSE AND SCOPE

Utah State University operates an Internal Revenue Service (IRS) Accountable Plan for University business-related travel expenses. When IRS criteria are met, travel expenses allowed under an Accountable Plan are considered to be non-taxable to the employee, whether reimbursed to the employee or [guest](#), or paid directly to the vendor with University funds.

This policy determines when an actual expense is allowed or whether a per diem or mileage allowance may be used. The University reserves the right to set per diem or mileage allowances at or below the applicable current Federal rates. Rates will be reviewed annually. Travel expenses are to be allowed uniformly throughout the University.

The University is accountable for how public money is spent and expects that travel expenses will be scrutinized. Those who travel on behalf of the University hold a position of trust and authority, requiring the demonstration of integrity by judicious use of such funds.

It is the responsibility of the Department Administrator to determine when travel is authorized. It is the responsibility of the traveler to certify via electronic approval that all expenses are correct and incurred in performance of University-related business. Wherever possible, the University will establish controls to ensure that departments meet their fiduciary responsibilities related to University travel.

When University funds are not available for all expenses, an individual is not obligated to travel. However, if the individual chooses to travel, it is expected that the traveler will assume the remainder of the cost.

All University travel must be supported by a properly completed Travel Authorization (TA) form unless the only expenses are relating to the operation of University-owned vehicles, including departmental and Motor Pool vehicles. The TA form is available at <https://servicenow.usu.edu>.

5302.2 POLICY

2.1 Approved Rates for Reimbursement

2.1.1 Transportation

2.1.1.1 Private Automobile

The allowed rate for University business-related use of a private automobile will be determined utilizing Motor Pool data for the cost of operation adjusted for the cost of fuel. Rates will not be greater than the approved IRS rate. The current rates can be found at https://travel.usu.edu/travel_procedures.

2.1.1.2 Automobile at Airfare Rate

When traveling out-of-state, and the traveler elects to drive the traveler's own vehicle the entire trip (in lieu of using a commercial carrier), allowed expenses will be the lesser of:

The allowed mileage rate; or

The associated expenses of flying as allowed and documented by the department.

2.1.1.3 Rental Vehicles

Allowed expenses for rental vehicles will be based on actual receipts, with reductions for any personal use outside of the University travel period.

Travelers should always use the car rental agencies that are under contract with the State of Utah (listed within Travel Procedures, https://travel.usu.edu/travel_procedures). These contracts include insurance coverage for damage to the rental vehicle and liability coverage for thirdparty property damage and injuries. If non-contracted rental agencies are used, both the damage and liability insurance offered by the rental agency should be procured; otherwise, there is a \$10,000 deductible with State Risk that would be the responsibility of the department.

2.1.1.4 Commercial Aircraft

Allowable air transportation costs are limited to those fares less than first class, as supported by an itemized receipt.

2.1.1.5 Private Aircraft

The allowed rate will be ten cents higher than the private automobile rate per mile for one person and fifteen cents higher than the private automobile rate per mile for two or more persons.

2.1.2 Lodging

2.1.2.1 Domestic

Domestic lodging will typically be reimbursed at the standard room rate of a reasonably priced hotel, along with hotel parking, mandatory fees, and applicable taxes, with an itemized receipt. "Standard room rate" refers to the lowest published rate for a basic room (e.g., queen(s) or king bed). If the standard or best available rate for the required lodging averages more than \$450 per night, justification must be documented.

Justification Examples

- Conference Hotel Requirement: The conference-designated hotel
- Availability Limitations: No standard rooms are available due to local demand, events, or seasonal constraints.
- Safety and Security: A higher-priced hotel is necessary due to location safety concerns.
- Cost Efficiency: A higher nightly rate results in lower overall costs (e.g., reduced transportation, included meals, waived fees).

2.1.2.2 International

International lodging will be reimbursed at actual costs as supported by itemized receipts not to exceed the maximum allowable Federal lodging per diem rate. The maximum allowable Federal lodging per diem rates can be found at the [US Department of State Office of Allowances](#). Per Federal guidelines, if

reasonable lodging accommodations cannot be secured at a location where the actual cost is within the maximum lodging per diem allowed, the traveler may request reimbursement on an actual expense basis, not to exceed 300 percent of the maximum lodging per diem allowance. Approval of actual expenses in excess of the maximum lodging per diem allowed should usually happen in advance of travel and at the discretion of the Department Administrator.

2.1.2.3 Airbnb, VRBO or other Alternative Lodging

Travelers may use services such as Airbnb or VRBO, but it is important to note that the University is not the contracting party for any agreements (electronic or otherwise). Instead, the agreement will be between the service and the individual, since it is the individual choosing this method of service, and the individual is responsible for any and all liability associated with the use of such services.

Hotels and other commercial properties offer insurance that covers their guests in case of injury or property loss. The type of properties offered via Airbnb and similar services varies widely in the type of coverage available for guests. Because of this, we do not recommend their use for university business. However, if you choose to utilize these services, please be aware that you are accepting personal responsibility for any incidents that may occur during your stay.

Travelers may elect to stay with friends, relatives, or other alternative lodging options, such as campgrounds, rather than staying in a traditional motel or hotel. With an authorized TA and proof of staying overnight away from home, the traveler will be reimbursed as follows:

\$25 per night with no receipts required; or Actual cost with an itemized receipt from a facility such as a campground or trailer park.

2.1.3 Meals

2.1.3.1 Travel Requiring an Overnight Stay – Either actual costs or per diem must be used for the entire trip.

2.1.3.1.1 Actual Costs (applicable to both domestic and international travel)

Expenses for meals based on actual costs are allowed but must be supported by itemized receipts.

2.1.3.1.2 Per Diem

2.1.3.2.1.1 Domestic Travel

Travelers may be allowed a per diem for any given trip.

The current per diem rate can be found at https://travel.usu.edu/travel_procedures.

2.1.3.2.1.2 International Travel

Travelers may be allowed a per diem for any given trip. The per diem rates applicable are the meals and incidental expense (M&IE) rates outlined in the Federal Travel Regulations. These rates can be accessed through the Department of State website at http://aoprals.state.gov/web920/per_diem.asp.

2.1.3.2.1.3 Partial-Day Travel

The per diem rate of the first and last day of any travel requiring more than a single day will be allowed at 75% of the full per diem rate.

2.1.3.2.1.4 Multiple Destination Points

The per diem rate will be based on the destination point. When there is more than one destination point, the per diem could be different for any given travel itinerary. For example, travel might include a conference in Washington, D.C., and then a departure to London, England. The initial per diem rate would be based on the rate effective for Washington, D.C. Upon departure from Washington, D.C., the per diem rate would be the rate effective for London, England.

2.1.3.2.1.5 Adjustment for Meals Provided

The per diem will be adjusted for any meals provided by the conference or event, included in the cost of lodging, or provided as part of a [group travel meal](#) or [business meal](#). Since per diem rates vary, the adjustment for meals provided will be a percentage of the total per diem allowed: 25% for breakfast, 30% for lunch, and 45% for dinner.

2.1.3.2 Travel Not Requiring an Overnight Stay

For single-day travel where the individual is in travel status for more than 12 hours but is not required to stay overnight, the allowed meal expenses will be at the actual cost as supported by an itemized receipt or 75% of the per diem rate, and will be reported as taxable income in accordance with Internal Revenue Service regulations.

2.1.4 Parking Fees

2.1.4.1 Airports

Parking at airports or off-site parking vendors will be allowed at the economy parking rate of the departure airport with an itemized receipt.

2.1.4.2 All other Parking Fees

All other parking fees will be allowed with an itemized receipt.

Unallowed parking expenses include:

- Valet parking for convenience when self-parking is available,
- Car detailing or washing services,
- Parking tickets or traffic violations,
- Vehicle maintenance or repairs, or
- Personal convenience fees associated with parking or transportation services.

2.1.5. Other Out-of-Pocket Expenses

2.1.5.1 Taxi, WIFI, etc.

All other University business-related expenditures are allowed at actual cost. Individual transactions of \$15.00 or more must be supported by an itemized receipt.

2.1.5.2 ATM Fees

ATM fees charged to obtain a cash advance related to the travel will be allowed.

3.1 Family Companion Travel

For those occasions when it is determined that family/companion travel is essential or beneficial to the University for the accomplishment of a bona fide business purpose, University funds may be used for the family/companion travel expenses with approval by the appropriate Dean or Vice President.

3.1.1 Essential Family/Companion Travel

If the family/companion travel is determined to be essential to the University for the accomplishment of a bona fide business purpose (not just beneficial), the allowed travel expenses will be non-taxable to the employee.

3.1.2 Beneficial Family/Companion Travel

If the family/companion travel is determined to be beneficial to the University for the accomplishment of a bona fide business purpose (not essential), the allowed travel expenses will be taxable to the employee, and withholding taxes will be deducted from the next available payroll.

5302.4 RESPONSIBILITIES

4.1 Controller's Office

The Controller's Office is responsible for monitoring and updating this policy.

4.2 University Departments

Departments are responsible for adhering to this accountable plan.

5302.5 RELATED USU POLICIES

- [Policy 5304](#): Meals and Entertainment
- [Policy 5001](#): Procurement
- [Policy 5303](#): International Travel

5302.6 DEFINITIONS

6.1 Group Meal

A meal where two or more employees eat together while on University business-related travel, and one employee pays for the entire cost of the meals of all employees in attendance.

6.2 Business Meal

A meal when one or more employees attend a meal with clients, customers, etc., whether the meal is paid for by the employee or the non-employee.

6.3 Per Diem Adjustment for Group Travel Meals or Business Meals

The per diem for meals will be adjusted for all employees in attendance at the group travel meal or business meal, including any employee who paid for the meal.

6.4 Guest

A guest is a non-employee traveling for University business, such as a job interview, a guest lecturer, etc.

RESOURCES

Procedures

- Travel Procedures, https://travel.usu.edu/travel_procedures

Guidance

- IRS Publication 463: Travel, Gift, and Car Expenses, <https://www.irs.gov/publications/p463>
- Internal Revenue Service Publication 5137, Fringe Benefit Guide

Related Forms and Tools

- Foreign Per Diem Rates, https://aoprals.state.gov/web920/per_diem.asp
- Private Automobile Reimbursement Rate, https://travel.usu.edu/travel_procedures
- Travel Authorization Form, <https://servicenow.usu.edu>

Contacts

[Controller's Office](#)

POLICY HISTORY

Original issue date: 2010/07/01

Last revision date: 2025/MM/DD

Previous revision dates: 2015/01/28, 2018/01/01, 2019/02/27, 2019/04/01, 2019/11/13, 2021/06/02, 2022/06/23, 2023/02/08, 2023/10/25,

University Policy 5302: Travel

Category: Facilities, Operations, IT

Sub Category: General Operations

Covered Individuals: Employees, Students, and Visitors

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller's Office, Controller

Last Revised: 2025/MM/DD

Previous USU Policy Number: 515

5302.1 PURPOSE AND SCOPE

Utah State University operates an Internal Revenue Service (IRS) Accountable Plan for University ~~business-related~~[business-related](#) travel expenses. When IRS criteria are met, travel expenses allowed under an Accountable Plan are considered to be non-taxable to the employee, whether reimbursed to the employee or [guest](#), or paid directly to the vendor with University funds.

This policy determines when an actual expense is allowed or whether a per diem or mileage allowance may be used. The University reserves the right to set per diem or mileage allowances at or below the applicable current Federal rates. Rates will be reviewed annually. Travel expenses are to be allowed uniformly throughout the University.

The University is accountable for how public money is spent and expects that travel expenses will be scrutinized. Those who travel on behalf of the University hold a position of trust and authority, requiring the demonstration of integrity by judicious use of such funds.

It is the responsibility of the Department Administrator to determine when travel is authorized. It is the responsibility of the traveler to certify via electronic approval that all expenses are correct and incurred in performance of ~~University-related~~[University-related](#) business. Wherever possible, the University will establish controls to ensure that departments meet their fiduciary responsibilities related to University travel.

When University funds are not available for all expenses, an individual is not obligated to travel. However, if the individual chooses to travel, it is expected that the traveler will assume the remainder of the cost.

All University travel must be supported by a properly completed Travel Authorization (TA) form unless the only expenses are relating to the operation of ~~University-owned~~[University-owned](#) vehicles, including departmental and Motor Pool vehicles. The TA form is available at <https://servicenow.usu.edu>.

5302.2 POLICY

2.1 Approved Rates for Reimbursement

2.1.1 Transportation

2.1.1.1 Private Automobile

The allowed rate for University ~~business-~~related use of a private automobile will be determined utilizing Motor Pool data for [the](#) cost of operation adjusted for [the](#) cost of fuel. Rates will not be greater than the approved IRS rate. The current rates can be found at https://travel.usu.edu/travel_procedures.

2.1.1.2 Automobile at Airfare Rate

When traveling out-of-state, and the traveler elects to drive ~~his or her~~ [the traveler's](#) own vehicle the entire trip (in lieu of using a commercial carrier), allowed expenses will be the lesser of:

The allowed mileage rate; or

The associated expenses of flying as allowed and documented by the department.

2.1.1.3 Rental Vehicles

Allowed expenses for rental vehicles will be based on actual receipts, with reductions for any personal use outside of the University travel period.

Travelers should always use the car rental agencies ~~which that~~ are under contract with the State of Utah (listed within Travel Procedures, https://travel.usu.edu/travel_procedures). These contracts include insurance coverage for damage to the rental vehicle and liability coverage for third-party property damage and injuries. If non-contracted rental agencies are used, both the damage and liability insurance offered by the rental agency should be procured; ~~otherwise~~ [otherwise](#), there is a \$10,000 deductible with State Risk that would be the responsibility of the department.

2.1.1.4 Commercial Aircraft

Allowable air transportation costs are limited to those fares less than first class, as supported by an itemized receipt.

2.1.1.5 Private Aircraft

The allowed rate will be ten cents higher than the private automobile rate per mile for one person and fifteen cents higher than the private automobile rate per mile for two or more persons.

2.1.2 Lodging

2.1.2.1 Domestic ~~and International~~ Travel

~~Lodging will be allowed at actual costs as supported by itemized receipts. Domestic lodging will typically be reimbursed at the standard room rate of a reasonably priced hotel, along with hotel parking, mandatory fees, and applicable taxes, with an itemized receipt. "Standard room rate" refers to the lowest published rate for a basic room (e.g., queen(s) or king bed). If the standard or best available rate for the required lodging averages more than \$450 per night, justification must be documented.~~

Justification Examples

- Conference Hotel Requirement: The conference-designated hotel
- Availability Limitations: No standard rooms are available due to local demand, events, or seasonal constraints.
- Safety and Security: A higher-priced hotel is necessary due to location safety concerns.
- Cost Efficiency: A higher nightly rate results in lower overall costs (e.g., reduced transportation, included meals, waived fees).

~~2.1.2.2 Airbnb, VRBO or other Alternative Lodging~~

2.1.2.2 International

International lodging will be reimbursed at actual costs as supported by itemized receipts not to exceed the maximum allowable Federal lodging per diem rate. The maximum allowable Federal lodging per diem

rates can be found at the US Department of State Office of Allowances. Per Federal guidelines, if reasonable lodging accommodations cannot be secured at a location where the actual cost is within the maximum lodging per diem allowed, the traveler may request reimbursement on an actual expense basis, not to exceed 300 percent of the maximum lodging per diem allowance. Approval of actual expenses in excess of the maximum lodging per diem allowed should usually happen in advance of travel and at the discretion of the Department Administrator.

2.1.2.3 Airbnb, VRBO or other Alternative Lodging

Travelers may use services such as Airbnb or VRBO, but it is important to note that the University is not the contracting party for any agreements (electronic or otherwise). Instead, the agreement will be between the service and the individual, since it is the individual choosing this method of service, and the individual is responsible for any and all liability associated with the use of such services.

Hotels and other commercial properties offer insurance that ~~cover~~ covers their guests in case of injury or property loss. The type of properties offered via Airbnb and similar services ~~vary~~ varies widely in the type of coverage available for guests. Because of this, we do not recommend their use for university business. However, if you choose to utilize these services, please be aware that you are accepting personal responsibility for any incidents that may occur during your stay.

Travelers may elect to stay with friends, relatives, or other alternative lodging options, such as campgrounds, rather than staying in a traditional motel or hotel. With an authorized TA and proof of staying overnight away from home, the traveler will be reimbursed as follows: \$25 per night with no receipts required; or Actual cost with an itemized receipt from a facility such as a campground or trailer park.

2.1.3 Meals

2.1.3.1 Travel Requiring an Overnight Stay – Either actual costs or per diem must be used for the entire trip.

2.1.3.1.1 Actual Costs (applicable to both domestic and international travel)

Expenses for meals based on actual costs are allowed but must be supported by itemized receipts.

2.1.3.1.2 Per Diem

2.1.3.2.1.1 Domestic Travel

Travelers may be allowed a per diem for any given trip.

The current per diem rate can be found at https://travel.usu.edu/travel_procedures.

2.1.3.2.1.2 International Travel

Travelers may be allowed a per diem for any given trip. The per diem rates applicable are the meals and incidental expense (M&IE) rates outlined in the Federal Travel Regulations. These rates can be accessed through the Department of State website at http://aoprals.state.gov/web920/per_diem.asp.

2.1.3.2.1.3 Partial-Day Travel

The per diem rate of the first and last day of any travel requiring more than a single day will be allowed at 75% of the full per diem rate.

2.1.3.2.1.4 Multiple Destination Points

The per diem rate will be based on the destination point. ~~When~~ Where there is more than one destination point, the per diem could be different for any given travel itinerary. For example, travel might include a

conference in Washington, D.C., and then a departure to London, England. The initial per diem rate would be based on the rate effective for Washington, D.C. Upon departure from Washington, D.C., the per diem rate would be the rate effective for London, England.

2.1.3.2.1.5 Adjustment for Meals Provided

The per diem will be adjusted for any meals provided by the conference or event, included in the cost of lodging, or provided as part of a [group travel meal](#) or [business meal](#). Since per diem rates vary, the adjustment for meals provided will be a percentage of the total per diem allowed: 25% for breakfast, 30% for lunch, and 45% for dinner.

2.1.3.2 Travel Not Requiring an Overnight Stay

For single-day travel where the individual is in travel status for more than 12 hours but is not required to stay overnight, the allowed meal expenses will be at the actual cost as supported by an itemized receipt or 75% of the per diem rate, and will be reported as taxable income in accordance with Internal Revenue Service regulations.

2.1.4—Other Out-of-Pocket Expenses [Parking Fees](#)

2.1.4.1 Parking Fees

~~Parking fees are allowed at the actual cost as supported by a receipt.~~

[2.1.4.1 Airports](#)

[Parking at airports or off-site parking vendors will be allowed at the economy parking rate of the departure airport with an itemized receipt.](#)

[2.1.4.2 All other Parking Fees](#)

[All other parking fees will be allowed with an itemized receipt.](#)

[Unallowed parking expenses include:](#)

- [Valet parking for convenience when self-parking is available.](#)
- [Car detailing or washing services.](#)
- [Parking tickets or traffic violations.](#)
- [Vehicle maintenance or repairs.](#)
- [Personal convenience fees associated with parking or transportation services.](#)

~~2.1.4.2.1.5~~ [Other Out-of-Pocket Expenses](#)

~~2.1.4.2~~ [2.1.5.1 Taxi, WIFI, etc.](#)

All other University business-related expenditures are allowed at actual cost. Individual transactions of \$15.00 or more must be supported by an itemized receipt.

~~2.1.4.3~~ [2.1.5.2 ATM Fees](#)

ATM fees charged to obtain a cash advance related to the travel will be allowed.

~~5302.3 FAMILY/COMPANION TRAVEL~~

[3.1 Family Companion Travel](#)

For those occasions when it is determined that family/companion travel is essential or beneficial to the University for the accomplishment of a bona fide business purpose, University funds may be used for the family/companion travel expenses with approval by the appropriate Dean or Vice President.

~~3.1~~ 3.1.1 Essential Family/Companion Travel

If the family/companion travel is determined to be essential to the University for the accomplishment of a bona fide business purpose (not just beneficial), the allowed travel expenses will be non-taxable to the employee.

~~3.2~~ 3.1.2 Beneficial Family/Companion Travel

If the family/companion travel is determined to be beneficial to the University for the accomplishment of a bona fide business purpose (not essential), the allowed travel expenses will be taxable to the employee, and withholding taxes will be deducted from the next available payroll.

5302.4 RESPONSIBILITIES

4.1 Controller's Office

The Controller's Office is responsible for monitoring and updating this policy.

4.2 University Departments

Departments are responsible for adhering to this accountable plan.

5302.5 RELATED USU POLICIES

- [Policy 5304](#): Meals and Entertainment
- [Policy 5001](#): Procurement
- [Policy 5303](#): International Travel

5302.6 DEFINITIONS

6.1 Group Meal

A meal where two or more employees eat together while on University business-related travel, and one employee pays for the entire cost of the meals of all employees in attendance.

6.2 Business Meal

A meal when one or more employees attend a meal with clients, customers, etc., whether the meal is paid for by the employee or the non-employee.

6.3 Per Diem Adjustment for Group Travel Meals or Business Meals

The per diem for meals will be adjusted for all employees in attendance at the group travel meal or business meal, including any employee who paid for the meal.

6.4 Guest

A guest is a non-employee traveling for University business, such as a job interview, a guest lecturer, etc.

RESOURCES

Procedures

University Policy 5302

Travel

- Travel Procedures, https://travel.usu.edu/travel_procedures

Guidance

- IRS Publication 463: Travel, Gift, and Car Expenses, <https://www.irs.gov/publications/p463>
- Internal Revenue Service Publication 5137, Fringe Benefit Guide

Related Forms and Tools

- Foreign Per Diem Rates, https://aoprals.state.gov/web920/per_diem.asp
- Private Automobile Reimbursement Rate, https://travel.usu.edu/travel_procedures
- Travel Authorization Form, <https://servicenow.usu.edu>

Contacts

Controller's Office

POLICY HISTORY

Original issue date: 2010/07/01

Last review date: 2023/02/08

Previous revision dates: 2015/01/28, 2018/01/01, 2019/02/27, 2019/04/01, 2019/11/13, 2021/06/02, 2022/06/23, 2023/02/08, 2023/10/25,

University Policy 5302: Travel

Category: Facilities, Operations, IT

Sub Category: General Operations

Covered Individuals: Employees, Students, and Visitors

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller's Office, Controller

Last Revised: 2023/10/25

5302.1 PURPOSE AND SCOPE

Utah State University operates an Internal Revenue Service (IRS) Accountable Plan for University business related travel expenses. When IRS criteria are met, travel expenses allowed under an Accountable Plan are considered to be non-taxable to the employee, whether reimbursed to the employee or [guest](#), or paid directly to the vendor with University funds.

This policy determines when an actual expense is allowed or whether a per diem or mileage allowance may be used. The University reserves the right to set per diem or mileage allowances at or below the applicable current Federal rates. Rates will be reviewed annually. Travel expenses are to be allowed uniformly throughout the University.

The University is accountable for how public monies are spent and expects that travel expenses will be scrutinized. Those who travel on behalf of the University hold a position of trust and authority, requiring the demonstration of integrity by judicious use of such funds.

It is the responsibility of the Department Administrator to determine when travel is authorized. It is the responsibility of the traveler to certify via electronic approval that all expenses are correct and incurred in performance of University related business. Wherever possible, the University will establish controls to ensure that departments meet their fiduciary responsibilities related to University travel.

When University funds are not available for all expenses, an individual is not obligated to travel. However, if the individual chooses to travel, it is expected that the traveler will assume the remainder of the cost.

All University travel must be supported by a properly completed Travel Authorization (TA) form unless the only expenses are relating to the operation of University owned vehicles, including departmental and Motor Pool vehicles. The TA form is available at <https://servicenow.usu.edu>.

5302.2 POLICY

2.1 Approved Rates for Reimbursement

2.1.1 Transportation

2.1.1.1 Private Automobile

The allowed rate for University business related use of a private automobile will be determined utilizing Motor Pool data for cost of operation adjusted for cost of fuel. Rates will not be greater than the approved IRS rate. The current rates can be found at https://travel.usu.edu/travel_procedures.

2.1.1.2 Automobile at Airfare Rate

When traveling out-of-state, and the traveler elects to drive his or her own vehicle the entire trip (in lieu of using a commercial carrier), allowed expenses will be the lesser of:

The allowed mileage rate; or

The associated expenses of flying as allowed and documented by the department.

2.1.1.3 Rental Vehicles

Allowed expenses for rental vehicles will be based on actual receipts with reductions for any personal use outside of the University travel period.

Travelers should always use the car rental agencies which are under contract with the State of Utah (listed within Travel Procedures, https://travel.usu.edu/travel_procedures). These contracts include insurance coverage for damage to the rental vehicle and liability coverage for third party property damage and injuries. If non-contracted rental agencies are used, both the damage and liability insurance offered by the rental agency should be procured, otherwise there is a \$10,000 deductible with State Risk that would be the responsibility of the department.

2.1.1.4 Commercial Aircraft

Allowable air transportation costs are limited to those fares less than first class as supported by an itemized receipt.

2.1.1.5 Private Aircraft

The allowed rate will be ten cents higher than the private automobile rate per mile for one person and fifteen cents higher than the private automobile rate per mile for two or more persons.

2.1.2 Lodging**2.1.2.1 Domestic and International Travel**

Lodging will be allowed at actual costs as supported by itemized receipts.

2.1.2.2 Airbnb, VRBO or other Alternative Lodging

Travelers may use services such as Airbnb or VRBO, but it is important to note that the University is not the contracting party for any agreements (electronic or otherwise). Instead, the agreement will be between the service and the individual, since it is the individual choosing this method of service, and the individual is responsible for any and all liability associated with the use of such services.

Hotels and other commercial properties offer insurance that cover their guests in case of injury or property loss. The type of properties offered via Airbnb and similar services vary widely in the type of coverage available for guests. Because of this we do not recommend their use for university business. However, if you choose to utilize these services, please be aware that you are accepting personal responsibility for any incidents that may occur during your stay.

Travelers may elect to stay with friends, relatives, or other alternative lodging options such as campgrounds, rather than staying in a traditional motel or hotel. With an authorized TA and proof of staying overnight away from home, the traveler will be reimbursed as follows:
\$25 per night with no receipts required; or Actual cost with an itemized receipt from a facility such as a campground or trailer park.

2.1.3 Meals

2.1.3.1 Travel Requiring an Overnight Stay – Either actual costs or per diem must be used for the entire trip.

2.1.3.1.1 Actual Costs (applicable to both domestic and international travel)

Expenses for meals based on actual costs are allowed but must be supported by itemized receipts.

2.1.3.1.2 Per Diem

2.1.3.1.2.1 Domestic Travel

Travelers may be allowed a per diem for any given trip.

The current per diem rate can be found at https://travel.usu.edu/travel_procedures.

2.1.3.1.2.2 International Travel

Travelers may be allowed a per diem for any given trip. The per diem rates applicable are the meals and incidental expense (M&IE) rates outlined in the Federal Travel Regulations. These rates can be accessed through the Department of State website at http://aoprals.state.gov/web920/per_diem.asp.

2.1.3.1.2.3 Partial-Day Travel

The per diem rate of the first and last day of any travel requiring more than a single day will be allowed at 75% of the full per diem rate.

2.1.3.1.2.4 Multiple Destination Points

The per diem rate will be based on the destination point. Where there is more than one destination point, the per diem could be different for any given travel itinerary. For example, travel might include a conference in Washington D.C. and then a departure to London, England. The initial per diem rate would be based on the rate effective for Washington D.C. Upon departure from Washington D.C. the per diem rate would be the rate effective for London, England.

2.1.3.1.2.5 Adjustment for Meals Provided

The per diem will be adjusted for any meals provided by the conference or event, included in the cost of lodging, or provided as part of a [group travel meal](#) or [business meal](#). Since per diem rates vary, the adjustment for meals provided will be a percentage of the total per diem allowed; 25% for breakfast, 30% for lunch, and 45% for dinner.

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For single day travel where the individual is in travel status for more than 12 hours but is not required to stay overnight, the allowed meal expenses will be at the actual cost as supported by an itemized receipt or 75% of the per diem rate, and will be reported as taxable income in accordance with Internal Revenue Service regulations.

2.1.4 Other Out-of-Pocket Expenses

2.1.4.1 Parking Fees

Parking fees are allowed at the actual cost as supported by a receipt.

2.1.4.2 Taxi, WIFI, etc.

All other University business related expenditures are allowed at actual cost. Individual transactions of \$15.00 or more must be supported by an itemized receipt.

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ATM fees charged to obtain a cash advance related to the travel will be allowed.

5302.3 FAMILY/COMPANION TRAVEL

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3.1 Essential Family/Companion Travel

If the family/companion travel is determined to be essential to the University for the accomplishment of a bona fide business purpose (not just beneficial), the allowed travel expenses will be non-taxable to the employee.

3.2 Beneficial Family/Companion Travel

If the family/companion travel is determined to be beneficial to the University for the accomplishment of a bona fide business purpose (not essential), the allowed travel expenses will be taxable to the employee and withholding taxes will be deducted from the next available payroll.

5302.4 RESPONSIBILITIES**4.1 Controllers Office**

The Controller's Office is responsible for monitoring and updating this policy.

4.2 University Departments

Departments are responsible for adhering to this accountable plan.

5302.5 RELATED USU POLICIES

- Policy 5304: Meals and Entertainment
- Policy 5001: Procurement
- Policy 5303: International Travel

5302.6 DEFINITIONS**6.1 Group Meal**

A meal where two or more employees eat together while on University business related travel and one employee pays for the entire cost of the meals of all employees in attendance.

6.2 Business Meal

A meal when one or more employees attend a meal with clients, customers, etc., whether the meal is paid for by the employee or the non-employee.

6.3 Per Diem Adjustment for Group Travel Meals or Business Meals

The per diem for meals will be adjusted for all employees in attendance at the group travel meal or business meal, including any employee who paid for the meal.

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A guest is a non-employee traveling for University business such as a job interview, a guest lecturer, etc.

RESOURCES

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Related Forms and Tools

- Foreign Per Diem Rates, https://aoprals.state.gov/web920/per_diem.asp
- Private Automobile Reimbursement Rate, https://travel.usu.edu/travel_procedures
- Travel Authorization Form, <https://servicenow.usu.edu>

Contacts

Dan Christensen, d.christensen@usu.edu

Michelle Bair, michelle.bair@usu.edu

POLICY HISTORY

Original issue date: 2010/07/01

Last review date: 2023/02/08

Previous revision dates: 2015/01/28, 2018/01/01, 2019/02/27, 2019/04/01, 2019/11/13, 2021/06/02, 2022/06/23, 2023/02/08, 2023/10/25

RESOLUTION

UTAH STATE UNIVERSITY

BOARD OF TRUSTEES

WHEREAS, USU Policy 5302: Travel sets standards for how public money is spent on University-business related travel expenses and hold employees accountable to demonstrate integrity by judicious use of such funds;

WHEREAS, the Vice President for Finance and Administrative Services desires to add guidance on reimbursement for University business-related domestic and international lodging rates, and parking;

WHEREAS, the revisions requested by the Vice President for Finance and Administrative Services are focused on clarifying expectations, and aligning the policy with the Federal lodging per diem rate where appropriate;

WHEREAS, the President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the amendments to Policy 5302: Travel; and

WHEREAS, the amendments to Policy 5302: Travel address concerns about presidential expenditures and will be presented for public comment and receive the appropriate USU administrative review and approval required by USU Policy 1001 following provisional approval by the Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees provisionally approve the amendments to Policy 5302: Travel.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

Signature of Chair White or designee

Date approved

Policy 5304: Meals & Entertainment

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USU Policy 5304: Meals & Entertainment

Category: Facilities, Operations & IT

Subcategory: Finances

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance & Administrative Services

Policy Custodian: Controller's Office, Controller

BACKGROUND:

Revisions to this policy were necessary to clarify expectations for responsible use of University funds, supported by documentation and aligned with Internal Revenue Services guidelines.

KEY PROVISIONS OF THE NEW/REVISED POLICY:

- Added documentation requirements to all de minimis sections
- Added additional de minimis examples to add clarity on occasions where meals or entertainment expenses may be appropriate
- Specified the steps to document business meals and entertainment expenses

IMPLEMENTATION PLAN:

Employees will be notified of requirements during training forums, on the Controller's website, and in procedures. Purchasing will enforce the policy as pcard transactions are monitored.

University Policy 5304: Meals and Entertainment

Category: Facilities, Operations, IT

Subcategory: Finances

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller, Controller's Office

Last Revised: 2025/MM/DD

Previous USU Policy Number: 516

5304.1 PURPOSE AND SCOPE

There are occasions when extending hospitality through meals and entertainment is in the best interest of the University. This policy identifies the limited situations in which University funds may be used to pay for meals and entertainment.

University funds must be used responsibly, supported by documentation, and follow USU policy and Internal Revenue Services (IRS) guidelines. This policy promotes accountability and consistency when meals or entertainment support University business purposes.

Note: Meals incurred while in travel status are governed by Policy 5302: Travel.

5304.2 POLICY

The University will pay for meals and entertainment expenses when costs are reasonable and necessary for the conduct of university business. Expenses must be:

- (1) directly related to the active conduct of University business;
- (2) associated with the active conduct of University business; or
- (3) de minimis under Internal Revenue Service (IRS) guidelines.

2.1 Directly Related to the Active Conduct of University Business

To meet the directly related test for meals and entertainment expenses, the following must be demonstrated:

- The main purpose of the combined business and meals/entertainment is to actively conduct business,
- Business is conducted with the person(s) during the meals/entertainment period, and
- There is more than a general expectation of obtaining some benefit to the University.

2.2 Associated with the Active Conduct of University Business

To meet the associated test for meals and entertainment expenses, the following must be demonstrated:

- Associated with the active conduct of University business, and

- Directly before or after a substantial business discussion.

2.3 De Minimis

A de minimis meal or entertainment is any occasional benefit with so little value (considering frequency) that accounting for it would be unreasonable and administratively impractical.

De minimis examples include:

2.3.1 Employee Events

Such as:

- Appreciation Events
- Retirement/Separation Functions
- Holiday Functions
- Retreats

Cost must be reasonable and may include employees, guests, and family members at the department head's discretion. Documentation is required.

2.3.2 Beverages/Food Items

Supplies of coffee, water, soda, juice, and similar items may be purchased for hospitality to guests. Department head approval and documentation are required.

2.3.3 Working Meetings

Refreshments or light meals may be appropriate for working meetings where food is incidental to the meeting. Working meetings are held to conduct substantive work, typically involve two or more departments, and last two or more hours. Department head approval and documentation are required.

2.3.4 Trainings/Workshops

Refreshments or light meals may be provided at trainings/workshops when appropriate for the event's time of day and duration. Department head approval and documentation are required.

2.3.5 Potential Candidate

When hosting a potential candidate, it is permissible to provide a meal(s) for the candidate, hiring committee, and other relevant guests. Department head approval and documentation are required.

Note:

Per IRS regulations (Publication 15-b, Tax Guide to Fringe Benefits), meals and entertainment expenses are considered taxable income to the employee

- (1) if the meals and entertainment expenses do not meet one of the tests noted above,
- (2) are not substantiated with supporting documentation (see Section 2.5), or
- (3) do not qualify as de minimis.

2.4 Alcohol Purchases

Purchase of alcohol may be allowed with approval of a Dean or Vice President. State appropriations, including E&G, and sponsored research funds may not be used to pay for alcohol.

2.5 Unallowable Costs

Meals when two or more employees choose to voluntarily go to lunch together regardless of whether business is conducted.

Meals when the meeting could have been scheduled during the normal course of business, except when employees from multiple departments can only meet during a meal period. Exceptions must not occur on a regular or routine basis, or be reciprocal (e.g.; monthly, weekly, etc.).

Charges for unallowable meals on a University P-card must be reimbursed.

2.6 Documentation

Business meals and entertainment expenses must be documented with:

- The business purpose for the meal/entertainment.
- Names and affiliations of individuals involved.
- Date and location of the meal/entertainment.
- Itemized receipts. (Credit card receipts do not qualify as itemized)

Meals and Entertainment documentation is not required for food that is purchased as research supplies, for culinary instruction, or as normal operating supplies (e.g. Edith Bowen lunch supplies, preschool snacks, or Dining Services food for resale). However, these types of purchases still require that the business purpose is documented and charged to the appropriate account code (i.e. Supplies, Cost of Goods, etc.).

If the business purpose and expense cannot be properly documented, the employee may be required to reimburse the University.

5304.3 RESPONSIBILITIES

3.1 Employees

Provide documentation for reimbursement or p-card charges.

3.2 Transaction Coordinators

Verify that expenditures are consistent with policy requirements and documented.

3.3 Business Managers

Verify that expenditures are allowable and allocable.

3.4 Department Heads

Approve allowable expenses consistent with this policy.

3.5 Dean or Vice Presidents

Approve alcohol purchases consistent with this policy.

3.6 Controller's Office

Monitor compliance with tax reporting requirements.

5304.4 REFERENCES

- [Internal Revenue Service Publication 5137, Fringe Benefit Guide](#)
- [Internal Revenue Service Publication 15-b, Employer's Tax Guide to Fringe Benefits](#)

5304.5 RELATED USU POLICIES

- [Utah State University Policy 5001: Procurement](#)
- [Utah State University Policy 5302: Travel](#)

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 P-Card Procedures](#)

Related Forms and Tools

- [ServiceNow Travel Forms](#)

Contacts

- [Controller's Office](#)

POLICY HISTORY

Original issue date: 2006/01/27

Last revision date: 2025/MM/DD

Next scheduled review date: 2026/09/01

Previous revision dates: 2022/06/23, 2017/08/09, 2015/04/22, 2013/04/10

University Policy 5304: Meals and Entertainment

Category: Facilities, Operations, IT

Subcategory: ~~General Operations~~ [Finances](#)

Covered Individuals: All Employees

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller, Controller's Office

Last Revised: 2022/06/23

Previous USU Policy Number: 516

5304.1 PURPOSE AND SCOPE

There are occasions when extending hospitality through meals and entertainment is in the best interest of the University. This policy identifies the limited situations in which University funds may be used to pay for meals and entertainment.

~~In all cases, the University expects employees to exercise good judgment when committing University funds for meals and entertainment.~~

University funds must be used responsibly, supported by documentation, and follow USU policy and Internal Revenue Services (IRS) guidelines. This policy promotes accountability and consistency when meals or entertainment support University business purposes.

Note: ~~Meals incurred while in travel status are governed by that are to be reimbursed on a Travel Authorization should follow Policy 5302: Travel~~ 515: Travel.

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5304.2 POLICY

2.1 Allowable Meals and Entertainment Expenses

The University will pay for meals and entertainment expenses when costs are reasonable ~~they are ordinary~~ and necessary for the conduct of university business. Expenses must be: ~~and~~

- (1) directly related to the active conduct of University business;
- (2) associated with the active conduct of University business; or
- (3) ~~when they are considered~~ de minimis ~~benefits~~ under Internal Revenue Service (IRS) guidelines.

~~Meals that are to be reimbursed on a Travel Authorization should follow Policy 515: Travel.~~

2.1 Directly Related to the Active Conduct of University Business

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To meet the directly related test for meals and entertainment expenses, the following ~~you must be demonstrated~~ ~~show that:~~

- The main purpose of the combined business and meals/entertainment ~~is to~~was the actively conduct ~~of business,~~
- ~~You did engage in b~~Business is conducted with the person(s) during the meals/entertainment period, and
- ~~There is~~You have more than a general expectation of obtaining some benefit to the University.

~~Entertainment expenses generally are not considered directly related if you are not present or in situations where there are substantial distractions that generally prevent you from actively conducting business.~~

2.2 Associated with the Active Conduct of University Business

To meet the associated test for meals and entertainment expenses, the following~~you must be~~ demonstrated~~show that the entertainment is:~~

- Associated with the active conduct of University business, and
- Directly before or after a substantial business discussion.

~~A business discussion will not be considered substantial unless you can show that you actively engaged in the discussion, meeting, negotiation, or other transaction to obtain some benefit to the University.~~

2.3 De Minimis Benefits

A de minimis meal or entertainment is any occasional benefit ~~provided to an employee or guest that has with~~ so little value (~~taking into account how~~considering frequency~~ly a meal or entertainment is provided~~) that accounting for it would be unreasonable and administratively impractical.

De minimis examples ~~of occasions when meals and entertainment may be classified as de minimis~~ include:

2.3.1 Employee Events

Such as:

- Appreciation Events,
- Retirement/Separation Functions,
- Holiday Functions,
- Retreats

Cost must be reasonable and may include employees, guests, and family members at the department head's discretion. Documentation is required.

2.3.2 Beverages/Food Items

Supplies of coffee, water, soda, juice, and similar items may be purchased for hospitality~~and provided~~ to ~~University~~ guests. ~~Approval must be by the d~~Department head approval and documentation are required.

2.3.2 Appreciation Events

~~Units may hold events during the year to show appreciation for employee efforts. The cost of the event should be reasonable and may include guests or family members at the department head's discretion. Approval of these events must be by the department head.~~

2.3.3 Working Meetings

Refreshments or light meals may be appropriate for working meetings where food is incidental to the meeting. Working meetings are held to conduct substantive work, typically involve two or more departments, and last two or more hours. Department head approval and documentation are required.

2.3.3 Retirement/Separation Functions

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Departments may hold a reception, luncheon, etc. for employees retiring or separating from the University (one per employee). Reasonable expenditures are permitted and may include guests or family members at the department head's discretion. Approval of these events must be by the department head.

2.3.4 ~~Holiday Functions~~

~~Holiday functions are permitted and may include guests or family members at the department head's discretion. The cost of such functions must be reasonable and may not be charged against any contract or grant fund or reimbursed overhead (F&A). Approval of these events must be by the department head.~~

2.3.5.2.3.4 ~~Trainings/Retreats and Workshops~~

~~Beverages/Refreshments or light meals may be provided at trainings/workshops (coffee, juice, soda, donuts, rolls, etc.) for retreats and workshops are permissible. Meals and entertainment may be provided to employees, guests and family members when appropriate for the event's time of day and duration of the event. Approval of these events must be by the department head.~~ approval and documentation are required.

2.3.5 Potential Candidate

When hosting a potential candidate, it is permissible to provide a meal(s) for the candidate, hiring committee, and other relevant guests. Department head approval and documentation are required.

Note:-

Per IRS regulations (Publication 15-b, Tax Guide to Fringe Benefits), meals and entertainment expenses are considered taxable income to the employee

- (1) if the meals and entertainment expenses do not meet one of the tests noted above,
- (2) are not substantiated with supporting documentation (see ~~Documentation s~~Section 2.54), or
- (3) do not qualify as de minimis.

5304.3 RESTRICTIONS ON MEAL EXPENDITURES

3.1 Allowable Costs

~~3.1.1 The cost of meals where only USU employees are present, are generally not permitted. In situations where employees from multiple departments or areas can only meet during a meal period it is permissible to charge the cost of the meal to University funds. Good judgment should be used when expending University funds in this manner. To document the business purpose and identify those who participated, a Meals and Entertainment Form should be completed electronically or attached to the reimbursement request. The purchase of alcohol may be allowed with approval of a Dean or Vice President.~~

~~3.1.2 Charges for alcohol may not be paid from state appropriated funds or federal funds.~~

~~3.1.3 Entertainment expenses of the spouse of a guest, employee, or the official host, that are not considered de minimis under section 2.1.3, are allowed as an exceptional expense provided that such meals and entertainment expenses serve a bona fide University business purpose. Participation in official functions that require the attendance of a spouse may be considered a bona fide business purpose. Fundraising events, alumni gatherings, community and recruiting events are examples of activities that may require the attendance of a spouse.~~

~~Note: Expenditures for spouse travel (meals, airfare, etc.) are generally not permitted.~~

2.4 Alcohol Purchases

~~The purchase of alcohol may be allowed with approval of a Dean or Vice President. Charges for alcohol may not be paid from state appropriations, ed funds or including E&G, and sponsored research-federal funds may not be used to pay for alcohol.~~

2.5 3.2 Non-Allowable Costs

3.2.1 Meals When two or more employees choose to voluntarily go to lunch together regardless of whether to continue their business is conducted as an incidental part of the meal.

2.4.2 Meals When the meeting could have been scheduled during the normal course of business, except when employees from multiple departments can only meet during a meal period. Exceptions must not occur on a regular or routine basis, or be reciprocal (e.g.: monthly, weekly, etc.).

2.4.3 When business meals with faculty, staff, or other colleagues are frequent (occurring on a regular or routine basis) and reciprocal.

Such expenses are not allowable under this policy. Charges for these types of expenses unallowable meals on a University P-card must be reimbursed to the University. If not properly reimbursed, these costs will be considered taxable income.

5304.43 DOCUMENTATION

Business meals and entertainment expenses must be documented with: (substantiated) to meet requirements of the Internal Revenue Services regulations and prudent business practices.

- The business purpose for the meal/entertainment.
- Names and affiliations of individuals involved.
- Date and location of the meal/entertainment.
- Itemized receipts. (Credit card receipts do not qualify as itemized)

4.1 This documentation is required if the employee is requesting reimbursement or if the expense is charged to the University on a P-Card or other method.

4.24.1 If the expense cannot be properly documented, the employee may be required to bear the cost.

A-Meals and Entertainment documentation form is not required for food that is purchased as research supplies, ~~cleaning supplies~~, for culinary instruction, or as normal operating supplies (e.g. Edith Bowen lunch supplies, preschool snacks, or Dining Services food for resale). However, these types of purchases still require that the business purpose is documented and charged to the appropriate account code (i.e. Supplies, Cost of Goods, etc.).

If the business purpose and expense cannot be properly documented, the employee may be required to reimburse the University bear the cost.

5304.5 EXCEPTIONS

~~There are occasions when it is in the University's best interest to make an exception to the above policy. In those cases, the Meals and Entertainment Expense form must be approved by a Dean or Vice President.~~

5304.4 RESPONSIBILITIES

4.1 Employees

Provide ~~complete~~ documentation for reimbursement or p-card charges.

4.2 Transaction Coordinators

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Verify that ~~all~~ expenditures are consistent with policy requirements and ~~fully~~ documented.

4.3 Business Managers

Verify that expenditures are ~~funding to ensure the expense is~~ allowable and, allocable, ~~and reasonable~~.

4.4 Department Heads

Approve allowable expenses consistent, ~~ensuring alignment~~ with this policy.

4.5 Dean or Vice Presidents

~~Ensure the funding is not state appropriated, E&G, or sponsored funds before a~~ Approving the alcohol purchases ~~expense~~ consistent with this policy.

4.6 Controller's Office

Monitor compliance with ~~and enforce IRS/~~ tax reporting requirements.

~~5304.3~~ REFERENCES

~~5304.5~~ Internal Revenue Service Publication 15-b, Employer's Tax Guide to Fringe Benefits

- [Internal Revenue Service Publication 5137, Fringe Benefit Guide](#)
- [Internal Revenue Service Publication 15-b, Employer's Tax Guide to Fringe Benefits](#)

~~5304.4~~ ~~5304.6~~ RELATED USU POLICIES

- [Utah State University Policy 5001: Procurement](#)
- [Utah State University Policy 5302~~515~~: Travel](#)

~~DEFINITIONS~~

- ~~Associated Test:~~ Expenditure directly before or after a substantial business discussion.
- ~~De minimis:~~ A benefit of such small value that accounting for it is unreasonable or administratively impractical.
- ~~Directly Related Test:~~ Expenditure primarily for business purposes where business is actively conducted.

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 P-Card Procedures](#)

Related Forms and Tools

[ServiceNow Travel Forms](#)

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Contacts

- ~~Controller's Office~~[Controller's Office](#)

POLICY HISTORY

Original issue date: 2006/01/27

Last revision date: [2025/MM/DD](#)

Next scheduled review date: [2026/09/01](#)

Previous revision dates: 2022/06/23, 2017/08/09, 2015/04/22, 2013/04/10



University Policy 5304: Meals and Entertainment

Category: Facilities, Operations, IT

Subcategory: General Operations

Responsible Executive: Vice President for Finance and Administrative Services

Policy Custodian: Controller's Office, Controller

Last Revised: June 24, 2022

5304.1 PURPOSE AND SCOPE

There are occasions when extending hospitality through meals and entertainment is in the best interest of the University. This policy identifies the limited situations in which University funds may be used to pay for meals and entertainment.

In all cases, the University expects employees to exercise good judgment when committing University funds for meals and entertainment.

5304.2 POLICY

2.1 Allowable Meals and Entertainment Expenses

The University will pay for meals and entertainment expenses when they are ordinary and necessary and (1) directly related to the active conduct of University business; (2) associated with the active conduct of University business; or (3) when they are considered de minimis benefits under Internal Revenue Service (IRS) guidelines.

Meals that are to be reimbursed on a Travel Authorization should follow Policy 5302: Travel.

2.1.1 Directly Related to the Active Conduct of University Business

To meet the directly related test for meals and entertainment expenses, you must show that:

- The main purpose of the combined business and entertainment was the active conduct of business,
- You did engage in business with the person during the entertainment period, and
- You have more than a general expectation of obtaining some benefit to the University.

Entertainment expenses generally are not considered directly related if you are not present or in situations where there are substantial distractions that generally prevent you from actively conducting business.

2.1.2 Associated with the Active Conduct of University Business

To meet the associated test for meals and entertainment expenses, you must show that the entertainment is:

- Associated with the active conduct of University business, and
- Directly before or after a substantial business discussion.

A business discussion will not be considered substantial unless you can show that you actively engaged in the discussion, meeting, negotiation, or other transaction to obtain some benefit to the University.

2.1.3 De Minimis Benefits

A de minimis meal or entertainment is any occasional benefit provided to an employee or guest that has so little value (taking into account how frequently a meal or entertainment is provided) that accounting for it would be unreasonable and administratively impractical. Examples of occasions when meals and entertainment may be classified as de minimis include:

2.1.3.1 Beverages/Food Items

Supplies of coffee, water, soda, juice and similar items may be purchased and provided to University guests. Approval must be by the department head.

2.1.3.2 Appreciation Events

Units may hold events during the year to show appreciation for employee efforts. The cost of the event should be reasonable and may include guests or family members at the department head's discretion. Approval of these events must be by the department head.

2.1.3.3 Retirement/Separation Functions

Departments may hold a reception, luncheon, etc. for employees retiring or separating from the University (one per employee). Reasonable expenditures are permitted and may include guests or family members at the department head's discretion. Approval of these events must be by the department head.

2.1.3.4 Holiday Functions

Holiday functions are permitted and may include guests or family members at the department head's discretion. The cost of such functions must be reasonable and may not be charged against any contract or grant fund or reimbursed overhead (F&A). Approval of these events must be by the department head.

2.1.3.5 Retreats and Workshops

Beverages/refreshments (coffee, juice, soda, donuts, rolls, etc.) for retreats and workshops are permissible. Meals and entertainment may be provided to employees, guests and family members when appropriate for the time and duration of the event. Approval of these events must be by the department head.

Note. Per IRS regulations (Publication 15-b, Tax Guide to Fringe Benefits), meals and entertainment expenses are considered taxable income to the employee (1) if the meals and entertainment expenses do not meet one of the tests noted above, (2) are not substantiated with supporting documentation (see Documentation section 4), or (3) do not qualify as de minimis.

5304.3 RESTRICTIONS ON MEAL EXPENDITURES

3.1 Allowable Costs

3.1.1 The cost of meals, where only USU employees are present, are generally not permitted. In situations where employees from multiple departments or areas can only meet during a meal period it is permissible to charge the cost of the meal to University funds. Good judgment should be used when expending University funds in this manner. To document the business purpose and identify those who participated, a Meals and Entertainment Form should be completed electronically or

attached to the reimbursement request. The purchase of alcohol may be allowed with approval of a Dean or Vice President.

3.1.2 Charges for alcohol may not be paid from state appropriated funds or federal funds.

3.1.3 Entertainment expenses of the spouse of a guest, employee, or the official host, that are not considered de minimis under section 2.1.3, are allowed as an *exceptional* expense provided that such meals and entertainment expenses serve a bona fide University business purpose. Participation in official functions that require the attendance of a spouse may be considered a bona fide business purpose. Fundraising events, alumni gatherings, community and recruiting events are examples of activities that may require the attendance of a spouse.

Note: Expenditures for spouse travel (meals, airfare, etc.) are generally not permitted.

3.2 Non-Allowable Costs

3.2.1 When two or more employees choose to go to lunch together to continue their business as an *incidental* part of the meal.

3.2.2 When the meeting could have been scheduled during the normal course of business.

3.2.3 When business meals with faculty, staff, or other colleagues are frequent (occurring on a regular or routine basis) and reciprocal.

Such expenses are not allowable under this policy. Charges for these types of expenses on a University P-card must be reimbursed to the University. If not properly reimbursed, these costs will be considered taxable income.

5304.4 DOCUMENTATION

Business meals and entertainment expenses must be documented (substantiated) to meet requirements of the Internal Revenue Services regulations and prudent business practices.

4.1 This [documentation](#) is required if the employee is requesting reimbursement or if the expense is charged to the University on a P-Card or other method.

4.2 If the expense cannot be properly documented, the employee may be required to bear the cost.

A Meals and Entertainment form is not required for food that is purchased as research supplies, cleaning supplies, for culinary instruction, or as normal operating supplies (e.g. Edith Bowen lunch supplies, preschool snacks, or Dining Services food for resale). However, these types of purchases still require that the business purpose is documented and charged to the appropriate account code (i.e. Supplies, Cost of Goods, etc.).

5304.5 EXCEPTIONS

There are occasions when it is in the University's best interest to make an exception to the above policy. In those cases, the Meals and Entertainment Expense form must be approved by a Dean or Vice President.

5304.6 REFERENCES

- [Internal Revenue Service Publication 15-b, Employer's Tax Guide to Fringe Benefits](#)

5304.7 RELATED USU POLICIES

- [Utah State University Policy 5302: Travel](#)

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, subject to review by the USU Policy Committee.

POLICY HISTORY

Original issue date: 2006/01/27

Last Review date: 2017/08/09

Previous revision dates: 2013/04/10, 2015/04/22, 2017/08/09

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, USU Policy 5304: Meals and Entertainment promotes accountability and consistency when meals or entertainment support University business purposes;

WHEREAS, the Vice President for Finance and Administrative Services desires to add documentation requirements to all de minimis sections, provide additional examples of when meals or entertainment expenses may be appropriate, and specify the steps to document business meals and entertainment expenses;

WHEREAS, the revisions requested by the Vice President for Finance and Administrative Services are focused on clarifying expectations for responsible use of University funds, and aligning the policy with Internal Revenue Services guidelines;

WHEREAS, the President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the amendments to Policy 5304: Meals and Entertainment; and

WHEREAS, the amendments to Policy 5304: Meals and Entertainment address concerns about presidential expenditures and will be presented for public comment and receive the appropriate USU administrative review and approval required by USU Policy 1001 following provisional approval by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees provisionally approve the amendments to Policy 5304: Meals and Entertainment.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES
Signature of Chair White or designee

Date approved

R401 New Administrative Unit Form

USU_BANNER - New R401 New Administrative Unit Form - Center For Civic Excellence - R401 Administrative Unit Form

HELPS AND HINTS FOR COMPLETING R401 PROPOSALS

COLLEGE AND DEPARTMENT INFORMATION

College
University

Department(s)
Center for Civic Excellence

Proposed Unit Title
Center for Civic Excellence

Unit being requested
New Center

DESCRIPTION | NARRATIVE

Administrative Unit Description and Narrative

SB334, passed in the 2025 Utah legislative session, requires and funds the creation of a Center for Civic Excellence to house and govern a revised general education curriculum at Utah State University. This unit's purpose is described in SB334 as follows:

"There is established the Center for Civic Excellence as a pilot program and an administrative unit in the Office of the Provost at Utah State University to: (1) provide general education for all Utah State University students; (2) replace the existing distribution model of general education..."

The Center for Civic Excellence shall: (1) serve as the program home of general education at Utah State University; (2) (a) govern faculty over all general education curriculum; (b) establish a faculty curriculum committee to develop and review program outcomes and all courses; (3) develop and assess the program and all general education courses, ensuring alignment with the purposes and commitments... (4) appoint and evaluate all instructors who will teach general education courses at Utah State University; and (5) provide professional development for instructors teaching in the program to ensure fidelity to the program's purposes, values, and outcomes.

In sum, the Center for Civic Excellence at Utah State University will house, govern, deliver, and assess the general education curriculum as one coherent academic program instead of distributing that delivery and governance across colleges and departments.

Mission and Vision

SB334 outlines the following mission of the Center for Civic Excellence:

"(a) Engaging students in civil and rigorous intellectual inquiry, across ideological differences, with a commitment to intellectual freedom in the pursuit of truth; (b) ensuring, through engagement with foundational primary texts representing "the best of what has been thought and said," that all graduates, regardless of the graduate's major, engage with the "big questions, great debates, and enduring ideas" that continue to shape society's self-understanding, the American experience, and the modern world; and (c) cultivating students' intellectual and personal habits of mind to enable the students to contribute and thrive in the students' economic, social, political, and personal lives with a focus on civil discourse, critical thinking about enduring questions, wise decision-making, and durable skills."

The Center for Civic Excellence will be the only administrative unit that houses general education curriculum. Simplified mission and visions statements for students and the public will be forthcoming.

Goals and Objectives

Students who complete the Center for Civic Excellence courses will be prepared to flourish in their personal/professional lives and contribute meaningfully to our democratic society. Through rigorous intellectual inquiry in the pursuit of truth, students will develop the durable skills necessary to engage in civil discourse, understand different viewpoints on important questions that animate society, and engage constructively in a pluralistic society. Students will cultivate the following habits of mind:

- Understand a wide range of human experiences and values by engaging with the big questions, great debates, and enduring ideas that have shaped society, American institutions, and the modern world;
- Engage in rigorous intellectual inquiry and honest debate across ideological, viewpoint, and cultural differences, pursuing understanding while always respecting the dignity of other people even when disagreeing with their views;
- Integrate information and diverse ways of knowing to apply multiple perspectives when approaching complex problems;
- Demonstrate curiosity, intellectual humility, reasoned judgment, effective communication, and the capacity for human flourishing and lifelong learning.

Evaluation Criteria

The Center for Civic Excellence is working with USU's Office of Data & Analytics to develop a comprehensive learning assessment plan for the Center's program outcomes that will meet the recommendation on general education given by USU's accreditors.

Additional Information

Participating Faculty

The Center for Civic Excellence is an administrative unit only and therefore will not have full-time faculty members that it houses and manages. Rather, faculty from across USU departments who are qualified to teach the Center's courses will participate as "Affiliate Faculty" of the Center for Civic Excellence and work on two-year, renewable appointments to teach one or more classes. The Center will provide professional development, and faculty will receive annual evaluations of their teaching.

Space and Facilities Requirements

The Center for Civic Excellence has only one immediate space need – an additional office for a Program Coordinator. Otherwise, current Center for Civic Excellence leadership have existing faculty offices near each other and the Office of the Provost. USU's Space Committee is addressing this immediate need as well as looking ahead to a future dedicated space which will include at least 4 administrative offices and a conference meeting space.

Funding and Budget Information

SB 334 carried with it a fiscal note with \$551,100 in ongoing appropriations to support the administrative structure and professional development activities of the Center for Civic Excellence.

See SB334 Fiscal Note.

ITEM FOR ACTION

Real Property Donation

The proposed real property donation described is submitted for the Utah State University Board of Trustees review and approval. The proposed action has received appropriate administrative review and approval.

EXECUTIVE SUMMARY

Utah State University (USU) desires to accept the proposed donation of approximately 20 acres of agricultural land, water shares, and associated buildings constituting a vineyard located at 1400 Dammeron Valley Ranch Road, Dammeron Valley, Utah, as illustrated in Exhibit A. The property is situated approximately five miles north of Snow Canyon State Park.

The property will serve as an applied research site for USU Extension, with a focus on high-value crops and water conservation in the southwestern region of the state. It will provide educational opportunities for vineyard growers across Utah and serve as a demonstration farm for the public. This site will be a valuable resource for research, education, and community engagement, with the goal of identifying and promoting best practices for improving water-use efficiency and advancing sustainable agricultural practices in the region.

The USU Environmental Health and Safety Office has recently completed an assessment of the site, including a review of public records and interviews with relevant individuals. The report concluded that there are no indications of environmental problems associated with the property and that the land is in good condition. USU Facilities conducted an assessment of the facilities and found that their overall condition is consistent with expectations, given the age and usage of the structures.

Ongoing operations and maintenance funding will be provided by the donor, supplemented by revenue generated through crop production. In addition, the USU Extension and Agricultural Experiment Station will fund a dedicated vineyard manager position to oversee the site's operations and ensure its effective use for research, education, and outreach.

RECOMMENDATION

The Interim President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Real Property Donation.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, Utah State University (USU) desires to accept the proposed donation of approximately 20 acres of agricultural land, water shares, and associated buildings constituting a vineyard located at 1400 Dammeron Valley Ranch Road, Dammeron Valley, Utah, as illustrated in Exhibit A, and

WHEREAS, the property is situated approximately five miles north of Snow Canyon State Park, and

WHEREAS, the property will serve as an applied research site for USU Extension, with a focus on high-value crops and water conservation in the southwestern region of the state, and

WHEREAS, it will provide educational opportunities for vineyard growers across Utah and serve as a demonstration farm for the public, and

WHEREAS, this site will be a valuable resource for research, education, and community engagement, with the goal of identifying and promoting best practices for improving water-use efficiency and advancing sustainable agricultural practices in the region, and

WHEREAS, the USU Environmental Health and Safety Office has recently completed an assessment of the site, including a review of public records and interviews with relevant individuals, and

WHEREAS, the report concluded that there are no indications of environmental problems associated with the property and that the land is in good condition; and

WHEREAS, USU Facilities conducted an assessment of the facilities and found that their overall condition is consistent with expectations, given the age and usage of the structures; and

WHEREAS, Ongoing operations and maintenance funding will be provided by the donor, supplemented by revenue generated through crop production; and

WHEREAS, the USU Extension and Agricultural Experiment Station will fund a dedicated vineyard manager position to oversee the site's operations and ensure its effective use for research, education, and outreach; and

WHEREAS, the Interim President and Vice President for Finance and Administrative Services recommend that the Board of Trustees approve the Real Property Donation:

NOW, THEREFORE BE IT RESOLVED that the USU Board of Trustees hereby approves the Real Property Donation.

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES:

Signature of Chair White or designee

Date approved

EXHIBIT A



EXHIBIT A
(CONTINUED)



**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

Ratification of Utah State University Board of Trustees Executive Committee

WHEREAS, the Utah State University Board of Trustees voted by email and unanimously approved on September 11, 2025, the following results are recommended:

NOW THEREFORE, BE IT NOW RESOLVED, that the USU Board of Trustees hereby approve the appointment of the following as members of the Utah State University Board of Trustees Executive Committee: Tessa White, Chair, Gina Gagon, Ryan Dent, David Huntsman, and Clark Whitworth.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

Tessa White, Chair

Date

USU Board of Trustees Executive Committee Meeting Report

September 17, 2025

1. USU Budget Approach - John O'Neil

- Emphasis on agility through budget efficiency and adaptability.
- Collaboration with Deloitte to establish best practices and improve financial data.
- Goal to align budget with strategic priorities and enhance long-term planning.
- Implementation of multi-year, all-funds planning model.
- Parallel model testing planned for 2026.
- Importance of correct and useful budget data; risks lie in implementation.
- Incentivizing departments to be nimble and responsible for outputs.
- ERP system consideration (e.g., Workday) with system-wide implementation.
- Transparency and quality of service are key goals.
- Suggestion to dedicate a meeting to budget strategy.

2. Real Property Gift - Dammeron Valley, Utah

- 20-acre parcel with functioning winery and vineyard near St. George.
- Annual \$100K donation for operations and \$2.5M endowment.
- USU plans to run vineyard as demonstration site for research and education.
- Facilities in good condition; no environmental concerns.
- Community engagement through veteran therapy rides and water conservation.
- Future faculty position in viticulture to be endowed.
- Possible conservation easement requested by donor.
- Board approved motion to proceed pending appraisal.

3. Presidential Spending Policy - Dave Cowley, Ryan Dent

- Updates to five expenditure policies; new presidential spending component added.
- Quarterly and annual reporting proposed.
- ARC committee reviewing feedback and questions.
- Consideration of vehicle allowance and discretionary budget approval.
- USHE travel and discretionary fund policies referenced.
- Clarity needed on board approval thresholds and audit procedures.

4. ASPIRE - David Jones, Regan Zane

- Transitioning from NSF funding to broader institutional collaboration.
- ASPIRE project entering second 5-year cycle.
- Potential for new funding and strategic growth.
- Trustees expressed excitement; dedicated meeting to be scheduled.
- Documentation praised for quality and clarity.



Audit, Risk, and Compliance Committee Report

USU Board of Trustees

Meeting: The Audit, Risk, and Compliance Committee met on September 16, 2025. Committee members Ryan Dent, David Petersen, Tessa White, Gina Gagon, and Jacey Skinner were in attendance. They were joined by USU administrators and staff: Mica McKinney, Janna Hawkins, Nicole Laroque, Dave Cowley, Al Smith, Courtney White, and Haley Klaassen.

Review: The committee reviewed and approved the meeting minutes from the August 2025 meeting.

Discussion: President Al Smith gave an update on the search for the Chief Audit Executive. A search committee is in the process of being formed and will be led by Courtney White. They will spearhead the administrative portion of the search and present a group of final candidates for the ARC Committee to interview. The ARC Committee will make the final hiring decision. If needed, a search firm will be engaged to make it a robust national search, attracting top candidates. Committee Chair Ryan Dent has spoken with USHE to ensure we are complying with all state statutes and USHE rules. The Committee expressed the need to clearly outline the role of the Chief Audit Executive before the position is posted.

The Committee next discussed enhancements to University's expenditures policies, including a Presidential Expenditure Policy proposal. The expenditure policy enhancements were requested to address areas of presidential spending and governance, following public attention on the spending of a former president.¹ The Board is pushing this policy initiative forward to promote transparency and good governance. The trustees have expressed the desire for this policy to be implemented quickly and have worked closely with Vice President Dave Cowley to review the proposed policy, recommend changes, and make necessary adjustments to the draft policy.

In addition to the new Expenditure Policy, Dave Cowley reviewed revisions to five existing expenditure policies that will address concerns. 3311: Employee Gifts and Awards, 5001: Procurement, 5005 Charitable Donations, 5302: Travel, and 5304: Meals and Entertainment. These revisions include adding additional details and guidance, as well as documentation requirements. The trustees have also reviewed these changes in detail and provided input on needed enhancements.

¹ A USU IAS audit was underway but not complete at the time of specific media coverage on the topic of presidential spending. This audit will be presented to the ARC Committee when it is complete.

There was also discussion regarding the upcoming legislative audit and internal audit updates. The legislative audit will likely take 8-10 months and focus on four different areas. Janna Hawkins updated the committee on the two internal audits that are in process. They are close to being finalized and the reports will likely be complete by the next ARC meeting.

The 2025 Annual GLBA Safeguards Rule Report and an Update on the USU Policy Review process were also shared with the committee as information items.



Research and Academic Approval Committee Report

USU Board of Trustees

Meeting: The Research and Academic Approval Committee met on September 22, 2025. Committee members Gina Gagon, Jacey Skinner, Kacie Malouf, and Ryan Dent were in attendance. They were joined by USU committee support staff: Lisa Berreau, Paul Barr, and Haley Klaassen.

Discussion: Vice President for Research, Lisa Berreau, presented on current and upcoming changes in research funding. She specifically discussed the changes that are happening regarding indirect cost funding from the federal government and how it would impact USU.

Executive Vice Provost Paul Barr presented a new center and three new proposed programs. The committee reviewed, discussed, and approved the following to bring to the full board for final approval.

New Center

- Center for Civic Excellence

The Center for Civic Excellence at Utah State University, as proposed in [Utah Senate Bill 334](#), is designed to promote civic education, engagement, and leadership across the state. This will be rolled out in phases over the next three years and will be fully implemented by the 2028/2029 school year. The center will be housed in the Office of the Provost and supported by faculty and colleges.

New Programs

- CAS-ART Master of Arts in Motion Design

This program will meet growing student and industry demand for motion design, a niche with rising job opportunities and higher salaries.

- CHES-TEAL Master in Elementary Teaching
- CHES-TEAL Master in Secondary Teaching

These programs create a direct master-level path for individuals with non-teaching undergraduate degrees to earn a professional teaching license, helping address Utah's shortage of qualified educators. It avoids redundant coursework, accelerates entry into the classroom, and offers a higher-salary route compared to associate license alternatives.



Athletics Committee Report

USU Board of Trustees

Meeting: The Athletics Committee met on September 22, 2025. Committee members Clark Whitworth, Jacey Skinner, and Luke Johnson were in attendance. They were joined by USU committee support staff: Sandy Barbour, Tony Hearrell, and Haley Klaassen.

Discussion: The committee discussed the new Abusive Coaching Practices Policies that have been developed for the USU Logan and USU Eastern Athletics departments. These policies were created in response to H.B. 479, which requires degree-granting institutions to adopt policies addressing abusive coaching practices by November 7, 2025.

They are not University policies but have been reviewed by the University Leadership Council and drafted with stakeholders and the guidance of Legal Affairs. In accordance with Utah Code section 53B-16-701, the policies require approval by the Board of Trustees. The committee unanimously approved the policies to be placed on the consent agenda for the September 26, 2025, regular meeting, with a recommendation for full board approval.



Student Success Committee Report

USU Board of Trustees

Meeting: The Student Success Committee met on September 15, 2025. Committee members David Huntsman, Brandon Sorensen, Kacie Malouf, and Tessa White were in attendance. They were joined by USU committee support staff, Kris Winter and Haley Klaassen.

Discussion: Trustee Huntsman opened the meeting by welcoming attendees and inviting introductions. Committee members expressed a strong commitment to supporting students and mental health. Kris Winter, the new Vice President of Undergraduate Affairs, shared her background in student programs and her enthusiasm for enhancing the student experience at USU. She emphasized the importance of cross-department collaboration and praised the trustees for their support. After a recent statewide tour, she is focused on meeting the diverse needs of students across campuses.

Much of the discussion centered on how trustees can best support Kris and students. Kris noted that the committee itself reflects meaningful support and suggested involving students directly when appropriate to hear their perspectives. Brandon Sorensen will serve as a liaison between students and the committee.

The conversation then shifted to recent events affecting the campus community and mental health resources. Brandon described the emotional impact on students and efforts to expand support through the CARE office. Kris acknowledged the complexity of student needs and noted that most students rely on USU's in-house services like CAPS, which offer crisis appointments and after-hours support.

Finally, the committee discussed emergency preparedness and how students are informed about safety plans. Kris will review orientation materials and explore additional ways to share this information. She also shared the [Aggie Safe Protective Actions flyer](#) with the committee. Trustees proposed dedicating the next meeting to emergency response planning, including orientation practices and student awareness.

The background of the slide features a photograph of graduates in black caps and gowns. Several hands are visible, some holding rolled-up diplomas. The scene is brightly lit, with a strong orange and yellow light flare in the upper left corner. A semi-transparent orange rectangle is overlaid on the right side of the image, serving as a background for the text and logo.

2025 Program Report

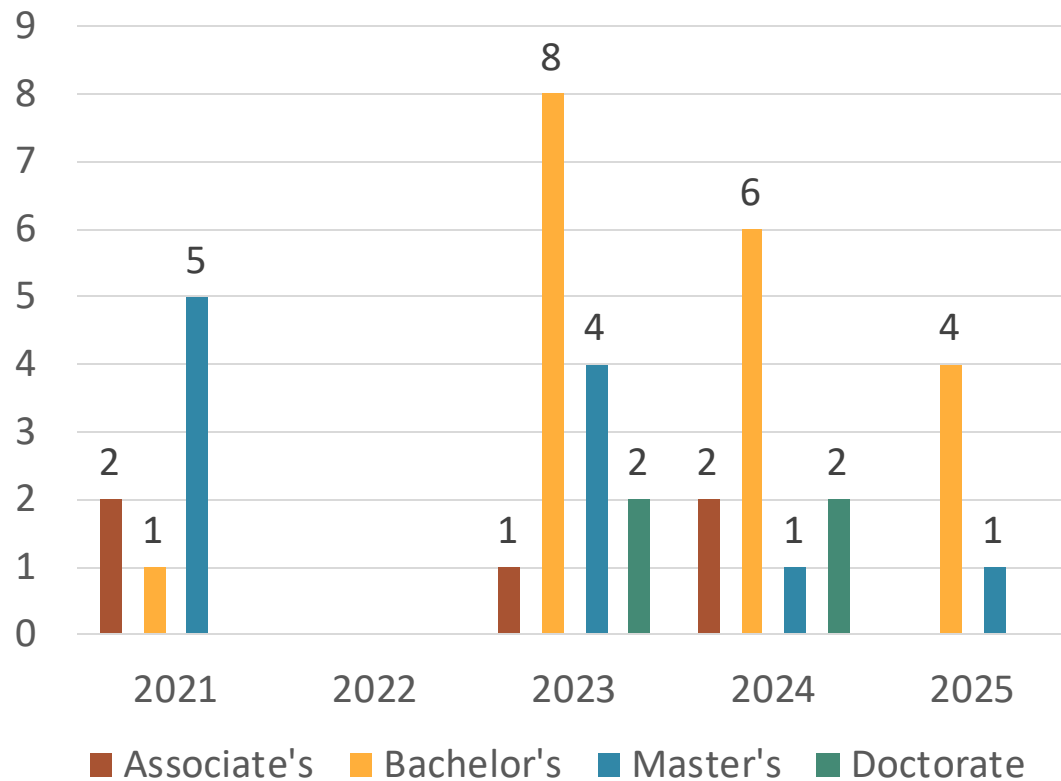
For Utah State University
September 26th, 2025



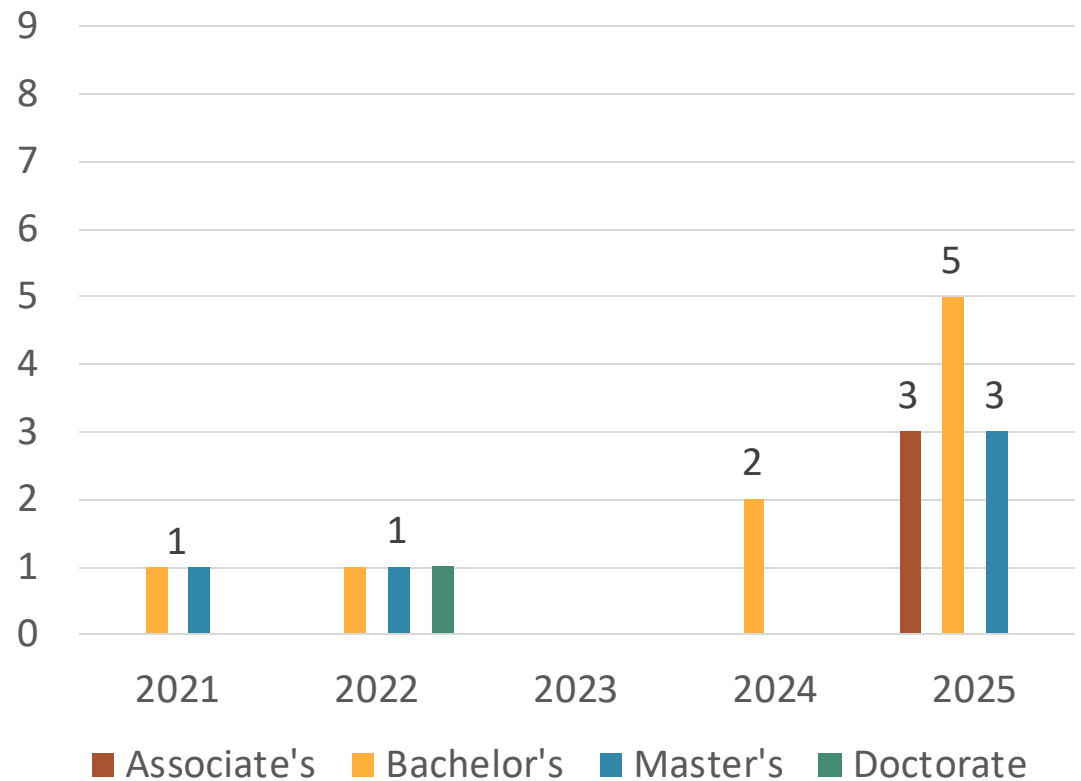
New and Discontinued Degrees

USU

New Degrees



Discontinued Degrees

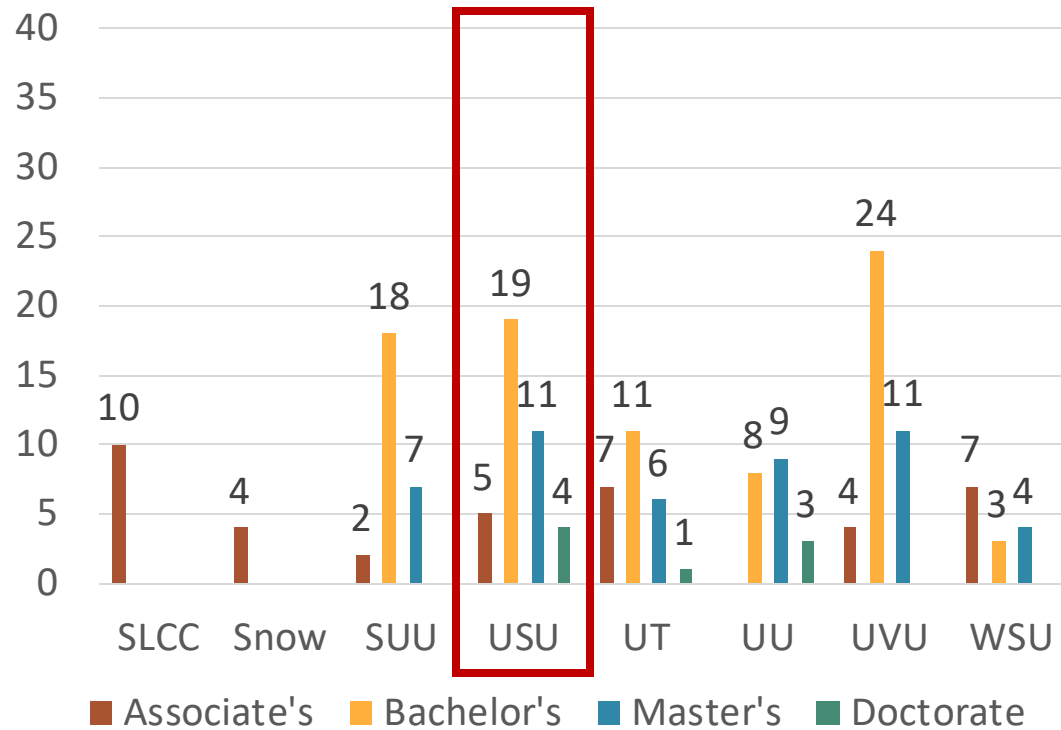




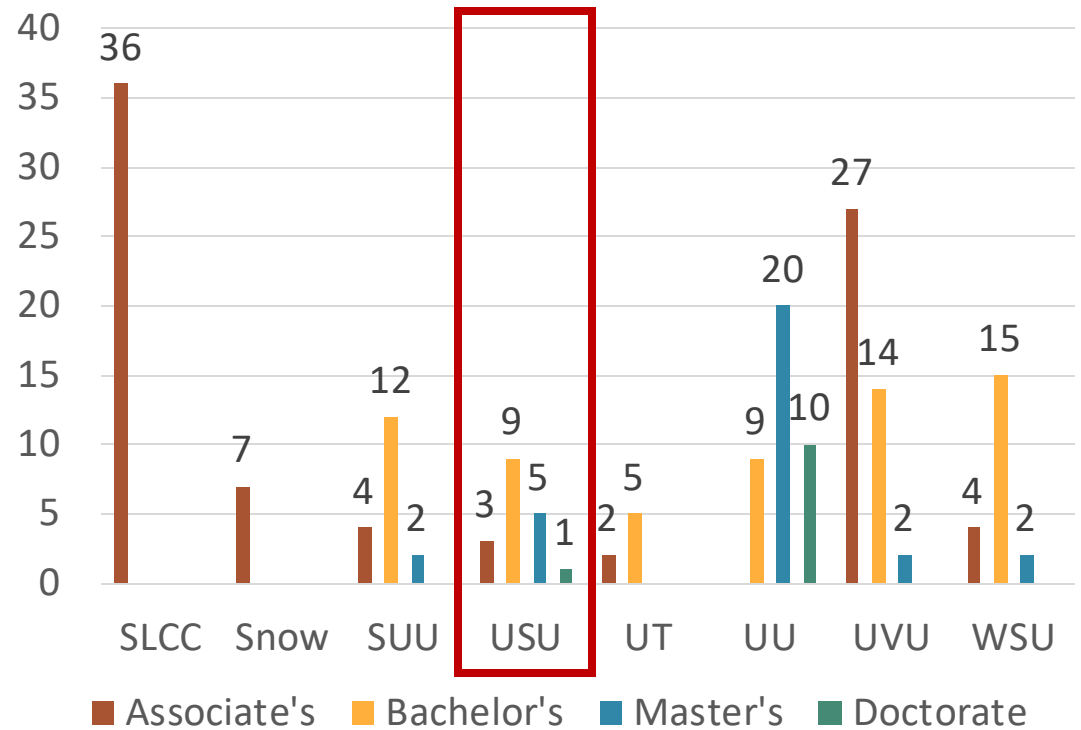
New and Discontinued Degrees

Statewide

New Degrees

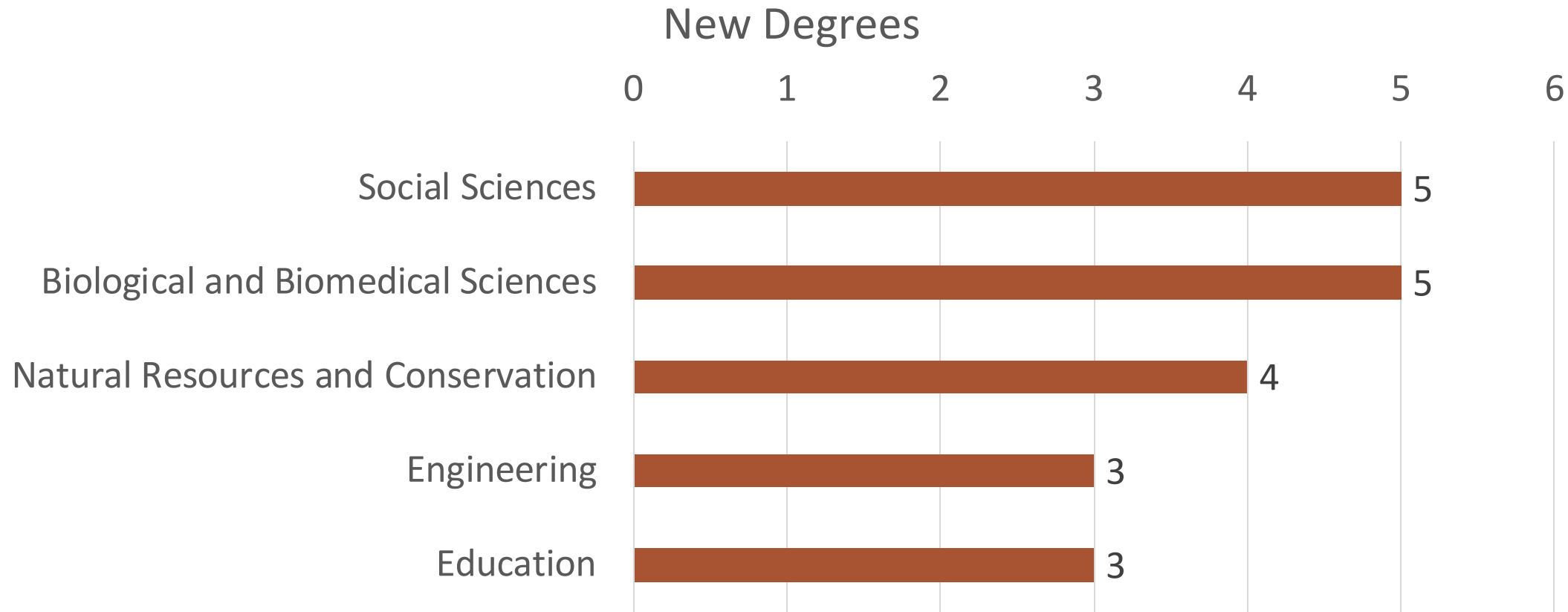


Discontinued Degrees





Instructional Area* as Percentage of Total *USU*

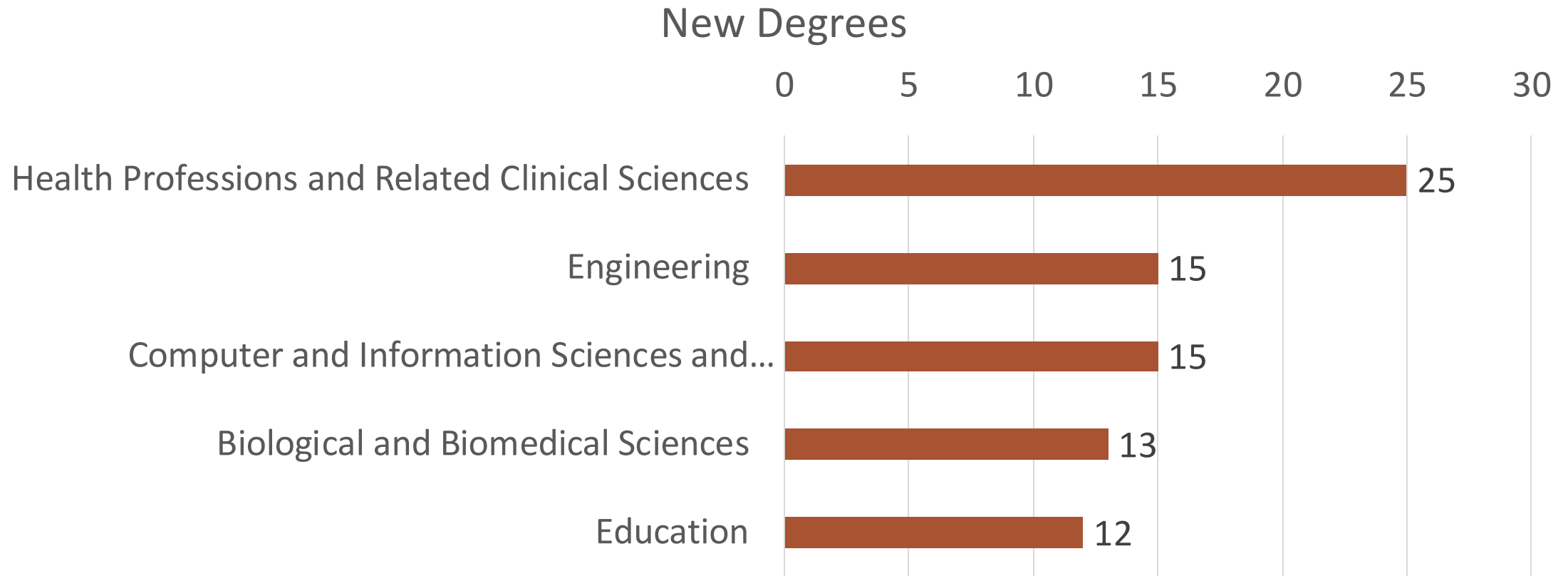


*2 Digit CIP Code



Instructional Area* as Percentage of Total

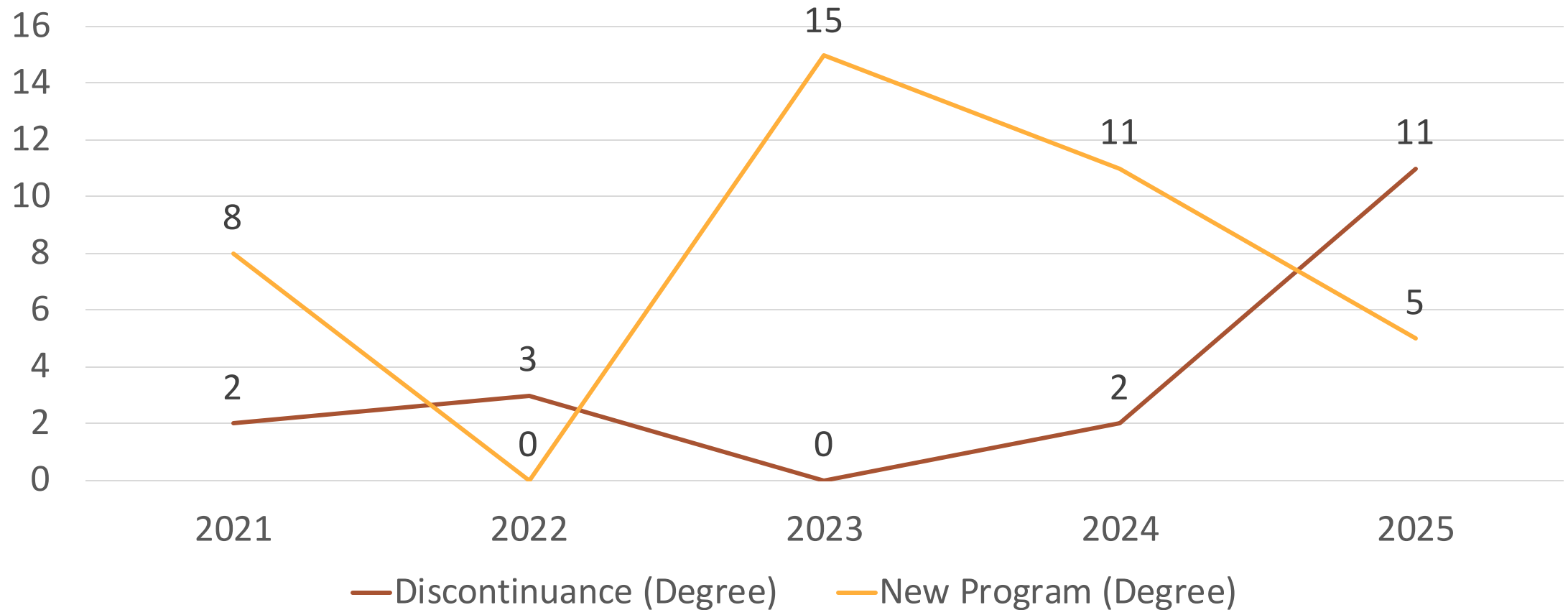
Statewide



*2 Digit CIP Code

Trend of New and Discontinued Degrees

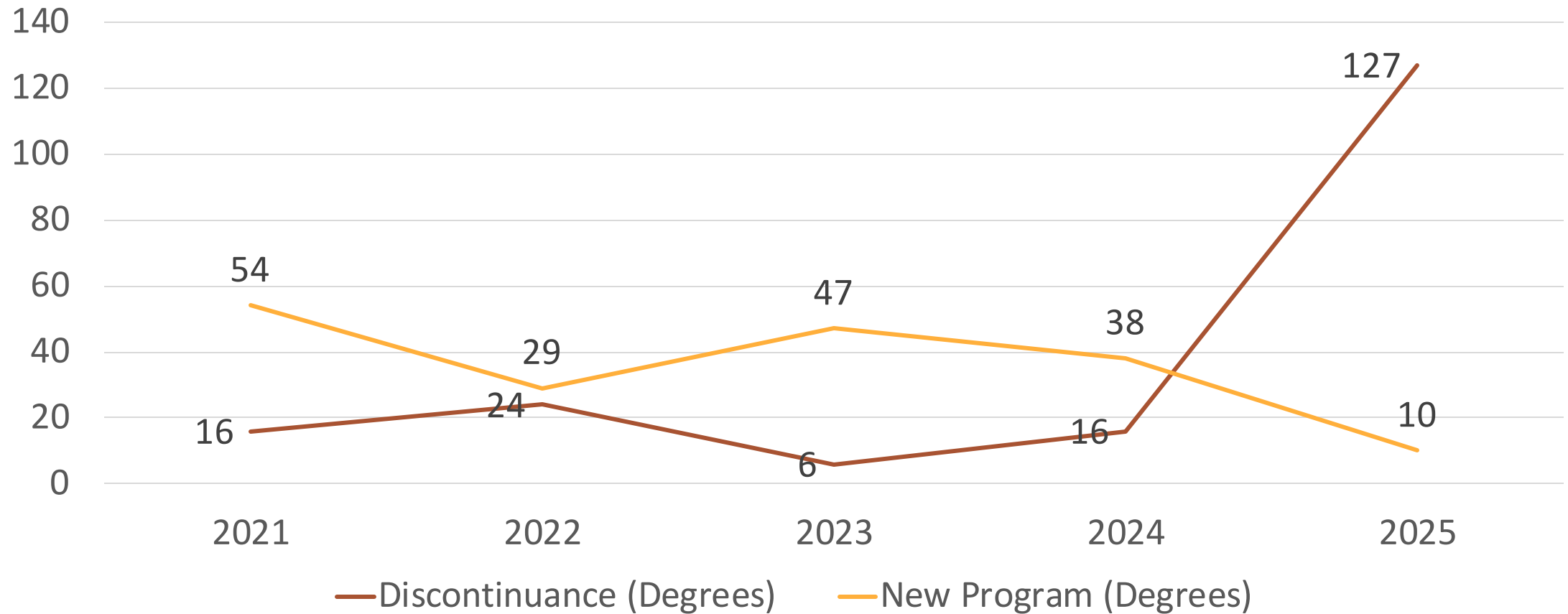
USU





Trend of New and Discontinued Degrees

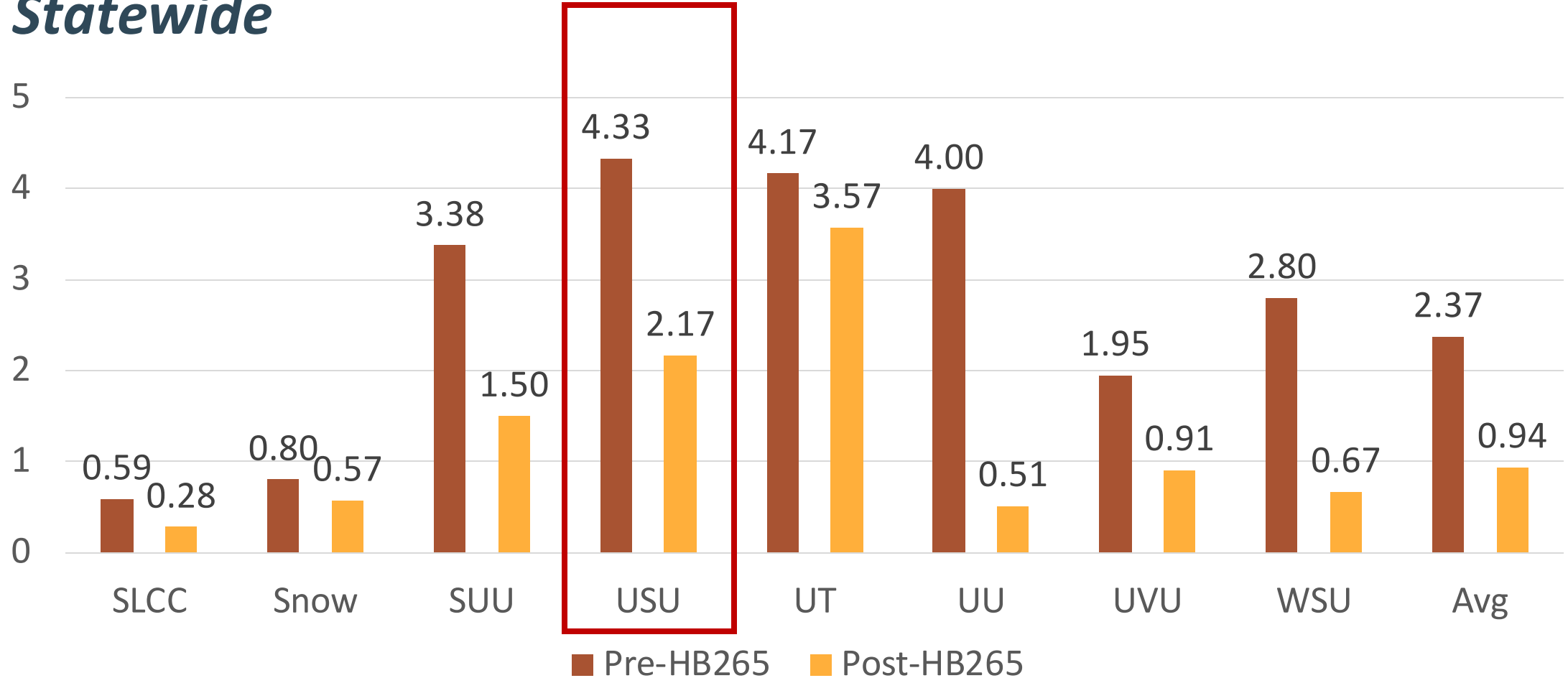
Statewide





New Degrees Per Discontinuance

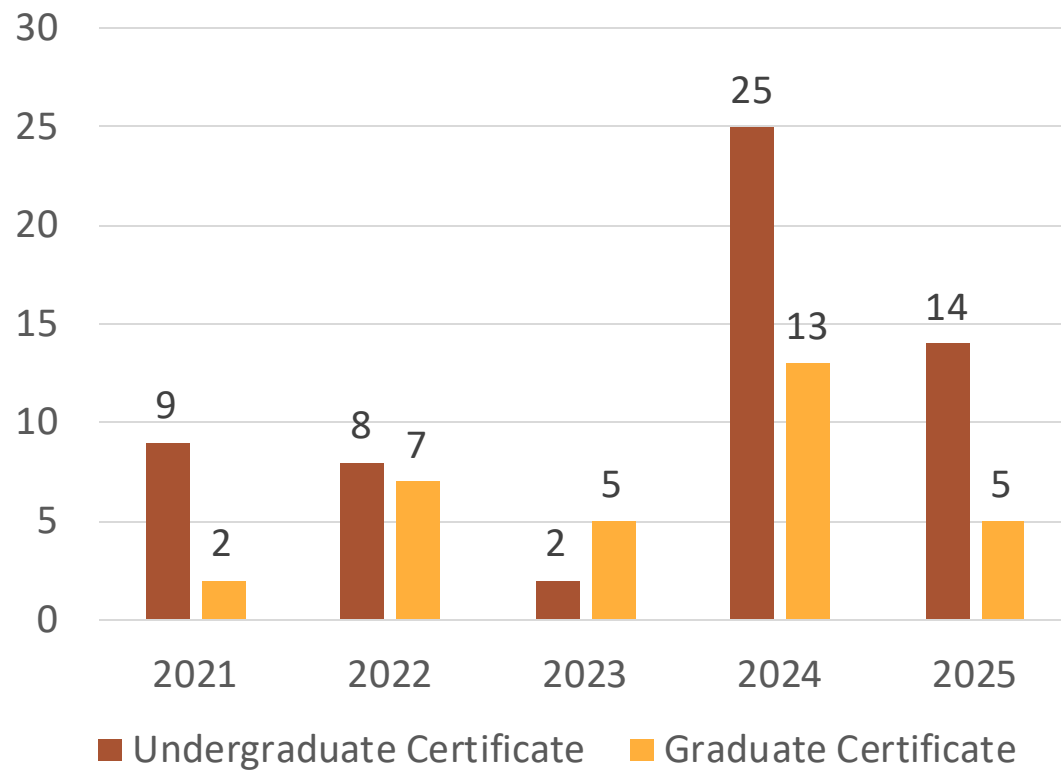
Statewide



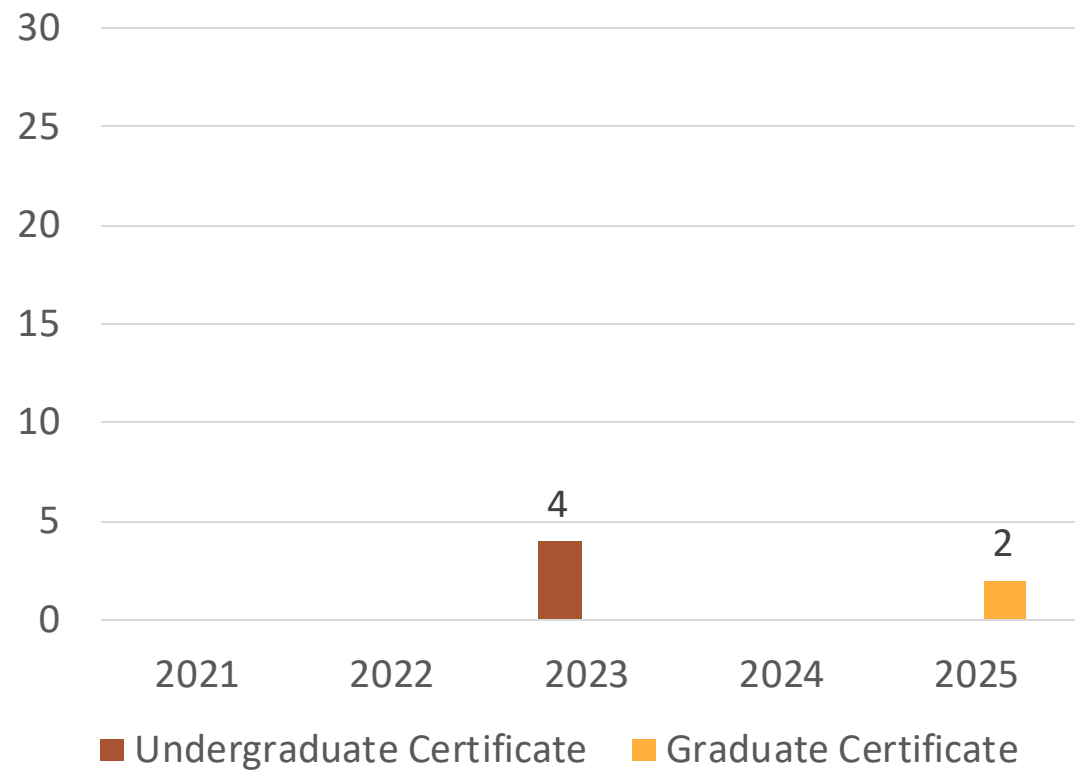
New and Discontinued Certificates

USU

New Certificates



Discontinued Certificates

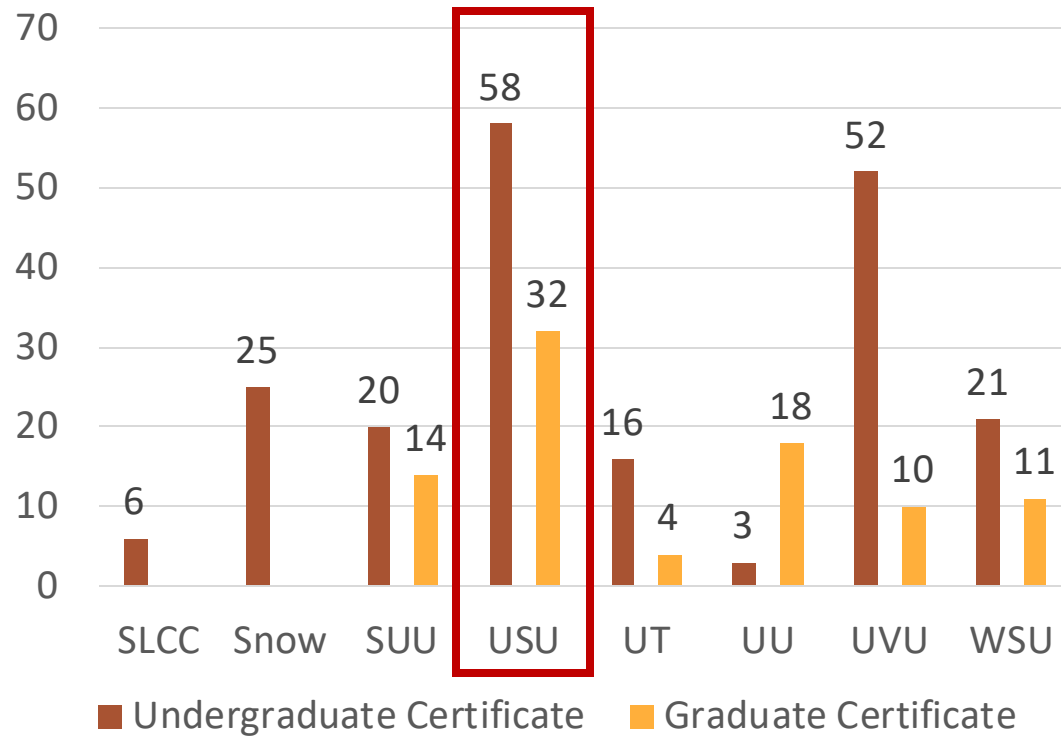




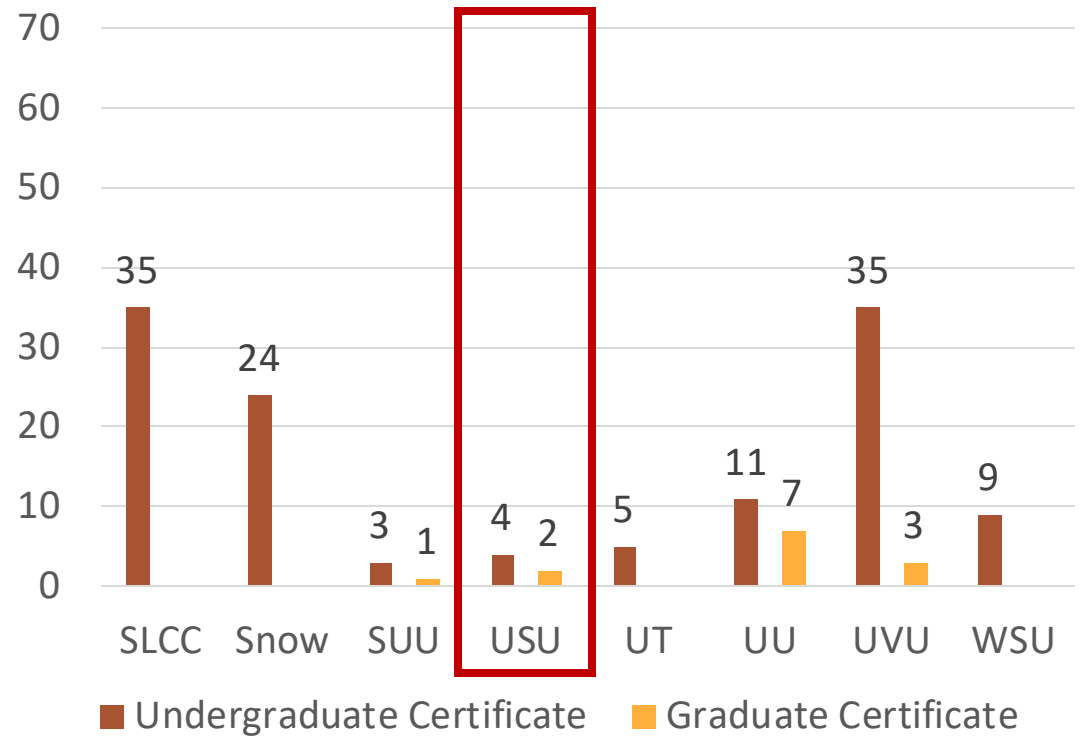
New and Discontinued Certificates

Statewide

New Certificates



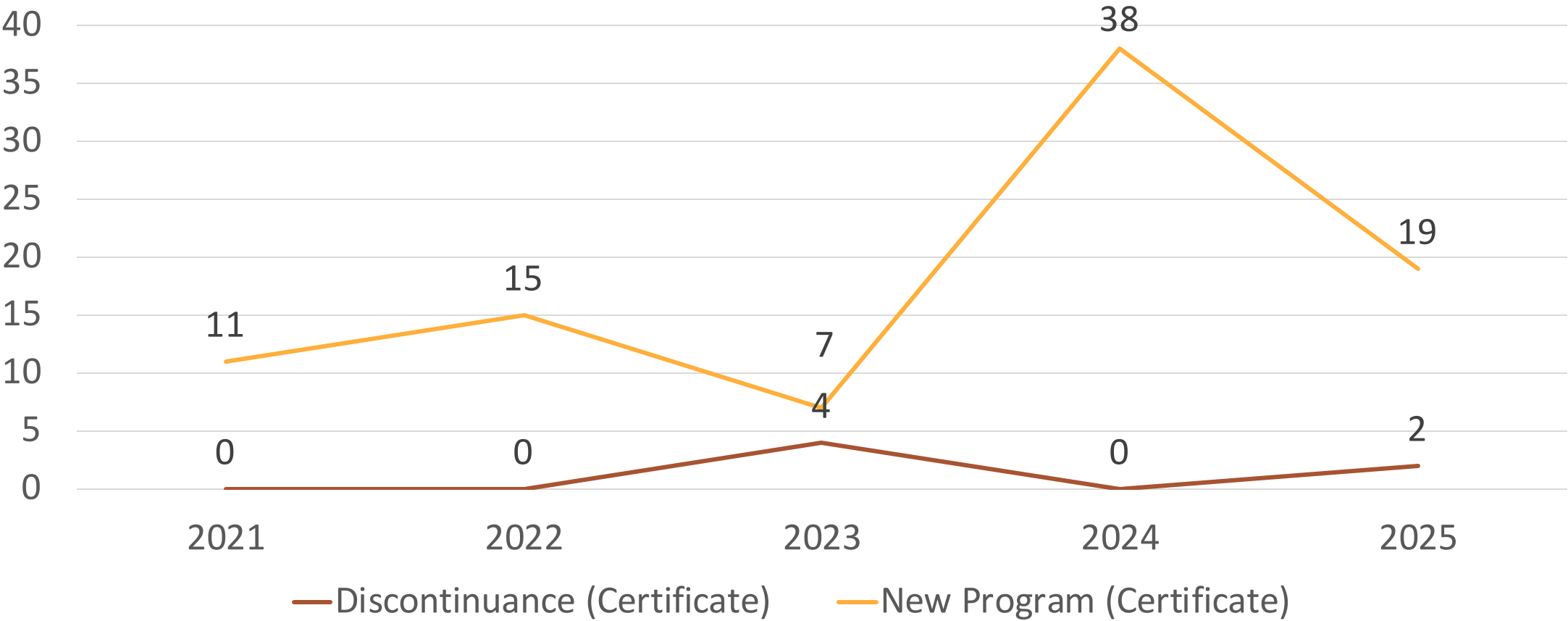
Discontinued Certificates





Trend of New and Discontinued Certificates

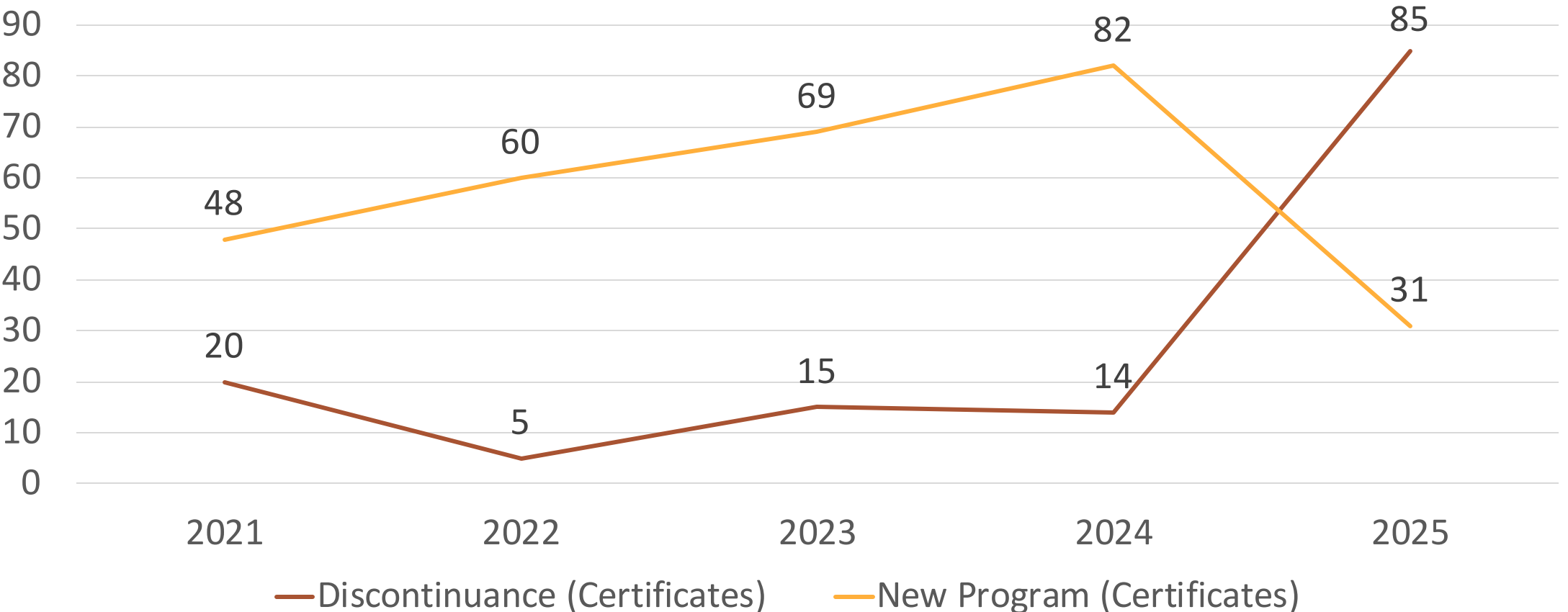
USU





Trend of New and Discontinued Certificates

Statewide



USHE Performance Funding Metrics

2024 Status and Targets (2025 in Oct/Nov)

ACCESS*

6.76%

NA

2025 Target

*The percentage of Utah high school graduates who attend **USHE** within three years of high school graduation*

TIMELY COMPLETION

58.1%

58.6%

2025 Target

The percentage of new students at USU who complete within 150% of time (6-Yr Cohort) Tech Ed is 3-Yr Cohort

HIGH YIELD AWARDS

80.5%

81%

2025 Target

The percentage of graduates within a High Yield program



*Performance is measured at USHE level not institutional level

Prepared by USU Office of Data and Analytics



USU Board of Trustees Retreat Minutes

Thursday, August 21, 2025, at 9:15 AM to 2:15 PM MDT

Maverik West Stadium Center (WSC): Founder's Suite Room 16

[Dress Code: USU Athletic Gear]

Attendance

Trustees Present:

Tessa White, Chair

Gina Gagon, Vice Chair

Kent Alder

David Huntsman

Kacie Malouf

Jacey Skinner

Clark Whitworth

Trustees Absent:

John Ferry

Heather Mason

David Petersen

Bradon Sorensen

University Representatives Present:

Jeff Aird

Dan Black

Donna Blake (virtual)

Stephen Campbell

Samantha Campbell (virtual)

Jen Cowburn

Todd Griffeth

Haley Klaassen

David Law (virtual)

Mica McKinney

John O'Neil

Kristian Olsen (virtual)

Al Smith

MaKenzie Stock

David Vernon (virtual)

Ken White

Additional Attendees:

TJ Bliss USHE (virtual)

Amanda Covington UBHE

(virtual)

Ryan Dent

Brett Hugie

Luke Johnson

Geoff Landward USHE

(virtual)

Agenda

1. Welcome

9:22 AM

Presenter: Chair Tessa White

Chair White officially opened the meeting as a public session, welcoming all attendees. She provided an overview of the day's agenda, emphasizing that the retreat was designed to help trustees gain deeper insight into their roles and responsibilities, better understand various aspects of the university, and ensure they are well-equipped to fulfill their duties effectively.

2. Role of Trustees and Priorities Panel Discussion

9:30 AM

Presenters: UBHE Chair Amanda Covington, USHE Associate Commissioner TJ Bliss, Commissioner Geoff Landward

The Chair of the Utah Board of Higher Education (UBHE), the Commissioner of the Utah System of Higher Education (USHE), and the Associate Commissioner (USHE) shared key insights on

what is most important for USU Trustees and the university to understand from a system-wide perspective. They emphasized the Board's primary goal of building trust with both institutions and the legislature, highlighting the importance of transparency and timely communication when challenges arise. Trustees were encouraged to actively participate in Board meetings and to view their roles within the context of a unified higher education system.

Legislative priorities were discussed, including cost-effectiveness and return on investment for both taxpayers and students. System-wide alignment in degree offerings and collaboration between institutions were identified as critical. USU was commended for its efforts in these areas, and the upcoming presidential transition was noted as a strategic opportunity.

Governance was described as a shared responsibility between the Utah Board of Higher Education and institutional Boards of Trustees. Trustees were encouraged to represent their communities effectively and collaborate regularly with the Board of Higher Education. USU was recognized for its leadership potential, and trustees were urged to continue supporting the university's mission with confidence and transparency.

3. Campus Master Plan Review

10:17 AM

3.1. Data Overview (see attached presentation)

Presenter: Chief Data Analytics Officer Jeff Aird

Jeff Aird provided a summary of the data presentation, explaining the structure and content of each slide as it related to individual campuses. He clarified what the graphs and figures represented and described the methodology used to generate the enrollment numbers and trends.

3.2. Brigham City

Presenter: AVP Dan Black

The vision for the Brigham City region is to develop vibrant campuses that serve as community hubs, fostering academic success and strong community engagement. Growth in the region has been driven by offering desirable, high-demand programs, supported by active recruitment efforts and strategic alignment with workforce needs. Recent shifts such as a growing reliance on online courses, reduced faculty presence, and some internal program overlap highlight areas where the campus can evolve. These trends offer a timely opportunity to refine our strategy and reinforce our vision. They will be thoughtfully addressed in upcoming statewide redesign discussions to ensure alignment with broader institutional goals.

3.3. Moab

Presenter: AVP Samantha Campbell

USU Moab, the smallest of the statewide campuses, is focused on strategic growth despite limited local population increases and declining high school graduation rates. Priorities include capital improvements, especially student housing. This campus is also working on expanding programs aligned with community and workforce needs, such as nursing, outdoor recreation, and technical education. USU Moab is actively partnering with local organizations and launching initiatives like ESL courses to support underserved populations. While facility limitations and policy adjustments present some constraints, they also create space for innovation. Ongoing efforts to develop programs for working adults and

strengthen Moab's role as a community-integrated campus reflect a commitment to growth and deeper local engagement.

3.4. Uintah Basin

Presenter: AVP David Law

The Uintah Basin Campus is addressing regional needs through strong programs in nursing, education, natural resources, and mental health, with ongoing efforts to expand faculty and clinical placements. New hires in early childhood education and business are enhancing local engagement, while opportunities in engineering, agriculture, and veterinary medicine are being explored to meet growing demand. The campus is working to align bachelor's degree offerings with industry needs, support concurrent enrollment through faculty development, and sustain cooperative education initiatives through local partnerships and grant funding.

3.5. Blanding

Presenter: AVP Donna Blake

USU Blanding serves as a vital educational bridge for diverse communities, including the Navajo Nation, and is experiencing steady growth in programs aligned with regional workforce needs. High demand in areas like nursing, social work, and welding is driving expansion efforts. Although staffing and facility limitations exist, they present a valuable opportunity to explore creative solutions, invest in strategic resources, and strengthen long-term capacity. These efforts can help enhance program delivery and better serve the evolving needs of the campus and community. The campus is planning infrastructure improvements, including the opening of the Monument Valley building to enhance access and safety. Recent grants and a strong endowment are fueling enhancements in student services and technology. This momentum creates an ideal environment to further strengthen key support programs and improve academic readiness among incoming students, ensuring long-term student success.

3.6. Tooele

Presenter: AVP Jen Cowburn

The Tooele Campus has strengthened relationships with the local school district and technical college, leading to improved perceptions of USU and better alignment with regional workforce needs. While the campus does not offer technical programs directly, it collaborates closely to ensure seamless educational pathways. Focus areas include social work, healthcare, and criminal justice, which are growing due to local developments. Faculty actively participate in recruitment, contributing to enrollment growth. A county-funded summer bridge program has been launched to support college readiness, with potential for future expansion.

3.7. Salt Lake and Southwest

Presenter: AVP David Vernon

Efforts are underway to integrate statewide campuses with Extension services, optimize facility use, and plan infrastructure improvements such as a data center and larger event spaces in Salt Lake. Emphasis is being placed on moving toward a more unified system approach, with goals to increase enrollment and retention and strengthen recruitment, particularly among transfer students from regional community colleges.

3.8. USU Eastern

Presenter: VP Kristian Olsen

The Eastern Campus, serving Carbon and Emery counties, is focused on supporting regional economic recovery through programs in nursing, mental health, social work, and trades. Efforts in fundraising, marketing, and scholarships are helping drive the recovery of recent enrollment declines due to COVID-19. The need for faster program development, expanded faculty hiring, and additional student housing presents a clear opportunity to invest in the campus' future. Addressing these areas will support long-term growth, enhance student experience, and strengthen academic capacity. The campus is working to align offerings with local industry needs, particularly in technical fields like energy engineering, and is exploring ways to streamline program approval processes to better respond to workforce demands. Collaboration with Snow College helps to fill the gaps in concurrent enrollment across the state.

3.9. Statewide Summary

Presenter: SVP Ken White

Trustees were thanked for their continued support of the statewide system, which currently accounts for 30% of USU's overall enrollment. Growth opportunities were highlighted, particularly in technical certificate programs, where USU is the only degree-granting institution offering fully stackable pathways toward associate degrees. Extension and statewide campuses plan to strengthen partnerships through needs assessments and real-time impact evaluations, supported by a new data analyst role. However, concerns were raised about delays in program approvals, especially in technical education, prompting a call to reassess requirements and better align with technical college standards.

Additional efforts are underway to increase scholarship funding for statewide campuses; with Michelle Merrill assigned to lead fundraising initiatives and support new program development. Faculty are working to adapt offerings to better meet local needs, aligning academic motivation with enrollment and retention goals. The redesign process for satellite campuses under HB265 will be presented before the next trustee meeting, with approval contingent on trustee subcommittee input.

4. LUNCH – Due to time constraints, the group continued discussions over lunch. **12:35 PM**

5. University Landscape

1:05 PM

Presenter: President Al Smith

President Smith shared three strategic goals for the University: increasing the student completion rate to 65% by 2029, becoming Utah's second AAU institution by 2032, and delivering 3,000 faculty-led extension activities by 2028. He emphasized that strong goals require clear metrics, visible progress tracking, defined success, and accountability. In response, the Board discussed key strategies like expanding scholarships, improving student retention, supporting near-completers with certificates, and strengthening graduate programs. They also reflected on potential challenges, including the need to avoid complacency, stay focused on priorities, and lead with vision and adaptability in a changing environment. By aligning a clear strategy and supporting it with consistent action, they agreed the University can continue to grow and lead with confidence.

6. Trustee Principles and Perspectives – No report due to time constraints.

Presenter: Chair Tessa White

7. University Insights Exchange

1:45 PM

Presenters: Provost Larry Smith, Executive Vice Provost Paul Barr, EVP John O'Neil, VP Lisa Berreau, Coach Bronco Mendenhall, Dean Douglas Anderson

Chair White asked each panelist, “How can the USU Board of Trustees best support you?” Each of the following individuals took time to share their perspectives, offering thoughtful insights into how the Board can contribute to the university’s success.

Paul Barr suggested that proposals should go to the board first, allowing for earlier engagement and better outcomes. Improving internal systems is essential for implementing effective programs, which in turn help attract the right employees. He also raised the question of how to prepare for approvals, noting that guidance will be provided. Overall, Barr appreciated the intentionality moving forward.

Bronco Mendenhall emphasized the importance of a clear identity at USU to guide alignment across people, processes, and decision-making, especially if the university intends to compete effectively. He stressed the need to differentiate USU from other institutions by selecting individuals who embody its values.

Lisa Berreau stressed the need for more effective communication about the value of research at USU, especially as a Carnegie R1 Institution. She encouraged finding new ways to convey impact to the public and government officials, including better storytelling. She also urged the board to push for greater adoption of technology, particularly in research, and to explore AI tools that can accelerate progress. Berreau emphasized the importance of taking risks, adapting quickly, and ensuring that staff are included in efforts to elevate the university.

John O'Neil emphasized the importance of building strong teams, leveraging data, and providing staff with the authority and responsibility to drive change, all in pursuit of greater operational efficiency and effectiveness. He highlighted the need for infrastructure, tools, and leadership to support strategic planning across teaching, research, and discovery—structured into strategic, decadal, tactical, and immediate actions. A design lab gathers faculty input for improvement, while the board plays a vital role in fostering mission-driven, action-oriented collaboration. He proposed that trustees act as intelligence officers—supporting advocacy, defense, amplification, and review—and stressed the importance of organized communication through the board chair to guide investment decisions and accelerate institutional progress, especially in research and technology.

Doug Anderson, who became Dean 20 years ago after serving on the Board of Trustees, shared that at that time USU was not in the shape he had remembered as a student and recognized the urgent need for significant change. He emphasized rediscovering and refining the university’s core identity and culture—something Jon Huntsman also saw as key to USU’s future potential. Anderson advocated for bold, strategic decisions such as eliminating underperforming PhD programs and reallocating resources to areas of strength, particularly at the graduate level, to better align with the university’s vision and ensure long-term success.

Larry Smith emphasized the vital partnership between USU trustees and administration, noting that trustees also serve as stewards of higher education nationally. He urged awareness of the shifting landscape shaped by state and federal pressures, including challenges like HB 265 and growing compliance demands. Smith stressed the importance of structured, efficient problem-solving focused on money, people, space, and time, and encouraged trustees to consider what not to do to stay effective. Accurate communication is key to helping trustees serve as informed ambassadors, and he called for trust in the university's professional leadership, which works with top consulting firms to stay aligned with national best practices. He also highlighted the opportunity to improve faculty culture and support student retention, especially through first-generation programs.

The Trustees expressed deep appreciation for the candid and transparent feedback they received.

8. Trustee Debrief

2:52 PM

Utah State University's leadership and trustees emphasized the opportunity to strengthen relationships with legislators and external stakeholders through proactive, transparent communication. President Smith is leading a strategic pivot toward external engagement. Trustees are encouraged to adopt a national perspective and understand the broader challenges facing higher education, including compliance burdens and funding pressures. Open dialogue, humility, and a shared understanding of roles and responsibilities are key to rebuilding credibility and aligning institutional goals with legislative expectations.

Moving forward, the focus is on signaling change, promoting initiatives, and ensuring that USU's identity and mission are clearly communicated. Trustees and administrators must work together to define strategic priorities, advocate effectively, and provide legislators with the insight they need to support the university. This is a pivotal moment for USU to shift from defense to offense, leveraging its statewide footprint and institutional strengths to build lasting partnerships and drive meaningful progress.

9. ADJOURN

3:36 PM

Motion:

Motion was made to adjourn the meeting. Motion moved by Trustee Clark Whitworth and motion seconded by Trustee Gina Gagon. Voting was unanimous in the affirmative. Motion passed and the meeting was adjourned.

Tessa White, Chair

Janalyn Brown, Secretary

Date Approved



USU Board of Trustees Regular Meeting

Friday, August 22, 2025, at 8:30 AM to 12:15 PM MDT

University Inn (5th Floor): Sonne Board Room [business dress] or via Zoom:

<https://usu.zoom.us/j/83920901817?pwd=lybrr2v3sufajGWmukr24aRZ68ntjH.1>

Attendance

Trustees:

Tessa White, Chair

Gina Gagon, Vice Chair

Kent Alder

Ryan Dent

John Ferry

David Huntsman

Kacie Malouf

David Petersen (virtual)

Jacey Skinner

Brandon Sorensen

Clark Whitworth

USU Representatives:

Tiffany Allison

Lisa Berreau (virtual)

Janalyn Brown

Doug Bullock

Stephen Campbell

Dave Cowley

Kerri Davidson (virtual)

Julie Duersch (virtual)

Crystal Giordano (virtual)

Todd Griffeth (virtual)

Devin Hansen (virtual)

Janna Hawkins

Michael Hoopes (virtual)

Fran Hopkins (virtual)

Haley Klaassen

Nicole Laroque

Mica McKinney

John O'Neil

Bill Plate

Al Smith, President

MaKenzie Stock

Matt White

Ken White

Craig Whyte (virtual)

Kris Winters

Other Attendees:

Brett Hugie

Joseph Adams

Luke Johnson

Burke Nazer

Heather Mason

Jaqualin Peterson

Agenda

1. Welcome and Call to Order

8:32 AM

Presenter: Chair Tessa White

Chair Tessa White called the meeting to order.

2. Resolution of Appreciation and Commendation

8:35 AM

Presenter: Chair Tessa White

2.1. Trustee Heather Mason

Chair White read the attached commendation and recognized and thanked Trustee Heather Mason for the work she has done over the last two years.

3. Oath of Office

8:38 AM

Presenter: Notary Tiffany Allison

3.1. Ryan Dent

Notary Tiffany Allison administered the oath of office to new Alumni President and Trustee, Ryan Dent. The attached form was signed by Trustee Dent and stamped by Notary Tiffany Allison at 8:40 AM. It will be filed with the Utah State Archives and the Utah System of Higher Education.

4. Closed Session

8:42 AM

Motion:

Vice Chair Gina Gagon moved that in accordance with 2-4-205 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 was seconded by Trustee David Huntsman. 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 8:42 AM and concluded at 11:34 AM. Vice Chair Gagon made a motion to end the closed session and Trustee Kacie Malouf seconded the motion.

Attendance

Trustees:

Tessa White, Chair

Gina Gagon, Vice Chair

Kent Alder

Ryan Dent

John Ferry

David Huntsman

Kacie Malouf

David Petersen (virtual)

Jacey Skinner

Brandon Sorensen

Clark Whitworth

USU Representatives:

Janalyn Brown

Doug Bullock

Dave Cowley

Mica McKinney

Al Smith, President

Others:

Joseph Adams

Burke Nazer

Jaqualin Peterson

5. BREAK

11:34 AM

6. Committee Reports

11:39 AM

6.1. Executive Committee (see attached report)

Presenter: Chair Tessa White

6.2. Retention, Recruitment, and Completion Committee (see attached report)

Presenter: Chair Tessa White

6.3. Research and Academic Approval Committee (TRAAC) (see attached report)

Presenter: Trustee Kacie Malouf

6.4. Audit, Risk and Compliance Committee (ARC) (see attached report)

Presenter: Chair Tessa White

7. President's Report (see attached report)

11:51 AM

Presenter: President Al Smith

8. Consent Agenda

11:57 AM

8.1. Approve: 6.20.2025 USU Board of Trustees Regular Meeting Minutes

8.2. Approve: 7.9.2025 USU Board of Trustees Special Meeting Minutes

8.3. Approve: Certificates

8.3.1. Physical Education Teaching Post-Bachelor's Certificate in the Emma Eccles Jones College of Education and Human Services

8.3.2. Foundations of Criminal Justice Academic Certificate in the College of Humanities and Social Sciences

8.3.3. Social Analytics Post-Bachelor's Certificate in the College of Humanities and Social Sciences

8.3.4. Accounting Fintech Post-Bachelor's Certificate in the Jon M. Huntsman School of Business

8.3.5. Fintech Analytics Post-Bachelor's Certificate in the Jon M. Huntsman School of Business

8.3.6. Machine Learning Operations Post-Bachelor's Certificate in the Jon M. Huntsman School of Business

8.3.7. Marketing Analytics Post-Bachelor's Certificate in the Jon M. Huntsman School of Business

8.3.8. Tech Innovation and Entrepreneurship Post-Bachelor's Certificate in the Jon M. Huntsman School of Business

8.3.9. Drones for Natural Resource and Environmental Management Academic Certificate in the S.J. and Jessie E. Quinney College of Natural Resources

8.3.10. Environmental and Natural Resource Law and Policy Academic Certificate in the S.J. and Jessie E. Quinney College of Natural Resources

Motion:

Motion was made to approve the consent agenda. Motion moved by Trustee Ryan Dent and motion seconded by Trustee Kent Alder. Voting was unanimous in the affirmative. Motion passed.

9. Action Agenda

9.1. Approve: USU Capital Development Priority for Fiscal Year 2026-27

11:58 AM

Presenter: VP Dave Cowley

Motion:

Motion was made to approve USU Capital Development Priority for Fiscal Year 2026-27. Motion moved by Trustee David Huntsman and motion seconded by Trustee John Ferry. Voting was unanimous in the affirmative. Motion passed.

9.2. Approve: American West Heritage Center Ground Lease

12:19 PM

Presenter: VP Dave Cowley

Motion:

Motion was made to approve American West Heritage Center Ground Lease. Motion moved by Trustee Clark Whitworth and seconded by Trustee Brandon Sorensen. Voting was unanimous in the affirmative. Motion passed.

9.3. Approve: Real Property Acquisition - Elwood, Utah

12:27 PM

Presenter: VP Dave Cowley

Motion:

Motion was made to approve Real Property Acquisition – Elwood, Utah. Motion moved by Trustee Jacey Skinner and seconded by Trustee John Ferry. Voting was unanimous in the affirmative. Motion passed.

10. Information Agenda

12:34 PM

10.1. USU Report of Investments

10.1.1. April 2025

10.1.2. May 2025

10.2. USU Policies

10.2.1. Policy 2201: Student Records (FERPA)

10.2.2. Policy 3314: Staff Employee Association

10.2.3. Policy 4107: Research Data

10.2.4. Policy 4201: Scholarship Awarding

10.2.5. Policy 5209: University Website

11. Adjourn

12:35 PM

Motion:

Motion was made to adjourn the meeting. Motion moved by Trustee Gina Gagon and seconded by Trustee Brandon Sorensen. Voting was unanimous in the affirmative. Motion passed, and the meeting was adjourned.

Tessa White, Chair

Janalyn Brown, Secretary

Date Approved

USU Logan Athletics Abusive Coaching Practices Policy

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NOTE: This is not a University policy but has been reviewed by the University Leadership Council and drafted with stakeholders and the guidance of Legal Affairs. Utah Code section 53B-16-701 requires approval by the Board of Trustees.



EXECUTIVE SUMMARY

Department of Athletics Policy: Abusive Coaching Practices

In March 2025, the state of Utah passed H.B. 479, which requires degree-granting institutions to adopt a policy addressing abusive coaching practices by November 7, 2025. This policy must be reviewed and approved by an institution's board of trustees and submitted to the Board of Higher Education and Education Interim Committee before the Education Interim Committee's November 2025 meeting. As the Senior Compliance Administrator, I was tasked with creating this policy for the USU Department of Athletics. I put together a six (6) person committee that included myself, the Interim SWA, former Deputy Athletics Director, Sr. Associate Athletics Director of Strategic Communications, Faculty Athletics Representative, and the Head Coach for Women's Soccer. Together, this committee created the policy in accordance with the state legislative requirements. The policy is specific to the Department of Athletics employees and student-athletes.

The policy strictly prohibits abusive coaching practices both on and off campus. Abusive coaching practices are defined in accordance with H.B. 479 as conduct by a coach or member of the coaching staff that creates a harmful environment for a student-athlete, including harmful or offensive physical contact; sexual misconduct or harassment; inappropriate sexual language; or conduct that a reasonable person would find to be psychologically abusive. The policy outlines the requirements to report alleged abusive coaching practices and how to do so. Additionally, the policy provides that all investigations will be led by the Senior Compliance Administrator and HR, unless the report includes allegations of sexual misconduct, in which the report will be referred to the Civil Rights & Title IX Office. All investigations will begin within 30 days of receiving the report and will follow the investigation procedures set forth in USU Policy 3002, Section 3002.2.1, except for those involving sexual misconduct, which will follow the Civil Rights & Title IX Office procedures. Finally, the policy aligns sanctions with USU Policy 3001, while allows appeals in accordance with USU Policy 3002.2.2.

H.B. 479 also mandates training for athletic department staff on recognizing and preventing abusive coaching practices. In alignment with this requirement, the policy requires annual training for student-athletes, coaches, and staff. This training will occur through an annual Learn Blue training for all athletics department staff and annual education provided to student-athletes by the Athletics Compliance Office.





The purpose of this Policy is to prohibit abusive coaching practices, establish guidelines related to abusive coaching practices to ensure compliance with Utah Code section 53B-16-701, and promote a safe and respectful environment for student-athletes.

Abusive Coaching Practice

Utah State University (USU) Athletics is committed to the health, safety, and well-being of student-athletes. As a result, USU Athletics requires coaches and members of the coaching staff to promote a supportive and respectful environment for its student-athletes. USU Athletics strictly prohibits abusive coaching practices both on and off campus. Additionally, USU Athletics prohibits coaches and members of the coaching staff from discouraging a report for an abusive coaching practice and from encouraging or advising a student-athlete to tolerate abusive coaching practices.

Consistent with Utah law “abusive coaching practice” is conduct by a coach or member of the coaching staff that creates a harmful environment for a student-athlete. This includes conduct by a coach or member of the coaching staff with a student-athlete that results in:

- (a) Harmful or offensive physical contact;
- (b) Sexual misconduct or harassment;
- (c) Inappropriate sexual language; or
- (d) Conduct that a reasonable person would find to be psychologically abusive.

Additionally, Utah law prohibits coaches and coaching staff from:

- (a) Encouraging or advising a student-athlete to tolerate an abusive coaching practice, or;
- (b) Discouraging a report of an abusive coaching practice.

Reporting Abusive Coaching Practices

Any person having knowledge of any activity or conduct that may constitute abusive coaching practices by a coach or member of the coaching staff can report the activity or conduct through the “Alleged Abusive Coaching Practices Intake Form”. To report, an individual can fill out the “Alleged Abusive Coaching Practices Intake Form” accessible [here](#). Coaches and members of the coaching staff, including sport-specific support staff (e.g., managers, athletic trainers, etc.), who learn of abusive coaching practices must report the activity or conduct through the “Alleged Abusive Coaching Practices Intake Form” within 24 hours. All reports of alleged abusive coaching practices will be reviewed by Human Resources (HR) and the USU Athletics Department.

Reports of abusive coaching practices that involve allegations of Sexual Misconduct under [Interim USU Policy 2102: Title IX Sexual Misconduct in an Employment or Education Program or Activity](#) or [Interim USU Policy 2103: Non-Title IX Sexual Misconduct](#), must be separately reported to the Civil Rights & Title IX Office for review per [Interim USU Policy 3012: Required Reporting of Sexual Misconduct](#).

After completing the “Alleged Abusive Coaching Practices Intake Form” the submitter will receive an automated email notification confirming receipt of the complaint submission along with a full copy of this Policy.

Consistent with [USU Policy 3011.2.1.3](#) and [USU Student Code Article V, Section 3](#), a report of abusive coaching practices should be made in good faith, and must not include any information that the individual knows to be false.



Investigation of Abusive Coaching Practices

HR and the Senior Compliance Administrator for Athletics will investigate reports received for any alleged behavior by a USU coach or member of the coaching staff that if found to be true, could be a violation of this Policy. An investigation will be initiated no later than 30 days after the receipt of a report. Investigations will be as thorough and timely as possible. These investigations will follow the procedures set forth in [USU Policy 3002, Section 3002.2.1](#). The investigation report will be presented to a Head Coach and Faculty Athletic Council representative not involved in the report, for relevant feedback.

- (a) If allegations of abusive coaching practices involve allegations of Sexual Misconduct under Interim [Interim USU Policy 2102: Title IX Sexual Misconduct in an Employment or Education Program or Activity](#) or [Interim USU Policy 2103: Non-Title IX Sexual Misconduct](#), HR and the Senior Compliance Administrator for Athletics will refer the allegations of Sexual Misconduct to the Civil Rights & Title IX Office for review.

Adjudication of Abusive Coaching Practices

Civil Rights and Title IX Office

Allegations of sexual misconduct or harassment will be adjudicated by the Civil Rights and Title IX Office consistent with the relevant USU Policy.

Human Resources

Allegations of harmful or offensive physical contact, or conduct that a reasonable person would find to be psychologically abusive will be adjudicated and follow the process outlined within [USU Policy 3002, Sections 3002.2.1](#).

Sanctions

USU coaches and members of the coaching staff found responsible for violating this Policy are subject to formal disciplinary action pursuant to [USU Policy 3001: Setting Expectations and Managing Performance](#). Volunteers found responsible for violating this Policy will be removed from USU programs or activities.

Appeals

USU coaches and members of the coaching staff who have been found responsible for violating this Policy, or who disagree with the sanction suggested, may request an administrative review of the findings pursuant to [USU Policy 3002.2.2](#).

Retaliation

Retaliation against an individual that reports an abusive coaching practice is prohibited. Any individual that retaliates against another individual for reporting an incident of abusive coaching practices or threatens or intimidates another individual to prevent them from reporting an incident of abusive coaching practices, will be investigated and adjudicated pursuant to USU Policies.

Training and Prevention

USU Athletics maintains a commitment to not only address incidents of abusive coaching practices that occur, but also to educate its coaches, staff, and student-athletes about abusive coaching practices and healthy alternatives to prevent this type of harm.

All student-athletes, coaches, and staff must complete training on abusive coaching practices upon joining the institution, and annually thereafter. USU Athletics is responsible for developing and facilitating these annual trainings on abusive coaching practices.



RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, USU is committed to the health, safety, and well-being of student-athletes;

WHEREAS, USU-Logan Athletics Policy Abusive Coaching Practices establishes guidelines to ensure compliance with Utah Code section 53B-16-701, and promote a safe and respectful environment for student-athletes;

WHEREAS, the new policy received administrative review, stakeholder feedback; and

WHEREAS, the President and Interim Athletics Director recommend that approval of USU-Logan Athletics Policy Abusive Coaching Practices be ratified by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees ratifies the adoption of USU-Logan Athletics Policy Abusive Coaching Practices.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

Signature of Chair White or designee

Date approved

USU Eastern Athletics Abusive Coaching Practices Policy

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NOTE: This is not a University policy but has been reviewed by the Director of Athletics and Vice President for Residential Statewide Campuses and the guidance of Legal Affairs. Utah Code section 53B-16-701 requires approval by the Board of Trustees.



EXECUTIVE SUMMARY

Department of USU-Eastern Athletics Policy: Abusive Coaching Practices

In March 2025, the state of Utah passed H.B. 479, which requires degree-granting institutions to adopt a policy addressing abusive coaching practices by November 7, 2025. This policy must be reviewed and approved by an institution's board of trustees and submitted to the Board of Higher Education and Education Interim Committee before the Education Interim Committee's November 2025 meeting. The Director of Athletics, Vice President for Residential Statewide Campuses, and the Office of General Counsel met to review the policy drafted for USU-Logan. Details were modified to meet the needs of USU Eastern, but otherwise the policy is the same as USU-Logan. The policy is specific to the Department of Athletics employees and student-athletes.

The policy strictly prohibits abusive coaching practices both on and off campus. Abusive coaching practices are defined in accordance with H.B. 479 as conduct by a coach or member of the coaching staff that creates a harmful environment for a student-athlete, including harmful or offensive physical contact; sexual misconduct or harassment; inappropriate sexual language; or conduct that a reasonable person would find to be psychologically abusive. The policy outlines the requirements to report alleged abusive coaching practices and how to do so. Additionally, the policy provides that all investigations will be led by the Senior Compliance Administrator and HR, unless the report includes allegations of sexual misconduct, in which the report will be referred to the Civil Rights & Title IX Office. All investigations will begin within 30 days of receiving the report and will follow the investigation procedures set forth in USU Policy 3002, Section 3002.2.1, except for those involving sexual misconduct, which will follow the Civil Rights & Title IX Office procedures. Finally, the policy aligns sanctions with USU Policy 3001, while allows appeals in accordance with USU Policy 3002.2.2.

H.B. 479 also mandates training for athletic department staff on recognizing and preventing abusive coaching practices. In alignment with this requirement, the policy requires annual training for student-athletes, coaches, and staff. This training will occur through an annual Learn Blue training for all athletics department staff and annual education provided to student-athletes by the Director of Athletics or their designee.



The purpose of this Policy is to prohibit abusive coaching practices, establish guidelines related to abusive coaching practices to ensure compliance with Utah H.B. 479 (2025), and promote a safe and respectful environment for student-athletes.

Abusive Coaching Practice

Utah State University Eastern (USUE) Athletics is committed to the health, safety, and well-being of student-athletes. As a result, USUE Athletics requires coaches and members of the coaching staff to promote a supportive and respectful environment for its student-athletes. USUE Athletics strictly prohibits abusive coaching practices both on and off campus. Additionally, USUE Athletics prohibits coaches and members of the coaching staff from discouraging a report for an abusive coaching practice and from encouraging or advising a student-athlete to tolerate abusive coaching practices.

Consistent with Utah H.B. 479 (2025) “abusive coaching practice” is conduct by a coach or member of the coaching staff that creates a harmful environment for a student-athlete. This includes conduct by a coach or member of the coaching staff with a student-athlete that results in:

- (a) Harmful or offensive physical contact;
- (b) Sexual misconduct or harassment;
- (c) Inappropriate sexual language; or
- (d) Conduct that a reasonable person would find to be psychologically abusive.

Additionally, H.B. 479 (2025) prohibits coaches and coaching staff from:

- (a) Encouraging or advising a student athlete to tolerate an abusive coaching practice, or;
- (b) Discouraging a report of an abusive coaching practice.

Reporting Abusive Coaching Practices

Any person having knowledge of any activity or conduct that may constitute abusive coaching practices by a coach or member of the coaching staff can report the activity or conduct through the “Abusive Coaching Practice Complaint Form”. To report, an individual can fill out the “Alleged Abusive Coaching Practices Intake Form” accessible online or sending an email to the Athletic Director outlining the alleged abuse. Coaches and members of the coaching staff, including sport-specific support staff (e.g., managers, athletic trainers, etc.), who learn of abusive coaching practices must report the activity or conduct through the “Alleged Abusive Coaching Practices Intake Form” within 24 hours. All reports of alleged abusive coaching practices will be reviewed by Human Resources (HR) and the USU Eastern Athletics Department.

Reports of abusive coaching practices that involve allegations of Sexual Misconduct under Interim [USU Policy 2102: Title IX Sexual Misconduct in an Employment or Education Program or Activity](#) or [Interim USU Policy 2103: Non-Title IX Sexual Misconduct](#), will be reported to the Civil Rights & Title IX Office for review.

After completing the “Alleged Abusive Coaching Practices Intake Form” the submitter will receive an automated email notification confirming receipt of the complaint submission along with a full copy of this Policy.

Investigation of Abusive Coaching Practices

HR and the Athletic Director or designee will investigate reports received for any behavior by a USUE coach or member of the coaching staff that may be determined to be in violation of this Policy. An investigation will be

initiated no later than 30 days after the receipt of a report. Investigations will be as thorough and expeditious as possible. These investigations will follow the procedures set forth in [USU Policy 3002, Section 3002.2.1](#).

- (a) If allegations of abusive coaching practices involve allegations of Sexual Misconduct under Interim [USU Policy 2102: Title IX Sexual Misconduct in an Employment or Education Program or Activity](#) or [Interim USU Policy 2103: Non-Title IX Sexual Misconduct](#), HR and the Senior Compliance Administrator for Athletics will refer the allegations of Sexual Misconduct to the Civil Rights & Title IX Office for review.

Adjudication of Abusive Coaching Practices

Civil Rights and Title IX Office

Allegations of sexual misconduct or harassment, or inappropriate sexual language will be adjudicated by the Civil Rights and Title IX Office.

Human Resources

Allegations of harmful or offensive physical contact, or conduct that a reasonable person would find to be psychologically abusive will be adjudicated and follow the process outlined within [USU Policy 3002, Sections 3002.2.1](#).

Sanctions

USUE coaches and members of the coaching staff found responsible for violating this Policy are subject to formal disciplinary action pursuant to [USU Policy 3001: Setting Expectations and Managing Performance](#). Volunteers found responsible for violating this Policy will be removed from USUE programs or activities.

Appeals

USUE coaches and members of the coaching staff who have been found responsible for violating this Policy, or who disagree with the sanction suggested, may request an administrative review of the findings pursuant to [USU Policy 3002.2.2](#).

Retaliation

Should an individual retaliate against another individual for reporting an incident of abusive coaching practices or threaten or intimidate another individual to prevent them from reporting an incident of abusive coaching practices, will be investigated and adjudicated pursuant to USUE Policies.

Training and Prevention

USUE Athletics maintains a commitment to not only address incidents of abusive coaching practices that occur, but also to educate its coaches, staff, and student-athletes about abusive coaching practices and healthy alternatives to prevent this type of harm.

All student-athletes, coaches, and staff must complete training on abusive coaching practices upon joining the institution, and annually thereafter. USUE Athletics is responsible for developing and facilitating these annual trainings on abusive coaching practices.

RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES

WHEREAS, USU is committed to the health, safety, and well-being of student-athletes;

WHEREAS, USU-Eastern Athletics Policy Abusive Coaching Practices establishes guidelines to ensure compliance with Utah Code section 53B-16-701, and promote a safe and respectful environment for student-athletes;

WHEREAS, the new policy received administrative review, stakeholder feedback; and

WHEREAS, the President and Vice President of Residential Statewide Campuses recommend that approval of USU-Eastern Athletics Policy Abusive Coaching Practices be ratified by the USU Board of Trustees.

NOW THEREFORE BE IT RESOLVED THAT the USU Board of Trustees ratifies the adoption of USU-Eastern Athletics Policy Abusive Coaching Practices.

RESOLUTION APPROVED BY THE BOARD OF TRUSTEES

Signature of Chair White or designee

Date approved

26 September 2025

ITEM FOR ACTION

RE: Faculty and Staff Adjustments

The attached faculty and staff adjustments are submitted for the Trustees consideration. They have received the appropriate administrative review and approval.

EXECUTIVE SUMMARY

The faculty and staff adjustments include one (1) new appointment with tenure.

RECOMMENDATION

The President and Provost recommend that the Board of Trustees approve the attached faculty and staff adjustments.

**RESOLUTION
UTAH STATE UNIVERSITY
BOARD OF TRUSTEES**

WHEREAS, The President and the Provost recommend that the Board of Trustees approve one (1) new appointment with tenure.

NOW, THEREFORE, BE IT RESOLVED, That the USU Board of Trustees hereby approve the recommendation of the faculty and staff adjustments.

RESOLUTION APPROVED BY THE USU BOARD OF TRUSTEES:

Signature

Date

Faculty and Staff Adjustments

New Appointments

College of Veterinary Medicine

Bettina Willie to be Professor with Tenure, Department of Veterinary Clinical and Life Sciences, effective January 1, 2026; B.S. University of Utah, 1998; Ph.D. University of Utah, 2005.

Date of Last Revision: May 10 2025

1. IDENTIFICATION

Name: Bettina Maria Willie
Address: Shriners Hospitals for Children-Canada, 1003 Decarie Blvd, Montreal
H4A 0A9, Canada
Telephone: 514-282-7156
Email: Bettina.willie@mcgill.ca

ORCID: <https://orcid.org/0000-0003-2907-3580>

Scopus: <https://www.scopus.com/authid/detail.uri?authorId=6603137523>

Github: <https://github.com/BWillieLab>

2. EDUCATION:

2007–2008 Postdoctoral Fellow, Hospital for Special Surgery/Weill Medical College of Cornell University, New York City, NY, USA
Research topic: Osseointegration and Bone Adaptation to Mechanical Loading, (*Supervisor: Mathias Bostrom*)
2005–2007 Postdoctoral Fellow, Institut für Unfallchirurgische Forschung und Biomechanik, Universität Ulm, Ulm, Germany
Research topic: Mechanobiology of Bone Healing, (*Supervisor: Lutz Claes*)
2001–2005 Ph.D., Bioengineering, University of Utah, Salt Lake City, USA
Thesis Title: Quantifying the effects of sterilization and aging on the oxidative degradation and wear of crosslinked and conventional polyethylene used in total joint replacement, (*Supervisor: Roy Bloebaum*)
1992–1998 B.S., Biology (Chemistry minor), University of Utah, Salt Lake City, USA
B.A., English, University of Utah, Salt Lake City, USA

3. APPOINTMENTS:

07/2023- current Associate Dean of Research and Graduate Education, Faculty of Dental Medicine and Oral Health Sciences, McGill University, Montreal, Canada
2022- current Full Professor with Tenure, Faculty of Dental Medicine and Oral Health Sciences, McGill University, Montreal, Canada
2023- current Associate Member, Department of Pediatric Surgery, McGill University, Montreal, Canada
2015- current Associate Member, Department of Biomedical Engineering, McGill University, Montreal, Canada
2015- current Investigator, Shriners Hospitals for Children – Canada, Montreal, Canada
2015- 2024 Associate Member, Department of Surgery, McGill University, Montreal, Canada
07/2022- 07/2023 PhD Program Director, Faculty of Dental Medicine and Oral Health Sciences, McGill University, Montreal, Canada

2022	Full Professor, Faculty of Medicine and Health Sciences, Department of Pediatric Surgery, McGill University, Montreal, Canada
2015- 2022	Associate Professor, Faculty of Medicine and Health Sciences, Department of Pediatric Surgery, McGill University, Montreal, Canada
2008–2015	Research group leader, Mechanobiology of bone adaptation and regeneration, Julius Wolff Institute for Biomechanics and Musculoskeletal Regeneration, Charité - Universitätsmedizin Berlin, Berlin, Germany

4. SALARY SUPPORT AWARDS AND RECOGNITION

10/2022	Shriners Hospitals for Children Board Awards, Grand Inspirer -Category Research Staff
07/2021-06/2023	Fonds de recherche du Québec–Santé (FRQS), Research Scholars Senior Career Salary Award program <i>Causes, détection et traitement des maladies causant des fragilités osseuses (Causes, detection and treatment of skeletal fragility disorders)</i>
07/2018-06/2020	Fonds de recherche du Québec–Santé (FRQS), Research Scholars Junior 2 Career Salary Award program <i>Étude des mécanismes biomécaniques impliqués dans la régénération et l'adaptation de l'os (Study of the biomechanical mechanisms involved in bone regeneration and adaptation)</i>
April 2012	Lydia Rabinowitsch Stipendium, Charité - Universitätsmedizin Berlin <i>Verbessert mechanische Stimulation die Knochenheilung unter Gabe eines Sklerostin-neutralisierenden Antikörpers? (Does fixation stiffness modulate the efficacy of sclerostin-neutralizing antibody treatment during bone healing?)</i>

5. TEACHING

1. Contributions to classroom teaching

McGill University Course Teaching

2023-current	DENT 701-PhD Comprehensive Examination, Faculty of Dental Medicine and Oral Health Sciences
2016-current	PHGY550 Molecular and Cellular Physiology of Bone, Department of Physiology
2023	DENT 700-Comprehensive Exam Skills, Faculty of Dental Medicine and Oral Health Sciences
2023	DENT 688-Bone Mechanobiology, Faculty of Dental Medicine and Oral Health Sciences
2023-2024	DENT 786-Foundations of Oral Health Sciences I and II, Faculty of Dental Medicine and Oral Health Sciences
2018-2024	BMDE 505-Cell and Tissue Engineering, Department of Biomedical Engineering
2023	DENT 683 Readings in Dentistry & Health Research, Faculty of Dental Medicine and Oral Health Sciences

2018-2023	BBME 501-Selected Topics in Biomedical Engineering, Department of Biomedical Engineering
2019-2022	INDS 123-Research Fundamentals 1, Faculty of Medicine and Health Sciences
2019-2022	INDS 223-Research Fundamentals 2, Faculty of Medicine and Health Sciences
2018	EXSU 601-Knowledge Management, Lecture, Department of Physiology
2017	DENT 673 Biotechnology and Entrepreneurship, Faculty of Dentistry,

Charité-Universitätsmedizin & Berlin-Brandenburg School for Regenerative Medicine (BSRT) Course Teaching

2014	Phenotyping Bone in the Mouse, <i>BSRT</i>
2013	Mechanical principles in biology, <i>BSRT</i>
2011-2012	Problem-Oriented Learning (POL) for Medical Students, <i>Charité</i>
2010-2011	Histology of Bone Regeneration, <i>BSRT</i>
2010-2011	Cell and Tissue Mechanics, <i>BSRT</i>
2010	Insights into pediatric surgery, <i>Charité</i>
2010	Joint loading, cartilage damage, & treatment in osteoarthritis, <i>Charité</i>

2. Research Trainees Supervised

Ph.D students

2024/8-present	Nicolas Plays, McGill University, Faculty of Dental Medicine & Oral Health Sciences, Thesis Title: Craniofacial and dentoalveolar abnormalities in osteogenesis imperfecta, (Co-Supervisor with Elizabeth Zimmermann)
2024/4-present	Meghan Morrell, McGill University, Faculty of Dental Medicine and Oral Health Sciences, Thesis Title: Anabolic strategies to enhance Bone Healing (Principal Supervisor)
2024/4-present	Leanne Van der Merwe, McGill University, Faculty of Dental Medicine and Oral Health Sciences, Thesis Title: Circadian rhythm's role in mechanoadaptation (Co-Supervisor with Suzanne Morin)
2023/8-present	Abhimanyu Mertiya, McGill University, Faculty of Dental Medicine & Oral Health Sciences, Thesis Title: Bone adaptation to mechanical loading in osteogenesis imperfecta, (Principal Supervisor)
2023/8-present	Setareh Khorshidparast, Faculty of Dental Medicine & Oral Health Sciences, Thesis Title: Skeletal fragility in egg laying hens, (Principal Supervisor)
2021/8-present	Priyesh Patel, McGill University, Faculty of Dental Medicine & Oral Health Sciences, Thesis Title: Modelling collagen pathophysiology in osteogenesis imperfecta using novel computational methods, (Co-Supervisor with Svetlana Komarova)
2021/1-present	Taylor DeVet, McGill University, Department of Biomedical Engineering Thesis Title: Examining the role of osteocyte lacunar canalicular networks, (Principal Supervisor)

- 2021/8-2024/10 Isabela Vitienes, McGill University, Department of Biomedical Engineering
Thesis Title: Understanding the determinants and improving detection of bone fragility in female chickens, (Principal Supervisor).
- 2020/8-2024/12 David Bertrand, McGill University, Department of Experimental Surgery
Thesis Title: Investigating Mechanisms of Bone Formation and Regeneration in Response to Anabolic Therapies, (Principal Supervisor).
- 2019/8-2024/11 Celine Agnes, McGill University, Department of Biomedical Engineering
Thesis Title: Encapsulation of Glycogen Synthase Kinase 3 Beta Phosphorylation Inhibitor, 6-Bromoindirubin-3'- Oxime, in the Guanosine Diphosphate Crosslinked Chitosan Scaffold for the Treatment of Critical Size Bone Defects, (Co-Supervisor with Maryam Tabrizian).
- 2018/12-2023/07 Seyedmahdi Hosseinitabatabaei, McGill University, Department of Biomedical Engineering, Thesis Title: Improving the Reliability of HR-pQCT Measurements in Longitudinal Studies of Individuals with Osteogenesis Imperfecta, (Principal Supervisor)
- 2016/8-2021/03 Aren Bezdjian, McGill University, Department of Experimental Surgery
Thesis Title: Surgical Innovations and Stability Outcomes of Bone Anchored Hearing Implants, (Co-Supervisor with Sam Daniel)
- 2017/1-2021/3 Maximilian Rummmler, McGill University, Dept of Experimental Surgery
Thesis Title: Rare diseases in bone-evaluating models to testing treatments, (Principal Supervisor)
- 2015/1-2020/3 Maximilian Rummmler, Technische Universität Berlin, Dept Material Science
Thesis Title: Adaptive response of bone to mechanical loading in a mouse model of myeloma bone disease, (Principal Supervisor)
- 2014/8-2019/08 Laia Albiol Sanchez, Technische Universität Berlin, Dept Mechanical Engineering, Thesis Title: Influence of age and *Sost* deficiency on the bone (re)modelling response to mechanical loading, (Co-Supervisor with Georg Duda)
- 2010/8-2015/11 Annette Birkhold, Technische Universität Berlin, Dept Mechanical Engineering, Thesis Title: A 4D imaging approach to monitor bone remodeling, (Co-Supervisor with Georg Duda)
- 2010/8-2015/3 Marta Aido, Technische Universität Berlin. Dept Material Science
Thesis Title: The Influence of Age and Mechanical Loading on Bone Structure and Material Properties, (Co-Supervisor with Georg Duda)
- MSc students***
- 2023/8-2023/12 Sara Shalviry, McGill University, Faculty of Dental Medicine & Oral Health Sciences, Thesis Title: Understanding the therapeutic potential of inhibiting Lair-1 for fracture healing (Co- Supervisor with Svetlana Komarova)
- 2023/1-2023/12 Meet Shah, McGill University, Faculty of Dental Medicine & Oral Health Sciences, Thesis Title: Mechanoadaptation in Chickens and Mice (Principal Supervisor)
- 2022/1-2024/03 Jack Chapman, McGill University, Department of Biomedical Engineering

- Thesis Title: Examining the efficacy of a novel prostaglandin E2 receptor 4 agonist in bone defect healing (Principal Supervisor)
- 2023/1-2024/4 Meghan Morrell, McGill University, Faculty of Dental Medicine and Oral Health Sciences, (Principal Supervisor; fast-tracked to PhD program).
- 2023/1-2024/4 Leanne Van der Merwe, McGill University, Faculty of Dental Medicine and Oral Health Sciences, (Principal Supervisor; fast-tracked to PhD program).
- 2019/8-2021/8 Isabela Vitienes, McGill University, Department of Biomedical Engineering (Principal Supervisor; fast-tracked to PhD program).
- 2018/1-2020/8 David Bertrand, McGill University, Department of Experimental Surgery (Principal Supervisor; fast-tracked to PhD program).
- 2020/1-2021/12 Beatrice Steyn, McGill University, Department of Biomedical Engineering
Thesis Title: Mechanoresponse in a mouse model of gerodermia osteodysplastica, (Principal Supervisor)
- 2018/8-2021/06 Kyle Kaverseri, McGill University, Department of Biomedical Engineering
Thesis Title: Cell therapy and mechanical stimulation to enhance bone healing, (Principal Supervisor)
- 2018/5-2020/12 Alice Bouchard, McGill University, Department of Experimental Surgery
Thesis Title: The Effect of the Circadian Rhythm on Load-Induced Bone Formation, (Principal Supervisor)
- 2017/1-2018/12 Chrisanne Dsouza, McGill University, Department of Biotechnology,
Non-thesis, Master's Applied, Project: Determining if time of loading affects osteoblast and osteocyte gene expression during bone adaptation, (Principal Supervisor)
- 2014/7 - 2015/8 Anne Seliger, Hochschule Albstadt-Sigmaringen/ Charité-Universitätsmedizin Berlin
Thesis Title: Bone adaptation during aging: examining regulation by mechanical loading and sclerostin antibody treatment, (Principal Supervisor)
- 2008 - 2010 Tobias Thiele, Beuth Hochschule für Technik Berlin/ Charité-Universitätsmedizin Berlin
Thesis Title: Role of Interleukin-6 in the adaptive response to mechanical loading, (Principal Supervisor)

Post-doctoral students

- 2023/7-2024/8 Michael Bruccoleri, Project Title: Role of Circadian Rhythms in Bone Adaptation, (Principal Supervisor)
- 2020/8-2021/8 Pouyan Asgharzadeh, McGill University, Project Title: Data-driven analysis of bone structure in osteogenesis imperfecta using HR-pQCT images and machine learning, (Principal Supervisor)
- 2019/1-2020/08 Nicholas Mikolajewicz, McGill University, Project Title: HR-pQCT cross-calibration across multiple centres and timepoints, (Principal Supervisor)
- 2016/1-2017/02 Haisheng Yang, McGill University, Project Title: Bone adaptation in mouse models of premature aging, (Principal Supervisor)

Research Assistants

2022/1-present Mayumi Umebayashi, McGill University, Project Title: Various projects, (Co-Supervisor)
 2016/3-present Catherine Julien, McGill University, Project Title: Various projects, (Principal Supervisor)
 2022/1-2023/12 Josephine Tauer, McGill University, Project Title: Various projects, (Co-Supervisor)
 2019/7-2021/06 Marie-Helene Gaumond, McGill University, Project Title: Setrusumab for the treatment of adults with osteogenesis imperfecta, (Co-Supervisor)
 2017/1-2020/06 Elizabeth Zimmermann, McGill University, Project Title: Various projects, (Principal Supervisor)
 2015/8 - 2016/12 Anne Seliger, Charité-Universitätsmedizin Berlin, Project Title: Bone adaptation in mouse models of premature aging, (Principal Supervisor)
 2009/1 - 2016/12 Tobias Thiele, Charité-Universitätsmedizin Berlin, Project Title: Various projects, (Principal Supervisor)

Human, Dental, Veterinary medicine

2022/8-present Michal Kulasek, McGill University, MD student (Principal Supervisor)
 2021/12-2024/7 Sara Kavari, McGill University, DMD student (Principal Supervisor)

German doktorarbeit with Thesis

2013/7-2019/1 Alex Buettner, MD student, Charité-Universitätsmedizin Berlin, Faculty of Medicine, Thesis Title: Alters- und geschlechterspezifische Effekte von mechanischer Belastung auf den durch das SOST-Gen regulierten Knochenumbau, (Principal Supervisor)
 2011/7-2019/6 Bettina Kruck, MD student, Charité-Universitätsmedizin Berlin, Faculty of Medicine, Thesis Title: Die Behandlung mit Sclerostin-neutralisierenden Antikörpern fördert die Knochenbildung, kann jedoch eine mechanisch bedingte Heilungsverzögerung nicht ausgleichen, (Principal Supervisor)
 2011/7-2017/1 David Pflanz, MD student, Charité-Universitätsmedizin Berlin, Faculty of Medicine, Thesis Title: Einfluss der Skelettreifung auf die Knochenmasse und adaptive Knochenantwort bei mechanischer Belastung in *Sost* KO/Sclerostin-defizienten Mäusen, (Principal Supervisor)
 2019/7-2013/1 Sophie Damerow, DVM student, Freien Universität Berlin, Thesis Title: Histologische Beurteilung der Auswirkungen des Proteins Sklerostin und der mechanischen Belastung auf die Knochenstruktur und die Knochenheilung in einem Mausmodell, (Principal Supervisor)
 2012/7-2016/1 Michele Demel Forner, DVM student, Freien Universität Berlin, Thesis title: Analyse des Einflusses des Biomaterialparameters Mikrosteifigkeit neuartiger Gelatinescaffolds auf die Knochenregeneration in einem Rattendefektmodell, (Principal Supervisor)

Undergraduate Students supervised at McGill University

Jan 2025- present Fiona Newsome, McGill University
 Oct 2024-present Shahd Audi, McGill University

Sept 2024-present	Hosna Akhgary, McGill University
Jan 2024-present	Karim Elsayed, McGill University
Nov 2023-present	Veronique Wirth, McGill University
Sept 2024-Jan 2025	Zainah Islam, McGill University
Oct. 2021- Sept 2024	Elena Nehme, Concordia University
June 2021-9/2021, 6/2022-12/2023	Carolyn Denton, John Abbott College, McGill University
Nov 2023-June 2024	Anthony El Helou, McGill University
April 2024-Aug 2024	Annie Mao, McGill University
May 2023-June 2024	Nabhaan Farooqi, McGill University
May 2023-Aug 2024	Rose Sullivan, McGill University
Nov 2023-Aug 2024	Richard Ilianu, McGill University
June 2021- May 2024	Annie-Laurine Sezikeye, McGill University
Nov 2023-Jan 2024	Peter Scartozzi, Concordia University
April 2023-Oct 2023	Matthew Angoh, McGill University
Sept2023-Nov 2023	Eman Rawi, South Valley University, Egypt
June 2022-Sept 2022	Richard Denton, TAV College
May 2022- Sept 2023	Aijing (Coco) Shen, McGill University
May 2021-Aug 2022	Samantha McCluskey, McGill University
Jan. 2021-April 2021	David Hartal, McGill University
June 2020-Aug 2022	Joseph Sayegh, McGill University
Aug 2019-Sept 2022	Gabriella Graceffa, John Abbott College
May2019-Dec 2019	Christine Andrea, McGill University

Undergraduate Students supervised at Charité-Universitätsmedizin Berlin

2013	Erin Thomson, RISE program, Charité-Universitätsmedizin Berlin
2012	Shereen Elmaghrab, RISE program, Charité-Universitätsmedizin Berlin
2012	Elliott Goff, RISE program, Charité-Universitätsmedizin Berlin
2011	Shalini Vysalini Akshintala, Freien Universität Berlin
2011	David Narrow, RISE program, Charité-Universitätsmedizin Berlin
2010	Nadja Kretzschmar, Beuth Hochschule für Technik Berlin
2008	Jenny Möhring, Beuth Hochschule für Technik Berlin

High School Summer students supervised at McGill University

2024	Antoine Fillon	2022	Lyla Roth
2023	Tamara Droual	2021	Kate Datsenko
2023	Stella Tutino	2021-2023	Hanna Gonzalez Hernandez
2023	Lilly Challen	2019	Annie-Laurine Sezikeye
2023	Raya Hussain	2019	Jenna Tetrault
2022-2023	Alexander Datsenko	2019	Kira Sikorska

Visiting Scholars hosted in my lab

2025	Leila Roshangar, PhD, Univ. of Tabriz, Dept of Anatomical Sciences, 6 months
2019	Pouyan Asgharzadeh, PhD Univ. of Stuttgart, Dept. Computer Science, 3 months

2018	Victoria Schmerz, PhD University of Potsdam, Dept of Material Science, DAAD travel award recipient, 3 months.
2013	Madge Martin, MSc, École Des Ponts Paris Tech, Dept. Bioengineering, 6 months
2012	Etienne Berthet, MSc, AgroParisTech, Dept. Bioengineering, 6 months

3. Invited Lectures, Talks, Presentations

International

1. Guest speaker, Meet-the-Professor session: Use of HR-pQCT to study bone density, microarchitecture, and strength in pediatric and adult populations, *2025 Annual Meeting of the American Society for Bone and Mineral Research*, Seattle, WA, USA, September 7, 2025.
2. Guest speaker, MicroCT- and HR-pQCT-based timelapse imaging of bone (re)modeling in mice and humans, *3rd Gordon Conference on Tissue Microstructure Imaging*, Stonehill College, MA, USA, July 13-18, 2025.
3. Guest speaker, A bispecific antibody targeting sclerostin and DKK-1 enhances bone microstructure, strength and (re)modeling in the *Brtl/+* mouse model of osteogenesis imperfecta, *Osteogenesis Imperfecta Foundation Annual Scientific Meeting*, Rosemont, IL, USA, April 9, 2025.
4. Keynote speaker, Applying for a Grant - Tips for Success as an Emerging Scientist, *International Society for Children's Bone Health New Investigator webinar*, Remote, February 28, 2025. <https://theiscbh.org/new-investigators/>
5. Guest speaker, Insights in skeletal mechanobiology, *Research Seminar, Department of Mechanical Engineering, Brigham Young University*, Provo, UT, USA, February 4, 2025.
6. Guest speaker, Insights in skeletal mechanobiology, *Research Seminar, College of Veterinary Medicine, Utah State University*, Logan, UT, USA, January 29, 2025.
7. Guest speaker, Bone adaptation to mechanical loading and osteogenesis imperfecta, *Shriners Hospitals for Children Organizational Grand Rounds Scientific Meeting*, Remote, February 21, 2024.
8. Guest speaker, Adaptive response to mechanical loading in OI mouse models, *Osteogenesis Imperfecta Foundation Annual Scientific Meeting*, Rosemont, IL, USA, April 13, 2023.
9. Guest speaker, Noninvasive quantification of bone remodeling dynamics in adults with OI using time-lapse high resolution peripheral quantitative computed tomography, *American Society for Bone and Mineral Research Pre-Meeting Symposium on Rare Diseases: From Molecules and Mechanisms to Therapeutics*, Austin, TX, USA, September 9-12, 2022.
10. Guest speaker, HR-pQCT in children with osteogenesis imperfecta, *International Conference on Children's Bone Health (ICCBH)*, Dublin, Ireland, July 3, 2022.
11. Keynote speaker, Insights in Skeletal Mechanobiology, *International Conference on Advancements in Interdisciplinary Research (AIR-2022)*, Motilal Nehru National Institute of Technology Allahabad, Prayagraj (U.P.), India (virtual attendance), May 6-7th 2022.
12. Guest speaker/Visiting professor, HR-pQCT for fracture risk assessment, *Charité - Universitätsmedizin Berlin*, Berlin, Germany, December 2, 2021.
13. Guest speaker/Visiting professor, Insights in Skeletal Mechanobiology, *Department of Biomedical Engineering at City College of New York (Virtual)*, September 22, 2021.

14. Keynote speaker, Time-lapse in vivo imaging of bone formation and resorption in mouse models and humans using microcomputed tomography and high-resolution peripheral quantitative computed tomography, *16th U.S. Congress on Computational Mechanics*, In minisymposium “Imaging-based Methods in Computational Medicine”, Chicago (Virtual), USA, July 27, 2021.
15. Guest speaker, Insights into mechanobiology of bone adaptation and regeneration, *Musculoskeletal System Symposium at the University of Stuttgart*, Stuttgart, Germany, July 16, 2020 (COVID-19 canceled).
16. Guest speaker, Finite element analysis in osteogenesis imperfecta, *Osteogenesis Imperfecta Foundation Scientific Meeting*, Rosemont, USA, April 2, 2020 (COVID-19 canceled).
17. Guest speaker/Visiting professor, Mechanobiology in mineralized tissues, *Faculty of Dentistry Grand Rounds, Charité - Universitätsmedizin Berlin*, Berlin, Germany, March 25, 2020 (COVID-19 canceled).
18. Guest speaker, Mechanoresponse during aging, *Julius Wolff Institute’s anniversary symposium on “Advanced therapies in musculoskeletal regeneration: Novel strategies and challenges for regeneration in compromised patients”* Berlin, Germany, June 15, 2018.
19. Guest speaker, In vivo microCT imaging: Longitudinal Assessment of Skeletal Microstructure, Strength, and (Re)modeling Dynamics, *Orthopaedic Research Society Workshop*, New Orleans, USA, March 13, 2018.
20. Guest speaker, The mechanobiology of the growing skeleton, *International Conference on Children’s Bone Health*, Würzburg, Germany, 10 June 2017.
21. Guest speaker, Introduction to HRpQCT & 3D time-lapse in vivo morphometry, *Asteroid Study Investigators’ Meeting*, Miami, USA, March 29, 2017.
22. Guest speaker, Quantifying adaptive (re)modeling in mouse models with low & high bone mass, *Orthopaedic Research Society Preclinical Models Section Meeting*, San Diego, USA, March 19, 2017.
23. Guest speaker, In vivo imaging of bone formation and resorption to assess bone adaptation to mechanical loading in aging mice. *7th World Congress of Biomechanics*, In symposium on "High Resolution ECM Imaging in Cell and Molecular Mechanobiology", Boston, MA, USA, July 11, 2014.
24. Guest speaker, The role of mechano-sensitivity in age-related trabecular bone loss. *7th World Congress of Biomechanics*, In symposium on " Biomechanical meet molecular cues: impact on tissue formation, regeneration and adaptation " Boston, USA, July 11, 2014.
25. Guest speaker, How mechanics influences modelling and remodeling of bone cells. *Berlin-Brandenburg School for Regenerative Therapies Summer School* “The Influence of metabolism on regeneration processes” Berlin, Germany, June 20, 2014.
26. Guest speaker, The role of mechano-sensitivity in age-related trabecular bone loss. *Deutschen Rheuma-Forschungszentrum Berlin*, Symposium" Osteoarthritis-The Challenge, Berlin, Germany. February 3, 2014.
27. Guest speaker, Mechano-sensitivity in age-related bone loss. *2nd Fragility Fracture Network Global Congress*, Berlin, Germany, August 31, 2013.

28. Guest speaker, Project & personnel management, *DFG Nachwuchsakademie Medizintechnik: Vom lebenden Material lernen, technische Materialien für die Geweberegeneration und für medizinische Implantate entwickeln*, Berlin, Germany, Aug. 25, 2011.
29. Guest speaker, The musculoskeletal system: a systems approach to understanding pathology and treatment. *European Calcified Tissue Society PhD Training Course*, Berlin, Germany, September 12, 2010.
30. Guest speaker, Rat healing models: external fixation of the tibia and femur. *Research symposium Homburg Hornbach Monastery: Small animal fracture models & non-union formation*, Bad Homburg, Germany, April 16, 2010.
31. Guest speaker, Collaborations between Bioengineers and Orthopedic Surgeons in Research. *Deutschen Kongress für Orthopädie und Unfallchirurgie*, Berlin, Germany, Oct. 24, 2008.
32. Guest speaker, Polyethylene past & present, *University of Utah, Orthopedic Grand Rounds*, Salt Lake City, USA, October 1, 2003.
33. Guest speaker, Biocompatibility testing of porous coated implants and crosslinked polyethylene in retrieved knee and hip replacements, *Centerpulse Orthopedics (formerly known as Sulzer Orthopedics)*, Austin, USA, December 20, 2002.
34. Guest speaker, Biocompatibility testing of porous coated implants. *The 122nd Meeting of the Association of Clinical Scientists*, Salt Lake City, USA, May 5, 2002.
35. Guest speaker, Calcium stearate's contribution to UHMWPE degradation, *University of Utah, Orthopedic Grand Rounds*, Salt Lake City, USA. February 2, 2000.

National (Canadian)

1. Guest speaker, High-resolution analysis of structure and materials, *University of Calgary, OsNET Summer School*, Calgary, Canada, June 17, 2025.
2. Guest speaker, How to Get Your Work Published and the Peer Review Process, *Le Réseau de recherche en santé buccodentaire et osseuse*, Montreal, Canada, April 4, 2025.
3. Guest speaker, Basic research at the Shriners Hospitals for Children-Canada, *Spring Weekend Shrine association*, Moose Jaw, Canada, February 21, 2025.
4. Guest speaker, Academic Panel Session, *Canadian undergraduate biomedical engineering conference (CUBIC)*, Montreal, Canada, January 25, 2025.
5. Keynote speaker, Skeletal mechanobiology in rare disease. *Canadian Connective Tissue Conference*, London, Canada, May 14, 2024.
6. Guest speaker, Bone adaptation to mechanical loading and osteogenesis imperfecta. *Department of Experimental Surgery / Surgical and Interventional Sciences Program 2023-2024 Virtual Seminar Series*, McGill University, Montreal, Canada, March 19, 2024.
7. Guest speaker, Skeletal Mechanobiology for Beginners. *Soup and Science Series, Faculty of Science, McGill University*, Montreal, Canada, September 26, 2023.
8. Guest speaker, Insights in Skeletal Mechanobiology. *50th Anniversary of Shriners Hospitals for Children-Canada Research Centre Symposium*, Montreal, Canada, August 16, 2023.
9. Guest speaker, Research Overview and Mechanobiology in Osteogenesis Imperfecta. *Annual Supreme Queen visit with Canadian Daughters of the Nile*, In Shriners Hospitals for Children Research Center, Montreal, Canada, June 27, 2023.
10. Guest speaker, Role of circadian rhythms in bone adaptation to mechanical environment, *6th Conference of the Canadian Society for Chronobiology*, Univ. of Guelph, June 14, 2023.

11. Guest speaker, Musculoskeletal health of laying hens, Comité Recherche & Vulgarisation, *Fédération des producteurs d'oeufs du Québec*, Longueuil (Virtual), Canada, Dec. 9, 2022.
12. Guest speaker, Insights into skeletal mechanobiology, *McGill University, Faculty of Dental Medicine and Oral Health Sciences Seminar (DENT 671)*, Montreal, Canada, Nov. 23, 2022.
13. Guest speaker, Bone adaptation in the skull, *14th Annual David R. Murphy Visiting Professorship Day at the MCH, Craniosynostosis Multidisciplinary Minisymposium, Department of Pediatric Surgery, McGill University*, Montreal, Canada, April 7, 2022.
14. Guest speaker, Bone adaptation to mechanical loading is affected by circadian rhythms, *Shriners Hospital for Children-Canada Research Committee Board meeting*, Montreal, Canada, March 14, 2022.
15. Guest speaker, Musculoskeletal health of laying hens, Comité Recherche & Vulgarisation, *Fédération des producteurs d'oeufs du Québec*, Longueuil (Virtual), Canada, Dec. 9, 2021.
16. Guest speaker, HR-pQCT for fracture risk assessment, *Endocrinology Grand Rounds, McGill University*, Montreal, Canada, October 28th, 2021.
17. Guest speaker, Skeletal mechanoadaptation, Current Trends in Bone Tissue Research and Engineering Symposium, *Réseau de recherche en santé buccodentaire et osseuse, AGORA group* (other speakers Helen Lu and Enrico Dall'Ara), Montreal (Virtual), May 28, 2021.
18. Guest speaker, Bone fragility and mechano-responsive in hens, Comité Recherche & Vulgarisation, *Fédération des producteurs d'oeufs du Québec*, Longueuil (Virtual), December 16, 2020.
19. Career Panel member: Multidisciplinary and multi-sectoral experts to provide insights into their career pathways, perspectives and pitfalls, *Canadian Connective Tissue Society Trainee Workshop*, Montreal, Canada, May 29, 2019.
20. Guest speaker, How to get your work published and the peer review process, *Chronobiology Mini-School at Canadian Society for Chronobiology 2019*, Montreal, Canada, May 26, 2019.
21. Guest speaker, Anabolic therapies to improve bone health, *Shriners Hospital for Children-Canada Annual Board meeting*, Montreal, Canada, May 13, 2019.
22. Guest speaker, Distraction Osteogenesis for long bones, *Pediatric Surgical Grand Rounds, McGill University*, Montreal, Canada, March 28th, 2019.
23. Guest speaker, Skeletal mechanoresponse changes with age, *International Workshop on Musculoskeletal and Neuronal Interactions*, Montreal, Canada, October 6-8, 2017.
24. Guest speaker, Mechanoresponsiveness in egg laying hens, *Fédération des producteurs d'oeufs du Québec*, Longueuil, Canada, December 16, 2016.
25. Guest speaker, Insights into mechanobiology of bone adaptation and regeneration, *McGill University, Department of Cell Biology and Anatomy*, Montreal, Canada, Sept. 14, 2016.
26. Guest speaker, Osteocytes in bone adaptation and regeneration, *McGill University, Pediatric Surgery Grand Rounds*, Montreal, Canada, May 19, 2016.
27. Guest speaker, Insights into mechanobiology of bone adaptation & regeneration, *McGill University, Depart. of Biomedical Engineering Seminar*, Montreal, Canada, April 15, 2016.
28. Guest speaker, Osteocytes: mechanical strain sensors in bone, *McGill University, Faculty of Dentistry Advanced Research Seminar and Workshop*, Montreal, Canada, April 14, 2016.

29. Guest speaker, Insights into mechanobiology of bone adaptation & regeneration, *Réseau de recherche en santé buccodentaire et osseuse annual meeting*, Montreal, Canada, Nov. 3, 2016.
30. Guest speaker, How the mechanical environment affects bone formation. *Annual Ladies Christmas Program*, In Shriners Hospitals for Children Research Center, Montreal, Canada, December 17, 2015.
31. Guest speaker, Mechanobiology of bone regeneration. *13th Annual Eugene Rogala Visiting Professor In Pediatric Orthopaedic Surgery*, Montreal, Canada, November 10, 2015.

4. Contribution to public education

Press release for publication on EDAI framework in Oral Health Care:

<https://www.jmir.org/2024/1/e63356>

<https://www.newswise.com/articles/new-framework-champions-equity-in-ai-for-health-care>

Reducing risk of bone fracture in people with rare genetic disorders, 2024/09/09

<https://lightsources.org/2024/09/09/reducing-risk-of-bone-fracture-in-people-with-rare-genetic-disorder/>

Interview with Bettina Willie, and Elizabeth Zimmermann.

Bone benefits: Measuring the impact of aviary rearing on bone health in pullets, By Jane Robinson, Canadian Poultry magazine, April 2023, pg 18-20.

<https://mydigitalpublication.com/publication/?m=1191&i=786434&p=18&ver=html5>

Interview with Bettina Willie, Svetlana Komarova, and Isabela Vitienes.

HR-pQCT: A revolution in bone imaging, Osteogenesis imperfecta federation Europe (OIEF) Magazine-Issue 3, 2022, <https://oife.org/news-resources/oife-magazine/> or

<https://oife.org/tag/bettina-willie/>

Interview with Bettina Willie

Biological rhythms influence bone formation/removal When Responding to Applied Forces

<https://www.facebook.com/ShrinersHospitalsforChildrenCanada> (September 1, 2022)

<https://www.shrinerschildrens.org/.../2022/08/bone-research> (August 28, 2022)

Interview with Bettina Willie

Easing the transition: Enabling hens to thrive in new aviary systems, By Jane Robinson, Canadian Poultry magazine, December 2020, pg 20-22.

<https://mydigitalpublication.com/publication/?m=1191&i=685321&p=20&ver=html5>

Interview with Tina Widowski (mentioned collaboration with Bettina Willie).

06/19/2019

Bone Mechanobiology and Imaging workshop at Shriners Hospital, hosted 12 high school students from the Alexander von Humboldt German International School Montreal, Baie d'Urfe, Canada.

2017, 2019	Career day, at the Alexander von Humboldt German International School Montreal, Baie d'Urfe, Canada, 01/02/2019 and 02/10/2017.
07/18/2018	SHAD program, Canadian summer enrichment program for high-achieving high school students. Co-organized w/ Suzanne Morin half day tour and lectures of 64 SHAD scholars at Shriners Hospital for Children
2016	Judge at the Canada-Wide Science Fair

Other mentoring

10/2019-6/2022	WIN4Science mentoring program, meeting with three female doctoral students/postdocs, 9-12 times/year.
2022, 2023	CIHR project grant Reviewer in Training (RiT) program , served as a mentor

6. OTHER CONTRIBUTIONS

1. Journals

Editorial Boards

01/2022-current: *Editorial Board Member*, Journal of Bone and Mineral Research
 08/2023-12/2023: *Guest Editor*, Collection: "Interdependencies and Interfaces in Bone Regeneration - The Immune System at its Core", Frontiers in Immunology, section Inflammation
 06/2021-7/2023: *Editorial Board Member*, Frontiers in Skeletal Physiology
 05/2018-03/2022: *Editorial Board Member*, Scientific Reports, Biomedical Engineering Section

Ad hoc Journal Article Reviews

Reviewer for more than 20 established international journals, including Proceedings of the National Academy of Sciences, Advanced Science, Science Advances, Journal of Bone and Mineral Research and Bone (two leading journals in bone biology); Acta Biomaterialia (a leading biomaterials journal, and Journal of Bone and Joint Surgery Am (a leading orthopedic journal).

Annual Conference Meeting Abstract Reviewing

2017, 2018, 2020, 2021	American Society for Bone & Mineral Research
2022	International Conference on Children's Bone Health
2016-2018, 2020-2021	Orthopaedic Research Society
2019, 2023	International Conferences on the Chemistry and Biology of Mineralized Tissues
2019	Canadian Connective Tissue Conference
2014, 2015	European Society for Biomechanics

2. Grant Reviews

Chair

June 18-19 2025	Canadian Foundation for Innovation Expert Committee in Regenerative Medicine
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Scientific Officer

Spring 2022-Spring 2024	Canadian Institute for Health Research (CIHR) Peer review Committee: Biomedical Engineering, Project Grant Competition
<i>Panel Review Member</i>	
June & Nov 2021	Canadian Institute for Health Research (CIHR) Peer review Committee: Biomedical engineering, Project Grant Competition
Feb & Nov 2021	Alberta Innovates, The Accelerating Innovations into CarE (AICE) – Concepts Program (the “Program”)
October 30, 2018	Canadian Institute for Health Research (CIHR) Peer review Committee: Operating Grant: Understanding the Health Impact of Inactivity
April 24-25, 2017	Canadian Institute for Health Research (CIHR) Peer review Committee: Clinical Investigations B, Project Grant Competition - APPCL23 - Final Assessment Stage
February 1-3, 2017	Canadian Institute for Health Research (CIHR) Peer review Committee: Project Grant Competition - Stage 1, Canadian Institute for Health Research (CIHR)
<i>Ad hoc reviews as an external member</i>	
2024	Belgian National Fund for Scientific Research – FNRS, Grants and Fellowships Call 2024
2024	Dutch Research Council (NWO), NWA-ORC research proposal
2024	ETH zurich grants
2024	Canadian Research Chair Awards
2024	Stem Cell Network (Judge for Summer studentship symposium)
2023	External Reviewer for a tenure/promotion dossier, University of Alberta, Department of Mechanical Engineering
2023	John R. Evans Leaders Fund (Canada Foundation for Innovation)
2023	FNRS (Basic Research funder for French speaking Belgium) PINT-BILAT-M: Bilateral mobility project" Call (1 proposal)
2021	NordForsk, “Japan-Nordic Frontier Research Projects for Healthy Longevity” (3 proposals)
2021	Research Foundation-Flanders (FWO) and the Belgian National Fund for Scientific Research (FNRS), Excellence of Science proposals (1 proposal)
2021	Belgian National Fund for Scientific Research – FNRS, Grants and Fellowships Call 2021 (2 proposals)
2020, 2021	New Frontiers in Research Fund-Exploration (3 proposals)
2018-2022	NSERC Discovery Grants (average of 2 proposals annually)
2020	Mitacs Accelerate proposal
2020	French National Research Agency (ANR) 2020 generic call
2019	Ministère de l'Agriculture, des Pêcheries et de l'Alimentation (le Programme Innov'Action agroalimentaire 2018-2023)
2019	Reseau de recherche en Sante buccodentaire et osseuse: Major Structuring Projects Competition,

2019	Reseau de recherche en Sante buccodentaire et osseuse: Student grant competition
2019	Canada Foundation for Innovation
2017, 2018, 2021, 2022	Deutsche Forschungsgemeinschaft (German Research Foundation) Project grants
2018	Wellcome Trust, Sir Henry Dale Fellowship
2018	The City College of New York – Memorial Sloan Kettering Cancer Center Partnership pilot research proposal,
2018	University of Utah, LS Peery research grant program,
2015	Arthritis Research United Kingdom, Project grants

3. Committees

McGill University Standing Committee Assignments

08/2023- current	Association of Canadian Faculties of Dentistry, Research Affairs Committee, representative for McGill University, 6 meeting hrs/yr
08/2024- current	McGill University Faculty Academic Planning and Operations Workgroup (FAPOW), member and representative for FDMOHS, 10 meeting hrs/yr
08/2024- current	Faculty of Dental Medicine and Oral Health Sciences, Executive committee, member, 6 meeting hrs/yr
08/2023- current	McGill University Academic Leadership Forum, member and representative for FDMOHS, 8 meeting hrs/yr
09/2022- current	Graduate Studies Committee, Faculty of Dental Medicine and Oral Health Sciences, member, 10 meeting hrs/yr
09/2022- current	Ad hoc Graduate Awards Committee, Faculty of Dental Medicine and Oral Health Sciences, member, 12 meeting hrs/yr
03/2019- current	Department of Pediatric Surgery, Faculty of Medicine, Research Core Committee, member, 12 meeting hrs/yr
05/2017- current	Fundamentals of Medicine and Dentistry Component Subcommittee, Member at large, 12 meeting hrs/yr
2020-2022	McGill University Senate member, elected representative of academic staff for the Faculty of Medicine
12/2020-8/2023	Awards Committee of the Department of Biomedical Engineering, member, 10 meeting hrs/yr
12/2020-8/2023	Fellowships Committee of the Department of Biomedical Engineering, member, 10 meeting hrs/yr
01/2017- 8/2023	Biological and Biomedical Engineering Department (BBME), Plenary Faculty Committee, member, 12 meeting hrs/yr

McGill University Ad hoc Committee Assignments

03/2025	Department of Family Medicine MSc and PhD Program Review committee member
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12/2024	Search committee Chair for recruitment of tenure-track academic staff, Faculty of Dental Medicine and Oral Health Sciences
12/2024	Selection committee Chair for William Dawson Scholar Award, Faculty of Dental Medicine and Oral Health Sciences
9/2024	Reappointment committee member for a tenure track assistant professor, Faculty of Dental Medicine and Oral Health Sciences, member
6/2024	Selection committee Chair for CRC Tier 2 recipient, Faculty of Dental Medicine and Oral Health Sciences
8/2023	Selection committee Chair for recruitment of tenure-track academic staff, Faculty of Dental Medicine and Oral Health Sciences
8/2023	Reappointment committee member for a tenure track assistant professor, Faculty of Dental Medicine and Oral Health Sciences
4/2023- present	Chair of Research Day 2024 & 2025 Planning Committee, Faculty of Dental Medicine and Oral Health Sciences, 10 meeting hrs/yr
11/2022- 04/2023	Vice Chair of Research Day 2023 Planning Committee, Faculty of Dental Medicine and Oral Health Sciences, 10 meeting hrs/yr

Graduate student thesis advisory committee member

1. Lauren Kerr, PhD (Supervisor: Frank Rauch), McGill University, Faculty of Pediatrics, Thesis Title: TBD.
2. Madalina Patron, PhD (Supervisor: Svetlana Komarova), McGill University, Faculty of Dental Medicine and Oral Health Sciences, Thesis Title: TBD.
3. Mattias Neset, PhD (Supervisor: Svetlana Komarova), McGill University, Faculty of Dental Medicine and Oral Health Sciences, Thesis Title: TBD.
4. Sebastien Quetin, PhD (Supervisor: Farhad Maleki & Shirin Enger), Thesis Title: AI-based dosimetry and treatment planning for brachytherapy applications, Dept of Biomedical Engineering, McGill University, 2022-current, Chair's Rep.
5. Emad Moghaddam, PhD (Supervisor: Georgios Mitsis), Thesis Title: Quantifying the Dynamics of Task-Based Functional Connectivity, Dept of Biomedical Engineering, McGill University, 2021-current, Chair's Rep.
6. Azin Esmaelbeigi, PhD (Supervisors: Shirin Enger and Slobodan Devic), Thesis Title: Improvement of Dosimetry and Development of Applicators for Treatment of Rectal Cancer with XOFT, Dept of Biomedical Engineering, McGill University, 2021-current, Chair's Rep.
7. Caroline del Real Mata, PhD (Supervisor: Sara Mahshid), Thesis title: A fully automated fluidic device integrating a universal platform for sensitive detection of extracellular vesicles via surface-enhanced Raman Spectroscopy, Dept of Biomedical Engineering, McGill University, 2021-current, Chair's Rep.
8. Mahmoud Moussa, MSc and PhD (Supervisor: Svetlana Komarova), McGill University, Faculty of Dentistry, Thesis Title: The role of vasculature in bone responses to loading and unloading.
9. Aishwaria Scaria Aishwaria, MSc (Supervisor: Monsur Murshed), McGill University, Department of Experimental Surgery. Thesis Title: SMPD3 regulates MV-mediated bone mineralization.

10. Chrisanne Dsouza, PhD (Supervisor: Svetlana Komarova), McGill University, Department of Experimental Surgery. Thesis Title: Examining how loading time of day affects osteocyte gene expression during bone adaptation.
11. Hossein Poorhemati, PhD (Supervisor: Svetlana Komarova), McGill University, Dept of Biomedical Engineering. Thesis Title: Understanding the dynamics of calcium and phosphate homeostasis.
12. Matthew Goldsmith, MSc (Supervisor: Svetlana Komarova), McGill University, Faculty of Dentistry, Thesis Title: Meta-analysis of bone parameters measured in animals after spaceflight.
13. Victoria Schmerz, PhD (Supervisor: Peter Frazl), University of Potsdam, Dept of Material Science. Thesis title: Heterogeneity of the osteocyte network architecture and material structure across different tissue types in healing bone.
14. Erin Ross, MSc (Supervisor Tina Widowski), University of Guelph, Dept of Animal Bioscience. Thesis title: The effect of housing on musculoskeletal health of pullets.
15. Celine Julie Agnes, MSc (Supervisor: Maryam Tabrizian), McGill University, Faculty of Dentistry. Thesis Title: Using the guanosine diphosphate (gdp) cross-linked chitosan sponge as a platform for the co-culture of endothelial and pre-osteoblast cells in attempt to produce osteogenesis and angiogenesis.
16. Nicholas Mikolajewicz, PhD (Supervisor: Svetlana Komarova), McGill University, Faculty of Dental Medicine and Oral Health Sciences, Thesis Title: In silico mapping of the spatial-temporal dynamics of intercellular purinergic signalling in response to mechanical stimulation of single bone cells.
17. Muthu Lakshmi Muthu, PhD, (Supervisor: Dieter Rheinhardt), McGill University, Department of Anatomy and Cell Biology. Thesis Title: Regulation of adipose tissue homeostasis by fibrillin-1.
18. Saber Ghadakzadeh, PhD (Supervisors: Reggie Hamdy & Maryam Tabrizian), Comprehensive exam, McGill University, Department of Experimental Surgery. Thesis Title: Novel Approach to Enhance Bone Repair by Silencing the Inhibitors of Bone-forming Growth Factors.
19. Rayan Fairag, PhD (Supervisors: Lisbeth Haglund & Michael Weber), Comprehensive exam, McGill University, Department of Experimental Surgery.
20. Nabila Karam, PhD (Supervisor: Vahab D. Soleimani), McGill University, Department of Human Genetics. Thesis title: Characterization of bone remodelling in mice lacking MYF6, master regulator of key myokines, under steady and physically active state.
21. Michael Thelen, PhD (Supervisor: Uwe Kornak), Technische Universität Berlin, Thesis Title: Altered bone formation response to mechanical loading in a mouse model of the progeroid disorder gerodermia osteodysplastica, 2015/8 - 2018/12.
22. Rebecca Hörth, PhD (Supervisor: Peter Frazl), Technische Universität Berlin, Thesis Title: Structural and compositional changes of tissue during bone healing and implant integration, 2011/3 - 2015/3.
23. Hajar Razi, PhD (Supervisors: Sara Checa & Georg Duda), Technische Universität Berlin, Thesis Title: An *in silico* study of age-related changes in the mechanical regulation of bone adaptation, 2010/8 - 2015/4.

Thesis examination

Masters Degree Thesis Examiner

- Oct 2024 Josh Webb, MSc (Supervisor Pierre Moffatt), Thesis title: Characterization of mouse model overexpressing OSTN in bone, McGill University, Department of Human Genetics, Internal reviewer.
- Dec 2023 Samantha Robinson, MSc (Supervisor Pierre Moffatt), Thesis title: Characterization of Humanized Mouse Models for Type V and Atypical type VI Osteogenesis Imperfecta, McGill University, Department of Human Genetics, Internal reviewer.
- March 2022 Dila Kavame, MSc (Supervisor Rene St-Arnaud), Thesis title: Partial Phenotyping of an Idiopathic Infantile Hypercalcemia Mouse Model, McGill University, Department of Human Genetics, Internal reviewer.
- Aug. 2021 Erin Ross, MSc (Supervisor Tina Widowski), Thesis title: The effect of housing on musculoskeletal health of pullets, University of Guelph, Dept of Animal Bioscience. External reviewer.
- Jan. 2020 Preeti Bhatt, PhD (Supervisor: Mari T. Kaartinen) “The role of plasma fibronectin in bone marrow adipogenesis” McGill University, Department of Experimental Surgery, Internal reviewer.
- Sept. 2019 Celine Julie Agnes, MS (Supervisor: Maryam Tabrizian), Thesis Title: Using the guanosine diphosphate cross-linked chitosan sponge as a platform for the co-culture of endothelial and pre-osteoblast cells in attempt to produce osteogenesis and angiogenesis, McGill University, Faculty of Dentistry, Internal reviewer.
- July 2017 Awatef Enagrat, MS (Supervisor: Monsur Murshed), Thesis Title: The cell-autonomous role of Phosphatase orphan 1 in skeletal tissue development, McGill University, Faculty of Dentistry, Internal reviewer.

Doctoral Thesis Examiner

- May 2025 Hanna Liu, PhD (Supervisor: Kathryn Stok), The University of Melbourne, Thesis title: Time-lapse in vivo Joint Imaging of Osteoarthritis Onset and Progression. External reviewer.
- Dec 2024 Mahdokht Mahmoodi, PhD (Supervisor: Mari Kaartinen), McGill University, Faculty of Dental Medicine and Oral Health Sciences, Thesis title: Novel roles of plasma fibronectin in energy metabolism and bone formation in vivo, Internal reviewer.
- Nov 2024 Aram Bahmani (Supervisors: Jianyu Li and Francois Barthelat), Thesis title: Engineering of Grain-Based Materials with Mechanical Agitation, McGill University, Dept of Mechanical Engineering, Pro-Dean.
- Aug 2024 Caitlin Anderson, PhD (Supervisor: Rene St-Arnaud), McGill University, Department of Human Genetics, Thesis title: The FIAT transcriptional repressor as a drug target for bone regeneration, Internal member.
- May 2024 Sanjay Singh, PhD (Supervisors: Satwinder Jit Singh & Jitendra Prasad), Indian Institute of Technology Ropar, Dept of Mechanical Engineering, Thesis title: Bone adaptation role of fluid flow and pore pressure. External reviewer.

Sept 2023	Marzieh Golabbakhsh, PhD (Supervisor: Robert Funnel), McGill University, Dept of Biological and Biomedical Engineering, Thesis title: Finite-element modelling based on optical coherence tomography and corresponding X-ray microCT data for normal and pathological middle ears. <u>Internal member</u> .
Feb 2023	Michael Bruccoli, PhD (Supervisor: Jean Vacher), McGill University, Department of Medicine Division of Experimental Medicine, Thesis title: Facet joint degeneration in scoliosis. <u>Internal reviewer</u> .
Jan 2023	Kathy Lee, PhD (Supervisor: Jane Mitchell and Marc Grynpas), University of Toronto, Graduate Department of Pharmacology and Toxicology, Thesis title: Investigating the in vivo effects of osteoblast-specific overexpression of Gas and Gαq/11 on bone formation and remodeling during fracture repair. <u>External reviewer</u> .
Dec 2022	Daniel Bisson, PhD (Supervisor: Lisbeth Haglund), McGill University, Department of Experimental Surgery, Thesis title: Facet joint degeneration in scoliosis. <u>Internal reviewer</u> .
June 2022	Victoria Schmerz, PhD (Supervisor: Peter Frazl), University of Potsdam, Dept of Material Science. Thesis title: Heterogeneity of the osteocyte network architecture and material structure across different tissue types in healing bone. <u>External reviewer</u> .
Nov 2021	Nathalie Gharibeh (Supervisor: Hope Weiler), Thesis title: The determinants of bone health in infancy including vitamin D status at birth and postnatal vitamin D supplementation, McGill University, School of Human Nutrition. <u>External member</u> .
March 2021	Tianyu Zhong (Supervisor: Mark Andrews), Thesis title: Trapping Ferrofluid Patterns: Insights into Hierarchies of Order from Self-Organization of Magnetic Nanoparticles, McGill University, Dept of Chemistry, <u>Pro-Dean</u> .
May 2020	Pouyan Asgharzadeh (Supervisor: Oliver Roehrl), Thesis title: Image-based analysis of biological network structures using machine learning and continuum mechanics, Stuttgart University, Dept of Mechanical Engineering. <u>External reviewer</u> .
Jan. 2020	Kaushar Jahan, PhD (Supervisor: Maryam Tabrizian), Thesis Title: Development of a novel Injectable phosphate-releasing purine-crosslinked Chitosan scaffold for Bone tissue engineering, Faculty of Dentistry, McGill University. <u>External member</u> .
Sept. 2019	Ivy Mak, PhD (Supervisors: Hope Weiler & Monsur Murshed), “The biological importance and mechanisms of long-chain polyunsaturated fatty acids on bone growth in diet-induced obesity: investigation in children with obesity and rodents”, School of Human Nutrition, McGill University, <u>External member</u> .
Sept. 2019	Hifang Sun, PhD, (Supervisor: Mari T. Kaartinen), The role of transglutaminases in osteoclastogenesis, Faculty of Dentistry, McGill University. <u>External member</u> .
July 2019	Tanvir Mustafy, PhD (Supervisors: Isabelle Villemure & Florina Moldovan), “The short and long-term effects of in vivo impact loadings applied during

- puberty on bone growth, morphometry, and biomechanics”, Département de Génie Mécanique, l’Université de Montréal. External reviewer.
- Feb. 2018 Betty Hoac, PhD, (Supervisors: Marc McKee & Monsur Murshed), “Enzymatic modifications of osteopontin and their role in mineralization”, Faculty of Dentistry, Internal reviewer.
- Jan 2017 Lamees Nayef, PhD, (Supervisor: Maryam Tabrizian), Thesis Title: Development of Injectable Multilayer Coated Nanoparticles and GDP- crosslinked Chitosan Sponge for BMP-7 delivery to Critical Size Defects and in Distraction Osteogenesis to Accelerate Bone Regeneration, Dept of Biomedical Engineering, McGill University. External member.
- July 2016 Nicole Loechel, PhD (Supervisor: Devakar Epari) modifying fixation stiffness to improve bone healing, Institute of Health and Biomedical Innovation, Faculty of Science and Engineering, Queensland University of Technology. External reviewer.
- 03-2016 Anna Shipov, PhD (Supervisor: Ron Shahar/Steve Weiner) “Selected metabolic syndromes affecting cortical and cancellous bone in different animal models” The Hebrew University of Jerusalem/The Weizmann Institute of Science. External reviewer.

4. Professional and/or Learned Societies

Society Committees/Institute Advisory Board

- 12/2023-12/2027 Scientific advisory board member, Ludwig Boltzmann Institute of Osteology, Vienna, Austria.
- 01/2020-01/2025 Scientific advisory board member, Deutsche Forschungsgemeinschaft Collaborative Research Centre -1444 Directed Cellular Self-Organisation to Advance Bone Regeneration, Berlin, Germany.
- 01/2017-12/2021 Scientific advisory board member for adult and pediatric clinical trial design, Mereo BioPharma, UK.
- 2023-present Member of Steering Committee, *Network for Canadian Oral Health Research*
- 2023-present Member, *American Society for Bone and Mineral Research*, Advocacy Science Policy Committee
- 2018-present Scientific Advisory Board member, *International Conferences on the Chemistry and Biology of Mineralized Tissues*
- 2014– 2016 Member, Meetings and event coordinator committee, *International Society for Fracture Repair*
- 2012 – 2015 Member, Media relations committee, *Orthopaedic Research Society*
- 2008 – 2014 Member, Finance subcommittee, *International Society for Fracture Repair*

Workshop and Conference Organization

- 6/2026 Programme Organising Committee member, 12th International Conference on Children's Bone Health, Montreal, Canada.

- 11/2024 Session Co-Organizer/Presenter, Pediatric Bone Imaging workshop, 24th International Workshop on Quantitative Musculoskeletal Imaging, Barossa Valley, Australia
- 10/2023 Session Moderator, Oral Presentations: Mediators of Mechanical Signals, American Society for Bone and Mineral Research Annual Meeting, Vancouver, Canada.
- 6/2023 Session Moderator and Judge, Student Oral Presentations Symposium, 6th Conference of the Canadian Society for Chronobiology, Guelph, Canada.
- 7/2022 Programme Organising Committee member, 10th International Conference on Children's Bone Health (ICCBH), Dublin, Ireland.
- 6/2021 Best oral presentation judge, 5th Conference of the Canadian Society for Chronobiology, Virtual meeting.
- 11/2020 Session Moderator, Osteogenesis imperfecta basic science, ICCBH Bone fragility disorders in children, Virtual meeting.
- 10/2019 Conference scientific advisory board member, 13th International conference on the Chemistry and Biology of mineralized tissues (ICCBHT) Fairmont le Chateau Montebello, Canada
- 7/2019 Conference organizing committee member, 2nd conference on mechano-chemistry and mechanobiology (MechanoChemBio 2019), Montreal, Canada.
- 9/2018 Session Moderator, Skeletal mechanobiology, American Society for Bone and Mineral Research Annual Meeting, Montreal, Canada.
- 7/2018 Session Co-Chair, Minisymposium, Mechanobiology of Bone and Cartilage, World Congress in Computational Mechanics, New York City, USA.
- 3/2018 Session Co-Chair, Orthopaedic Research Society Workshop, In vivo MicroCT Imaging: Longitudinal assessment of skeletal microstructure, strength, & (re)modeling dynamics, New Orleans, LA.
- 10/2017 Conference organizing committee member, International Workshop on Musculoskeletal and Neuronal Interactions, Montreal, Canada.
- 3/2017 Session Co-Chair, Orthopaedic Research Society, Preclinical Models Section at Annual Meeting, "Developing Best Practices for Mouse Models of In Vivo Loading", San Diego, CA.

7. RESEARCH

Research Grants and Industry contracts (Note: NPA=nominated principal applicant, PA=principal applicant, Co-A=co-applicant, Col=collaborator), \$ are in USD unless indicated.

Under review

- 1/2026-12/2027 **Shriners Hospitals for Children**
Bettina Willie-PA, Frank Rauch-Co-A, Pierre Moffatt-Co-A, *Short stature in osteogenesis imperfecta*, (Total: \$297,617USD)
- 1/2026-12/2028 **Shriners Hospitals for Children**
Bettina Willie-PA, Monzur Murshed-PA, Frank Rauch-Co-A, *Correcting Osteocyte-Associated Pathologies in X-Linked Hypophosphatemia*, (Total: \$821,415 USD)

- 08/2025-08/2030 **NIH, PAR-24-206, U54: Rare Diseases Clinical Research Consortia (RDCRC) for the Rare Diseases Clinical Research Network (RDCRN)** Bettina Willie-PA, Frank Rauch-Co-A, Julia Levy-Cohen-Co-A, Jean-Marc Retrovey-Co-A, *Novel imaging outcomes in Osteogenesis Imperfecta*, Project grant within the Brittle Bone Disorders Consortium, (My portion: \$428,202 USD)
- 7/2025-7/2030 **Canadian Institutes of Health Research (CIHR) project grant:** Bettina Willie-Co-A, Melissa Fisaletti-NPA, Leanne Ward-PA, Frank Rauch-Co-A, *From Prediction to Prevention of Fractures in Duchenne Muscular Dystrophy: an Osteoporosis Clinical Trial Preparedness Study ("CAN-OPTIMIZE DMD")*, (\$1,500,000)
- 07/2025-07/2030 **Canadian Institutes of Health Research (CIHR) project grant:** Bettina Willie-Col, Elizabeth Zimmerman-NPA, Jean Pierre Farmer-PA, Louis-Nicholas Veilleux-Co-A, Alessandra Carriero-Col, *Bone mass and microarchitecture and their relation to walking function in children with cerebral palsy*, (\$1,200,000)
- 07/2025-07/2030 **Canadian Institutes of Health Research (CIHR) project grant:** Bettina Willie-Col, Zoha Kibar-NPA, *Investigating the role of notochord defects in the etiopathogenesis of congenital scoliosis*, (\$1,000,000)
- 07/2025-07/2026 **Quebec Pain Research Network, Pilot projects:** Bettina Willie-Co-A, Elizabeth Zimmerman-NPA, Lander Manrique-Co-A, Emerson Krock-Co-A, *Susceptibility to nerve damage in osteogenesis imperfecta*, (\$25,000)

Currently funded

- 5/2025-05/2027 **Shriners Hospitals for Children**, Leanne Ward-NPA, Frank Rauch-PA, Bettina Willie- Co-A, Monzur Murshed-Co-A, Cheryle Seguin-Co-A, Pierre Moffat-Co-A, Matthew Grol-Co-A, Argerie Tsimicalis-Co-A, Annie Sbrocchi-Co-A, *STAR proposal on rare bone disorders*, (Total:\$400,000, My portion: \$31,000).
- 11/2023-03/2028 **Canadian Poultry Research Council, Poultry Science Cluster** Bettina Willie PA, Alexandra Harlander-NPA, Tina Widowski-PA, Svetlana Komarova-PA, Russell Main-PA, Brett Tobalske-PA, Don Powers-PA, *Winging it or not? – influence of embryonic and pre-juvenile experience on development of musculoskeletal system and navigational ability in pullets and laying hens*, (Total: \$1,405,190, My portion: \$521,255)
- 07/2023-06/2025 **Canadian Institutes of Health Research (CIHR)**
Principal Applicants: Steven Boyd, Angela Cheung, Suzanne Morin
Co-Applicants: Alain Moreau, Alexandra Papaioannou, Allan Liew, Andrea Burden, Andrew Howard, Andrew Laing, Andy Karaplis, Andy Kin On Wong, **Bettina Willie**, Bradley Meulenkamp, Brent Edwards, Brent Liewers, Brent Richards, Caitlin McArthur, Cari Whyne, Carol Lam, Carrie Ye, Cathy Craven, Chelsey Grimbly, Cheryl Barnabe, Cheryl Quenneville, Christine Fahim, Christine Thomas, Christopher Kovacs, Claudia Gagnon, Dan

Romanyk, David Goltzman, Despoina Manousaki, Dominique Rouleau, Edward Harvey, Elizabeth Zimmermann, Emil Harald Schemitsch, Emily Lalone, Emma Billington, Fabrice Mac-Way, Frank Rauch, Greg Wohl, Gregory Berry, Gustavo Duque, Heidi-Lynn Ploeg, Janie Astephen Wilson, Janna Andronowski, JD Johnston, Jenna Gibbs, Julia Sorbara, Kathryn Grandfield, Laetitia Michou, Larry Funnell, Lauren Beaupre, Lauren Burt, Leanne Ward, Leigh Gabel, Lidan You, Lindsey Westover, Lisa Lix, Lora Giangregorio, Mansur Halai, Marc McKee, Marie-Eve Robinson, Marie-Josée Bégin, Mathieu Ferron, Maureen Ashe, Melissa Fiscaletti, Michael Doschak, Monzur Murshed, Munier Nour, Natalie Reznikov, Nathalie Alos, Nik Knowles, Philippe Campeau, Pierre Guy, Prism Schneider, Richard Kremer, Richard Walker, Roman Krawetz, Romina Pace, Ross Kenneth Leighton, Saija Kontulainen, Sarah Manske, Sarah West, Sharon Straus, Sidney Feldman, Stephane Pelet, Steven Papp, Suzanne Cadarette, Svetlana Komarova, Thomas Willett, Todd Alexander, Wendy Ward, William Leslie

Osnet: The Canadian Bone Health Research Network, (Total: \$1,200,000)

01/2023-12/2025 **Contract with Angitia Biopharmaceuticals:** Bettina Willie-PA, *Hetero DS in Osteogenesis imperfecta mice*, (\$323,786).

10/2022-09/2027 **Canadian Institutes of Health Research (CIHR) project grant:** Bettina Willie-NPA, Frank Rauch-PA, Richard Weinkamer-Co-A, *Mechano-adaptation in Osteogenesis Imperfecta*, (Total: \$868,276; My portion: \$763,276)

04/2022-03/2027 **Canadian Institutes of Health Research (CIHR) project grant:** Bettina Willie Co-A, Claudia Gagnon-NPA, Suzanne Morin-PA, Sonia Jean-PA, Andre Marette- Co-A; Andre Tchemof-CoA; Jenna Gibbs- Co-A, *Bone and muscle health following sleeve gastrectomy in men, premenopausal women and postmenopausal women* (\$750,000)

03/2022-3/2026 **Contract with Mesentech:** Bettina Willie-PA, *Bone Anabolic Treatment for critical size defects in rodents*, (\$156,865)

10/2021-9/2026 **Canadian Institutes of Health Research (CIHR) project grant:** Bettina Willie-NPA, Suzanne Morin-Co-A, Nicolas Cermakian-Co-A, *Role of circadian rhythms in bone adaptation to the mechanical environment* (Total: \$739,910, My portion: \$609,910)

Past funded

04/2023-04/2025 **Stem Cell Network, Fueling Biotechnology Partnerships Awards Program (FBP):** Bettina Willie-CoA, Fabio Rossi-PA, Frank Rauch-CoA, *Bone targeted EP4 agonists as therapeutics for muscular dystrophy* (Total: \$399,822, My portion: \$108,740)

04/2019-3/2025 **NSERC-Discovery Grant (RGPIN-2019-05374):** Bettina Willie-PA, *Bone fragility in egg laying hens* (\$200,000+40,000 covid funds for 2024-2025)

12/2024 **SOLEIL Synchrotron:** Bettina Willie-PA, Paul Zaslansky-PA, “20240595: Preventing bone fractures in chickens: high contrast high resolution imaging of

- osteocyte lacunae within the calcium reservoir, medullary bone” (Anatomix, 9 shifts (8hrs/shift), shift ~5,000 €, Total: 45,000 €)
- 09/2023-9/2024 **MITACS accelerate:** Bettina Willie-PA, Michael Bruccoleri-PA, Récupération sûre et rapide des fractures osseuses, (\$15,000)
- 10/2023-10/2024 **CIHR Planning & Dissemination Grant, Institute Community Support project:** Bettina Willie Co-A, Elham Emami-NPA, Samira Abbasghlizadaheh-Rahimi-PA, Svetlana Komarova- Co-A, Fatiha Chandad- Co-A, Pascale Caidor-CoA, Pascaline Kengne Talla-CoA, Claire Davies-CoA, Ahmed Faleh Tamimi-CoA, Christopher Bedos-CoA, Ajung Moon-CoA, Sreenath Madathil-CoA, Amal Idrissi Janati-CoA, Richa Shrivastava-CoA, Milka Nyariro-CoA; *Integrating Equity, Diversity, and Inclusion into the lifecycle of AI for health and Oral Healthcare*, (\$50,000).
- 10/2019-9/2024 **Canadian Institutes of Health Research (CIHR) project grant:** Bettina Willie-PA, Svetlana Komarova-NPA, Role of extracellular ATP in bone adaptation to mechanical environment (Total: \$573,750, My portion: \$191,250)
- 03/2022-3/2024 **MITACS accelerate:** Bettina Willie-PA, *A Novel Bone Anabolic Treatment for critical size defects in rats*, (\$180,000)
- 04/2022-3/2024 **Canadian Space Agency (21HLSRM03):** Bettina Willie-NPA, Svetlana Komarova-Co-A, *Role of circadian rhythms in mechanical unloading-related bone loss*, (Total: \$150,000, My portion: \$100,000)
- 01/2022-12/2024 **Shriners Hospitals for Children**
Bettina Willie-PA, Frank Rauch-Co-A, Richard Weinkamer-Col, *Mechano-adaptation in Osteogenesis Imperfecta*, (Total: \$693,276, My portion: \$543,276) (Note: funding for 2023-2024 was returned to Shriners since CIHR grant was awarded)
- 06/2023 **Canadian Foundation for Innovation-John R. Evans Leaders Fund (equipment grant):** Bettina Willie-PA, Svetlana Komarova-Co-A, Rene St-Arnaud-Co-A, *Mechanoadaptation and whole body bioenergetics in osteogenesis imperfecta and other metabolic bone diseases*, (\$1,113,255).
- 06/2018-12/2023 **Mereo BioPharma:** Bettina Willie-NPA, Francis Glorieux-PA, *Natural history study: normative HRpQCT data in children with osteogenesis imperfecta*, (Total: \$144,040, My portion \$50,000)
- 11/15/2023 **SOLEIL Synchrotron:** Bettina Willie-PA, Paul Zaslansky-PA, Taylor DeVet-PA, “20230808: How are the characteristics of osteocyte lacuna and resulting bone micro porosity related to skull sutures?”(Anatomix, 5 shifts (8hrs/shift), shift ~5,000 €, Total: 25,000 €)
- 11/17/2023 **SOLEIL Synchrotron:** Bettina Willie-PA, Paul Zaslansky-PA, Taylor DeVet-PA, Leanne van der Merwe-PA, “20230832: Quantifying osteocyte lacuna characteristics and resulting bone micro porosity related to mechanical unloading?” (ID19, 6 shifts, (8hrs/shift), shift ~5,000 €, Total: 30,000 €)
- 01/2022-12/2023 **Réseau de recherche en santé buccodentaire et osseuse, Major structuring project:** Bettina Willie Co-A, Elham Emami-NPA, Samira Abbasghlizadaheh-Rahimi-PA, Svetlana Komarova- Co-A, Fatiha Chandad- Co-A, Pascale

- Caidor-CoA, Pascaline Kengne Talla-CoA, Claire Davies-CoA, Ahmed Faleh Tamimi-CoA, Christopher Bedos-CoA, Ajung Moon-CoA, Sreenath Madathil-CoA, Amal Idrissi Janati-CoA, Richa Shrivastava-CoA, Milka Nyariro-CoA; *Integrating Equity, Diversity, and Inclusion in the Development of Artificial Intelligence for Better Health and Oral Health Care: EDIAI Pilot Study*, (\$50,000).
- 01/2023-12/2023 **Contract with NextCure:** Bettina Willie-CoA, Svetlana Komarova-PA, *Exploring immunomedicine for bone diseases (Lair-1 pilot study)*, (\$25,730).
- 06/2023-09/2023 **Mitacs Global Research Award:** Bettina Willie-PI, David Bertrand-CoA, Taylor DeVet-CoA, *Osteocyte lacuna-canalicular network architecture and mechanoadaptation* (\$12,000 for students to work at Max Planck Institute in Golm Germany for 12 weeks)
- 07/12/2023 **European Synchrotron Radiation Facility:** Bettina Willie-PA, Paul Zaslansky-PA, Taylor DeVet-PA, Jack Chapman-PA, David Bertrand-PA, "Fast Access at Beamline ID19: Microtomography; XLH mouse models". (ID19, 3 shifts, (8hrs/shift), shift ~5,000 €, Total: 15,000 €)
- 04/29-30/2023 **European Synchrotron Radiation Facility:** Bettina Willie-PA, Paul Zaslansky-PA, Taylor DeVet-PA, Jack Chapman-PA, David Bertrand-PA, "IH-SC-1767: Osteocyte-lacuna-canalicular network analysis in different mammalian and avian species", (ID19, 6 shifts, (8hrs/shift), shift ~5,000 €, Total: 30,000 €)
- 04/2019-3/2023 **Collaborative Health Research Projects:** Bettina Willie-Co-A, Maryam Tabrizian PA, Monzur Murshed-PA, An Injectable Phosphate Releasing Bone Tissue Construct Encapsulating Adipose-Derived Stem Cells and Diphosphate Cleaving Enzymes to Promote Biomineralization in Critical Size Bone Defects (Total: \$864,150, My portion \$90,000)
- 04/2018-03/2023 **Canadian Poultry Research Council, Poultry Science Cluster**, which is supported by Agriculture and Agri-Food Canada as part of the Canadian Agricultural Partnership (grant # 054159), Bettina Willie PA, Tina Widowski-NPA, Svetlana Komarova-PA, Karen Schwean-Lardner-PA, Alexandra Harlander-PA, Russell Main-PA, Brett Tobalske-PA, Don Powers-PA, Identifying developmental determinants of successful behavioral adaptation and musculoskeletal health of egg-laying hens, (Total: \$1,882,325, My portion: \$511,586)
- 01/2022-01/2023 **Réseau de recherche en santé buccodentaire et osseuse:** Bettina Willie Co-A, Claudia Gagnon-NPA, Andre Marette-PA, Suzanne Morin-PA, Sonia Jean-PA, Andre Tchemof-CoA; *Associations Between the Changes in Gut Microbiota, Bone and Muscle Outcomes After Sleeve Gastrectomy*, (\$50,000).
- 04/2022 **NSERC RTI:** Bettina Willie Co-A, Maryam Tabrizian-PA, Sara Mahshid Co-A, Guojun Chen Co-A, Maureen McKeague, Co-A *Quantification of physical and chemical characteristics of cells and bioparticles using flow cytometry* (\$59,829)
- 04/2020-3/2022 **Canadian Space Agency (19HLSRM04):** Bettina Willie-PA, Svetlana

- Komarova-NPA, Richard Weinkamer-Col, Understanding relative contributions of fluid flow and mechanical strain to bone adaptation to altered gravity (Total: \$150,000, My portion: \$75,000).
- 01/2020-12/2021 **Shriners Hospital for Children:** Bettina Willie Co-A, JP Farmer-PA, Elizabeth Zimmermann Co-A, Louis-Nicholas Veilleux-Co-A, Alessandra Carriero-Col), Selective dorsal rhizotomy for spastic cerebral palsy: Impact on musculoskeletal health and predicting patient outcomes (\$200,000)
- 06/2017-12/2021 **Mereo BioPharma**
Bettina Willie PA, *HR-pQCT image analysis, finite element analysis and bone quality assessment for the study: A Phase 2b, Multicentre, Multinational, Placebo-controlled, Double-blind, Dose-finding Study in Adult Patients with Type I, III or IV Osteogenesis Imperfecta Treated with Setrusumab*, (\$938,831)
- 01/2018-12/2021 **Shriners Hospital for Children (RFP: Translational Regenerative Medicine in the Treatment of Mission-Specific Pediatric Disease or Injury)**
Bettina Willie-Co-A, Reggie Hamdy-PA, Frank Rauch-Co-A, *Multidisciplinary Approaches for Bone Regeneration using Biomaterials & Cell Therapy*, (Total: \$712,140, My portion: \$112,700)
- 6/2021 **NSERC RTI:** Bettina Willie Co-A, Noemie Dorval Courchesne Co-A, Matthew Harrington-PA, ATR FTIR microscope and fluid cell for tracking hierarchical assembly of molecules to materials (\$150,000)
- 06/2021 **PETRA III Synchrotron Source-DESY:** Bettina Willie-PA, Wolfgang Wagermaier-PA, Peter Fratzl-PA, Victoria Schemenz-PA, Correlation between bone mineral particle characteristics and the osteocyte cell network architecture in Marfan Syndrome (nanofocus beamline P03 at Petra III, 12 shifts, shift ~3,000 €) Note: beamtime was originally planned for Dec 2020 but was delayed until 06/2021 due to Covid 19
- 04/2018-03/2020 **Fédération des producteurs d'oeufs du Québec:** Bettina Willie-PA, Identifying developmental determinants of successful behavioral adaptation and musculoskeletal health of egg-laying hens, (\$10,000)
- 09/2020 **Canadian light source synchrotron:** Bettina Willie-PA, Elizabeth Zimmermann-PA, Paul Zaslansky-PA, Human tibia and skull: same bone material, different mechanobiology? (BMIT-BM, 9 shifts, shift ~\$3,000)
- 09/2020 **European Synchrotron Radiation Facility:** Bettina Willie-PA, Wolfgang Wagermaier-PA, Peter Fratzl-PA, Elizabeth Zimmermann-PA, Correlation between bone minerals and cell network at in the Marfan Syndrome (Beamline ID-13, 12 shifts, shift ~5,000 €)
- 01/2018-12/2019 **Mereo BioPharma**
Bettina Willie-PA, *Determining the influence of bone morphometry, porosity and tissue material properties on mechanical behavior of bone in Brtl/+ mice*, (\$37,960)
- 01/2018-12/2019 **National Marfan Foundation (247184)**

- Bettina Willie-NPA, Svetlana Komarova-PA, Dieter Rheinhardt-PA, *Osteocyte Mechanobiology in Marfan Syndrome*, (Total: \$100,000 USD, My portion: \$60,000 USD)
- 01/2017-12/2018 **Shriners Hospitals for Children-Developmental grant**
Bettina Willie-PA, *Synchronizing Circadian Clock-controlled Adaptive Bone (Re)modeling in Mice*, (\$107,632)
- 11/2015-12/2020 **Shriners Hospitals for Children**
Bettina Willie-PA, Start-up funding, (\$626,152)
- 02/2015-07/2018 **Bundesministeriums für Bildung und Forschung (Federal Ministry of Education and Research)**
Bettina Willie-PA, Georg Duda-PA, *Project 5: Loss of mechano-regulation and the potential of sclerostin to modulate mechano-sensation*. In consortium: Detection and individualized management of early onset osteoporosis (Total: 444,948 €, My portion: 444,948 €)
- 02/2017-01/2018 **CIHR Planning & Dissemination Grant, Institute Community Support**
Bettina Willie co-A, David Holdsworth-PA, *Canadian Research Leaders in Musculoskeletal Health: A self-assembled national consortium*, (Total: \$29,995 CND, My portion: \$0)
- 07/2016-10/2019 **Deutsche Forschungsgemeinschaft (German Research Foundation)** JU 426/45-1, Bettina Willie-Col, Franziska Jundt-PA, *Adaption processes of the bone to mechanical load in a mouse model for osteolytic bone changes in multiple myeloma*, (Total: 223,393 €, My portion: 40,509 €)
- 08/2014-08/2017 **Deutsche Forschungsgemeinschaft (German Research Foundation)** WI 3761/4-1, Bettina Willie-PA, Uwe Kornak-PA, *Adaptive and regenerative response of bone to mechanical strain in a mouse model of premature aging*, In Research Unit FOR2165: Regeneration in Aged Individuals: bone healing as a model system to characterize regeneration under compromised conditions, (Total: 409,900 €, My portion: 215,300 €)
- 02/2016-02/2017 **Réseau de recherche en santé buccodentaire et osseuse**
Bettina Willie-PA, Recruitment Aid Program, (\$20,000)
- 08/2015 **PETRA III Synchrotron Source-DESY** Bettina Willie-PA, Phase contrast-enhanced microCT mapping of osteocyte lacunae in SOST knock-out mice tibia, following in vivo mechanical. (P05, 12 shifts, shift ~3,000 €, Total: 36,000 €)
- 01/2012-01/2015 **Deutsche Forschungsgemeinschaft (German Research Foundation)** WI 3761/1-1, Bettina Willie-PA, *Adaptive response of bone to mechanical strain in a mouse model of premature aging* (214,300 €)
- 05/2010-05/2013 **Bundesministeriums für Bildung und Forschung (Federal Ministry of Education and Research)**: Bettina Willie-PA, Georg Duda-PA, Effect of mechanical strain on the osteocyte during bone adaptation and formation. In: Osteopath Research Consortium/TP6: The molecular pathology of osteoporosis, (Total: 274,000 €, My portion: 274,000 €).
- 05/2012-12/2013 **Elsbeth Bonhoff Foundation**: Bettina Willie PA, Does mechanical

- stimulation improve the efficacy of sclerostin-neutralizing antibody to enhance bone healing? (Verbessert mechanische Stimulation die Knochenheilung unter Gabe eines Sklerostin-neutralisierenden Antikörpers?), (47,000 €).
- 11/2013 **PETRA III Synchrotron Source-DESY:** Bettina Willie-PA, Paul Zaslansky-PA, Phase contrast-enhanced μ CTmapping of osteocyte lacunae in adult and elderly mice following in vivo mechanical loading (P05, 12 shifts, shift ~3,000 €, Total: 36,000 €)
- 06/2013 **BESSY II Synchrotron:** Bettina Willie-PA and Paul Zaslansky-PA, Submicron phase-contrast enhanced tomography to visualize osteocyte lacunae in mice of two ages with different loading histories. (12 shifts, shift ~3,000 €, Total: 36,000 €)
- 11/2011 **European Synchrotron Radiation Facility:** Bettina Willie-PA, Wolfgang Wagermaier-PA, Marta Aido-PA, Investigating age-related diminished skeletal mechanosensitivity by high resolution SAXS & WAXS analysis of osteocyte perilacunar tissue. (ID13, 12 shifts, shift ~5,000 €, Total: 60,000 €)

Publications: *Original publications in peer-reviewed journals (underlined are personnel supervised by me, impact factor for year published is shown on left).*

1. Bilal M, Si W, Vitienes I, **Willie B**, and Zhao X, (2023) 3.9
Cohousing-mediated microbiota transfer promotes bone health and modulates gut integrity, microbiota, and immunity in young broiler chickens,
Applied and Environmental Microbiology section *Environmental Microbiology*, Under review, 2025.
2. Bertrand D, Kavaseri K, Umebayashi M, Tauer JT, Sezikeye AL, Rauch F, (2023) 2.1
Hamdy R, **Willie BM**,
Systemic Bisphosphonate-EP4 Agonist Treatment Enhances Healing of a Critical-Sized Bone Defect in a Mouse Model of Osteogenesis Imperfecta,
Journal of Tissue Engineering and Regenerative Medicine, Under review, 2025.
3. Schemenz V, Rummler M, van Tol A, Vitienes I, Thiele T, Hartmann MA, (2023) 3.5
Burghammer M, Fratzl P, Weinkamer R, **Willie BM**, Wagermaier W
Correlations between osteocyte lacuna-canalicular network and material characteristics in healthy and mechanically stimulated murine cortices,
Bone, Under review, 2025.
4. Hosseinitabatabaei S, McCluskey S, Denton C, Zimmermann E, Glorieux F, (2023) 5.1
Charbonneau F, Rauch F, **Willie BM**,
Bone microstructural and strength changes over one year in children with osteogenesis imperfecta are comparable to age- and sex-matched healthy controls,
Journal of Bone and Mineral Research, In revision, 2025.
5. Vitienes I, Julien C, Rentsch A, Main R, Widowski TM, Checa S, **Willie BM** (2023) 3.5
Benefits of increased loading history on bone mechanical behaviour are genetic strain dependent in female adolescent chickens,

Bone Reports, In revision, 2025.

6. Agnes CJ, Li L, Bertrand D, Murshed M, **Willie BM**, Tabrizian M, (2023) 3.4
Development of a Myoblastic C2C12 Cell and RAW 264.7 Monocyte Macrophage Co-
Culture System within a 6-BromoIndirubin-3'-Oxime Incorporated Chitosan-Based Scaffold:
An In Vitro Evaluation of Osteogenic Differentiation,
Heliyon, In press, 2025.
7. Moussa M#, deVet T#, Zaslansky P, **Willie BM***, Komarova S* (2023) 5.1
(#*shared authorship),
Botulinum toxin (a)-induced bone loss is associated with increased blood velocity and
reduced vascular bone porosity,
Journal of Bone and Mineral Research, In press, 2025.
8. Chapman J, Umebayashi M, DeVet T, Kulasek M, Shen A, (2023) 2.1
Julien C, Rauch F, **Willie BM**,
Bone Healing Response to Systemic Bisphosphonate-Prostaglandin E2 Receptor 4 Agonist
Treatment in Female Rats with a Critical-Size Femoral Segmental Defect,
Injury, 56(4):112269, 2025.
9. Zimmermann EA, Gagnon M, Audet D, Tap R, Julien C, (2023) 5.1
Hosseinitabatabaei S, **Willie BM**, Carriero A, Farmer JP, Veilleux LN
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in trabecular microarchitecture,
Journal of Bone and Mineral Research, 21;40(4):511-521, 2025.
10. Karoichan A, Li L, Agnes C, **Willie BM**, Tabrizian M, (2023) 18.5
Mesenchymal Stem Cells-Derived Extracellular Vesicles Mimetics as Osteoinductive
mediators for Bone Healing,
Journal of Advanced Functional Materials, 2419562, 2025.
11. Agnes CJ, Li L, Bertrand D, Murshed M, Willie BM, Tabrizian M, (2023) 7.7
Assessment of bone regeneration potential for a 6-bromindirubin-3'-oximie (BIO)
encapsulated chitosan based scaffold in a mouse critical sized bone defect model
International Journal of Biological Macromolecules, 304(Pt 2):140995, 2025.
12. Hosseinitabatabaei S, Vitienes I, Birkhold, Rummmler M, Rauch F, **Willie BM**, (2023) 5.1
Non-invasive quantification of bone remodeling dynamics in adults with osteogenesis
imperfecta using timelapse HR-pQCT,
Journal of Bone and Mineral Research 40(3):348-3612025, 2025.
13. Pu S, Fu R, Bertrand D, **Willie BM**, Yang H, (2023) 2.1
A 4D time-lapse morphometry method to quantify bone formation and resorption during
distraction osteogenesis
Journal of Orthopedic Research, 43(3):586-594, 2025.
14. Wang M, Zhao S, Shi C, Guyot M-C, Zhao Z, Liao M, Zhao L, Tauer JT, (2023) 4.6
Willie BM, Li G, Cobetto N, Aubin C-E, Küster-Schöck ED, Drapeau P,
Bagnat M, Zhang J, Zhang TJ, Wu N, * Kibar Z* (#, * shared authorship),

Planar cell polarity zebrafish models of congenital scoliosis reveal novel underlying defects in notochord morphogenesis
Development, 151(21): dev202829, 2024.

15. Rummler M, von Tol A, Schemenz V, Hartmann M, Blouin S, **Willie BM**, Weinkamer R (2023) 3.3
 The lacunocanicular network is denser in C57BL/6 compared to BALB/c mice
Calcified Tissue International, 115(5):744-758, 2024.
16. Bertrand D, Kavaseri K, Fu R, Villemure I, Rauch F, Hamdy R, Yang H, **Willie BM**, (2023) 3.8
 The Accordion Technique did not improve healing compared to conventional Distraction Osteogenesis,
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17. Chan WL, Bucher C, Goldes J, Ma AC, Steiner M, **Willie BM**, Mundlos S, Kornak U, (2023) 8.0
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18. Rummler M, Ziouti F, Snyder L, Zimmermann E, Lynch M, Donnelly E, Wagermaier W, Jundt F, **Willie BM**, (2023) 7.9
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19. Zimmermann EA, Devet T, Cilla M, Albiol L, Kavaseri K, Andrea C, Julien C, Tiedemann K, Panahifar A, Alidokht S, Chromik R, Komarova SV, Reinhardt DP, Zaslansky P, **Willie BM** (2023)
 Tissue material properties, whole-bone morphology and mechanical behavior in the *Fbn1*^{C1041G/+} mouse model of Marfan Syndrome,
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20. Rummler M, Schemenz V, McCluskey S, Davydok A, Rauch F, Glorieux F, Harrington MJ, Wagermaier W, **Willie BM***, Zimmermann EA* (*shared authorship) (2023) 5.1
 Bone matrix properties in adults with osteogenesis imperfecta are not adversely affected by Setrusumab - a sclerotin neutralizing antibody
Journal of Bone and Mineral Research, 39(9):1229-1239, 2024.
21. Glorieux F, Langdahl B, Chapurlat R, Jan de Beur S, Sutton V, Poole K, Dahir K, Orwoll E, **Willie BM**, Mikolajewicz N, Zimmermann E, Hosseinitabatabaei S, Ominsky M, Saville C, Clancy J, MacKinnon A, Mistry A, Javaid M K, (2023) 5.1
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22. Bezdjian A, Mikolajewicz N, Denton C, Bouchard A, Rummler M, (2023) 2.1

- Gludovatz B, Shin M, Zimmerman E, Salameh S, Daniel SJ, **Willie BM**,
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bone-anchored hearing implant stability,
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23. Tauer JT, Thiele T, Julien C, Ofer L, Zaslansky P, Shahar R, **Willie BM**, (2023) 3.5
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24. Chen J, Aido M, Roschger A, Van Tol A, Checa S, **Willie BM**, Weinkamer R, (2023) 2.9
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25. Breuer M, Rummler M, Zaouter C, Jamadagni P, Singh J, (2023) 5.1
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Journal of Bone and Mineral Research, 39(4):498-512, 2024.
26. Young, SAE, Heller A-D, Garske DS, Rummler M, Qian V, Ellinghaus A, (2023) 11.7
Duda GN, **Willie BM**, Grueneboom A, Cipitria A,
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(re)modeling in early lesion formation
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27. Indermaur M, Casari D, Kochetkova T, **Willie B**, Michler J, (2023) 3.3
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28. Indermaur M, Casari D, Kochetkova T, **Willie B**, Michler J, Schwiedrzik J, Zysset P, 3.4
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29. Fu R, Liu Y, Song F, Fu J, Du T, Liu Y, **Willie BM**, Yang H, 2.1
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30. Rentsch A, Harlander A, Siegford J, Vitienes I, **Willie BM**, Widowski T, 2.1
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31. Vitienes I, Mikolajewicz N, Hosseinitabatabaei S, Bouchard A, Julien C, 3.5
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32. Agnes C, Takada A, Murshed M, **Willie B**, Tabrizian M, 7.7
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33. Fu R, Feng Y, Bertrand D, Du T, Liu Y, Willie BM, Yang H, 6.1
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34. Young, SAE, Rummler M, Taïeb HM, Garske DS, Ellinghaus A, Duda GN, 4.1
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35. Hosseinitabatabaei S, Mikolajewicz N, Zimmermann EA, Rummler M, 6.2
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37. Fu R, Bertrand D, Wang J, Kavaseri K, Feng Y, Du T, Liu Y, **Willie BM**, Yang H, 6.1
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38. Simon M, Indermaur M, Schenk D, Hosseinitabatabaei M, **Willie BM**, 4.1
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39. Fu R, Feng Y, Liu Y, **Willie BM**, Yang H, 2.8
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40. Bouchard A, Dsouza C, Julien C, Rummler M, Gaumont M-H, 4.1
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41. Fu R, Feng Y, Bertrand D, Du T, Liu Y, **Willie BM**, Yang H, 6.208
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- International Journal of Molecular Sciences*, 22(21):11734, 2021.
42. Turcotte A-F, O'Connor S, Morin SN, Gibbs JC, **Willie BM**, Jean S, Gagnon C, 3.752
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 45. Ziouti F*, Rummler M*, Steyn B, Thiele T, Seliger A, Duda G, Bogen B, 6.208
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 47. Rummler M, Ziouti F, Bouchard A, Brandl A, Duda GN, Bogen B, 10.633
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 48. van Tol A, Schemenz V, Wagermaier W, Roschger A, Razi H, Vitienes I, 11.205
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2. Van der Merwe L, Brucoleri M, Shah M, Julien C, Cermakian N, Morin S, **Willie BM**, Osteocyte-conditional knockout of *Bmal1* results in decreased bone formation response to in-vivo tibial loading in mice, *American Society for Bone and Mineral Research*, Under review, Seattle, USA, September 5-8, 2025.
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6. Al Jallad H, Vitienes I, Lamplugh I, **Willie B**, Moffatt P, Cephalometric analysis of a new dominant osteogenesis imperfecta *IFITM5* model, *Canadian Connective Tissue Conference*, Under review, Montreal, Canada, May 26-28, 2025.
7. Thierbach M, Zimmermann E, **Willie BM**, Wildemann B, Marfan Syndrome affects the Achilles tendon in mice – pilot study, *ORS Annual Meeting*, Poster Presentation, Phoenix, AZ, USA, February 2025.
8. **Willie BM**, Hosseinitabatabaei S, Mikolajewicz N, Julien C, Zimmermann E, Lessons learned from an HR-pQCT study in adults with osteogenesis imperfecta, *QMSKI Conference 2024*, Oral Presentation, Barossa Valley, Australia, November 2024.
9. Hosseinitabatabaei S, McCluskey S, Denton C, Zimmermann E, Glorieux F, Charbonneau F, Rauch F, **Willie BM**, Natural history of the peripheral bones in children with osteogenesis imperfecta and age- and sex-matched healthy controls using longitudinal HR-pQCT analysis, *QMSKI Conference 2024*, Oral Presentation, Barossa Valley, Australia, November 2024.
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11. deVet T, Moussa M, Komarova S, **Willie BM**, Mechanical Unloading induced Changes in Blood Flow and Bone Loss in Murine Hindlimb, *American Society for Bone and Mineral Research*, Poster Presentation, Toronto, Canada, September 27-30, 2024.

12. Hosseinitabatabaei S, McCluskey S, Denton C, Zimmermann E, Glorieux F, Charbonneau F, Rauch F, **Willie BM**, Natural history of the peripheral bones in children with osteogenesis imperfecta and age- and sex-matched healthy controls using longitudinal HR-pQCT analysis, *American Society for Bone and Mineral Research*, Poster Presentation, Toronto, Canada, September 27-30, 2024.
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14. Vitienes I, Julien C, Rentsch A, Widowski T, Main R, **Willie BM**, *In vivo* loading induces region-specific changes in tibiotarsal microstructure at the proximal metaphysis, *Poultry Science Association Annual Meeting*, Oral Presentation, Louisville, Kentucky, July 15-18, 2024.
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17. Bertrand D, Tauer JT, Marini JC, Rauch F, **Willie BM**, Adaptive Response to Loading is Impaired in a Mouse Model of Osteogenesis Imperfecta coincident with altered periosteal lacunar properties, *International Conference on Children's Bone Health*, Oral Presentation, Salzburg, Austria, June 22-25, 2024.
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20. Bertrand D, Tauer JT, Marini JC, Rauch F, **Willie BM**, Adaptive Response to Loading is Impaired in a Mouse Model of Osteogenesis Imperfecta, *Shriners Hospitals for Children State of Science Meeting*, Oral Presentation, Georgia Tech, Atlanta, GA; Feb 23-24, 2024.
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 30. Yang A, Coll J-C, Varin T, Simard S, Morin SN, Mac-Way F, Tchernof A, **Willie B**, Lebel S, Marette A, Gagnon C, Associations Between the Changes in Gut Microbiota and Bone and Muscle Outcomes After Sleeve Gastrectomy, *American Society for Bone and Mineral Research*, Plenary Poster Presentation, Vancouver, Canada, October 13-16, 2023.
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35. Hosseinitabatabaei S, Vitienes I, Rummler M, Birkhold A, Rauch F, **Willie BM**, Non-invasive quantification of bone remodeling dynamics in adults with osteogenesis imperfecta using time-lapse HR-pQCT, *ORS Musculoskeletal Biology Workshop*, Poster presentation, Midway, Utah; 22-27 July 2023.
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37. Vitienes I, Julien C, Kavari S, Rentsch A, Widowski T, Main R, **Willie BM**, Genetic strain and rearing housing influence tibiotarsal mechanoreponse to controlled *in vivo* loading, *Poultry Science Association Annual Meeting*, Oral Presentation, Philadelphia, Pennsylvania, July 10-13, 2023.
38. Gagnon M, Carriero A, **Willie BM**, Veilleux LN, Farmer JP, Zimmermann E, Short term effect of selective dorsal rhizotomy on musculoskeletal health: Preliminary results, *Gait and Clinical Motion Analysis Society (GCMAS) annual conference*, Oral Presentation, High Point, NC, USA, June 26-28, 2023.
39. Hosseinitabatabaei S, McClusky S, Zimmermann EA, Glorieux F, Charbonneau F, Rauch F, **Willie BM**, Natural history of HR-pQCT-measured bone density and microarchitecture over 12 months in children with osteogenesis imperfecta compared to controls, *Bruce R Williams Pediatric Surgery Annual Research Day*, Oral Presentation, Montreal, Canada, June 8 2023.
40. Rummler M, van Tol A, Schemenz V, Hartmann M, Blouin S, **Willie B**, Weinkamer R, Mapping structural heterogeneities of the osteocyte lacunocanalicular network in whole cross sections of the mouse tibia, *European Calcified Tissue Society*, Poster presentation, April 15-18 2023, Liverpool, England.
41. deVet T, Moussa M, Komarova S, **Willie BM**, Mechanical loading induces short- and long-term changes in murine hindlimb vasculature, *Orthopaedic Research Society Annual Meeting*, Poster presentation, Dallas, USA, Feb 11-14, 2023.
42. Vitienes I, Mikolajewicz N, Hosseinitabatabaei S, Bouchard A, Julien C, Graceffa G, Ross E, Rentsch A, Widowski TM, Main R, **Willie BM**, Chicken Genetic Strain Influenced In Vivo Strain Patterns And Bone Curvature, *Orthopaedic Research Society Annual Meeting*, Poster presentation, Dallas, USA, Feb 11-14, 2023.
43. Agnes C, Murshed M, **Willie B**, Tabrizian M, Fabrication of 6-Bromoindirubin-3'-Oxime Incorporated Guanosine Diphosphate Crosslinked Chitosan Scaffolds to promote Osteogenic Differentiation in Myoblastic C2C12 Cells, *32nd Annual Conference of the European Society for Biomaterials*, Sept. 4-8, 2022, Poster presentation and rapid fire oral presentation.
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45. Asgharzadeh P, Birkhold A, Zimmermann E, Tabatabaei S, **Willie BM**, A data-driven Surrogate Modelling, a Patient-specific Approach for Predicting Treatment Effects for Patients with Osteogenesis Imperfecta, *15th World Congress on Computational Mechanics (WCCM-XV)*, *8th Asian Pacific Congress on Computational Mechanics (APCOM-VIII)*, Oral presentation, 31 July – 5 August 2022, Yokohama, Japan,.
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48. Javaid MK, Langdahl B, Chapurlat R, Jan De Beur S, Sutton VR, Poole K, Dahir K, Orwoll ES, **Willie BM**, Mikolajewicz N, Zimmermann E, Ominsky M, Saville C, Clancy J, Mackinnon A, Mistry A, Glorieux FH, Changes in BMD and Bone Turnover Markers Following Discontinuation of Setrusumab After 1 Year of Treatment in Adults with Osteogenesis Imperfecta, *American Society for Bone and Mineral Research*, Oral presentation, Austin, USA, September 9-12, 2022.
49. Malekzadeh M, Hosseinitabatabaei S, **Willie BM**, McWalter E, Johnston JD, Kontulainen S, The impact of exercise countermeasure on 2-weeks bedrest in older adults, *American Society for Bone and Mineral Research*, Poster presentation, Austin, USA, September 9-12, 2022.
50. Hosseinitabatabaei S, Vitienes I, Rummler M, Birkhold A, Rauch F, **Willie BM**, Noninvasive quantification of bone remodeling dynamics in adults with OI using time-lapse high resolution peripheral quantitative computed tomography, *American Society for Bone and Mineral Research*, Poster presentation, Austin, USA, September 9-12, 2022.
51. Bertrand D, Kavaseri K, Villemure I, Rauch F, Hamdy R, **Willie BM**, The Accordion Technique does not improve healing compared to conventional Distraction Osteogenesis, *ORS ISFR 17th International Biennial Meeting*, Oral presentation, Edinburgh, Scotland, September 5 – 7, 2022.
52. Kavaseri K, Bertrand D, Umebayashi M, Tauer JT, Rauch F, Hamdy R, **Willie BM**, Anabolic therapies for bone healing in a femoral critical-sized segmental defect in a mouse model of osteogenesis imperfecta, *ORS ISFR 17th International Biennial Meeting*, Poster presentation, Edinburgh, Scotland, September 5 – 7, 2022.
53. Bertrand D, Kavaseri K, Sezikeye A-L, Julien C, Hamdy R, Marini J, Rauch F, **Willie BM**, Mechanical regulation of bone healing is altered in mouse models of osteogenesis imperfecta, *ORS ISFR 17th International Biennial Meeting*, Poster presentation, Edinburgh, Scotland, September 5 – 7, 2022.
54. Kavaseri K, Bertrand D, Umebayashi M, Tauer JT, Rauch F, Hamdy R, **Willie BM**, Anabolic therapies for bone healing in a femoral critical-sized segmental defect in a mouse model of

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55. Bertrand D, Kavaseri K, Sezikeye A-L, Julien C, Hamdy R, Marini J, Rauch F, **Willie BM**, Mechanical regulation of bone healing is altered in mouse models of osteogenesis imperfecta, *14th International Conference on Osteogenesis imperfecta 2022*, Poster presentation, Sheffield, England, Aug 30-Sept 2, 2022.
 56. Hosseinitabatabaei S, Vitienes I, Rummler M, Birkhold A, Rauch F, **Willie BM**, Non-invasive quantification of bone remodeling dynamics in adults with OI using time-lapse high-resolution peripheral quantitative computed tomography imaging, *14th International Conference on Osteogenesis imperfecta 2022*, Oral presentation, Sheffield, England, Aug 30-Sept 2, 2022.
 57. Hosseinitabatabaei S, Zimmermann E, Steyn B, Rummler M, Rauch F, **Willie BM**, 3D image registration marginally improves short-term in-vivo precision of high resolution peripheral quantitative CT images from adults with osteogenesis imperfecta compared to cross-sectional-area registration, *14th International Conference on Osteogenesis imperfecta 2022*, Poster presentation, Sheffield, England, Aug 30-Sept 2, 2022.
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 59. Vitienes I, Mikolajewicz N, Hosseinitabatabaei S, Bouchard A, Julien C, Graceffa G, Ross E, Rentsch A, Widowski TM, Main R, **Willie BM**, Pullet genetic strain and rearing housing influence *in vivo* skeletal strains during physical activity, *Poultry Science Association 2022 Annual Meeting*, Oral presentation, San Antonio, USA, July 11-14, 2022.
 60. Bertrand D, Kavaseri K, Sezikeye A-L, Julien C, Hamdy R, Marini J, Rauch F, **Willie BM**, Mechanical regulation of bone healing is altered in mouse models of osteogenesis imperfecta, *10th International Conference on Children's Bone Health*, Poster presentation, Dublin, Ireland, 2 - 5 July 2022.
 61. Hosseinitabatabaei S, Vitienes I, Rummler M, Birkhold A, Rauch F, **Willie BM**, Parametric analysis of a method to non-invasively quantify bone remodeling using time-lapse high-resolution peripheral quantitative computed tomography imaging from individuals with OI, *10th International Conference on Children's Bone Health*, Poster presentation, Dublin, Ireland, 2 - 5 July 2022.

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63. Young SAE, Heller A-D, Garske DS, Rummler M, Qian V, Taieb HM, Ellinghaus A, Duda GN, Grüneboom A, **Willie BM**, Cipitria A, 3D visualization of the early bone metastatic niche and in vivo monitoring of pathological changes in bone structure and dynamics, *EMBO | EMBL Symposium - Defining and defeating metastasis*, Heidelberg, June 2022, Poster presentation review.
64. Zysset P, Indermaur M, Casari D, Kochetkova T, Peruzzi C, Zimmermann E, Rauch F, **Willie B**, Michler J, Schwiedrzik J, Micromechanical Properties of Bone Biopsies in Osteogenesis Imperfecta, *9th World Congress of Biomechanics*, Oral presentation, Taipei Taiwan July 10-14, 2022.
65. Fu R, Bertrand D, **Willie B**, Yang H, Effect of the accordion technique on bone regeneration during distraction osteogenesis of the mouse femur, *9th World Congress of Biomechanics*, Poster presentation, Taipei Taiwan July 10-14, 2022.
66. Schemenz V, Rummler M, Hartmann MA, Blouin S, Fratzl P, **Willie BM**, Wagermaier W, Weinkamer R, Spatial correlations between the local architecture of the lacunocanalicular network and the surrounding mineralized matrix in mouse tibiae, *European Calcified Tissue Society*, Poster presentation, Helsinki, Finland May 2022.
67. Agnes C, Murshed M, **Willie B**, Tabrizian M, 6-Bromoindirubin-3'-Oxime Incorporation in the Guanosine Diphosphate Crosslinked Chitosan Scaffold as a Glycogen Synthase Kinase 3 Inhibitor: Investigation of Material Properties for Bone Tissue Regeneration, *Society for Biomaterials & Japanese Society for Biomaterials Joint Symposium*, Poster presentation, Jan 2022.
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69. Javaid MK, Saag K, Civitelli R, Cohen-Solal M, **Willie B**, Hosseinitabatabaei S, Zimmermann E, Clancy J, MacKinnon A, Black I, Mistry A, Baseline Patient Demographics and Disease Characteristics in Adultswith Osteogenesis Imperfecta (OI) in the Phase 2b ASTEROID Study, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, Oct 1-4, 2021.
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71. Vitienes I, Ross E, Graceffa G, Bouchard A, Steyn B, Widowski TM, **Willie BM**, Aviary rearing enhances bone microstructure in Lohmann LSL-Lite and bone mass in Lohmann

- Brown Lite egg-laying hen pullets compared to conventional cage-rearing, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, Oct 1-4, 2021.
72. Kavaseri K, Bertrand D, Umabayashi M, Tauer JT, Rauch F, Hamdy R, Willie BM, Healing of a femoral critical-sized segmental defect, in a mouse model of osteogenesis imperfecta, using collagen scaffolds and adipose tissue-derived stem cells, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, Oct 1-4, 2021.
 73. Bertrand D, Kavaseri K, Villemure I, Rauch F, Hamdy R, Willie BM, The Accordion Technique applied during the consolidation phase does not improve healing compared to conventional Distraction Osteogenesis, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, Oct 1-4, 2021.
 74. Hosseinitabatabaei S, Mikolajewicz N, Zimmermann EA, Rummler M, Steyn B, Julien C, Rauch F, Willie BM, 3D image registration marginally improves short-term in-vivo precision of high resolution peripheral quantitative CT images from adults with osteogenesis imperfecta compared to cross-sectional-area registration, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, Oct 1-4, 2021.
 75. Indermaur M, Casari D, Kochetkova T, Willie B, Michler J, Schwiedrzik J, Zysset P, Tensile properties of dry bone matrix from trans-iliac biopsies are not inferior in osteogenesis imperfecta compared to healthy control, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, Oct 1-4, 2021.
 76. Gagnon M, Zimmermann E, Carriero A, Willie BM, Veilleux LN, Farmer JP, Effect of selective dorsal rhizotomy on musculoskeletal health: A study protocol, *American Academy of Cerebral Palsy and Developmental Medicine conference*, Poster presentation, Quebec City, Oct. 6-9, 2021.
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 78. Ross E, Vitienes I, Willie BM, Widowski TM, The effect of early life environmental complexity on skeletal characteristics in two strains of laying hen pullets, *Poultry Science Association 2021 Annual Meeting*, Podium presentation, Virtual meeting, July 19-22, 2021.
 79. Vitienes I, Ross E, Graceffa G, Bouchard A, Steyn B, Willie BM, Widowski TM, Aviary rearing enhances bone microstructure in Lohmann LSL-Lite and bone mass in Lohmann Brown Lite egg-laying hen pullets compared to conventional cage-rearing, *Poultry Science Association 2021 Annual Meeting*, Poster presentation, Virtual meeting, July 19-22, 2021.
 80. Rentsch AK, Vitienes I, Willie BM, Ross E, Widowski TM, Complex rearing aviary design promotes different load bearing activities in laying hen pullets, Oral presentation, *Canadian Poultry Research Forum*, June 21-23, 2021.
 81. Ross E, Vitienes I, Willie BM, Rentsch AK, Widowski TM, Rearing Environment Affects Pectoralis Major and Keel Bone Development in Laying Hen Pullets, *World's Poultry Congress 2021 in Paris, France*, August 8-12, 2021 (COVID-19 Postponed).
 82. Rentsch AK, Vitienes I, Willie BM, Ross E, Widowski TM, Complex rearing aviary design promotes different load bearing activities in laying hen pullets, *World's Poultry Congress 2021 in Paris, France*, August 8-12, 2021 (COVID-19 Postponed).

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84. Bertrand D, Kavaseri K, Villemure I, Rauch F, Hamdy R, **Willie BM**, The Accordion Technique applied during the consolidation phase does not improve healing compared to conventional Distraction Osteogenesis, *Bruce Williams Pediatric Surgery Research Day*, Oral presentation, June 3, 2021.
85. Turcotte A-F, O'Connor S, Morin SN, Gibbs JC, **Willie BM**, Jean S, Gagnon C, Effects of Obesity on Risk of Fracture, Bone Mineral Density and Bone Quality in Adults: A Systematic Review and Meta-Analysis, *Canadian Obesity Summit*, Oral presentation, Virtual meeting, May 10-13, 2021.
86. Breuer M*, Rummler M*, Zaouter C, **Willie BM**[#], Patten SA[#], Highly mineralized inclusions and Col2a1 depletion in vertebrae of a zebrafish model of CHARGE syndrome (*[#], shared authorship), *IZFS 2021 Annual Meeting*, Submitted, Virtual meeting, 2021.
87. Kavaseri K, Bertrand D, Umebayashi M, Tauer JT, Rauch F, Hamdy R, **Willie BM**, Establishment of a critical-sized segmental defect and efficacy evaluation of adipose tissue-derived stem cells for bone healing in a mouse model of Osteogenesis imperfecta, *Réseau de recherche en santé buccodentaire et osseuse annual research meeting*, Virtual, Poster presentation, April 21-23, 2021.
88. Agnes C, Murshed M, **Willie BM**, Tabrizian M, Effect of Incorporation of the GSK3 Inhibitor, 6-Bromoindirubin-3'-Oxime, on the Material Properties of the Guanosine Diphosphate Crosslinked Chitosan Scaffold, *Réseau de recherche en santé buccodentaire et osseuse annual research meeting*, Virtual, Poster presentation, April 21-23, 2021.
89. Vitienes I, Ross E, Graceffa G, Bouchard A, Steyn B, Widowski TM, **Willie BM**, Aviary rearing enhances bone microarchitecture compared to rearing in conventional cages in LSL-Lite, but not Lohmann Brown-Lite egg-laying hen pullets, *Réseau de recherche en santé buccodentaire et osseuse annual research meeting*, Virtual, Poster presentation, April 21-23, 2021.
90. Bertrand D, Kavaseri K, Villemure I, Rauch F, Hamdy R, **Willie BM**, The Accordion Technique applied during the consolidation phase does not improve healing compared to conventional Distraction Osteogenesis, *Réseau de recherche en santé buccodentaire et osseuse annual research meeting*, Virtual, Poster presentation, April 21-23, 2021.
91. Hosseinitabatabaei S, Mikolajewicz N, Zimmermann EA, Rummler M, Steyn B, Julien C, Rauch F, **Willie BM**, 3D and cross-sectional-area registration of high resolution peripheral quantitative CT images from adults with osteogenesis imperfecta provide similar short-term in-vivo precision, *Réseau de recherche en santé buccodentaire et osseuse annual research meeting*, Virtual, Poster presentation, April 21-23, 2021.
92. Gagnon M, Yap R, Carriero A, **Willie BM**, Veilleux LN, Farmer JP, Zimmermann E. Selective dorsal rhizotomy for cerebral palsy: Impact on musculoskeletal health, *Réseau de recherche en santé buccodentaire et osseuse annual research meeting*, Virtual, Poster presentation, April 21-23, 2021.

93. Turcotte A-F, O'Connor S, Morin SN, Gibbs JC, **Willie BM**, Jean S, Gagnon C, Effects of Obesity on Risk of Fracture, Bone Mineral Density and Bone Quality in Adults: A Systematic Review and Meta-Analysis, *Réseau de recherche en santé buccodentaire et osseuse annual research meeting*, Virtual, Poster presentation, April 21-23, 2021.
94. Kavaseri K, Bertrand D, Rauch F, Hamdy R, **Willie BM**, Establishing a Critical-Sized Segmental Defect in a Mouse Model of Osteogenesis Imperfecta, *ICCBH Bone fragility disorders in children*, Oral presentation, Virtual meeting, Nov. 18-20, 2020.
95. Steyn B, Julien C, Chen WL, Kornak U, **Willie BM**, Inactivation of the *Gorab* gene does not alter the mechanoresponse, *ICCBH Bone fragility disorders in children*, Poster presentation, Virtual meeting, Nov. 18-20, 2020.
96. Asgharzadeh P, Birkhold A, Zimmermann E, Rauch F, Röhrle O, **Willie BM**, A data-driven Analysis of Bone Structure in Osteogenesis Imperfecta Using HR-pQCT Images and Machine Learning, *ICCBH Bone fragility disorders in children*, Oral presentation, Virtual meeting, Nov. 18-20, 2020.
97. Hosseinitabatabaei S, Zimmermann EA, Mikolajewicz N, Rummler M, Steyn B, Julien C, Glorieux F, Rauch F, **Willie BM**, Matched angle image registration improves short-term precision of bone strength estimated from HR-pQCT scans of adults with osteogenesis imperfecta, *ICCBH Bone fragility disorders in children*, Oral presentation, Virtual meeting, Nov. 18-20, 2020.
98. Breuer M*, Rummler M*, Zaouter C, **Willie BM**[#], PattenSA[#], Chd7 dependent osteogenesis results in variable bone mineralization and abnormal vertebrae morphology in a zebrafish model for CHARGE syndrome (*[#], shared authorship), *11th European zebrafish meeting*, Poster presentation, Virtual meeting, October 26-27, 2020.
99. Kavaseri K, Bertrand D, Rauch F, Hamdy R, **Willie BM**, Establishing a Critical-Sized Segmental Defect in a Mouse Model of Osteogenesis Imperfecta, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, 2020.
100. Fu R, **Willie BM**, Yang H, The Interactive Effects of Dynamization Time and Degree on Bone Healing, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, 2020.
101. Fu R, Bertrand D, **Willie BM**, Yang H, The effect of the accordion technique on bone regeneration during distraction osteogenesis, *American Society for Bone and Mineral Research*, Poster presentation, Virtual meeting, 2020.
102. Asgharzadeh P, Birkhold A, Zimmermann E, Rauch F, Röhrle O, **Willie BM**, Deep Learning Analysis of Bone Structure in Osteogenesis Imperfecta Using HR-pQCT Images, *European Society of Biomechanics*, Coronavirus-postponed, 2020.
103. Indermaur M, Casari D, Kochetkova, Michler J, **Willie BM**, Schwiedrzik J, Zysset P, Tissue fixation doesn't affect compressive strength of ovine cortical bone ECM, *European Society of Biomechanics*, Coronavirus-cancelled, 2020.
104. Roschger A, van Tol A, Thelen M, Seliger A, Yang H, Chen WL, Thiele T, Roschger P, Duda G, Zaslansky P, Kornak U, **Willie BM**, Weinkamer R, The effect of a deteriorated architecture of the lacunocanalicular network on the organization and mineralization of the extracellular matrix, *European Society of Calcified Tissue*, Coronavirus-cancelled, 2020.

105. van Tol A, Schemenz V, Wagermaier W, Roschger A, Razi H, Vitienes I, Fratzl P, **Willie BM**, Weinkamer R, The influence of the lacunocanalicular network architecture on bone's mechanoresponsiveness, *Gordon conference*, Coronavirus-cancelled, 2020.
106. Bezdjian A, Smith RA, Thomeer HGXM, **Willie BM**, Daniel SJ, A Systematic Review on Factors Associated with Percutaneous Bone Anchored Hearing Implants Loss, *ESPO 2020*, Poster presentation, Marseille, France, Coronavirus-cancelled until Feb 13-16, 2021.
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Presentation, Seattle, WA, USA, 2015.

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 222. **Willie BM**, Blakytyn R, Besse J, Bausewein C, Ignatius A, Claes L, Late dynamization on fracture healing in a rat femoral osteotomy model, *Conference of the International Society for Fracture Repair*, Oral presentation, Lake Tahoe, NV, 2008.
 223. Claes L, Blakytyn R, Besse J, Bausewein C, Ignatius A, **Willie BM**, Late dynamization enhances fracture healing in a rat femoral osteotomy model, *Deutschen Kongress für Orthopädie und Unfallchirurgie*, Oral presentation, Berlin, Germany, 2008.
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 226. **Willie BM**, Dearden C, Ashrafi S, Steffensen T, Bloebaum RD, Hofmann AA, Comparative analysis of oxidative degradation in two years real-time shelf aged intentionally crosslinked polyethylene, *Transactions of the 50th Annual Meeting of the Orthopedic Research Society*, Poster presentation, Washington DC, 2005.
 227. **Willie BM**, Foot LJ, Prall MW, Bloebaum RD, Hofmann AA, Elemental analysis of particulate in retrieved intentionally crosslinked and conventional polyethylene tibial inserts, *Transactions of the 50th Annual Meeting of the Orthopedic Research Society*, Poster presentation, Washington DC, 2005.
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 229. **Willie BM**, Foot LJ, Prall MW, Bloebaum RD, Hofmann AA, Surface damage of retrieved crosslinked and conventional polyethylene tibial components, *Transactions of the 31st Annual Meeting of the Society for Biomaterials*, Poster presentation, Memphis, TN, 2005.
 230. Bloebaum RD, **Willie BM**, Furness T, Stevenson MD, Mitchell BS, Hofmann AA, Quantifying the relationship between mineralized bone area, osteoid area, bone remodeling, and bone ingrowth into a porous coated implant in a sheep model, *Transactions of the 31st Annual Meeting of the Society for Biomaterials*, Oral presentation, Memphis, TN, 2005.
 231. **Willie BM**, Ashrafi S, Steffensen T, Bloebaum RD, Comparative analysis of the oxidative resistance between shelf-aged crosslinked and conventional polyethylene acetabular liners, *Transactions of the 48th Annual Meeting of the Orthopedic Research Society*, Poster presentation, New Orleans, LA, 2003.

232. **Willie BM**, Foot L, Le D, Bloebaum RD, Hofmann AA, Comparative analysis of the oxidative resistance and crystallinity in a series of retrieved crosslinked Durasul liners and conventional Sulene liners, *Transactions of the 48th Annual Meeting of the Orthopedic Research Society*, Poster presentation, New Orleans, LA, 2003.
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234. Neff CN, Bloebaum RD, **Willie BM**, Hofmann AA, Analysis of the relationship between osteoblast morphology and bone ingrowth in weightbearing porous coated plugs in sheep, *Transactions of the 48th Annual Meeting of the Orthopedic Research Society*, Poster presentation, New Orleans, LA, 2003.
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236. **Willie BM**, Bloebaum RD, Hofmann AA, Comparative analysis of bone ingrowth and remodeling in a porous coated plug sheep model and human model, *Transactions of the 29th Annual Meeting of the Society for Biomaterials*, Oral presentation, Reno, NV, 2003.
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238. **Willie BM**, Ashrafi S, Steffensen T, Bloebaum RD, The effect of radiation type and dose on the percent crystallinity in crosslinked acetabular liners, *Transactions of the 29th Annual Meeting of the Society for Biomaterials*, Poster presentation, Reno, NV, 2003.
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 246. Bloebaum RD, Bachus KN, **Willie BM**, Hofmann AA, Quantitative analysis of bone ingrowth into 14 postmortem porous coated total knee component, *Transactions of the 47th Annual Meeting of the Orthopedic Research Society*, Poster presentation, Dallas, TX, 2002.
 247. **Willie BM**, Le D, Foot L, Bloebaum RD, Hofmann AA, Assessment of oxidation resistance using FTIR in a series of retrieved Durasul crosslinked acetabular liners, *Transactions of the 28th Annual Meeting of the Society for Biomaterials*, Poster presentation, Tampa, FL, 2002.
 248. **Willie BM**, Larson J, Steffensen T, Ashrafi S, Bloebaum RD, A comparative analysis of the density of shelf aged standard and highly crosslinked UHMWPE acetabular liners, *Transactions of the 28th Annual Meeting of the Society for Biomaterials*, Poster presentation, Tampa, FL, 2002.
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258. **Willie BM**, Shea JE, Bloebaum RD, Hofmann AA, Distinguishing between bone cement, bone, calcium stearate, and hydroxyapatite as third body particulate in polyethylene, *Transactions of the 25th Annual Meeting of the Society for Biomaterials*, Oral presentation, Providence, RI, 1999.
259. **Willie BM**, Bloebaum RD, Hofmann AA, Analysis of calcium stearate particles in the white band region of retrieved polyethylene components, *Transactions of the 25th Annual Meeting of the Society for Biomaterials*, Poster presentation, Providence, RI, 1999.
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**Utah System of Higher
Education New Academic
Program Proposal
Cover/Signature Page - Full
Template**

Institution Submitting Request: Utah State University

Proposed Program Title: Master of Arts in Motion Design

Are There New Emphases: Yes ☐ No ☒

Names of New Emphases (Separated by Commas):

Sponsoring School, College, or Division: Caine College of the Arts

Sponsoring Academic Department(s) or Unit(s): Department of Art and Design

Classification of Instructional Program Code¹ : 6 - Digit CIP: 50.0102 -Digital Arts

Min/Max Credit Hours Required of Full Program: Min Cr Hr 30 / Max Cr Hr 30

Proposed Beginning Term²: Summer 2025

Institutional Board of Trustees' Approval Date:

Program Type (mark all that apply with an x):

☐ (AAS)	Associate of Applied Science Degree
☐ (AA)	Associate of Arts Degree
☐ (AS)	Associate of Science Degree
☐	Specialized Associate Degree (specify award type ³ :)
☐	Other (specify award type ³ :)
☐ (BA)	Bachelor of Arts Degree
☐ (BS)	Bachelor of Science Degree
☐ (BAS)	Bachelor of Applied Science Degree
☐	Specialized Bachelor Degree (specify award type ³ :)
☐	Other (specify award type ³ :)
☒ (MA)	Master of Arts Degree
☐ (MS)	Master of Science Degree
☐	Specialized Bachelor Degree (specify award type ³ :)
☐	Other (specify award type ³ :)
☐	Doctoral Degree (specify award type ³ :)
☐	K-12 School Personnel Program
☐	Out of Service Area Delivery Program ☐ Attached MOU
☐	Out of Mission Program
☐	NEW Professional School

¹ For CIP code classifications, please see <http://nces.ed.gov/ipeds/cipcode/Default.aspx?y=55>.

² "Proposed Beginning Term" refers to first term after Regent approval that students may declare this program.

³ Please indicate award such as APE, BFA, MBA, MEd, EdD, JD

Changes to Existing Programs or Administrative Units Required (mark all that apply with an x, if any):

☐	Program Restructure with or without Consolidation
☐	Emphases transfer from another program or academic unit
☐	Name Change of Existing Program or Academic Unit
☐	Program transfer to a different academic unit
☐	Suspension or discontinuation of a unit or program
☐	Reinstatement of a previously suspended/discontinued program or administrative unit
☐	Other

Chief Academic Officer (or Designee) Signature:

I, the Chief Academic Officer or Designee, certify that all required institutional approvals have been obtained prior to submitting this request to the Office of the Commissioner.

Please type your first and last name _____ Date: _____

☐

I understand that checking this box constitutes my legal signature.

Utah System of Higher Education Program Description - Full Template

Section I: The Request

Utah State University's (Department of Art and Design) requests approval to offer the following degree(s):

To be effective on: Summer 2025

This program was approved by the institutional Board of Trustees on:

Section II: Program Proposal

Program Description

The MA in Motion Design focuses on 2-dimensional and 3-dimensional motion methodology and technology, digital media/film theory, design for motion, video and emerging forms of media that include augmented and virtual reality. The MA is a 30-credit (3 semester) program that culminates in a plan B master's thesis research project and exhibition. It is intended for students who have a strong background/education in graphic design and for professional designers who seek to continue their education to expand their professional competency and conceptual abilities.

Consistency with Institutional Mission

The program strongly aligns with Utah State University's institutional mission on multiple fronts. Students will integrate technical skills with digital media/ film theory and complete a thesis research project as the capstone of their degree. This combination of technical proficiency, theoretical grounding, and research aligns with the university's mission to advance knowledge and drive innovation in addition to its emphasis on research as one of Utah's premier research institutions.

In terms of labor market relevance, it fulfills industry needs for skilled motion designers as the program is geared toward imparting marketable skills for professional practice, targeting both recent BFA graduates and experienced designers seeking to expand their professional competency and conceptual abilities. In doing so, it fulfills the institutional goal of providing continuing education opportunities and contributing to economic development.

Motion design sits at the forefront of technology and represents the natural evolution of the graphic design medium. The proposed program will not only explore established motion design methodologies but will also engage with emerging media such as virtual and augmented reality. By fostering expertise in these areas, the program will contribute to innovation, as well as supporting the social and cultural advancement of the state.

With a capacity of 10 students, this is larger and more accessible than most state educational graduate design programs. Currently our MFA graphic design emphasis only accepts 1-3 students, which is similar admission rates in comparable programs. This aspect supports Utah State University's land grant-mission of increasing accessibility to graduate design education.

Section III: Needs Assessment

Program Rationale

The proposed MA in Motion Design is uniquely positioned to address a significant gap in motion design education. As a discipline, motion design is defined by its connection to graphic/communication design as it includes the use of type, shapes and abstract elements to create dynamic visual experiences. With motion design, the focus is primarily on design principles that include layout, typography, and composition, which are then brought to life through movement. On the other hand, animation (as opposed to 'motion design') typically focuses on character-driven storytelling and character-driven narratives.

Motion industry experts agree that graphic design provides the most relevant foundation for understanding motion design; however, they often find that many applicants who have studied motion/animation lack a rigorous design background as their education was more technically focused on the complexities of software and/or informed by traditional character-driven animation. Nationally, the Savannah College of Art and Design (SCAD) offers the only MA program in motion design, where most graduate programs elsewhere focus on animation or media studies, which may include aspects of, but do not emphasize motion design as defined here. By positioning this program as a rigorous extension of a 4-year BFA in graphic design, it creates a unique national opportunity to address this high-demand niche in the labor market. Graduates from the program will be well-positioned to compete at the top levels in this high-demand and rapidly expanding field.

Labor Market Demand

2023, the national median pay for "Special Effects Artist/Animators was 99,060 per year, or 47.63 per hour with a Bachelor Degree education. The job growth rate over the next 10 years is estimated at 4%. This shows a higher average salary and growth rate than traditional graphic design. The employment change from 2023-2033 is 3,200.

The state of Utah lists 80 annual openings, 785 total projected employed in this discipline

<https://www.bls.gov/ooh/arts-and-design/multimedia-artists-and-animators.htm#tab-1>

<https://jobs.utah.gov/jsp/utalmis/#/occupation/27-1014.00/report>

Design agencies across the United States are increasingly required to offer motion design capabilities to complement traditional advertising, branding, and other forms of communication design. Additionally, a well-established motion design industry serves the entertainment and broadcasting sectors. This industry often distinguishes between designers and animators due to a shortage of hybrid professionals. In both fields, motion designers who combine strong foundational design skills—such as typography, composition, and layout—with animation expertise and technical proficiency are in high demand but short supply.

Student Demand

Currently USU's undergraduate graphic design area has a capacity with current faculty of 20 students per cohort. There is higher demand for this area than we can accommodate. Many of our undergraduate students express interest in learning motion design, although it is outside of the constraints of our current curriculum. There is currently space to accommodate up to 10 MA students per year. Based on current demand from our own undergraduate students, coupled with accepting students from across the state and nationally, we project that the program will be at capacity within 2 years. In previous years, USU's graphic design program offered a motion design elective course, which was in extremely high demand, however as the instruction was introductory, it did not provide enough of a foundation for students to confidently identify as a "Motion Designer".

Similar Programs

While other USHE institutions offer individual courses in motion design as part of a broader undergraduate graphic design program, there is currently no program in the state dedicated exclusively to motion design, particularly at the

master's level. Nationally, the Savannah College of Art and Design (SCAD) offers the only MA program specifically in motion design, where most graduate programs elsewhere focus on animation or media arts/studies, which may include aspects of, but do not emphasize motion design. For example, the University of Utah's Film and Media Arts MFA prioritizes film studies rather than motion design or animation and their undergraduate animation program has a focus on character-driven animation for film.

Collaboration with and Impact on Other USHE Institutions

As an extension of a BFA-level undergraduate design education, this program will provide other UHSE institutions with Graphic Design BFA programs with a follow-up graduate option for students who are interested in advancing their professional motion design competencies. Because the program is fundamentally different from all other UHSE programs, it will not have a negative effect on any other institution but rather offer expanded opportunities for continuing education in the state of Utah.

External Review and Accreditation

The proposed degree criteria have been reviewed and approved by the Art Faculty of Utah State University's Caine College of the Arts' Department of Art and Design.

The Caine College of the Arts' Department of Art and Design has established a Curriculum Committee of faculty members from every emphasis area in the Department and is responsible for overseeing and approving every curricular change. The Department's curriculum is designed with an awareness of the requirements for accreditation from National Association of Schools of Art and Design (NASAD).

The Department of Art and Design at Utah State University is currently accredited by NASAD, the governing body that officially oversees art and design program standards of higher education in the United States. In accordance with NASAD policy, the department will apply for Plan Approval after institutional approval is granted and before students are admitted into the program. Following approval by the Faculty Senate and the USU Board of Trustees, the department will begin the Plan Approval process.

The program was also developed in consultation with leading experts in the field, including Buck TV, a top global creative and motion agency headquartered in Los Angeles, and Gantry, Utah's premier motion design agency based in Salt Lake City. Additionally, we consulted with Michelle Dougherty, a globally renowned motion director. While a creative director at Imaginary Forces in Los Angeles, her title sequences earned four Emmy nominations, including the Emmy-winning sequence for *Stranger Things* and the iconic Netflix intro that precedes every series and film. She is currently a creative director at Apple.

Our faculty who developed the curriculum also bring extensive external motion design industry experience with studios that include Imaginary Forces (Los Angeles), Red Antler (New York), Thinking Box (Salt Lake City), Enlisted Design (Salt Lake City), and Afton Klein Group (Salt Lake City).

Section IV: Program

Details Graduation Standards and Number of Credits

Students must maintain a 3.0 or higher, with a B- minimum grade for all classes and successfully defend a master's thesis that will be exhibited at the conclusion of the program. The program requires 30 credits hours which aligns with the North American Schools of Art and Design (NASAD) requirements for an MA in studio arts.

Admission Requirements

Successful applicants must exhibit academic excellence along with a portfolio that displays a strong understanding of graphic design and typography. A BFA or equivalent in a design related field is required. GPA in design courses during the last two years of undergraduate work must be at least 3.0 on a 4-point scale. A digital portfolio of recent work must be included in the application for consideration. Previous experience in motion design is not required.

Portfolios will be evaluated by faculty members to determine acceptance based on overall strength of applicant's work.

Curriculum and Degree Map

see Appendix A

Summer Semester

3 Credits ART 6100: Design Strategies for Film, Broadcast and Advertising

3 Credits ART 6110: 2-Dimensional Motion Studio

Fall Semester

3 Credits ART 6125: Digital Media Theory/Visual Culture

3 Credits ART 6130: Advanced 2-Dimensional Motion Studio

3 Credits ART 6140: Narrative Cinematography

3 Credits ART 6150: 3-Dimensional Motion Studio

Spring Semester

3 Credits ART 6160: Experimental Motion

3 Credits ART 6170: Advanced 3-Dimensional Motion Studio

6 Credits ART 6180: Motion Design Thesis

Section V: Institution, Faculty, and Staff Support

Institutional Readiness

The proposed program will not impact the delivery of undergraduate education. The Department of Art and Design currently has strong administrative and counseling support. As this program is relatively small, with 10 students maximum, the current structures are sufficient to support the program.

Faculty

The graphic design area currently has four full-time faculty members who can cover the majority of the teaching requirements for the curriculum. The program will require three courses to be covered by adjunct instructors.

Staff

There will be no need to hire additional staff.

Student Advisement

Students will have access to current departmental advisors and the department graduate program coordinator in addition to current graphic design faculty members.

Library and Information Resources

This program will not require any specific library resources.

Projected Enrollment and Finance

Section VI: Program Evaluation

Program Assessment

The program aims to prepare students for leadership roles in the high-demand and rapidly evolving motion design industry. The program's goals include advancing students' technical skills and theoretical knowledge through focused instruction and studio practice. By integrating professional practice with research, the program emphasizes innovation and professional competency.

The program will be assessed periodically by NASAD along with the entire department, as well as ongoing communication and advisement by external expert consultants from within the discipline to ensure the pedagogy continues to stay at the forefront of the discipline.

The teaching of the courses that collectively comprise the program are evaluated every semester using the IDEA instrument. The results from these evaluations are compiled by the Office of Analysis, Assessment, and Accreditation and made available to Department Heads who consult with individual faculty about results during mandatory annual reviews. While these evaluations are not program specific, the process and the results are used by the Department Head and faculty when evaluating, discussing, and modifying program curricula.

Faculty teaching in the program will also receive peer evaluation assessment related to the promotion process.

Student Standards of Performance

Students will graduate with a firm understanding of both 2-dimensional and 3-dimensional motion design methodology and technology. They will possess an advanced understanding of theoretical and narrative frameworks, conceptual skills and the technical capabilities necessary for advanced competence in the discipline. From a technology perspective, students will become proficient in Adobe After Effects for 2-Dimensional motion, Final Cut Pro for video editing, and Maxon Cinema 4D for 3-dimensional motion and modeling.

As our accepted applicants will be vetted for previous competency in graphic design, they will be particularly competitive with the augmentation of their newly acquired motion capabilities.

Students will be evaluated through standard grading techniques throughout their coursework including formative assessments of student progress recurring throughout each semester in formal critique. The quality of their final thesis will be reviewed by a thesis advisory committee comprised of at least three full-time faculty.

For variable credits, please enter the minimum value in the table for credit hours. To explain variable credit in detail as well as any additional information, use the narrative box at the end of this appendix.

Course Number	NEW Course	Course Title	Credit Hours
General Education Courses (list specific courses recommended for this program on Degree Map)			
General Education Credit Hour Sub-Total			
Required Courses			
ART 6100		Design Strategies for Film, Broadcast and Advertising	3
ART 6110		2-Dimensional Motion Studio	3
ART 6125		Digital Media Theory/Visual Culture	3
ART 6130		Advanced 2-Dimensional Motion Studio	3
ART 6140		Narrative Cinematography	3
ART 6150		3-Dimensional Motion Studio	3
ART 6160		Experimental Motion	3
ART 6170		Advanced 3-Dimensional Motion Studio	3
ART 6180		Motion Design Thesis	6
Required Course Credit Hour Sub-Total			
Elective Courses			
Elective Credit Hour Sub-Total			
Core Curriculum Credit Hour Sub-Total			30

Add An Emphasis:

Can students complete this degree without emphases? Yes **X** No

Course Number	NEW Course	Course Title	Credit Hours
Name of Emphasis:			
Emphasis Credit Hour Sub-Total			

Total Number of Credits to Complete Program		
--	--	--

Program Curriculum Narrative

The Motion Design MA program curriculum is a series of sequential courses that scaffold learning objectives throughout the 3 semesters and are required to be taken in the prescribed order. The curriculum is informed by consultation with industry experts and takes into consideration structures of similar programs in the US.

Degree Map

N/A—Degree maps pertain to undergraduate programs ONLY.

First Year Fall	Cr. Hr.	First Year Spring	Cr. Hr.
Total		Total	
Second Year Fall	Cr. Hr.	Second Year Spring	Cr. Hr.
Total		Total	
Third Year Fall	Cr. Hr.	Third Year Spring	Cr. Hr.
Total		Total	
Fourth Year Fall	Cr. Hr.	Fourth Year Spring	Cr. Hr.
Total		Total	

Appendix C: Current and New Faculty / Staff Information

Part I. Department Faculty / Staff

	# Tenured	# Tenure - Track	# Non - Tenure Track	
Faculty: Full Time with Doctorate				
Faculty: Part Time with Doctorate				
Faculty: Full Time with Masters	3			
Faculty: Part Time with Masters				
Faculty: Full Time with Baccalaureate			1	
Faculty: Part Time with Baccalaureate				
Teaching / Graduate Assistants				
Staff: Full Time				
Staff: Part Time				

Part II. Proposed Program Faculty Profiles

	First Name	Last Name	Tenure (T) / Tenure Track (TT) / Other	Degree	Institution where Credential was Earned	Est. % of time faculty member will dedicate to proposed program.	If "Other," describe
Full Time Faculty							
	David	Smellie	T	MFA	Utah State University	15%	
	Mike	Daines	T	MFA	Cranbrook Academy of Art	15%	
	Robert	Winward	T	MFA	Kent State University	15%	
	Ryker	Kimball	Other	BFA	Utah State University	100%	Assistant Professor of Professional Practice
							Add Another Full Time
Part Time Faculty							
							Add Another Part Time

Part III: New Faculty / Staff Projections for Proposed Program

	# Tenured	# Tenure - Track	# Non - Tenure Track	Academic or Industry Credentials Needed	Est. % of time to be dedicated to proposed program.
Faculty: Full Time with Doctorate					
Faculty: Part Time with Doctorate					
Faculty: Full Time with Masters					
Faculty: Part Time with Masters					
Faculty: Full Time with Baccalaureate					

Faculty: Part Time with Baccalaureate					
Teaching / Graduate Assistants					
Staff: Full Time					
Staff: Part Time					

Appendix D: Projected Program Participation and Finance

Part I.

Three Year Projection: Program Participation and Department Budget						
	Year Preceding Implementati on	New Program				
		Year 1	Year 2	Year 3	Year 4	Year 5
Student Data						
# of Majors in Department						
# of Majors in Proposed Program(s)		5	10	10	10	10
# of Graduates from Department						
# Graduates in New Program(s)		5	10	10	10	10
Department Financial Data						
<i>Project additional expenses associated with offering new program(s). Account for New Faculty as stated in Appendix C, "Faculty Projections."</i>	Department Budget					
	Year Preceding Implementati on (Base Budget)	Year 1	Year 2	Year 3		
		Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)		
EXPENSES – nature of additional costs required for proposed program(s)						
<i>List salary benefits for additional faculty/staff each year the positions will be filled. For example, if hiring faculty in year 2, include expense in years 2 and 3. List one-time operating expenses only in the year expended.</i>						
Personnel (Faculty & Staff Salary & Benefits)		\$15,000 adjunct funding	\$15,000	\$15,000		
Operating Expenses (equipment, travel, resources)						
Other: Software Licensing		\$2,189	\$2,189	\$2,189		
TOTAL PROGRAM EXPENSES		\$17,189	\$17,189	\$17,189		
TOTAL EXPENSES		\$17,189	\$17,189	\$17,189		
FUNDING – source of funding to cover additional costs generated by proposed program(s)						
<i>Describe internal reallocation using Narrative 1 on the following page. Describe new sources of funding using Narrative 2.</i>						
Internal Reallocation						
Appropriation						
Special Legislative Appropriation						
Grants and Contracts						
Special Fees						
Tuition (In-State top row)		\$60,940	\$121,880	\$121,880		
Tuition (Out-of-State bottom row)		\$200,255	\$400,510	\$400,510		
Differential Tuition (requires Regents approval)						
PROPOSED PROGRAM FUNDING		\$17,189	\$17,198	\$17,189		
TOTAL DEPARTMENT FUNDING		\$17,189	\$17,189	\$17,189		

Difference					
Funding - Expense	\$0	\$0	\$0	\$0	

Part II: Expense explanation

Expense Narrative

The program will require little in terms of additional funding. The department currently has the space, full-time faculty, classroom technology and much of the required equipment to be fully-functioning. It will require an initial investment of \$62,000 to purchase the remaining required equipment, an annual sum of \$15,000 to cover adjunct faculty and \$2,189 annually for software licensing.

Part III: Describe funding sources

Revenue Narrative 1

Listed above is the projected tuition revenue generated for the institution based on student numbers. Department revenue is a mix of several sources, including the State general fund and education fund, tuition, and other sources. Revenue is not appropriated to specific departments.

Revenue Narrative 2

**Utah System of Higher Education
New Academic Program Proposal
Cover/Signature Page - Full Template**

Institution Submitting Request: Utah State University

Proposed Program Title: Master in Elementary Teaching

Are There New Emphases: Yes ☐ No ☒

Names of New Emphases (Separated by Commas):

Sponsoring School, College, or Division: Emma Eccles Jones College of Education and Human Services

Sponsoring Academic Department(s) or Unit(s): School of Teacher Education and Leadership (TEAL)

Classification of Instructional Program Code¹: 6 - Digit CIP: 13.1202 - Elementary Education and Teaching.

Min/Max Credit Hours Required of Full Program: 33 Min Cr Hr / 33 Max Cr Hr

Proposed Beginning Term²: Fall 2025

Institutional Board of Trustees' Approval Date:

Program Type (mark all that apply with an x):

☐ (AAS)	Associate of Applied Science Degree
☐ (AA)	Associate of Arts Degree
☐ (AS)	Associate of Science Degree
☐	Specialized Associate Degree (specify award type ³ :)
☐	Other (specify award type ³ :)
☐ (BA)	Bachelor of Arts Degree
☐ (BS)	Bachelor of Science Degree
☐ (BAS)	Bachelor of Applied Science Degree
☐	Specialized Bachelor Degree (specify ward type ³ :)
☐	Other (specify award type ³ :)
☐ (MA)	Master of Arts Degree
☐ (MS)	Master of Science Degree
☐	Specialized Bachelor Degree (specify ward type ³ :)
☒	Other (specify award type ³ : Master in Elementary Teaching)
☐	Doctoral Degree (specify award type ³ :)
☐	K-12 School Personnel Program
☐	Out of Service Area Delivery Program ☐ Attached MOU
☐	Out of Mission Program
☐	NEW Professional School

¹ For CIP code classifications, please see <http://nces.ed.gov/ipeds/cipcode/Default.aspx?y=55>.

² "Proposed Beginning Term" refers to first term after Regent approval that students may declare this program.

³ Please indicate award such as APE, BFA, MBA, MEd, EdD, JD

Changes to Existing Programs or Administrative Units Required (mark all that apply with an x, if any):

☐	Program Restructure with or without Consolidation
☐	Emphases transfer from another program or academic unit
☐	Name Change of Existing Program or Academic Unit
☐	Program transfer to a different academic unit
☐	Suspension or discontinuation of a unit or program
☐	Reinstatement of a previously suspended/discontinued program or administrative unit
☐	Other

Chief Academic Officer (or Designee) Signature:

I, the Chief Academic Officer or Designee, certify that all required institutional approvals have been obtained prior to submitting this request to the Office of the Commissioner.

Please type your first and last name _____ Date: _____

☐

I understand that checking this box constitutes my legal signature.

Utah System of Higher Education Program Description - Full Template

Section I: The Request

Utah State University's (School of Teacher Education and Leadership) requests approval to offer the following degree: **Master in Elementary Teaching**

To be effective on: July 1, 2025 (Fall semester 2025)

This program was approved by the institutional Board of Trustees on:

Section II: Program Proposal

Program Description

The School of Teacher Education and Leadership (TEAL) proposes a Master in Elementary Teaching (MET) degree that is designed for persons seeking educator licensing following a previous undergraduate degree. The MET degree is available for students both at the Logan campus and at Statewide Campuses. The basic elements of the MET coursework option include completion of 33 credits in an approved program of study. An additional 30 credits of nonmatriculated coursework are required to meet licensure requirements of the Utah State Board of Education (USBE). All courses require minimum grades and students must maintain an overall GPA of 3.0 or higher.

This program is specifically designed to provide an avenue for education degree seekers and job changers to become licensed educators. Upon degree completion, USU will be able to recommend licensure. However, licensure is ultimately awarded by the USBE.

Consistency with Institutional Mission

Utah State University is a land-grant university with a role assignment in the USHE policy R312-7 of providing Master's degrees (Research and Professional). This specific proposal is to meet a growing number of career-changing professionals seeking to become licensed elementary educators. As Utah's land grant university, USU is committed to meeting a growing need for educational professionals, specifically job-changing individuals. The MET program will meet the growing population of individuals who want to become licensed elementary educators.

Section III: Needs Assessment

Program Rationale

The educational landscape is constantly changing. However, the consistent need for qualified and licensed educators is ever-present. Providing "career-changing" individuals with an avenue that leads to licensure while concurrently earning a Master's degree increased expertise within the field and opportunities for individuals. This MET program will enable education degree seekers with opportunities to gain Master's level skills needed in classrooms throughout Utah and the nation.

Labor Market Demand

The Utah Education Policy Center (UEPC) at the University of Utah in collaboration with the Utah State Board of Education (USBE) collected data on the teacher shortage in Utah. When surveyed in 2015, 48% of the 31 responding school districts indicated that they began the school year without a certified teacher in every classroom. Additionally, 90% of respondents reported that the pool of qualified applicants has been shrinking. More currently, in 2024 teacher starting salaries have risen reducing the shortage concerns while increasing the interest in becoming a teacher. Increased salaries have led to higher numbers of teacher applicants and individuals seeking avenues for high-quality licensure options. Alternative credentialing options have also risen nationally leaving space for universities to expand programmatic options that meet the needs of schools and districts. Closer to home, USU education advisors are seeing increased inquiry from "career changers" into university-based Master's options leading to educator licensure. Specifically, 1-2 students per week have inquired about Master's degrees connected to licensure over the past 6 months.

Student Demand

Since this is a new type of Master's degree we do not have historical enrollment data. However, based on the current interest it appears that 3-6 new students might enroll each semester. These students would also be enrolling in elementary content and pedagogy coursework to fulfill the USBE requirements for licensure. A current USU student who completed the licensure coursework said the following: *"My program that they created could be offered to more people. I was a trial run. I think it was sustainable for other teachers. I wouldn't change it. I think you should offer it to more people."* Another student in the current cycle identified, *"After 20 years, I've found my purpose!"* This sentiment has been expressed by many interested students who are looking for a way to take their subject expertise and use it for career evolution. This program will create an accessible avenue to become a professional teacher for those who want to change careers or improve their teaching ability. As the program becomes well known we anticipate that school districts will also encourage future teachers to use the MET as a means of satisfying district alternative licensure requirements.

Similar Programs

Several universities in Utah offer Master's degrees. However, these degrees vary in focus and emphasis. Some are Master of Arts others are Masters of Education. The Master in Elementary Teaching (MET) provides a unique focus on career changers and their desire to become a Master's in teaching. Below is a listing of the degrees offered by Utah institutions of higher education.

SUU – Master of Education: 1/3rd of coursework for MEd can be completed by applying courses from an APPEL or APPEL-SpEd endorsement.

UofU – Master of Education in Educational Psychology with Elementary Licensure: focuses on working with students from diverse cultural, linguistic, and socioeconomic backgrounds.

WGU – Masters in Curriculum and Instruction, Master of Arts in Teaching – Mathematics Education for Middle School, Master's in Chemistry Education, Master's in English Education – Middle and High School. These programs prepare teachers in a targeted online coursework.

UVU – Offer several courses to educators enrolled in the APPEL program. The focus appears to be for secondary teachers although elementary-focused students may participate.

USU – Graduate Route to Licensure is currently offered and would be expanded to include multiple content areas where currently science and mathematics education are the only areas included.

Collaboration with and Impact on Other USHE Institutions

This program will be delivered to all statewide campuses and include Connect versions of delivery to meet the needs of rural teachers as well as those close to a USU statewide campus. It will also provide opportunities to collaborate with local school districts by supporting their need to have qualified educators. Other USHE institutions will also benefit as we will be able to support students who earn initial undergraduate degrees at these partner institutions to obtain a subsequent graduate degree at USU.

External Review and Accreditation

Currently, the educational degrees and courses offered in TEAL are accredited through AAQEP and this program aligns with the current accreditation. Additional information will be included in the current accreditation process.

Section IV: Program Details

Graduation Standards and Number of Credits

The proposed MET program fulfills all the USBE requirements for elementary teacher licensure. The coursework has been mapped in a way that allows future educators to develop both the foundational and practical skills of teaching.

Graduation Requirements

- The Program of Study for a Master's degree must include at least 18 semester credits at the level of 6000 or above.
- A Master's degree must be completed within six years of entering the degree program. Additional time may be requested and submitted to the Vice Provost of Graduate Studies for review.
- Coursework over eight years old at the time of degree completion may not be used for a graduate degree unless it is revalidated.

Admission Requirements

- A bachelor's degree from an accredited U. S. college or university or a similarly recognized international university is required for admission to and completion of a graduate program.
- At minimum 3.0 GPA will be required for admission.
- Acceptance to the ELED program, which includes MATH 2010 & MATH 2020.
- Approved background check.

Curriculum and Degree Map

Please see Appendix A and Appendix B for a program curriculum and a sample degree map for the MET degree.

Section V: Institution, Faculty, and Staff Support

Institutional Readiness

The current Elementary Education coursework structure and Master's program offerings are robust enough to include additional students in the course offerings. No new administrative or organizational needs are required with no anticipated impacts on the current delivery of the Master's and Elementary Education programs. This new MET program will add positive interaction and collaboration experiences for our current and future students.

Faculty

Existing faculty in TEAL will be sufficient for program implementation.

Staff

Existing staff will be sufficient to support the proposed MET program; no new staff will be needed. Current administrative, advising, and support staff will undergo training to learn of the proposed program components.

Student Advisement

A current education advisor will be assigned to meet the student needs of the MET program. The advisor will be trained in all the program components and will effectively advise career changing-students. This individual will incorporate this particular advising into their current work responsibilities. There will not be a need to hire an additional advisor. Additionally, the GPC and Master's Director will support and assist the assigned advisor and students.

Library and Information Resources

No additional library resources will be needed to support this program.

Projected Enrollment and Finance

Please refer to Appendix D.

Section VI: Program Evaluation

Program Goals and Assessment

Program Goals:

- Provide career-changing professionals with a teaching entrance option that includes coursework and a Master's degree that enables USU to recommend individuals for licensure.
- Market an avenue for individuals who want to be educators but have a prior undergraduate degree that may appear to limit their opportunities to be a teacher.
- Collaborate with local education partners to provide university degree-based alternatives to APPEL and other alternative routes to licensure.
- Enhance graduate degree program offerings within the College of Education and the School of Teacher Education and Leadership.

Program Assessment and Evaluation:

- Faculty review of the program curriculum.
- End of program student surveys for program feedback and improvement.
- End of program student interview for program feedback and improvement.
- Stakeholder feedback for practicum and student teaching experiences.
- Course evaluations each semester by students according to the IDEA system that compares USU evaluations to a national database. Student feedback will be used for program evaluation and improvement.
- Student scores on the Student Teaching Evaluation Rubric (STER) which is aligned with USBE teacher competencies.
- Inclusion in teacher education accreditation process through the Association for Advancing Quality Educator Preparation (AAQEP).

Student Standards of Performance

The MET program is designed to ensure each student will demonstrate the following competencies as they progress through the program. Each area below is defined by an associated USBE rubric.

- **LEARNERS AND LEARNING:** Effective teachers exhibit knowledge, skills and dispositions that demonstrate an awareness of and sensitivity toward diversity in learner development and student individualities.
- **INSTRUCTIONAL CLARITY:** Effective teachers exhibit knowledge, skills, and dispositions that demonstrate clarity regarding the content they teach and how to organize and sequence it to effectively facilitate learning and drive student engagement.
- **INSTRUCTIONAL PRACTICE:** Effective teachers exhibit knowledge, skills, and dispositions that support instructional practices that drive high-quality instruction, demonstrate a data-driven and cooperative approach to teaching and learning, and meet the diverse needs of all learners.
- **CLASSROOM CLIMATE:** Effective teachers exhibit the knowledge, skills, and dispositions that enable them to create appropriate physical, social, and emotional environments to support learning.
- **PROFESSIONAL RESPONSIBILITY:** Effective teachers exhibit the knowledge, skills, and dispositions that demonstrate awareness of and adherence to professional and ethical standards personally, within their school community, with parents, and within their local community.

Each course syllabus in the MET program currently provides student learning objectives and competency outcomes based on the USBE licensure requirements. Student competency will be measured using the STER instrument during the student teaching experience. Additional standards of passing performance will include the following:

- **Elementary Education Content Competencies** in reading/language arts, mathematics, social studies, and science.
- **Elementary Education Literacy Competencies**
- **Utah Foundations of Reading Assessment (UFORA)** - USBE licensure requirement.

Appendix A: Program Curriculum

Course Number	NEW Course	Course Title	Credit Hours
Elementary Content/Pedagogy Courses (The content/pedagogy courses are required for USU to recommend teaching licensure to the USBE, however, they do not fulfill master's requirements.)			
ITLS 2500		<i>Technology Enabled Instruction</i>	3
ELED 3050		<i>PE and Health in the Elementary Classroom</i>	2
ELED 3100		<i>Classroom Reading Instruction</i>	3
ART 3700, MUS 3260, THEA 3320, 3330, 3340, or 3380		<i>Select One</i>	3
SPED 4000		<i>Education of Students with Disabilities</i>	3
ELED 4040		<i>Reading Assessment and Intervention</i>	2
ELED 4042		<i>Reading Assessment and Intervention Practicum</i>	1
ELED 4049		<i>Foundations of Reading Review</i>	1
ELED 4061		<i>Teaching Elementary School Mathematics I</i>	3
ELED 4150		<i>Assessment and Differentiated Across the Curriculum</i>	3
TEAL 3080		<i>Integrating Arts into Academic Learning</i>	3
ELED 5105		<i>Motivation and Classroom Management</i>	3
Elementary Content/Pedagogy Licensure Requirements Credit Hour Sub-Total			30
Master in Elementary Teaching Required Courses			
Course # Change to ELED 5010 (≈ ELED 4050)		<i>Teaching Social Studies in Elementary School</i>	2
Course # Change to ELED 5020 (≈ ELED 4020)		<i>Teaching Science in Elementary School</i>	2
Course # Change to ELED 5030 (≈ ELED 4030)		<i>Teaching Language Arts in Elementary School</i>	2
Course # Change to ELED 5040 (≈ ELED 4062)		<i>Teaching Elementary School Math II</i>	2
Course # Change to ELED 5060 (≈ ELED 4056)		<i>Elementary Content Practicum</i>	4
TEAL 6190		<i>Theories of Learning and Models of Teaching</i>	3
TEAL 6410		<i>Social Foundations of Education</i>	3
TEAL 6710		<i>Diversity in Education</i>	3
TEAL 6770		<i>Content-Based Instruction for DLI/ESL</i>	3
NEW Course TEAL 6200 Grad ST Seminar (≈ ELED 5250)	X	<i>ST Seminar</i>	3
TEAL 6210		<i>Graduate Student Teaching</i>	6
Required MET Course Credit Hour Sub-Total			33
Total Number of Credits to Complete Licensure and Program			63

Degree Map

Degree maps pertain to undergraduate programs, however this program provides both undergraduate content and pedagogy coursework to satisfy teacher licensure requirements. The degree map below is a sample for those students able to attend as a fulltime student. Many degree changers will have unique situations where modifications to the map below will be required.

First Year Fall	Cr. Hr.	First Year Spring	Cr. Hr.
ITLS 2500 Technology Enabled Instruction	3	ELED 4040 Reading Assessment and Intervention	2
ELED 3050 PE and Health in the Elementary Classroom	2	ELED 4042 Reading Assessment and Intervention Practicum	1
ELED 3100 Classroom Reading Instruction	3	ELED 4049 Foundations of Reading Review	1
Choose One: ART 3700, MUS 3260, THEA 3320, 3330, 3340, or 3380	3	ELED 4061 Teaching Elementary School Mathematics I	3
*If needed: Include MATH 2010	3	ELED 4150 Assessment and Differentiated Across the Curriculum	3
*If needed: Include MATH 2020	3	TEAL 3080 Integrating Arts into Academic Learning	3
Total	11-17	Total	13
Second Year Fall	Cr. Hr.	Second Year Spring	Cr. Hr.
Course # Change to ELED 5010 (≈ ELED 4050 Teaching Social Studies in Elem Sch)	2	ELED 5105 Motivation and Classroom Management	3
Course # Change to ELED 5020 (≈ ELED 4020 Teaching Science in Elem. School)	2	TEAL 6410 Social Foundations of Education (≈ ELED 3000/3002)	3
Course # Change to ELED 5030 (≈ ELED 4030 Teaching Language Arts in ElemSch)	2	TEAL 6710 Diversity in Education (≈ ELED 3000/3002)	3
Course # Change to ELED 5040 (≈ ELED 4062 Teaching Elementary School Math II)	2	TEAL 6770 Content-Based Instruction for DLI/ESL (≈ TEAL 5710)	3
Course # Change to ELED 5060 (≈ ELED 4056 Elementary Content Practicum)	4	SPED 4000 Education of Students with Disabilities	3
Total	12	Total	15
Third Year Fall	Cr. Hr.	Third Year Spring	Cr. Hr.
NEW Course TEAL 6200 Grad ST Seminar (≈ ELED 5250 ST Seminar)	3		
TEAL 6210 Graduate Student Teaching (≈ ELED 5150)	6		
TEAL 6190 Theories of Learning and Models of Teaching	3		
Total	12	Total	
Fourth Year Fall	Cr. Hr.	Fourth Year Spring	Cr. Hr.
Total		Total	

Appendix C: Current and New Faculty / Staff Information

Part I. Department Faculty / Staff

Identify # of department faculty / staff (headcount) for the year preceding implementation of proposed program.

	# Tenured	# Tenure -Track	# Non -Tenure Track	Current staff and faculty who will support the program are listed. Additional and new staff/faculty will not be needed for this program.
Faculty: Full Time with Doctorate	0	0	1	
Faculty: Part Time with Doctorate	0	0	0	
Faculty: Full Time with Masters	0	0	0	
Faculty: Part Time with Masters	0	0	0	
Faculty: Full Time with Baccalaureate	0	0	0	
Faculty: Part Time with Baccalaureate	0	0	0	
Teaching / Graduate Assistants	0	0	0	
Staff: Full Time	0	0	2	
Staff: Part Time	0	0	0	

Part II. Proposed Program Faculty Profiles

	First Name	Last Name	Tenure (T) / Tenure Track (TT) / Other	Degree	Institution where Credential was Earned	Est. % of time faculty member will dedicate to proposed program.	If "Other," describe
Full Time Faculty							
	Max	Longhurst	PP	PhD	Utah State University		Associate Professor PP
							Add Another Full Time
Part Time Faculty							
							Add Another Part Time

Part III: New Faculty / Staff Projections for Proposed Program

	# Tenured	# Tenure -Track	# Non -Tenure Track	Academic or Industry Credentials Needed	Est. % of time to be dedicated to proposed program.
Faculty: Full Time with Doctorate	0	0	0		
Faculty: Part Time with Doctorate	0	0	0		
Faculty: Full Time with Masters	0	0	0		
Faculty: Part Time with Masters	0	0	0		
Faculty: Full Time with Baccalaureate	0	0	0		
Faculty: Part Time with Baccalaureate	0	0	0		
Teaching / Graduate Assistants	0	0	0		
Staff: Full Time	0	0	0		
Staff: Part Time	0	0	0		

Appendix D: Projected Program Participation and Finance

Part I.

Project the number of students who will be attracted to the proposed program as well as increased expenses, if any. Include new faculty & staff as described in Appendix C.

Three Year Projection: Program Participation and Department Budget						
	Year Preceding Implementation	New Program				
		Year 1	Year 2	Year 3	Year 4	Year 5
Student Data						
# of Majors in Department	267	267	270	270	275	280
# of Majors in Proposed Program(s)		3	4	6	8	8
# of Graduates from Department						
# Graduates in New Program(s)		1	2	3	4	5
Department Financial Data						
	Department Budget					
	Year Preceding Implementation (Base Budget)	Year 1	Year 2	Year 3		
		Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)		
EXPENSES – nature of additional costs required for proposed program(s)						
Personnel (Faculty & Staff Salary & Benefits)	0	0	0	0		
Operating Expenses (equipment, travel, resources)	0	0	0	0		
Other:	0	0	0	0		
TOTAL PROGRAM EXPENSES		\$0	\$0	\$0		
TOTAL EXPENSES	\$0	\$0	\$0	\$0		
FUNDING – source of funding to cover additional costs generated by proposed program(s)						
Internal Reallocation	NA	NA	NA	NA		
Appropriation	NA	NA	NA	NA		
Special Legislative Appropriation	NA	NA	NA	NA		
Grants and Contracts	NA	NA	NA	NA		
Special Fees	NA	NA	NA	NA		
Tuition	NA	NA	NA	NA		
Differential Tuition (requires Regents approval)	NA	NA	NA	NA		
PROPOSED PROGRAM FUNDING		\$0	\$0	\$0		
TOTAL DEPARTMENT FUNDING	\$0	\$0	\$0	\$0		
Difference						
Funding - Expense	\$0	\$0	\$0	\$0		

Part II: Expense explanation

Expense Narrative

Existing faculty in TEAL will teach the ELED pedagogy courses and Master's courses in the proposed MET program. It is not anticipated that new sections will be necessary by adding new students to the current course offerings.

No other expenses are anticipated associated with the proposed program.

Part III: Describe funding sources - NA

Revenue Narrative 1

It is anticipated that this new MET graduate offering will have a positive impact on the current graduate course enrollment and expand access to Elementary Education. By including the program within the current offerings the MET seeks to create increases in enrollment while fully utilizing the current course structure of Elementary Education and graduate coursework.

Revenue Narrative 2

No new funding sources are anticipated or needed.

**Utah System of Higher Education
New Academic Program Proposal
Cover/Signature Page - Full Template**

Institution Submitting Request: Utah State University

Proposed Program Title: Master in Secondary Teaching

Are There New Emphases: Yes ☐ No ☒

Names of New Emphases (Separated by Commas):

Sponsoring School, College, or Division: Emma Eccles Jones College of Education and Human Services

Sponsoring Academic Department(s) or Unit(s): School of Teacher Education and Leadership (TEAL)

Classification of Instructional Program Code¹: 6 - Digit CIP: 13.1205 - Secondary Education and Teaching

Min/Max Credit Hours Required of Full Program: 30 Min Cr Hr / 30 Max Cr Hr

Proposed Beginning Term²: Fall 2025

Institutional Board of Trustees' Approval Date:

Program Type (mark all that apply with an x):

☐ (AAS)	Associate of Applied Science Degree
☐ (AA)	Associate of Arts Degree
☐ (AS)	Associate of Science Degree
☐	Specialized Associate Degree (specify award type ³ :)
☐	Other (specify award type ³ :)
☐ (BA)	Bachelor of Arts Degree
☐ (BS)	Bachelor of Science Degree
☐ (BAS)	Bachelor of Applied Science Degree
☐	Specialized Bachelor Degree (specify ward type ³ :)
☐	Other (specify award type ³ :)
☐ (MA)	Master of Arts Degree
☐ (MS)	Master of Science Degree
☐	Specialized Bachelor Degree (specify ward type ³ :)
☒	Other (specify award type ³ : Master in Secondary Teaching)
☐	Doctoral Degree (specify award type ³ :)
☐	K-12 School Personnel Program
☐	Out of Service Area Delivery Program ☐ Attached MOU
☐	Out of Mission Program
☐	NEW Professional School

¹ For CIP code classifications, please see <http://nces.ed.gov/ipeds/cipcode/Default.aspx?y=55>.

² "Proposed Beginning Term" refers to first term after Regent approval that students may declare this program.

³ Please indicate award such as APE, BFA, MBA, MEd, EdD, JD

Changes to Existing Programs or Administrative Units Required (mark all that apply with an x, if any):

☐	Program Restructure with or without Consolidation
☐	Emphases transfer from another program or academic unit
☐	Name Change of Existing Program or Academic Unit
☐	Program transfer to a different academic unit
☐	Suspension or discontinuation of a unit or program
☐	Reinstatement of a previously suspended/discontinued program or administrative unit
☐	Other

Chief Academic Officer (or Designee) Signature:

I, the Chief Academic Officer or Designee, certify that all required institutional approvals have been obtained prior to submitting this request to the Office of the Commissioner.

Please type your first and last name _____ Date: _____

☐

I understand that checking this box constitutes my legal signature.

Utah System of Higher Education Program Description - Full Template

Section I: The Request

Utah State University's (School of Teacher Education and Leadership) requests approval to offer the following degree: **Master in Secondary Teaching**

To be effective on: **July 1, 2025 (Fall semester 2025)**

This program was approved by the institutional Board of Trustees on:

Section II: Program Proposal

Program Description

The School of Teacher Education and Leadership (TEAL) proposes a Master in Secondary Teaching (MST) degree that is designed for persons seeking educator licensing following a previous undergraduate degree. The MST degree is available for students both at the Logan campus and at Statewide Campuses. The basic elements of the MST coursework option include completion of 30 credits in an approved program of study. An additional 30 credits of nonmatriculated coursework are required to meet licensure requirements of the Utah State Board of Education (USBE). All courses require minimum grades and students must maintain an overall GPA of 3.0 or higher.

This program is specifically designed to provide an avenue for education degree seekers and job changers to become licensed educators. Upon degree completion, USU will be able to recommend licensure. However, licensure is ultimately awarded by the USBE.

Consistency with Institutional Mission

Utah State University is a land-grant university with a role assignment in the USHE policy R312-7 of providing Master's degrees (Research and Professional). This specific proposal is to meet a growing number of career-changing professionals seeking to become licensed secondary educators. As Utah's land grant university, USU is committed to meeting a growing need for educational professionals, specifically job-changing individuals. The MST program will meet the growing population of individuals who want to become licensed secondary educators.

Section III: Needs Assessment

Program Rationale

The educational landscape is constantly changing. However, the consistent need for qualified and licensed educators is ever-present. Providing "career-changing" individuals with an avenue that leads to licensure while concurrently earning a Master's degree increased expertise within the field and opportunities for individuals. This MST program will enable education degree seekers with opportunities to gain Master's level skills needed in classrooms throughout Utah and the nation.

Labor Market Demand

The Utah Education Policy Center (UEPC) at the University of Utah in collaboration with the Utah State Board of Education (USBE) collected data on the teacher shortage in Utah. When surveyed in 2015, 48% of the 31 responding school districts indicated that they began the school year without a certified teacher in every classroom. Additionally, 90% of respondents reported that the pool of qualified applicants has been shrinking. More currently, in 2024 teacher starting salaries have risen reducing the shortage concerns while increasing the interest in becoming a teacher. Increased salaries have led to higher numbers of teacher applicants and individuals seeking avenues for high-quality licensure options. Alternative credentialing options have also risen nationally leaving space for universities to expand programmatic options that meet the needs of schools and districts. Closer to home, USU education advisors are seeing increased inquiry from "career changers" into university-based Master's options leading to educator licensure. Specifically, 1-2 students per week have inquired about Master's degrees connected to licensure over the past 6 months.

Student Demand

Since this is a new type of Master's degree we do not have historical enrollment data. However, based on the current interest it appears that 3-6 new students might enroll each semester. These students would also be enrolling in content and pedagogy coursework to fulfill the USBE requirements for licensure. A current USU student who completed the licensure coursework said the following: *"My program that they created could be offered to more people. I was a trial run. I think it was sustainable for other teachers. I wouldn't change it. I think you should offer it to more people."* Another student in the current cycle identified, *"After 20 years, I've found my purpose!"* This sentiment has been expressed by many interested students who are looking for a way to take their subject expertise and use it for career evolution. This program will create an accessible avenue to become a professional teacher for those who want to change careers or improve their teaching ability. As the program becomes well known we anticipate that school districts will also encourage future teachers to use the MST as a means of satisfying district alternative licensure requirements.

Similar Programs

Several universities in Utah offer Master's degrees. However, these degrees vary in focus and emphasis. Some are Master of Arts others are Masters of Education. The Master in Secondary Teaching (MST) provides a unique focus on career changers and their desire to become a master in teaching. Below is a listing of the degrees offered by Utah institutions of higher education.

SUU – Master of Education: 1/3rd of coursework for MEd can be completed by applying courses from an APPEL or APPEL-SpEd endorsement.

UofU – Master of Education in Educational Psychology with Elementary Licensure: focuses on working with students from diverse cultural, linguistic, and socioeconomic backgrounds.

WGU – Masters in Curriculum and Instruction, Master of Arts in Teaching – Mathematics Education for Middle School, Master's in Chemistry Education, Master's in English Education – Middle and High School. These programs prepare teachers in a targeted online coursework.

UVU – Offer several courses to educators enrolled in the APPEL program. The focus appears to be for secondary teachers although elementary-focused students may participate.

USU – Graduate Route to Licensure is currently offered and would be expanded to include multiple content areas where currently science and mathematics education are the only areas included.

Collaboration with and Impact on Other USHE Institutions

This program will be delivered to all statewide campuses and include Connect versions of delivery to meet the needs of rural teachers as well as those close to a USU statewide campus. It will also provide opportunities to collaborate with local school districts by supporting their need to have qualified educators. Other USHE institutions will also benefit as we will be able to support students who earn initial undergraduate degrees at these partner institutions to obtain a subsequent graduate degree at USU.

External Review and Accreditation

Currently, the educational degrees and courses offered in TEAL are accredited through AAQEP and this program aligns with the current accreditation. Additional information will be included in the current accreditation process.

Section IV: Program Details

Graduation Standards and Number of Credits

The proposed MST program fulfills all the USBE requirements for secondary teacher licensure. The coursework has been mapped in a way that allows future educators to develop both the foundational and practical skills of teaching.

Graduation Requirements

- The Program of Study for a Master's degree must include at least 18 semester credits at the level of 6000 or above.
- A Master's degree must be completed within six years of entering the degree program. Additional time may be requested and submitted to the Vice Provost of Graduate Studies for review.
- Coursework over eight years old at the time of degree completion may not be used for a graduate degree unless it is revalidated.

Admission Requirements

- A bachelor's degree from an accredited U. S. college or university or a similarly recognized international university is required for admission to and completion of a graduate program.
- At minimum 3.0 GPA will be required for admission.
- Acceptance to the STEP program.
- Approved background check.

Curriculum and Degree Map

Please see Appendix A and Appendix B for a program curriculum and a sample degree map for the MST degree.

Section V: Institution, Faculty, and Staff Support

Institutional Readiness

The current Secondary Education coursework structure and Master's program offerings are robust enough to include additional students in the course offerings. No new administrative or organizational needs are required with no anticipated impacts on the current delivery of the Master's and Secondary Education programs. This new MST program may add additional students to courses offered by partner departments across the USU campuses. The program will add positive interaction and collaboration experiences for our current and future students.

Faculty

Existing faculty in TEAL will be sufficient for program implementation. It is anticipated that partner departments will possibly see a 1-2 student increase in course numbers requiring no new faculty.

Staff

Existing staff will be sufficient to support the proposed MST program; no new staff will be needed. Current administrative, advising, and support staff will undergo training to learn of the proposed program components.

Student Advisement

A current education advisor will be assigned to meet the student needs of the MST program. The advisor will be trained in all the program components and will effectively advise career changing-students. This individual will incorporate this particular advising into their current work responsibilities. There will not be a need to hire an additional advisor. Additionally, the GPC and Master's Director will support and assist the assigned advisor and students.

Library and Information Resources

No additional library resources will be needed to support this program.

Projected Enrollment and Finance

Please refer to Appendix D.

Section VI: Program Evaluation

Program Assessment

Program Goals:

- Provide career-changing professionals with a teaching entrance option that includes coursework and a Master's degree that enables USU to recommend individuals for licensure.
- Market an avenue for individuals who want to be educators but have a prior undergraduate degree that may appear to limit their opportunities to be a teacher.
- Collaborate with local education partners to provide university degree-based alternatives to APPEL and other alternative routes to licensure.
- Enhance graduate degree program offerings within the College of Education and the School of Teacher Education and Leadership.

Program Assessment and Evaluation:

- Faculty review of the program curriculum.
- End of program student surveys for program feedback and improvement.
- End of program student interview for program feedback and improvement.
- Stakeholder feedback for practicum and student teaching experiences.
- Course evaluations each semester by students according to the IDEA system that compares USU evaluations to a national database. Student feedback will be used for program evaluation and improvement.
- Student scores on the Student Teaching Evaluation Rubric (STER) which is aligned with USBE teacher competencies.
- Inclusion in teacher education accreditation process through the Association for Advancing Quality Educator Preparation (AAQP)

Student Standards of Performance

The MST program is designed to ensure each student will demonstrate the following competencies as they progress through the program. Each area below is defined by an associated USBE rubric.

- **LEARNERS AND LEARNING:** Effective teachers exhibit knowledge, skills and dispositions that demonstrate an awareness of and sensitivity toward diversity in learner development and student individualities.
- **INSTRUCTIONAL CLARITY:** Effective teachers exhibit knowledge, skills, and dispositions that demonstrate clarity regarding the content they teach and how to organize and sequence it to effectively facilitate learning and drive student engagement.
- **INSTRUCTIONAL PRACTICE:** Effective teachers exhibit knowledge, skills, and dispositions that support instructional practices that drive high-quality instruction, demonstrate a data-driven and cooperative approach to teaching and learning, and meet the diverse needs of all learners.
- **CLASSROOM CLIMATE:** Effective teachers exhibit the knowledge, skills, and dispositions that enable them to create appropriate physical, social, and emotional environments to support learning.
- **PROFESSIONAL RESPONSIBILITY:** Effective teachers exhibit the knowledge, skills, and dispositions that demonstrate awareness of and adherence to professional and ethical standards personally, within their school community, with parents, and within their local community.

Each course syllabus in the MST program currently provides student learning objectives and competency outcomes based on the USBE licensure requirements. Student competency will be measured using the STER instrument during the student teaching experience.

Appendix A: Program Curriculum

Course Number	NEW Course	Course Title	Credit Hours
Secondary Content/Pedagogy Courses			
(The content/pedagogy courses are required for USU to recommend teaching licensure to the USBE, however, they do not fulfill master's requirements.)			
<i>Defined by USBE Secondary Endorsement</i>		<i>Content Endorsement Requirement -</i>	
<i>Defined by USBE Secondary Endorsement</i>		<i>Content Endorsement Requirement -</i>	
<i>Defined by USBE Secondary Endorsement</i>		<i>Content Endorsement Requirement -</i>	
<i>Defined by USBE Secondary Endorsement</i>		<i>Content Endorsement Requirement -</i>	
<i>Defined by USBE Secondary Endorsement</i>		<i>Content Endorsement Requirement -</i>	
<i>Defined by USBE Secondary Endorsement</i>		<i>Content Endorsement Requirement -</i>	
SPED 4000		SPED 4000 Education of Exceptional Individuals	3
SCED 5820 (unique # by content)		Content Area Methods I	3
SCED 6720 (unique # by content)		Content Area Clinical I	1
SCED 6900 (unique # by content)		Content Area Methods II (if required by content area)	3
SCED 6305 (unique # by content)		Content Area Clinical II (if required by content area)	1
ITLS 2500 or ITLS 5500		ITLS 2500 Tech Enabled Inst or ITLS 5500 Integration & Innovation of Tech in Ed	3
Secondary Content/Pedagogy Licensure Requirements Credit Hour Sub-Total			14
Master in Secondary Teaching Required Courses			
SCED 5100		Motivation and Classroom Management	3
TEAL 6770		Content-Based Instruction for DLI / ESL	3
SCED 5210		Learning Theory, Curriculum, & Assessment (≈ TEAL 6190)	3
TEAL 6150		Foundations of Curriculum (3) (≈ SCED 3210)	3
TEAL 6410		Social Foundations of Education (3)	3
TEAL 6545		Research for Teachers (3)	3
TEAL 6710		Diversity in Education (3) (≈ SCED 3210)	3
NEW Course TEAL 6200 Grad ST Seminar (≈ SCED 5500)	X	ST Seminar	3
TEAL 6210		Graduate Student Teaching (≈ SCED 5630)	6
Required MST Course Credit Hour Sub-Total			30
Total Number of Credits to Complete Licensure and Program			44

Degree Map

Degree maps pertain to undergraduate programs this program provides both undergraduate content and pedagogy coursework to satisfy teacher licensure requirements. The degree map below is a sample for those students able to attend as a fulltime student. Many degree changers will have unique situations where modifications to the map below will be required.

First Year Fall	Cr. Hr.	First Year Spring	Cr. Hr.
SPED 4000 Education of Exceptional Individuals	3	SCED 5100 Motivation and Classroom Management	3
Content Area Methods I	3	TEAL 6770 Content-Based Instruction for DLI / ESL (≈ SCED 5200)	3
Content Area Clinical I	1	SCED 5210 Learning Theory, Curriculum, & Assessment (≈ TEAL 6190)	3
Content Area Methods II (if required by content area)	3	TEAL 6150 Foundations of Curriculum (3) (≈ SCED 3210)	3
Content Area Clinical II (if required by content area)	1	TEAL 6410 Social Foundations of Education (3)	3
SCED 5100 Motivation and Classroom Management	3	TEAL 6710 Diversity in Education (3) (≈ SCED 3210)	3
Total	14	Total	15
Second Year Fall	Cr. Hr.	Second Year Spring	Cr. Hr.
ITLS 2500 Tech Enabled Inst or ITLS 5500 Integration & Innovation of Tech in Ed	3		
TEAL 6545 Research for Teachers (3)	3		
NEW Course TEAL 6200 Grad ST Seminar (≈ SCED 5500 ST Seminar)	3		
TEAL 6210 Graduate Student Teaching (≈ SCED 5630)	6		
Total	15	Total	
Third Year Fall	Cr. Hr.	Third Year Spring	Cr. Hr.
Total		Total	
Fourth Year Fall	Cr. Hr.	Fourth Year Spring	Cr. Hr.
Total		Total	

Appendix C: Current and New Faculty / Staff Information

Part I. Department Faculty / Staff

	# Tenured	# Tenure -Track	# Non -Tenure Track	Current staff and faculty who will support the program are listed. Additional and new staff/faculty will not be needed for this program.
Faculty: Full Time with Doctorate	0	0	1	
Faculty: Part Time with Doctorate	0	0	0	
Faculty: Full Time with Masters	0	0	0	
Faculty: Part Time with Masters	0	0	0	
Faculty: Full Time with Baccalaureate	0	0	0	
Faculty: Part Time with Baccalaureate	0	0	0	
Teaching / Graduate Assistants	0	0	0	
Staff: Full Time	0	0	2	
Staff: Part Time	0	0	0	

Part II. Proposed Program Faculty Profiles

	First Name	Last Name	Tenure (T) / Tenure Track (TT) / Other	Degree	Institution where Credential was Earned	Est. % of time faculty member will dedicate to proposed program.	If "Other," describe
Full Time Faculty							
	Max	Longhurst	PP	PhD	Utah State University		Associate Professor PP
							Add Another Full Time
Part Time Faculty							
							Add Another Part Time

Part III: New Faculty / Staff Projections for Proposed Program

	# Tenured	# Tenure -Track	# Non -Tenure Track	Academic or Industry Credentials Needed	Est. % of time to be dedicated to proposed program.
Faculty: Full Time with Doctorate	0	0	0		
Faculty: Part Time with Doctorate	0	0	0		
Faculty: Full Time with Masters	0	0	0		
Faculty: Part Time with Masters	0	0	0		
Faculty: Full Time with Baccalaureate	0	0	0		
Faculty: Part Time with Baccalaureate	0	0	0		
Teaching / Graduate Assistants	0	0	0		
Staff: Full Time	0	0	0		
Staff: Part Time	0	0	0		

Appendix D: Projected Program Participation and Finance

Part I.

Project the number of students who will be attracted to the proposed program as well as increased expenses, if any. Include new faculty & staff as described in Appendix C.

Three Year Projection: Program Participation and Department Budget						
	Year Preceding Implementation	New Program				
		Year 1	Year 2	Year 3	Year 4	Year 5
Student Data						
# of Majors in Department	115	115	115	120	120	120
# of Majors in Proposed Program(s)		3	4	6	8	8
# of Graduates from Department	111	111	111	115	115	115
# Graduates in New Program(s)		1	2	3	5	5
Department Financial Data						
	Department Budget					
	Year Preceding Implementation (Base Budget)	Year 1	Year 2	Year 3		
		Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)		
EXPENSES – nature of additional costs required for proposed program(s)						
Personnel (Faculty & Staff Salary & Benefits)	0	0	0	0		
Operating Expenses (equipment, travel, resources)	0	0	0	0		
Other:	0	0	0	0		
TOTAL PROGRAM EXPENSES		\$0	\$0	\$0		
TOTAL EXPENSES	\$0	\$0	\$0	\$0		
FUNDING – source of funding to cover additional costs generated by proposed program(s)						
Internal Reallocation	NA	NA	NA	NA		
Appropriation	NA	NA	NA	NA		
Special Legislative Appropriation	NA	NA	NA	NA		
Grants and Contracts	NA	NA	NA	NA		
Special Fees	NA	NA	NA	NA		
Tuition	NA	NA	NA	NA		
Differential Tuition (requires Regents approval)	NA	NA	NA	NA		
PROPOSED PROGRAM FUNDING		\$0	\$0	\$0		
TOTAL DEPARTMENT FUNDING	\$0	\$0	\$0	\$0		
Difference						
Funding - Expense	\$0	\$0	\$0	\$0		

Part II: Expense explanation

Expense Narrative

Existing faculty in TEAL and partner departments will teach the SCED courses in the proposed MST program. It is not anticipated that new sections will be necessary by adding new students to the current course offerings.

No other expenses are anticipated associated with the proposed program.

Part III: Describe funding sources - NA

Revenue Narrative 1

It is anticipated that this new MST graduate offering will have a positive impact on the current graduate course enrollment and expand access to Secondary Education. By including the program within the current offerings the MST seeks to create increases in enrollment while fully utilizing the current course structure of Secondary Education and graduate coursework.

Revenue Narrative 2

No new funding sources are anticipated or needed.

26 September 2025

ITEM FOR INFORMATION

Report of Investments for June 2025

The Report of Investments for June 2025 is submitted to the Board of Trustees for information.

EXECUTIVE SUMMARY

The following report is a list of Utah State University's investment holdings for the month ended June 2025. Investments are executed in accordance with the State Money Management Act, Rules of the State Money Management Council, and Uniform Prudent Management of Institutions Funds Act.



UTAH STATE UNIVERSITY
REPORT OF INVESTMENTS
June 2025

The following report is a list of Utah State University's investment holdings for the month ended June 2025. To the best of my knowledge, Utah State University is in compliance with the Utah State Money Management Act, Rules of the Utah State Money Management Council, Utah State Uniform Prudent Management of Institutional Funds Act, and Utah Board of Higher Education and University policies.



Wendy Keller
Controller

9-2-2025
Date

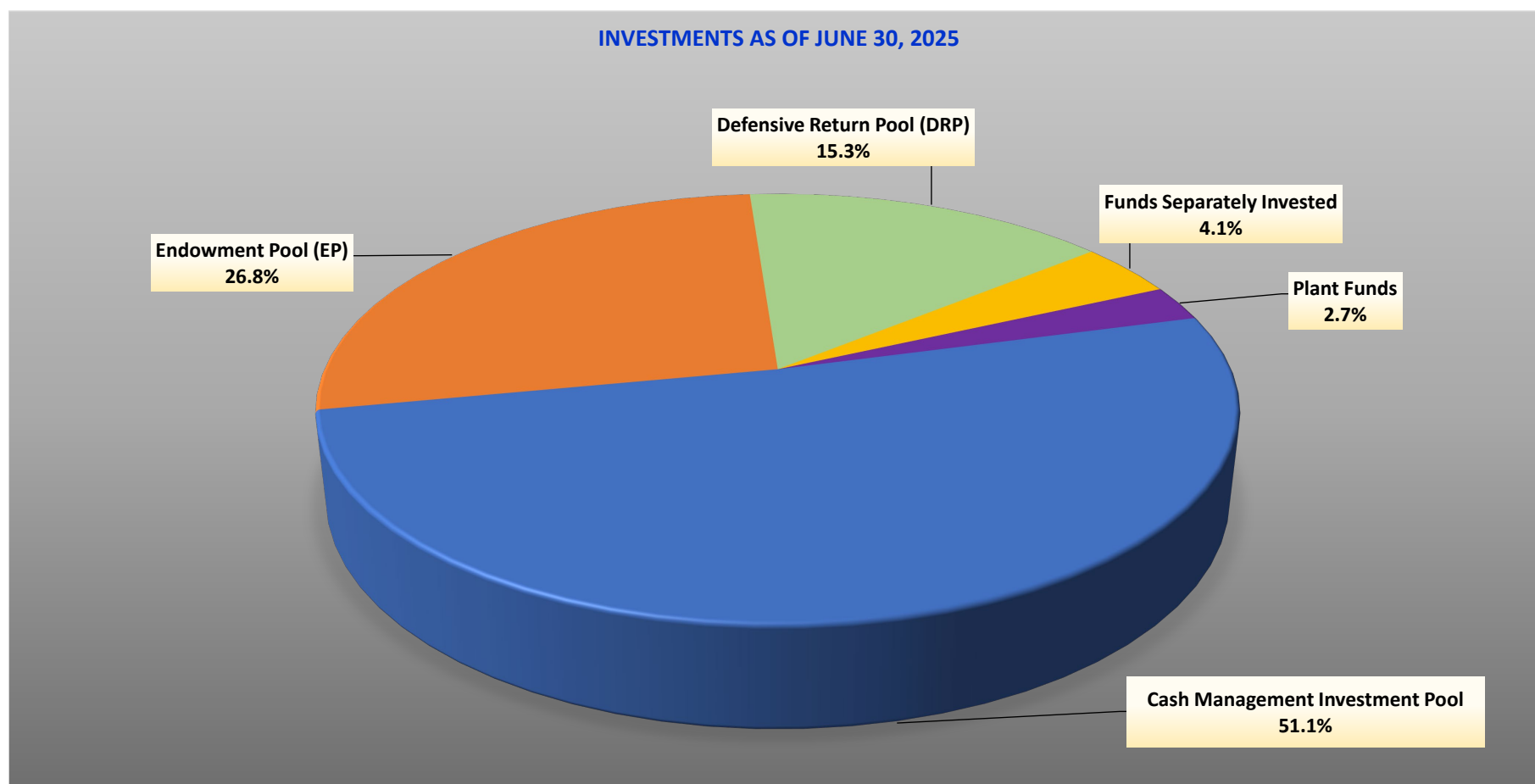


David T. Cowley
Vice President
for Finance and Administrative Services

9/3/25
Date



Investment Pool Holding Totals		June 2025 Fair Value
Cash Management Investment Pool		\$602,898,341
Endowment Pool (EP)	<i>(Does not include \$5.0 M invested in CMIP)</i>	316,456,464
Defensive Return Pool (DRP)	<i>(Does not include \$74.4 M invested in CMIP)</i>	179,826,260
Funds Separately Invested	<i>(Donor Restricted Individual Securities, Donor Required External Management)</i>	48,119,684
Plant Funds	<i>(Bond Proceeds during Construction and Debt Service Reserves)</i>	31,345,646
Total		\$1,178,646,395

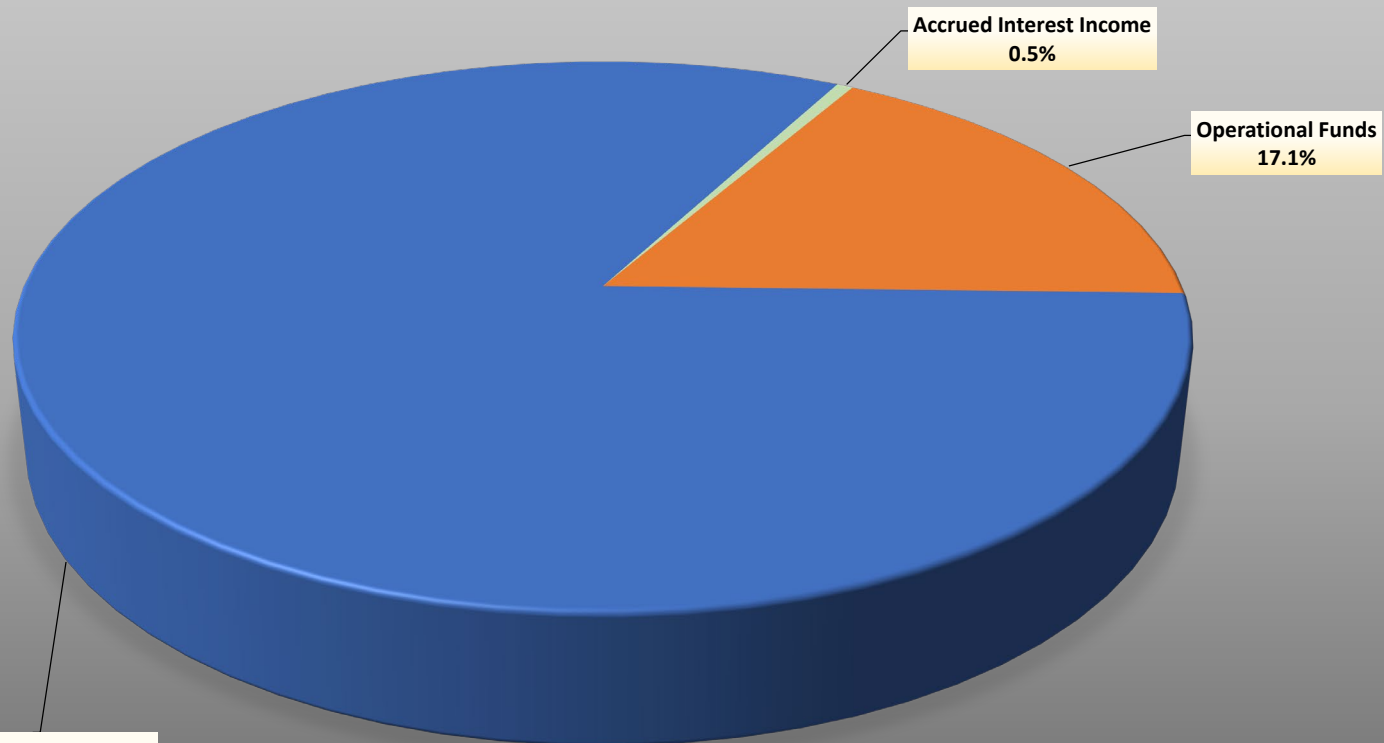




Investment Pool Holding Totals		Annualized Yield	June 2025 Par Value	June 2025 Cost Basis	June 2025 Fair Value	Unrealized (G/L)*
Operational Funds	(Cash and Cash equivalents & investments where maturities are one year or less)		\$103,300,000	\$103,263,428	\$102,992,149	(\$271,279)
Securities Invested for Income	(Investments intended to generate a consistent stream of income year over year with maturities between one and ten years)		521,445,000	521,874,635	496,702,545	(25,172,090)
Accrued Interest Income					3,203,647	
Total		3.91%	\$624,745,000	\$625,138,063	\$602,898,341	(\$25,443,369)

* Changes in unrealized gains or losses are based on the difference between the cost and current fair value. Like other public institutions, Utah State University practices a buy and hold to maturity strategy, therefore at maturity, principal balances will be returned at full par value. All investments are in compliance with the State of Utah Money Management Act.

CASH MANAGEMENT INVESTMENT POOL



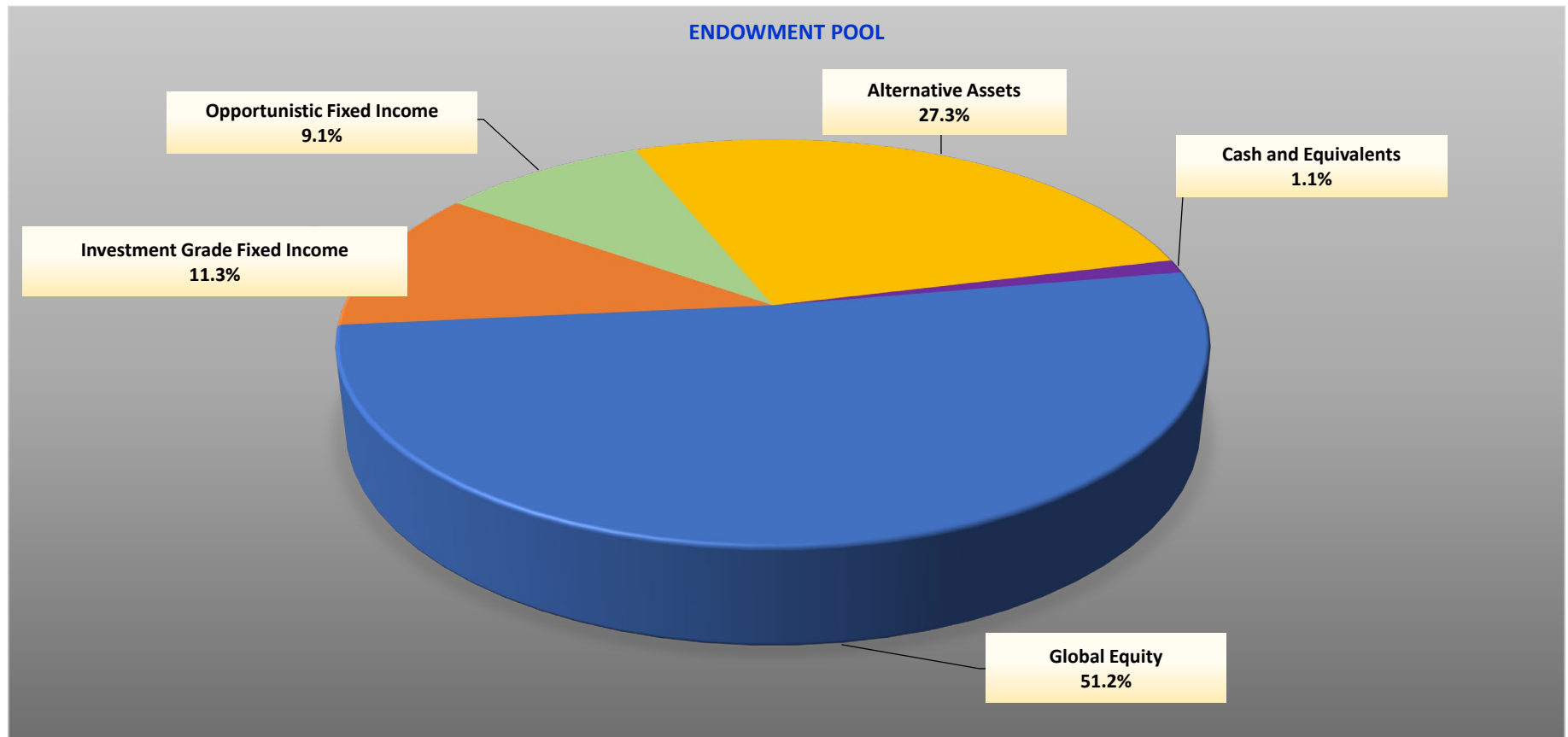
Securities Invested for Income
82.4%

Accrued Interest Income
0.5%

Operational Funds
17.1%

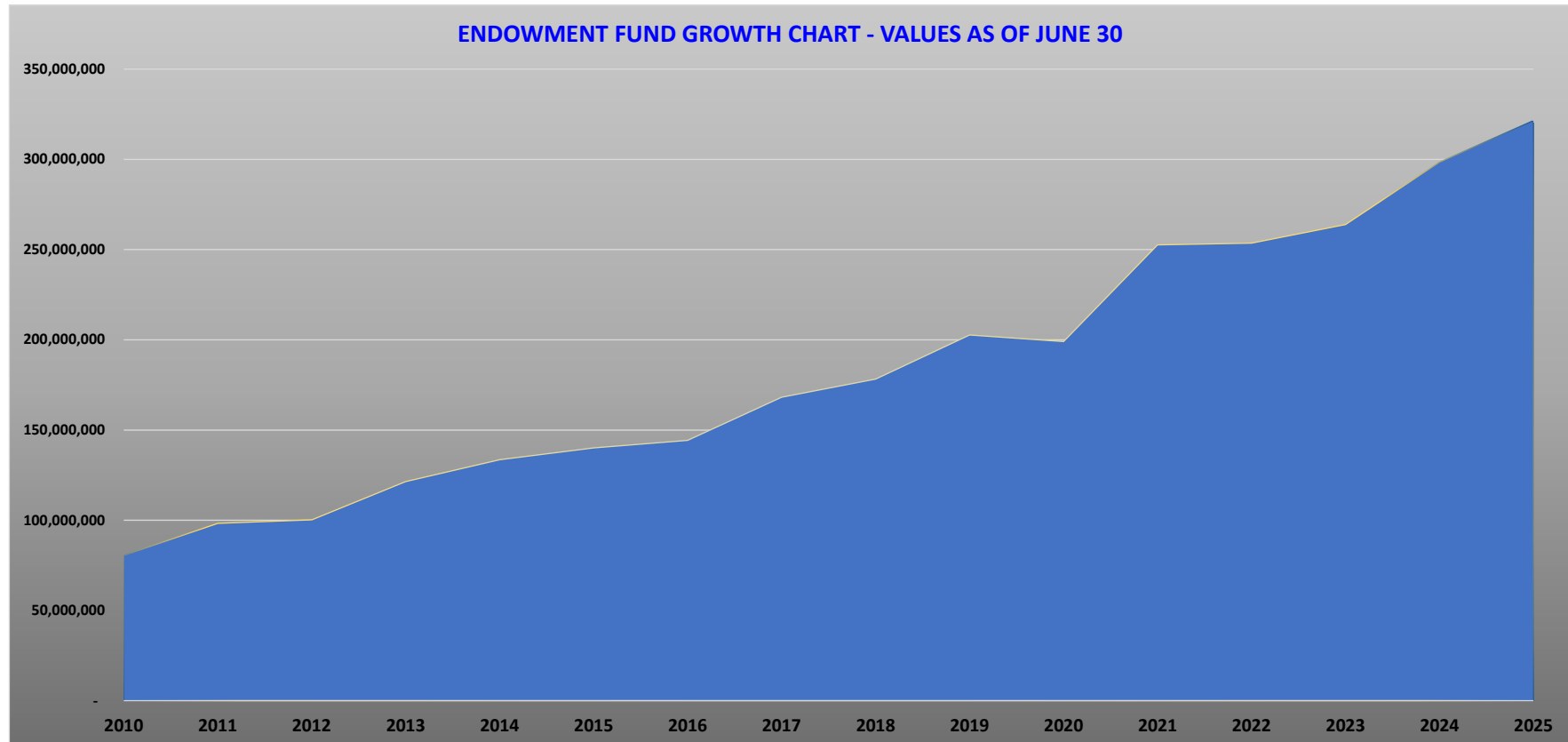


Investment Pool Holding Totals	Change From Prior Year			Change From Prior Month		
	June 2024 Fair Value	June 2025 Fair Value	Net Change from Prior Year	May 2025 Fair Value	June 2025 Fair Value	Net Change from Prior Month
Global Equity	\$148,743,382	\$164,654,632		\$158,858,741	\$164,654,632	
Investment Grade Fixed Income	36,417,648	36,449,293		48,811,619	36,449,293	
Opportunistic Fixed Income	26,252,600	29,264,889		29,239,966	29,264,889	
Alternative Assets	85,263,090	87,681,230		86,789,842	87,681,230	
Cash and Equivalents	1,775,323	3,443,948		2,506,502	3,443,948	
Total	\$298,452,043	\$321,493,992	\$23,041,949	\$326,206,670	\$321,493,992	(\$4,712,678)



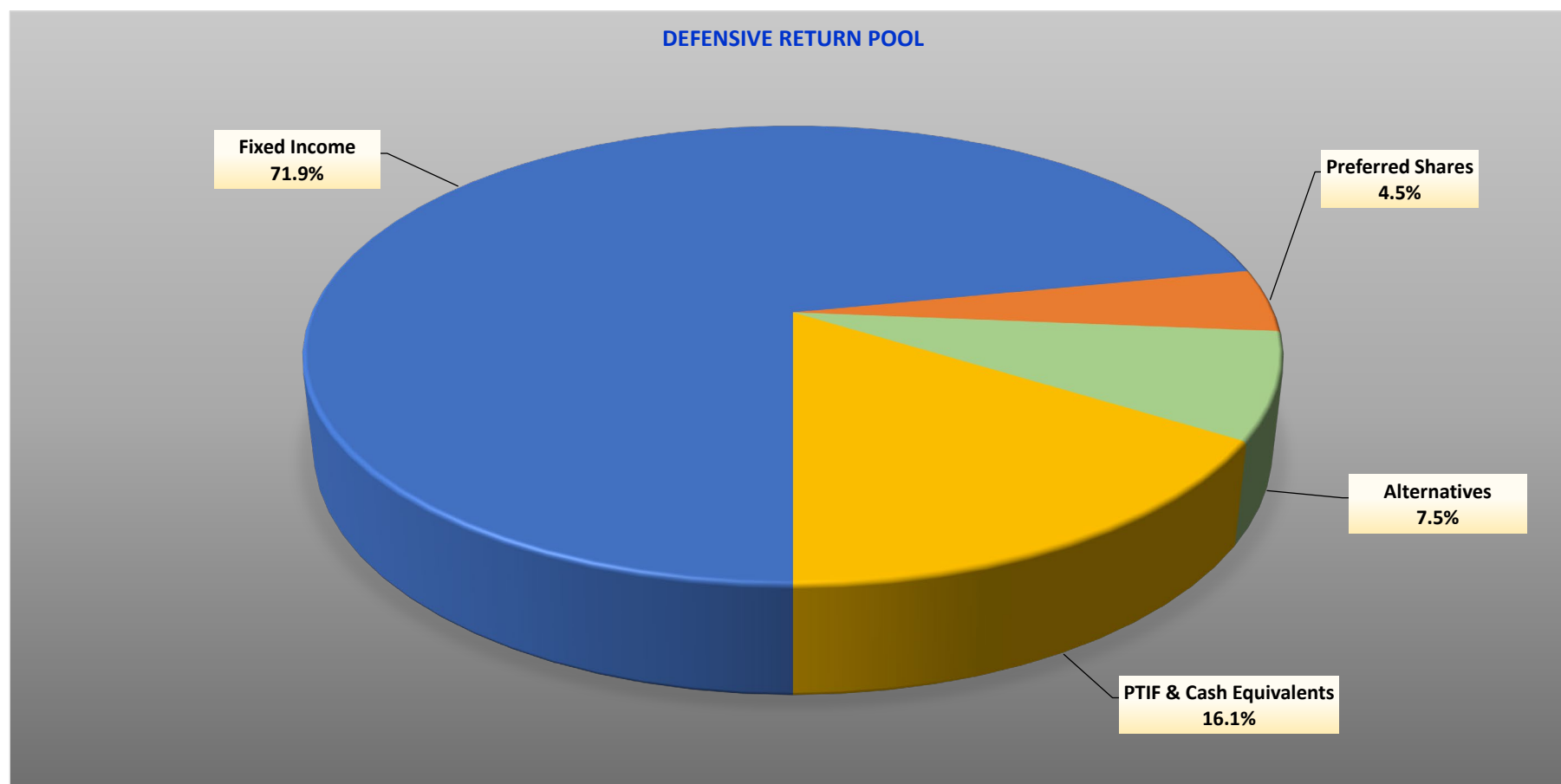


Investment Pool Holding Totals	Asset Allocation		Performance as of June 30, 2025			
	Current Allocation	Target	1 Year %	3 Years %	5 Years %	10 Years %
Global Equity	51.2%	48.0%	QA			
Investment Grade Fixed Income	11.3%	11.5%				
Opportunistic Fixed Income	9.1%	7.5%				
Alternative Assets	27.3%	33.0%				
Cash and Equivalents	1.1%	0.0%				
Total Fund Aggregate	100%	100%	7.7%	8.4%	9.3%	7.5%
Benchmark			11.5%	10.1%	9.7%	7.6%





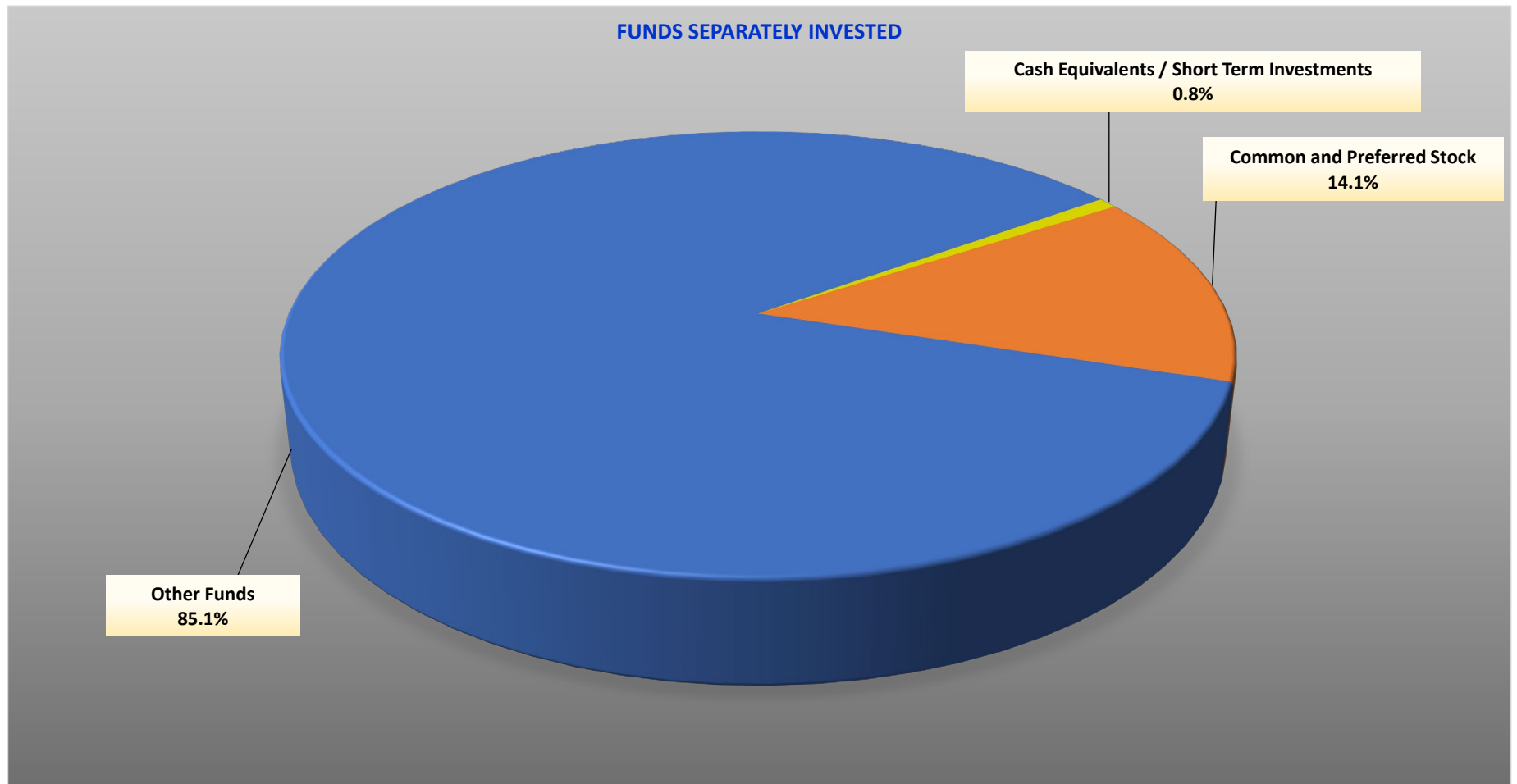
Investment Pool Holding Totals		May 2025 Fair Value	June 2025 Fair Value	Net Change in Fair Value
Fixed Income	(Includes \$74.4 M invested in CMIP)	\$193,914,666	\$182,741,659	
Preferred Shares		11,216,116	11,341,820	
Alternatives		19,133,762	19,104,856	
PTIF & Cash Equivalents		40,315,715	41,078,543	
Total		\$264,580,259	\$254,266,878	(\$10,313,381)





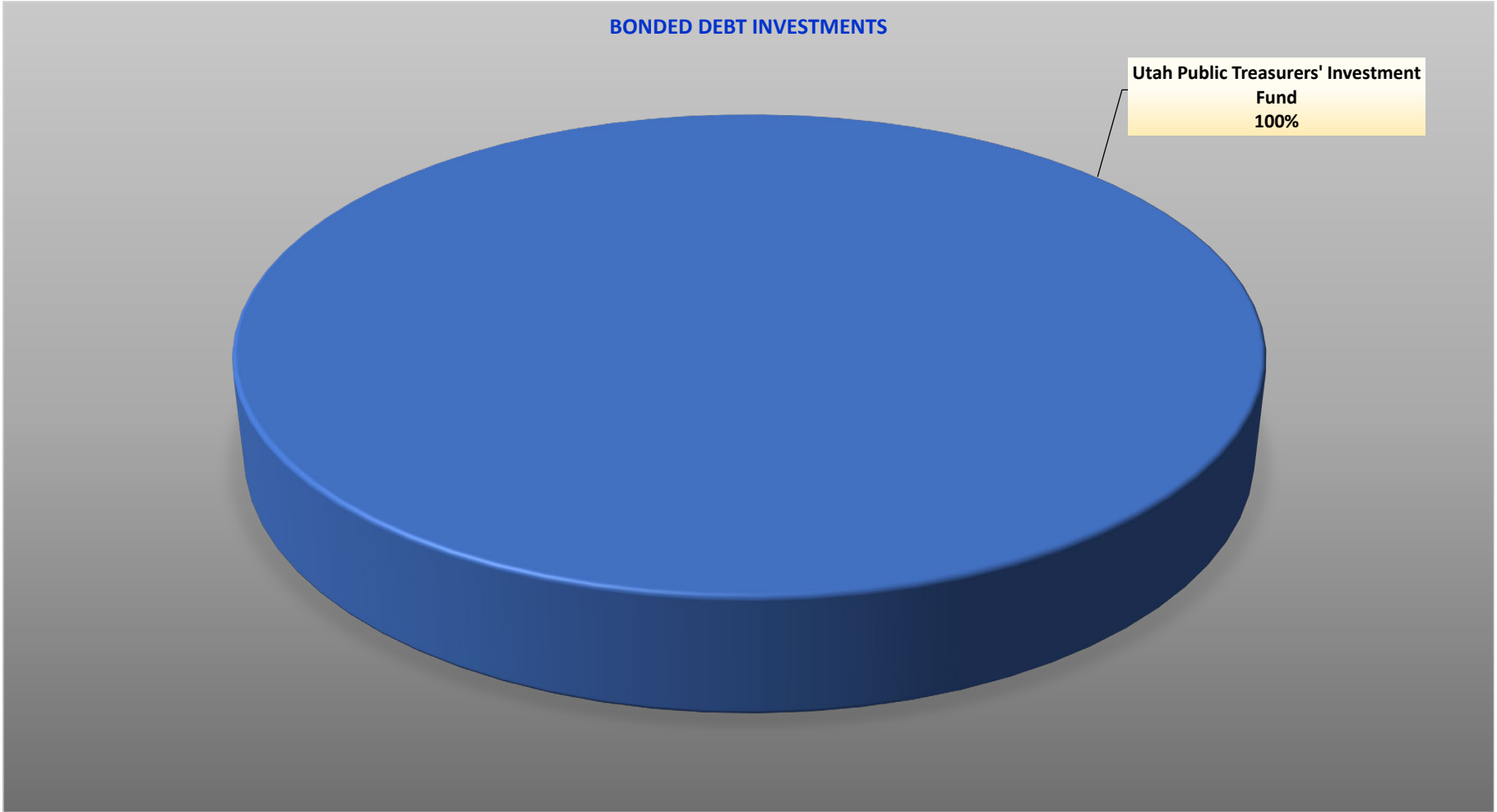
Funds Separately Invested*	June 2025 Cost Basis	June 2025 Fair Value	Change in Unrealized (G/L)
Cash Equivalents / Short Term Investments	\$376,425	\$376,425	
Common and Preferred Stock	6,627,641	6,769,235	
Other Funds	9,836,198	40,974,024	
Total	\$16,840,264	\$48,119,684	\$31,279,420

* Funds Separately Invested primarily consists of donor restricted individual securities donated to the University and managed by outside investment managers.





Bonded Debt Investments		May 2025 Fair Value	June 2025 Fair Value	Net Change in Fair Value
Utah Public Treasurers' Investment Fund	(Bond Proceeds during Construction and Debt Service Reserves)	\$41,194,618	\$31,345,646	
Total		\$41,194,618	\$31,345,646	(\$9,848,972)





Utah State University Surpasses Fundraising Goals with \$68.8 Million Raised

From July 1, 2024, to June 30, 2025, Utah State University achieved a remarkable fundraising milestone, securing \$68.8 million through more than 29,500 contributions — a significant rise in donations since 2019. All gifts were part of the university’s ongoing “Create Your Aggie Impact” campaign, which focuses on strengthening programs, supporting students, and expanding access to education.

This year also marked a record-breaking 15 seven-figure gifts, underscoring the transformational generosity of donors who are helping drive USU’s mission forward. Gifts came from 9,587 donors, including more than \$10.9 million from donations under \$25,000, reflecting broad-based support from the USU community.

“Our donors are the foundation of our success,” said Matt White, vice president for Advancement and president of the USU Foundation. “Their generosity directly strengthens programs, supports students, and allows USU to reach further than ever. Every gift, no matter the size, makes an impact.”

Watch our social channels @utahstatealumni for the full media release posting later this month.

Thank You for Another Successful Year!

Your service and dedication to USU have been invaluable in helping us exceed our fundraising goals once again. We would not be able to excel, year after year, without the leadership, advocacy, and investment of our Foundation Board members and Advancement team. Here is a breakdown of our final fundraising totals for fiscal year 2024-25:

Donor Type	Total	% Total	# Gifts	# Donors	% Donors
Alumni	\$21,526,592.24	31.25%	14,529	4,410	46.00%
Corporation	\$13,725,444.45	19.93%	2,010	645	6.73%
Foundation	\$17,657,265.00	25.64%	583	180	1.88%
Individual	\$12,746,546.39	18.51%	11,065	3,653	38.10%
Other Organization	\$1,668,910.48	2.42%	238	94	.98%
Parent	\$1,513,195.78	2.20%	944	488	5.09%
Student	\$38,866.55	0.06%	222	117	1.22%
TOTAL	\$68,876,820.89		29,591	9,587	



USU Foundation Announces New Chair, Vice Chair, Members for 2025-26 Fiscal Year

The Utah State University Foundation Board has announced several updates including new appointments and new members for the 2025-26 fiscal year. In partnership with the university, board members serve as advocates within their communities, aid in cultivating private support and foster meaningful engagement as they work toward shared strategic goals.

[Read More](#)



Utah State Athletics Unveils Recruitment, Retention Funds

USU Athletics has unveiled new sport-specific recruitment and retention funds in response to the changing landscape of intercollegiate athletics. The donation opportunity offers Aggie Nation a way to contribute to revenue sharing as part of their Big Blue Club membership.

[Read More](#)



USU Announces Janet Q. Lawson Endowed Deanship for College of Agriculture & Natural Resources

The Janet Q. Lawson Endowed Deanship marks a milestone for the university as it brings together the former College of Agriculture and Applied Sciences and the S.J. & Jessie E. Quinney College of Natural Resources, two of the institution's most impactful and historic academic units. The newly named college is poised to foster deeper interdisciplinary collaboration, strengthen academic programming and broaden its capacity to serve Utah and beyond.

[Read More](#)



Utah State Athletics Celebrates Move to Pac-12 Conference at 'Reach and Rise' Campaign Event

USU is entering a bold new era as it prepares to join the Pac-12 Conference, a milestone celebrated during the "Reach and Rise" campaign event hosted by USU Advancement and Athletics at the end of June. The event brought together alumni, donors, fans and supporters to mark Utah State's acceptance into the Pac-12 Conference, effective July 1, 2026.

[Read More](#)

Fundraising Progress

Fall 2025

University Advancement Report

July 1, 2025 to September 2, 2025

Donor	Total	% Total	# Gifts	# Donors	% Donors
Alumni	\$3,138,496.59	21.45%	2,874	1,239	46.81%
Corporation	\$2,163,413.40	14.79%	290	136	5.14%
Foundation	\$8,454,362.12	57.79%	43	34	1.28%
Individual	\$607,242.66	4.15%	2,337	1,089	41.14%
Other Organization	\$218,729.71	1.50%	73	16	0.60%
Parent	\$34,401.90	0.24%	170	118	4.46%
Student	\$11,858.81	0.08%	34	18	0.68%
TOTAL	\$14,628,505.19		5,821	2,647	

July 1, 2024 to September 2, 2024

Donor	Total	% Total	# Gifts	# Donors	% Donors
Alumni	\$7,509,622.08	41.07%	2,065	1,092	51.58%
Corporation	\$2,751,105.82	15.05%	309	139	6.57%
Foundation	\$1,717,900.13	9.40%	42	35	1.65%
Individual	\$5,257,134.47	28.75%	1,389	694	32.78%
Other Organization	\$70,524.30	0.39%	32	21	0.99%
Parent	\$976,561.90	5.34%	172	112	5.29%
Student	\$1,739.20	0.01%	45	24	1.13%
TOTAL	\$18,284,587.90		4,054	2,117	



FY Progress to Goal

As of 9/11/2025 7:21:24 AM

		Amount	Pace	Completion
Dollars Granted		\$15,679,934.56 \$65,000,000	22.3%	24.1%
Visits		663 3,700	-9.2%	17.9%
Qualification Visits		196 1,000	-0.6%	19.6%
Proposals Submitted >= \$50,000		101 400	28.0%	25.3%
Proposals Granted >= \$25,000		49 275	-9.7%	17.8%

\$65M GOAL JUSTIFICATION FY26

HISTORIC DATA	3 donors in FY 2025 raising \$11.0M 5 Year Avg 2.4 donors	\$3M+	Have 3 prospects @ \$11.5M Have received 1 Totaling \$5.0M	PROPOSAL DATA
	12 donors in FY 2025 raising \$18.5M 5 Year Avg: 10.0 donors	\$1M - \$2.9M	Have 24 prospects @ \$30.1M Have received 2 Totaling \$3.0M	
	12 donors in FY 2025 raising \$9.2M 5 Year Avg 8.6 donors	\$500K - \$999K	Have 21 prospects @ \$11.9M Have received 2 Totaling \$1.6M	
	52 donors in FY 2025 raising \$11.2M 5 Year Avg: 52.2 donors	\$100K - \$499K	Have 97 prospects @ \$15.5M Have received 16 Totaling \$2.7M	
	179 donors in FY 2025 raising \$9.3M 5 Year Avg: 163.4 donors	\$25K - \$99K	Have 434 prospects @ \$14.7M Have received 38 Totaling \$1.7M	
	9,442 donors in FY 2025 raising \$9.7M	\$1 - \$24,999	(Does not include Annual Fund donors) Have 151 prospects @ \$1.3M	

5 Year Avg: 8,523.8 donors

Total Forecasted: \$84,923,205 + \$15,679,935 Raised FYTD = \$100,603,140

60% of Forecasted: \$50,953,923 + \$15,679,935 Raised FYTD = \$66,633,858

40% of Forecasted: \$33,969,282 + \$15,679,935 Raised FYTD = \$49,649,217

Forecasted at Current Close Rate of 41.61%: \$35,332,967 + \$15,679,935 Raised FYTD = \$51,012,901

Have received 2,805 Totaling \$1.7M

Major Gifts

June 3, 2025 to September 1, 2025

Fall 2025

University Advancement Report



Amount	Purpose	Division
\$50,000.00	Institute of Land, Water & Air	President
\$31,200.00	Karen Munns Education Scholarship & Endowment	Statewide Campuses
\$108,000.00	Grant History Other Assistance	College of Arts & Sciences
\$500,000.00	Utah Public Radio	College of Arts & Sciences
\$54,000.00	Ralph S. & DeOra Blackham Scholarship Endowment	Quinney College of Agriculture & Natural Resources
\$25,462.20	Southard Soil Science Graduate Fellowship Endowment	Quinney College of Agriculture & Natural Resources
\$54,000.00	Keith R. & Maurine B. Allred Scholarship Endowment	Quinney College of Agriculture & Natural Resources
\$55,000.00	Do Some Good in the World Scholarship & Endowment	Student Success
\$70,000.00	Strata Networks General Technology Scholarship	Statewide Campuses
\$26,000.00	DME Foundation Nursing Scholarship & Endowment	Statewide Campuses
\$85,000.00	Linda L. & Edward Wolcott Graduate Assistantship Endowment and Expendable Fund	University Libraries
\$5,000,000.00	Quinney College of Agriculture and Natural Resources Endowed Chair	Quinney College of Agriculture & Natural Resources
\$750,000.00	Football Stadium Maintenance	Athletics
\$35,000.00	Stephen R. Covey Leadership Center	Jon M Huntsman School of Business
\$100,000.00	Wanlass Arts Education & Research Center	President
\$75,000.00	Rebecca Allen Allred Scholarship Endowment	Statewide Campuses
\$75,000.00	USU Eastern Athletic Club	Statewide Campuses
\$100,000.00	Mechanical & Aerospace Engineering	College of Engineering
\$77,690.00	Special Collections & Archives	University Libraries
\$30,000.00	College of Veterinary Medicine Building	College of Veterinary Medicine
\$30,000.00	Piano & Organ	College of Arts & Sciences
\$30,000.00	Football Recruitment & Retention & Mens Basketball Recruitment & Retention	Athletics
\$72,450.00	Old Main Wifi Towers	University Advancement
\$35,000.00	Gregg and Julie Erickson Simonds Graduate Research Fund	Quinney College of Agriculture & Natural Resources
\$37,831.90	Obert C. Tanner Lecture Series in Caine College of the Arts & Humanities and Social Sciences	College of Arts & Sciences
\$1,488,725.00	Bastian Agricultural Center	Extension
\$25,000.00	Mitch & Leslie Butikofer Scholarship Endowment	College of Engineering
\$25,000.00	Women's Volleyball	Athletics
\$600,000.00	Football Recruitment & Retention	Athletics
\$25,000.00	Michael Ballam Endowment	College of Arts & Sciences
\$50,000.00	Norman Savoie French Scholarship Endowment	College of Arts & Sciences
\$130,000.00	Mens Basketball Recruitment & Retention	Athletics

Major Gifts

June 3, 2025 to September 1, 2025
(continued)

Fall 2025

University Advancement Report

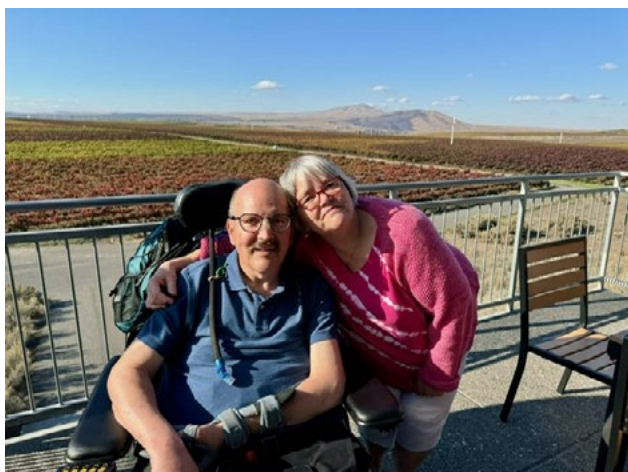
Amount	Purpose	Division
\$25,000.00	Lundahl Summer Band Endowment	College of Arts & Sciences
\$25,000.00	Utah Public Radio	College of Arts & Sciences
\$100,000.00	Mens Basketball Recruitment & Retention	Athletics
\$90,000.00	Ivan Bowen Family Foundation Swaner Support Fund	Extension
\$30,000.00	Western Ranch Management Academy	Extension
\$100,000.00	Delta Campus Collaboration	Statewide Campuses-Non Residential
\$25,000.00	Emma Eccles Jones CEHS & Jon M. Huntsman School of Business	EEJ Education & Human Services & Jon M Huntsman School of Business
\$30,000.00	Joseph G. & Karen W. Morse Scholarship Endowment in Honors	Provost & Executive Vice President
\$25,000.00	Research Support - Van Vliet	Quinney College of Agriculture & Natural Resources
\$25,000.00	Institute of Land, Water & Air	President
\$100,000.00	Hydraulics Research Workshop Fund	College of Engineering
\$34,000.00	Alan S. Peck Geoscience Scholarship, ASTE Scholarship, and ADV Sciences Scholarship	Quinney College of Agriculture & Natural Resources
\$50,000.00	Brown Family Foundation Swaner Support	Extension
\$36,000.00	FJ Management Impact Fund Scholarship	University Advancement
\$26,000.00	Beth & Kurt Seibert Endowed Scholarship	College of Arts & Sciences
\$37,932.73	Extension	Extension
\$36,383.39	Dr. Anthony LaPray Scholarship Endowment	EEJ Education & Human Services
\$25,000.00	Utah Public Radio	College of Arts & Sciences
\$975,000.00	Teacher Education Retention	EEJ College of Education & Human Services
\$250,000.00	W. Brent & Beverley Robinson Endowment	College of Engineering
\$25,000.00	Outdoor Product Design & Development	Quinney College of Agriculture & Natural Resources
\$25,000.00	Hydraulics Research Workshop Development Fund	College of Engineering
\$5,500,000.00	J. Duncan Brite Non-American History Scholarship Endowment, George Ellsworth American History Scholarship Endowment, Caine Endowed Directorship, and George Ballif Caine Dairy Student Scholarship Endowment	Quinney College of Agriculture & Natural Resources
\$106,233.00	BUILD Dairy General Support	Quinney College of Agriculture & Natural Resources
\$48,000.00	Emma Eccles Jones CEHS	EEJ Education & Human Services
\$100,000.00	JQL Institute for Land, Water & Air	President
\$100,000.00	JQL Institute for Land, Water & Air	President
\$44,053.41	College of Engineering	College of Engineering
\$100,000.00	Richard W. & Moonyeen R. Anderson Scholarship Endowment Quasi	College of Engineering
\$30,000.00	Western Ranch Management Academy	Extension



The Art of Teaching: USU Alum Billie Sessions Uplifts Future Educators

For Billie Palmer Sessions, art has always been more than a subject — it's a way of seeing, thinking, and connecting with the world. A proud alumna of Utah State University, Billie has devoted her life to visual art as an educator, curator, artist, researcher, author, and advocate. And now, through the creation of an endowment in the [Caine College of the Arts](#) and a major gift to the university's [Nora Eccles Harrison Museum of Art](#) (NEHMA), she is ensuring that future generations of artists and educators have the same transformative opportunities she did.

[Read More](#)



Language, Learning, and the Power of Giving: Cheryl Riniker's Planned Gift to USU

Cheryl Riniker has always believed in the power of education to change lives, because she's seen it firsthand. As a Utah State University alumna with a bachelor's degree in French '85 and a master's degree in English '87, she credits her time at USU with helping her build the foundation for a long and fulfilling career in the tech industry. Now, through a [planned gift](#) to the [Carl T. Degener Memorial Scholarship Endowment](#) in the [Department of World Languages and Culture](#), she's ensuring that future Aggies can pursue the same kind of transformative experience.

[Read More](#)



A Path Beyond the Playground: Wesley and Lorinda Mortensen's Gift for Outdoor Learning at Edith Bowen

When Wesley and Lorinda Mortensen considered how they might give back to Utah State University — the place where their story began and where their children's stories are still unfolding — the answer came as naturally as a walk through Logan Canyon: they would invest in outdoor education for elementary-aged children. Both proud USU alumni and parents of five, the Mortensens recently established the [Wesley and Lorinda Mortensen Outdoor Education Endowment Fund](#) at Utah State University's Edith Bowen Laboratory School. Their generous gift provides a dedicated mini bus to support student field experiences and creates an endowment that will ensure outdoor experiential learning thrives at Edith Bowen for generations to come.

[Read More](#)



Upcoming Events

- USU Credit Union Alumni Golf Tournament – September 15
- Aggies in Box Elder Bingo Night – September 19
- Tunes & Tradition Alumni Trip – September 21-28
- All-Aggie Tailgate at Vanderbilt – September 27
- Aggies In Hawaii Alumni Trip – October 7-12
- All-Aggie Tailgate at Hawaii – October 11
- Homecoming Week – October 13-18
 - Running With the Bulls 5K – October 18
 - Homecoming Parade – October 18



Check out Homecoming week activities usu.edu/homecoming
and more upcoming alumni events usu.edu/alumni/events

Past Events



**Cache AirFest
VIP Breakfast**
119 Attendees

**Cache AirFest
Main Event**
1,208 Attendees

Emeriti June Program
32 Attendees

Aggies in the Basin Rodeo Night
85 Attendees



**Aggies in Davis
Farmington & Bountiful Parades**
Chapter committee participation



Aggie Day with the Salt Lake Bees
142 Attendees

Emeriti July Program
36 Attendees



Aggies in Davis Movie Night
150 Attendees

USU Eastern Alumni Town Ties

250 Attendees



Tooele Movie Night

65 Attendees

Emeriti August Program

32 Attendees



All-Aggie Tailgate at Texas A&M

225 Attendees



Aggies in Gorongosa

14 Attendees

Aggies in the Basin Bingo Night

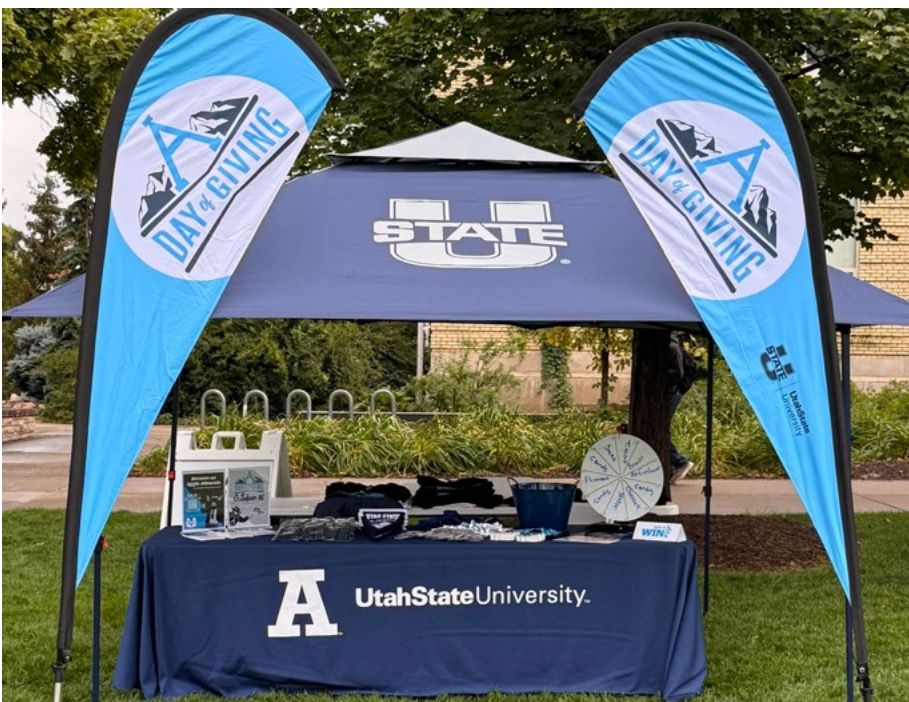
32 Attendees



Meet Sage, USU's Virtual Engagement Officer

Powered by artificial intelligence, our virtual engagement officer is being developed to help us accelerate our engagement and fundraising efforts.

Learn more: utahstateuniversity.ai



USU's Day on The Quad

Even with the rain, Day On The Quad was one of the biggest campus community gatherings. More than 400 community and campus groups participated to support USU students and highlight the services of their organizations. USU's Annual Giving team is always excited to be a part of this event to teach students about A Day of Giving. This event hosts more than 5,000 student attendees each year.

Upcoming and Ongoing Campaigns



- Day of Giving – October 16, 2025
Learn how you can get involved at: adayofgiving.usu.edu
 - Help spread the word using #24hrs2give on your favorite social channels
 - Goal: 1,000 donors
 - 2024 Results: \$399,454 raised, 760 donors to 204 areas across the university
- Employee Appreciation Day Booth – October 3, 2025
- Fall USU Mailer – November
- Campus-Wide Mailer – November
- Year-End Email Campaign – December
- Lapsed Donor Emails – Monthly

Alumni Center for Engagement (Phonathon) Fall Calling

- Lybunts (donors who gave last year but not this year)
- A Day of Giving
- Fall and Campus-Wide Mailer follow up
- Thankathon



Current & Upcoming AggieFunded Campaigns

SNAC, MHR, JCOM, SAA





2024-25 By The Numbers:

Event Support

The Stewardship events team executed or supported more than 50 events in FY25. Support ranged from creating and covering the fees for registration pages to full event planning and execution.

Some of our largest events included:

- Founders Day and Old Main Society Celebration
- Old Main Society Christmas in Montpelier lunch and discussion
- President's Garden Party

Acknowledgments

Stewardship has implemented a program to ensure every gift is acknowledged.

4,482 Thank you postcards for gifts less than \$1,000

187 Personalized thank you letters from USU President and Vice President of Advancement

445 Memorial and honor thank you gift cards for gifts given in honor of those who have passed away, or a gift in their honor

1,097 Thank you cards from the President for recurring gifts

Impact Reporting

Impact reports are sent to all donors so they understand how their gift is making a difference.

10,282 Impact Report postcards directing donors to the impact report website

1,152 Donors received an endowment report

7 Personalized impact reports were created

Engagement

Engagement is important to help donors feel appreciated and part of the Aggie family.

1,896 Birthday cards to Old Main Society members and other supporters

99 Holiday gifts sent to the highest-level supporters

1,344 Old Main Society holiday cards mailed

Ongoing Unit Stewardship Training

A lot of important stewardship happens at the unit level, so the Stewardship team works hard to support the unit by providing ongoing training, helping or advising on unit events, and assisting with the questions, challenges, and opportunities that arise.

Welcome New Team Members

(since June 1, 2025)

Join us in welcoming our new team member as we continue to expand our reach and secure increased philanthropic support for our ambitious Create Your Aggie Impact initiative-driven fundraising campaign. Together, we're helping Utah State become the leading model of the modern land-grant university.



Betsy Clark
Financial Officer



Alana Ward
Student Alumni and Networking
Coordinator



Matt Rudzinski
Social Media Manager

Policy 2400: Campus Closure

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EXECUTIVE SUMMARY

USU POLICY 2400: Campus Closure

Category: Community Expectations

Subcategory: Safety & Risk Management

Covered Individuals: Students, Faculty, Staff, and Visitors

Responsible Executive: Vice President of Operational Strategy

Policy Custodian: Executive Director of Public Safety

Background

Although campus closures or delayed starts do not occur often, closures and delays do occur. The most common contributor to a closure or a delay is weather events; however, emergency situations may require a closure as well. These closures or delays are to protect the safety of students, faculty, staff, and visitors.

USU Policy 2400 is an existing University Policy, and the proposed substantive changes accomplish the following:

- updating the policy to reflect current plans utilized for campus closures;
- updating the policy to reflect current University practices; and
- authorizing any campus closures or delays.

Key Provisions of the Campus Closure Policy:

- Updates the policy to reflect current plans utilized for campus safety alerts.
- Outlines authority to close any USU campus.
- Removes procedures from the policy and references appropriate plans.

University Policy 2400: Campus Closure

Category: Community Expectations

Subcategory: Safety & Risk Management

Covered Individuals: University Employees, Students, and Visitors

Responsible Executive: Executive Vice President & Chief Operating Officer

Policy Custodian: Office of Public Safety, Executive Director of Public Safety

Last Revised: 2025/MM/DD

Previous USU Policy Number: 507

2400.1 PURPOSE AND SCOPE

The purpose of this policy is to (i) protect the health and safety of all students, staff, faculty, and visitors to any university property and; (ii) sustain business continuity and previously scheduled academic activities of faculty and students, including classes, research, athletics, rehearsals, practices, and study sessions.

2400.2 POLICY

Utah State University (USU) reserves the right to close campus, research, and facilities as needed.

USU will endeavor to issue notifications regarding closures via the most effective means of communication at the time of closure to students, faculty, staff, and campus visitors.

Unit and Department leaders shall designate which positions are essential and who must report to work to ensure the continued operation of the university in the event of closure.

2400.3 RESPONSIBILITIES

3.1 University President

The President, or the President's designee, is responsible for determining whether USU and its campuses will close, partially close, or delay start.

3.2 Executive Vice President & Chief Operating Officer

The Executive Vice President & Chief Operating Officer is responsible for coordinating information and action with the President and other Leadership members.

3.3 Executive Director for Public Safety and Emergency Management Department

The Executive Director for Public Safety and the Emergency Management Department are responsible for advising the President and the Executive Vice President & Chief Operating Officer and other administrators on severe weather conditions, emergencies, and other special circumstances that may warrant a campus closure, partial closure, or delayed start.

3.4 Senior Vice President for University Marketing and Communications

The Senior Vice President and the University Marketing and Communications Department are responsible for preparing all necessary communications and determining the most appropriate means for communicating a campus closure, partial closure, or delayed start.

2400.4 RELATED USU POLICIES

- [USU Policy 2402 – Public Safety, Response, and Reporting](#)
- [USU Policy 3014: Safety and Health](#)

2400.5 DEFINITIONS

- **Essential Positions** means a role that is critical for maintaining the health, safety, and well-being of the university community during emergencies or crises. Employees in these positions are required to be physically present at the university or work remotely to ensure continuity of key operations and protect university property.

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

- Severe Weather Plan

Guidance

- [Delayed Start and Closure Pay Guidelines, January 2023](#)

Contacts

- Executive Director of Public Safety -
<https://www.usu.edu/directory/?person=56DB09FECDEBC4C3D7>
- Director of Emergency Management -
<https://www.usu.edu/directory/?person=56DB09FFC9EFC1C3D4>

POLICY HISTORY

Original issue date: 2001/12/14

Last revised date: 2025/MM/DD

Next scheduled review date: 2028/03/01

Previous revision dates: 2001/12/14; 2022/06/23



University Policy 2400: Campus Closure

Category: Community Expectations

Subcategory: Safety & Risk Management

Covered Individuals: University Employees, Students, and Visitors

Responsible Executive: Executive Vice President & Chief Operating Officer

Policy Custodian: Office of Public Safety, Executive Director of Public Safety

Last Revised: 2025/MM/DD

Previous USU Policy Number: 507

2400.1 ~~POLICY~~ PURPOSE AND SCOPE

~~During severe inclement weather, emergencies or special situations, the University may have a full or partial closure. During official closures budgeted employees will be given administrative leave for regularly scheduled work hours as directed by the President. Payroll employees will not be paid during closures unless work is actually performed.~~

The purpose of this policy is to (i) protect the health and safety of all students, staff, faculty, and visitors to any university property and; (ii) sustain business continuity and previously scheduled academic activities of faculty and students, including classes, research, athletics, rehearsals, practices, and study sessions.

2400.2 ~~DEFINITION~~ POLICY

2.1 ~~Essential Personnel~~

~~Employees of the University who, due to the nature of their assignments, must continue to perform duties even during times of full or partial closure.~~

Utah State University (USU) reserves the right to close campus, research, and facilities as needed. ~~due to severe weather conditions, emergencies, or other special circumstances.~~

USU will endeavor to issue notifications regarding closures via the most effective means of communication at the time of closure to students, faculty, staff, and campus visitors.

Unit and Department leaders shall designate which positions are essential and who must report to work to ensure the continued operation of the university in the event of closure.

2400.3 ~~PROCEDURES~~ RESPONSIBILITIES

3.1 ~~Assessment and Approval~~ University President

- ~~(1) If severe weather, emergency or special circumstances occur, the Director of Facilities and the Director of University Police will assess circumstances and conditions and make a recommendation to the Provost and the Vice President for Finance and Administrative Services.~~

The President, or the President's designee, is responsible for determining whether USU and its campuses will close, partially close, or delay start.

~~(2) After evaluating the recommendation and supporting information the Provost and the Vice President for Finance and Administrative Services will recommend full or partial closure, or alternative actions to the President or his/her designee. With the approval of the president or his/her designee, the closure or alternative action will be initiated.~~

~~3.2 Notification~~ Executive Vice President & Chief Operating Officer

~~(1) KUSU FM 91.5 will be the prime public source of disseminating information concerning campus closure or other emergency or special plans. In addition other local public media sources will also be given the same information for dissemination.~~

The Executive Vice President & Chief Operating Officer is responsible for coordinating information and action with the President and other Leadership members.

3.3 Executive Director for Public Safety and Emergency Management Department

The Executive Director for Public Safety and the Emergency Management Department are responsible for advising the President and the Executive Vice President & Chief Operating Officer and other administrators on severe weather conditions, emergencies, and other special circumstances that may warrant a campus closure, partial closure, or delayed start.

3.4 Senior Vice President for University Marketing and Communications

The Senior Vice President and the University Marketing and Communications Department are responsible for preparing all necessary communications and determining the most appropriate means for communicating a campus closure, partial closure, or delayed start.

2400.4 RELATED USU POLICIES

- USU Policy 2402 – Public Safety, Response, and Reporting
- USU Policy 3014: Safety and Health

2400.5 DEFINITIONS

- **Essential Positions** means a role that is critical for maintaining the health, safety, and well-being of the university community during emergencies or crises. Employees in these positions are required to be physically present at the university or work remotely to ensure continuity of key operations and protect university property.

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

- Severe Weather Plan

Guidance

- Delayed Start and Closure Pay Guidelines, January 2023

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https://www.usu.edu/directory/?person=56DB09FECDEBC4C3D7](https://www.usu.edu/directory/?person=56DB09FECDEBC4C3D7)
- [Director of Emergency Management -
https://www.usu.edu/directory/?person=56DB09FFC9EFC1C3D4](https://www.usu.edu/directory/?person=56DB09FFC9EFC1C3D4)

POLICY HISTORY

[Original issue date: 2001/12/14](#)

[Last revised date: 2025/MM/DD](#)

[Next scheduled review date: 2028/03/01](#)

[Previous revision dates: 2001/12/14; 2022/06/23](#)



UtahStateUniversity

POLICY MANUAL

OPERATING POLICIES AND PROCEDURES

Number 2400

Subject: University Closure

Effective Date: February 24, 1997

Revision Date: June 24, 2022

Effective Date of Last Revision: June 24, 2022

Previous USU Policy #: 507: University Closure

2400.1 POLICY

During severe inclement weather, emergencies or special situations, the University may have a full or partial closure. During official closures budgeted employees will be given administrative leave for regularly scheduled work hours as directed by the President. Payroll employees will not be paid during closures unless work is actually performed.

2400.2 DEFINITION

2.1 Essential Personnel

Employees of the University who, due to the nature of their assignments, must continue to perform duties even during times of full or partial closure.

2400.3 PROCEDURES

3.1 Assessment and Approval

(1) If severe weather, emergency or special circumstances occur, the Director of Facilities and the Director of University Police will assess circumstances and conditions and make a recommendation to the Provost and the Vice President for Finance and Administrative Services.

(2) After evaluating the recommendation and supporting information the Provost and the Vice President for Finance and Administrative Services will recommend full or partial closure, or alternative actions to the President or his/her designee. With the approval of the president or his/her designee, the closure or alternative action will be initiated.

3.2 Notification

(1) KUSU FM 91.5 will be the prime public source of disseminating information concerning campus closure or other emergency or special plans. In addition other local public media sources will also be given the same information for dissemination.

Handling Notifications, Expectations, and Pay for Delayed Start

Delayed starts or early departures are primarily about employee safety and may result in not all employees being treated the same given the circumstances. Delayed starts and early departures do not affect employees who are on approved/scheduled paid leaves. Some location specific jobs may need to stay on or come to campus regardless (e.g. snow removal, HVAC, research animal and plant care staff, police officers, etc.) of any announcement. Supervisors should clarify expectations with their respective employees.

What Happened?	What to Do?	
Scenario	If Position is Eligible or Scheduled for Telework	If Position is Not Eligible for Telework
I received notice of delayed start before I left home for work.	Begin work remotely (no need to wait for delayed start).	Wait to report to work until delayed start time.
I received notice enroute to work.	Return home until announced start time. Begin work remotely.	Return home until delayed start time.
I received notice after arriving to and starting work.	Confirm with supervisor on what to do. If unsafe to remain but safe to leave, return home until delayed start time and work remotely. If safer to remain and work, do so.	Confirm with supervisor on what to do. If unsafe to remain but safe to leave, return home until delayed start time. Location specific jobs may need to stay on campus (snow removal, etc.).
I received notice of delayed start and my home is part of a power and/or internet outage.	Confirm with supervisor on what to do. If home power/internet is out, and it is safe to report to work on campus, you may do so at delayed start time. If home power/ internet is out, and it's unsafe to report to work on campus, wait until announced work start time or until home power is restored to work remotely—whichever is first.	Wait to report to work until delayed start time.
My supervisor requested me to leave early due to impending weather.	Go home and continue work remotely.	Go home. Location specific jobs may need to stay on campus (snow removal, etc.).
Compensation and time submittal for those <u>eligible</u> for telework and/or those who have location specific responsibilities and work will be handled through normal processes. Compensation for those <u>not eligible</u> for telework during a USU delayed start: Exempt: No change in time submittal. Nonexempt: Submit "University Closure" Leave Type in MyTime Wage/Hourly: Paid based on hours worked. Supervisor may flex schedule to recover lost hours. For additional questions not covered above, employees should consult with their supervisor or contact Human Resources.		

Policy 4202: Course Fees

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EXECUTIVE SUMMARY

USU Policy 4202: Course Fees

Category: Academic Affairs

Subcategory: Academic Fees & Awards

Covered Individuals: Students

Responsible Executive: Provost and Executive Vice President

Policy Custodian: Office of the Provost and Executive Vice President, Vice President and Chief of Staff to the Provost

BACKGROUND:

Utah State University (USU) has revised its course fee policy to ensure alignment with the Utah System of Higher Education (USHE) standards. Historically, USU allowed course fees to fund graduate teaching assistants (GTAs) for teaching courses and labs. However, this practice no longer aligns with USHE policy. In response, USU successfully secured \$1.3 million in central funding to support GTAs who deliver new instructional content. This funding shift eliminates the need to use course fees for GTA salaries and brings USU into full compliance with USHE requirements.

Additionally, the former policy combined policy and procedural content into a single document. As part of this revision, procedures have been separated into a standalone document for clarity and better governance.

Alignment with USU's Mission

This policy change supports USU's mission of providing exceptional education and enhancing learning experiences. By reallocating funding for GTAs centrally, the university reduces financial burdens on students while maintaining high-quality teaching support.

Impact on the USU Community

The policy benefits students by lowering course fees and reinforcing the appropriate and strategic use of such fees. These revisions also provide clearer oversight and controls, ensuring that all proposed course fees are justified and used as intended.

Regulatory and Policy Implications

The revised policy helps USU maintain affordable education while aligning with broader USHE guidelines. It ensures proper governance of course fee usage, particularly in avoiding the previous practice of funding GTAs with course fees.

Risk Assessment

Without this revision, USU would lack necessary controls to evaluate fee appropriateness and usage, potentially leading to non-compliance and misallocated funds. This policy introduces vital checks and accountability structures.

KEY PROVISIONS OF THE NEW/REVISED POLICY:

- **Primary Change:** The section “Approved Uses of Course Fees” was narrowed under “Teaching Support.” The previous approval of “teaching assistants” has been replaced with more specific roles such as mentors, tutors, student teaching mentors/supervisors, and professional preceptors, aligning with USHE guidelines.
- **Clarification of Roles:** While no new requirements were introduced, the responsibilities of various university groups were clarified to support proper implementation.
- **Substantive Amendments:** The revised policy clarifies what constitutes an approved use of course fees and specifies the responsibilities of key stakeholders.
- **Stakeholder Involvement:** Feedback was solicited and considered from the Course Fee Committee, University Audit, and the Provost. Many of their recommendations were incorporated into the final policy.

IMPLEMENTATION PLAN:

USU has already enacted the changes necessary to comply with this policy. Central funding for GTAs will begin in Fall 2025. Academic units with course fees planned for Fall 2026 have been guided to revise their requests accordingly, removing GTA funding from their proposals.

- **Communication Strategy:** Deans and department heads were informed of the upcoming changes during the previous academic year. They understand that GTAs can no longer be funded through course fees.
- **Procedural Updates:** All course fee-related procedures were reviewed and revised in collaboration with stakeholders. These updates will be reflected in required course fee training, which must be completed before submitting any new proposals.
- **Resource Allocation:** An investment of \$1.3 million was necessary to transition GTA funding from course fees to central support. These funds will be distributed to academic units beginning Fall 2025.

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Covered Individuals: Students

Responsible Executive: Provost and Executive Vice President

Policy Custodian: Office of the Provost and Executive Vice President, Vice President and Chief of Staff to the Provost

Last Revised: 2025/MM/DD

Previous USU Policy Number: 538

4202.1 PURPOSE AND SCOPE

This Policy establishes a framework to ensure responsible management, appropriate guidelines, and internal controls for Course Fees, including fees assessed for credit-bearing courses. It is intended to build student trust by ensuring fees collected are used solely for the direct benefit of the students who pay them. This Policy also supports USHE's strategic goal of affordability by establishing routine reviews of how Course Fees impact the cost of attendance.

4202.2 POLICY

Course Fees are intended to enhance the educational experience and may be assessed when existing funding for a specific course is insufficient or unavailable. General expenses for course development, instruction, and assessment are the responsibility of the department and college.

2.1 Course Fee Guidelines

Course Fees are reviewed every three years and must be based on realistic cost estimates or prior actual expenses, while being kept as low as possible. These fees may not exceed the actual cost of providing the service or materials, and the funds collected should directly benefit the students enrolled in the semester they are charged. Additionally, Course Fees can support the scheduled repair or replacement of course Equipment. All Course Fees must be clearly disclosed at the time of registration. Billing and payment must be processed through standard university business procedures. The collection of Course Fees in the classroom is strictly prohibited.

2.2 Approved Use of Course Fees

Course Fees may be used only for expenses that directly support and enhance student learning in the course.

Course Fees may be used to support the following:

- Software licensing, upgrades, or usage
- **Equipment:** usage, repair, replacement, or maintenance
- Usage and replenishment of **Materials and Supplies**
- Specific types of teaching support such as **Mentors or Tutors**, **Student Teaching Mentors** and **Supervisors**, and **Professional Preceptors**
- Field trips and class-wide activities

- Honoraria for visiting experts

Expenditures outside of these categories are not permitted.

2.3 Course Fee Accounts

Course Fee accounts are actively monitored and adjusted as necessary to ensure ongoing compliance with university policies. Accounts that show inadequate or excess balances or atypical charges will be subject to a compliance review. This review will assess whether the fees collected align with actual course-related expenses and whether any corrective actions are needed to maintain financial integrity and policy adherence.

2.3.1 Inadequate Account Balance

Departments are responsible for resolving any deficits in Course Fee accounts using their departmental funds. Under no circumstances may future students be charged to cover past deficits. If course costs increase, or if there is a change in pedagogy that affects Course Fee requirements, departments may submit an [Off-Cycle Review](#) request.

2.3.2 Excess Account Balance

If a surplus in a Course Fee account exceeds reasonable expectations, a fee reduction or removal must be implemented. Any remaining funds from discontinued courses must be used in accordance with the originally approved intent and require approval from the Office of the Provost and Executive Vice President. Surplus funds may not be transferred to general departmental budgets under any circumstances.

2.3.3 Refunds

Refunds are issued only if the course activity changes. No other refunds will be granted.

2.3.4 Unexpected Course Changes

Instructors may adjust or modify course activities as needed to meet learning objectives, provided these changes occur within the same semester and remain consistent with the original intent of the fee.

2.3.5 Repair and Replacement of Equipment

Fees may be accumulated over time to fund the repair or replacement of high-cost Equipment. These funds must be carefully monitored to ensure they are used appropriately and that account balances remain within acceptable limits.

2.4 Course Fee Committee

The [Course Fee Committee](#) consists of a minimum of seven members appointed by the Office of the Provost and Executive Vice President. Membership includes:

- Representative from the Office of the Provost and Executive Vice President
- Administrative representative
- Faculty representative
- Scheduling representative
- Office of the Registrar representative
- Controller's Office representative
- Student representative

4202.3 RESPONSIBILITIES

3.1 Course Instructors

- Initiate Course Fee proposals.
- Utilize fees as approved.
- Monitor account transactions for accuracy using monthly reports.

3.2 Business Services Personnel

- Assist instructors in preparing course-specific budget templates, including those for [Shared Resource](#) expenses, to ensure consistency and accuracy.
- Review all Course Fee requests to confirm that requested items comply with university policy and guidelines.
- Verify the accuracy of submitted budgets, ensuring that projected costs are reasonable and well-documented.
- Ensure that revenue is distributed appropriately.
- Ensure that the correct index codes are established for tracking purposes.
- Continuously monitor spending activity within Course Fee accounts and make adjustments to transactions as necessary to maintain compliance and financial accuracy.

3.3 Department Head

- Conduct periodic reviews of departmental Course Fees process.
- Approve fee requests.
- Liaise between instructors and business services personnel.
- Coordinate Shared Resource budgets with all stakeholders.
- Respond to compliance reviews.
- Cover deficits with departmental funds.
- Submit reports during the three-year review cycle.

3.4 Course Fee Committee

- Oversee the Course Fee process.
- Evaluate requests for policy alignment.
- Give final approval of allowed Course Fees.
- Participate in compliance reviews.

3.5 Human Resources

- Partner with the Course Fee Committee to develop training programs for managing Course Fees.

3.6 Controller's Office

- Create index accounts.
- Generate financial reports.
- Provide financial oversight and leadership.

3.7 Academic Deans

- Ensure proper use of fees and address misuse.

3.8 Office of the Provost and Executive Vice President

- Provide final approval and oversight to the process.
- Ensure accountability in fee management.

3.9 Board of Trustees

- Review the Course Fee Committee's recommendations on an annual basis, as presented in a written report.

3.10 Internal Audit

- Conduct periodic audits of the institutions' Course Fees to ensure compliance with policy.

4202.4 REFERENCES

- [Utah System of Higher Education Policy R517: Course and Program Fees](#)

4202.5 RELATED USU POLICIES

- [Policy 4203: Logan Campus General Student Fee Policy](#)
- [Policy 4204: Statewide Campuses General Student Fee Policy](#)

4202.6 DEFINITIONS

- **Course Fee.** A Course Fee is a charge applied at the course level for expenses directly related to students' participation in the course.
- **Course Fee Committee.** A committee that reviews and approves the use of Course Fees and conducts compliance reviews of related expenses.
- **Equipment.** High-cost items used for instructional purposes that have a useful life of greater than one year. Equipment may be used and paid for by one or more courses.
- **Materials and Supplies.** Items consumed or used during the semester the course is taught, ensuring enrolled students directly benefit.
- **Off-Cycle Review.** Under certain circumstances, departments may request Course Fee changes outside of the regular review cycle by submitting an off-cycle review request. Approved circumstances may include a new course that has been approved or an urgent need for a new or increased fee prior to the start of the three-year cycle.
- **Professional Preceptor.** An experienced individual in a profession (e.g., healthcare) who provides guidance, supervision, and mentorship to someone transitioning into that profession.
- **Repair and Replacement Index.** Index used to track revenue and expenses for high-cost items used exclusively by a single course. These items are expected to require repair or replacement less frequently than each semester.
- **Shared Resources.** Materials, supplies, or Equipment that are used by multiple courses. The associated costs for these resources are distributed equitably among the courses that use the items.
- **Shared Resource Index.** Index used to track revenue and expenses for materials, supplies, or Equipment shared by two or more courses.
- **Standard Operating Index.** Index used to track revenue and expenses for a single course. Expenses may include instructional materials, supplies, or services consumed during the semester the course is offered, ensuring enrolled students directly benefit from the fees they paid. The balance at the end of each semester should be as close to zero as possible.

- **Student Teacher Mentor.** An experienced educator who guides and supports the student teacher's development.
 - **Student Teacher Supervisor.** A professional educator from the university or a school district who oversees the practical experience of student teaching.
 - **Tutor or Mentor.** A graduate or undergraduate student who provides academic support to a single undergraduate student or a small group of undergraduate students.
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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

- Course Fee Procedures

Related Forms and Tools

- [Course Fee Budget Template](#)
- [Course Fee Shared Resources Template](#)
- [Course Fee Template Instructions](#)

Contacts

- [Office of the Provost & Executive Vice President](#)

POLICY HISTORY

Original issue date: 2021/01/27

Last revised: 2025/MM/DD

Next scheduled review date: 2028/06/01

Previous revision dates: N/A

4202 PR-1: Course Fee Procedures

Effective: 2025/MM/DD

Last Revised: 2025/MM/DD

Approved by: Vice President and Chief of Staff to the Provost

Purpose

USU Policy 4202 establishes the appropriate use of course fees and outlines accountability standards.

Definitions

Definitions relevant to these Procedures are set forth in University Policy 4202: Course Fees.

Structure of the Course Fee Committee

The Course Fee Committee is a standing committee approved by the Office of the Provost and Executive Vice President. Voting members include:

- Office of the Provost and Executive Vice President Representative (Chair)
- Administrative Representative
- Faculty Member
- Student Representative – USUSA Vice President
- Scheduling Representative
- Registrar's Office Representative
- Controller's Office Representative

Procedures

Three-Year Review

Course fees are reviewed on a three-year rotating schedule.

- Proposals are due by **November 1**. Late requests will not be considered.
- Approved fees take effect the **following fall semester**.

The Process

- Instructor submits the form and the completed budget templates in ServiceNow.
- Business Services Representative reviews the proposal.
- Course Fee Committee reviews the application and budget template(s) for accuracy.
- Department Head approves the proposal.
- Course Fee Committee gives final approval or returns the proposal for correction.

Off-Cycle Review

Departments may submit off-cycle requests for new, increased, or decreased fees under special circumstances, such as a newly approved course or an urgent need.

Proposal Deadlines

- August 15 for Spring Semester
- December 1 for Summer Semester
- January 10 for Fall Semester
- *Late submissions will not be considered.*

The Process

- Instructor submits the form and the completed budget templates in ServiceNow.
- Business Services Representative reviews the proposal.
- Course Fee Committee reviews the application and budget template(s) for accuracy.
- Department Head approves the proposal.
- Course Fee Committee gives final approval or returns the proposal for correction.

One-Semester Reduction

A one-time course fee reduction may be requested if course activities change, such as cancellation of a field trip. If approved, the entire class will be refunded. No other refunds will be given.

- The form is available from **two weeks before the semester starts through the last day of the semester.**
- *Late submissions will not be considered.*

The Process

- Faculty member submits the form in ServiceNow.
- Provost Office Representative reviews and approves the request.
- If approved, refunds are processed for students.

Procedural Review

Procedures will be reviewed by the Course Fee Committee every three years to ensure accuracy, consistency, and alignment with university policy. Updates will be documented and communicated to all stakeholders.

Notification to Students

Students are notified of course fees at the time of registration.

Approved Use of Course Fees

Refer to Policy 4202: *Course Fees* for a list of allowable expenses.

Non-Allowable Expenses

The following are examples of non-allowable uses of course fees. This is not an exhaustive list:

- Expenses that do not benefit students within the course
- Classroom furnishings (e.g., desks, chairs, stools, tables, AV equipment, projection screens), remodeling, or maintenance
- Usual classroom equipment and maintenance
- Textbooks and required printed or electronic learning materials
- Materials students can purchase directly through the bookstore, unless bulk purchase by the instructor saves students money

Use of Excess Funds When a Course is Discontinued

When a course is discontinued, the remaining funds must be used with the originally approved intent of the funds. Approval is required from the Office of the Provost and Executive Vice President.

Additional Information

For more information on course fees, refer to [University Policy 4202: Course Fees](#).

Questions regarding these procedures can be directed to the Office of the Provost and Executive Vice President Program Coordinator at 435-797-0121.



University Policy 4202: ~~Course Fee~~ Course Fees

Category: Academic Affairs

Sub Category: Academic Fees & Awards

Covered Individuals: Students

Responsible Executive: ~~Executive Vice President and~~ Provost and ~~Executive Vice President~~

Policy Custodian: Office of the Provost and Executive Vice President, ~~Assistant Provost~~ Vice President and Chief of Staff to the Provost

Last Revised: ~~2021/01/27~~ 2025/MM/DD

Previous USU Policy Number: 538: ~~Course Fee~~ Course Fees

4202.1 PURPOSE AND SCOPE

This Policy ~~Establishes~~ the a-framework to ensure responsible management, appropriate ~~that proper~~ stewardship, guidelines, and internal controls for Course Fees, including fees assessed for credit-bearing courses. ~~are in place to achieve the highest level of~~ It is intended to build student trust by ~~e~~ Ensuring fees ~~that~~ collected ~~fees~~ are used solely for the direct benefit of the students paying ~~who pay~~ them. This Policy also supports USHE's strategic goal of affordability by establishing routine reviews of how Course Fees impact the cost of attendance.

4202.2 POLICY

~~Course fee~~ Course Fees are ~~used~~ intended to enhance the educational experience and may be ~~charged~~ assessed when ~~other existing~~ funding support for a specific course is ~~inadequate~~ insufficient or unavailable. General ~~costs~~ expenses for course related to the development, instruction, and assessment ~~of courses are borne by~~ are the responsibility of the department and college.

2.1 ~~Course Fee~~ Course Fee Guidelines

~~Course fee~~ Course Fees are reviewed ~~on a regular, rotating schedule~~ every three years and must be ~~. The fee is~~ based on realistic cost estimates ~~of the costs or previous records of prior~~ actual ~~costs~~ expenses, while being and will be kept as low as possible. ~~The charge cannot~~ These fees may not exceed the actual cost of providing the ~~product or service~~ or materials, and the funds collected should directly benefit the students enrolled in the semester they are charged. ~~available to the student. Course fees should be used~~ each semester for the benefit of the students who paid the fees. In some cases, this may include charging fees for equipment used in the course that must be replaced or repaired on a rotating schedule. ~~Course fee~~ Additionally, Course Fees can support the scheduled repair or replacement of course Equipment. All Course Fees ~~are~~ must be clearly disclosed ~~to students~~ at the time of registration. ~~The amount and purpose of the course fee must be clearly stated on the first page of the course syllabus.~~ Billing and payment of ~~course fees~~ must be processed ~~are~~ through standard uUniversity business practices procedures. ~~The C~~ Collection of ~~course fee~~ Course Fees in the classroom is ~~not allowed~~ strictly prohibited.

2.2 Approved Use of ~~Course Fee~~ Course Fees

~~Approved use of course fees may include:~~ Course Fees may be used only for expenses that directly support and enhance student learning in the course.

Course Fees may be used to support the following:

www.usu.edu/policies/4202/

- ~~Computers: use, replacement, repairs, and maintenance~~
- ~~Computer Software licensing; use, upgrades, and licensing, or usage~~
- ~~Equipment: use, age, repair, replacement, repairs, and or maintenance~~
- ~~Usage and replenishment of Materials, and Supplies, and consumables: use and replacement~~
- ~~Specific types of Student teaching assistants support such as Mentors or Tutors, Student Teaching Mentors and Supervisors, and Professional Preceptors~~
- ~~Field trips and class activities in which the entire class participates~~
- ~~Honoraria for Visiting experts~~

• Expenditures outside of these categories are not permitted.

2.3 Course Fee-Accounts

~~The available balance in course fee~~ Course Fee accounts are actively monitored and adjusted as necessary to ensure ongoing compliance with university policies. ~~will be reviewed annually with investigation occurring if the balance is +/- 10% of the expected annual course fee revenue.~~ Accounts that show inadequate or excess balances or atypical charges will be subject to a compliance review. This review will assess whether the fees collected align with actual course-related expenses and whether any corrective actions are needed to maintain financial integrity and policy adherence.

2.3.1 Account Surplus 2.3.1 Inadequate Account Balance

~~If the annual review of course fee balances indicates an excess balance (+10% of annual revenue), a course fee reduction or a one-time course fee removal request should be submitted. If a course fee is deleted and a balance remains, the remainder of the revenue should be used in accordance with the original approved budget. If a course is discontinued and a balance remains, the remainder of the revenue should be used to support similar student-oriented costs. Remaining course fees cannot be transferred to general departmental funds.~~

2.3.2 Account Deficit

Departments are responsible for resolving ~~course fee balance~~ any deficits in Course Fee accounts ~~by using their departmental funds.~~ ~~If course fee revenue is found to be insufficient to cover approved expenses, departments can submit a course fee increase request.~~ Under no circumstances may future students be charged to cover past deficits. If course costs increase, or if there is a change in pedagogy that affects Course Fee requirements, departments may submit an Off-Cycle Review request.

2.3.2 Excess Account Balance

If a surplus in a Course Fee account exceeds reasonable expectations, a fee reduction or removal must be implemented. Any remaining funds from discontinued courses must be used in accordance with the originally approved intent and require approval from the Office of the Provost and Executive Vice President. Surplus funds may not be transferred to general departmental budgets under any circumstances.

2.3.3 Refunds Policy

~~Under circumstances in which the purpose for the course fee is cancelled or unavailable, (e.g., a cancelled field trip), students will be refunded. Otherwise, no refunds will be given. In some cases, instructors may need to modify course activities. Instructors may exercise reasonable flexibility, as long as course fees are used to accomplish the same learning objectives and fees are expended during the semester they are accrued and in a manner consistent with policy.~~

Refunds are issued only if the course activity changes. No other refunds will be granted.

2.3.3 Unexpected Course Changes

Instructors may adjust or modify course activities as needed to meet learning objectives, provided these changes occur within the same semester and remain consistent with the original intent of the fee.

~~2.3.3~~ 2.3.5 Repair and Replacement of Equipment

~~Course fee~~Fees may be ~~accrued~~ accumulated over ~~several semesters or years~~ time to fund the repair ~~and~~ or replacement of ~~more expensive high-cost e~~Equipment. ~~In these cases, the balance from course fees~~ These funds must be carefully monitored to ensure ~~that course fees they~~ they are ~~collected, held, and~~ used appropriately ~~and that account balances remain within acceptable limits.~~

~~2.3.4 Accountability~~

~~Internal auditors, external auditors, and Provost's Office personnel have authority to review the effectiveness of course fee controls. They may randomly select courses to be audited for compliance with course fee policy and require the responsible college to justify account balances and document compliance with course fee policy.~~

2.4 Course Fee Committee

The Course Fee Committee consists of a minimum of seven members appointed by the Office of the Provost and Executive Vice President. Membership includes:

- Representative from the Office of the Provost and Executive Vice President
- Administrative representative
- Faculty representative
- Scheduling representative
- Office of the Registrar representative
- Controller's Office representative
- Student representative

4202.3 RESPONSIBILITIES

~~.1 Department Heads~~ 3.1 Course Instructors

- Initiate Course Fee proposals.
- Utilize fees as approved.
- Monitor account transactions for accuracy using monthly reports.

~~Responsible for reviewing and approving fee requests, writing the Department Head Overview Report, and monitoring uses of course fees.~~

~~.2 3.2 College Deans~~ Business Services Personnel

~~Responsible for final approval of all fee requests prior to forwarding to Course Fee Review Committee.~~

- Assist instructors in preparing course-specific budget templates, including those for Shared Resource expenses, to ensure consistency and accuracy.
- Review all Course Fee requests to confirm that requested items comply with university policy and guidelines.
- Verify the accuracy of submitted budgets, ensuring that projected costs are reasonable and well-documented.
- Ensure that revenue is distributed appropriately.
- Ensure that the correct index codes are established for tracking purposes.
- Continuously monitor spending activity within Course Fee accounts and make adjustments to transactions as necessary to maintain compliance and financial accuracy.

3.3 Department Head

- Conduct periodic reviews of departmental Course Fees process.
- Approve fee requests.
- Liaise between instructors and business services personnel.
- Coordinate Shared Resource budgets with all stakeholders.
- Respond to compliance reviews.
- Cover deficits with departmental funds.
- Submit reports during the three-year review cycle.

~~3.3.4~~ Course Fee Review Committee

~~Responsible for assessing if the requested fee is approvable according to policy, ensuring that expenditures are appropriate, and issuing final approval.~~

- Oversee the Course Fee process.
- Evaluate requests for policy alignment.
- Give final approval of allowed Course Fees.
- Participate in compliance reviews.

~~4 Department Business Manager~~ 3.5 Human Resources

~~Responsible for monitoring uses of course fees with department heads and providing support to correctly use course fees.~~

- Partner with the Course Fee Committee to develop training programs for managing Course Fees.

~~5~~ 3.6 Controller's Office

~~Responsible for creating new indexes, preparing summary reports, and providing additional support and leadership as needed.~~

- Create index accounts.
- Generate financial reports.
- Provide financial oversight and leadership

3.7 Academic Deans

- Ensure proper use of fees and address misuse.

3.8 Office of the Provost and Executive Vice President

- Provide final approval and oversight to the process.
- Ensure accountability in fee management.

3.9 Board of Trustees

- Review the Course Fee Committee's recommendations on an annual basis, as presented in a written report.

3.10 Internal Audit

- Conduct periodic audits of the institutions' Course Fees to ensure compliance with policy.

~~.6 Provost's Office~~

~~Provide oversight and support of procedures for course fee request, approval, and accountability.~~

4202.4 REFERENCES

~~Utah System of Higher Education Policy R510, Tuition. The Board shall annually review price competitive tuition data including general and course fee data.~~

- Utah System of Higher Education Policy R517: Course and Program Fees

4202.5 RELATED USU POLICIES

- ~~None~~
- Policy 4203: Logan Campus General Student Fee Policy
- Policy 4204: Statewide Campuses General Student Fee Policy

4202.6 DEFINITIONS~~.1 Course Fee~~

- ~~Utah State University defines a course fee as a charge applied at the course level for expenses directly related to the students' participation in a course.~~
- Course Fee. A Course Fee is a charge applied at the course level for expenses directly related to students' participation in the course.
- Course Fee Committee. A committee that reviews and approves the use of Course Fees and conducts compliance reviews of related expenses.
- Equipment. High-cost items used for instructional purposes that have a useful life of greater than one year. Equipment may be used and paid for by one or more courses.
- Materials and Supplies. Items consumed or used during the semester the course is taught, ensuring enrolled students directly benefit.
- Off-Cycle Review. Under certain circumstances, departments may request Course Fee changes outside of the regular review cycle by submitting an off-cycle review request. Approved circumstances may include a new course that has been approved or an urgent need for a new or increased fee prior to the start of the three-year cycle.
- Professional Preceptor. An experienced individual in a profession (e.g., healthcare) who provides guidance, supervision, and mentorship to someone transitioning into that profession.
- Repair and Replacement Index. Index used to track revenue and expenses for high-cost items used exclusively by a single course. These items are expected to require repair or replacement less frequently than each semester.
- Shared Resources. Materials, supplies, or Equipment that are used by multiple courses. The associated costs for these resources are distributed equitably among the courses that use the items.

- **Shared Resource Index.** Index used to track revenue and expenses for materials, supplies, or Equipment shared by two or more courses.
- **Standard Operating Index.** Index used to track revenue and expenses for a single course. Expenses may include instructional materials, supplies, or services consumed during the semester the course is offered, ensuring enrolled students directly benefit from the fees they paid. The balance at the end of each semester should be as close to zero as possible.
- **Student Teacher Mentor.** An experienced educator who guides and supports the student teacher's development.
- **Student Teacher Supervisor.** A professional educator from the university or a school district who oversees the practical experience of student teaching.
- **Tutor or Mentor.** A graduate student who provides academic support to a single undergraduate student or a very small group of undergraduate students.

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, subject to review by the USU Policy Committee.

RESOURCES

Procedures

- [Course Fee Procedures](#)

Guidance

Related Forms and Tools

- ~~None.~~
- [Course Fee Budget Template](#)
- [Course Fee Shared Resources Template](#)
- [Course Fee Template Instructions](#)

Contacts

- ~~Provost's Office, 435-797-1166~~
- [Office of the Provost & Executive Vice President](#)

POLICY HISTORY

Original issue date: 2021/01/27

Last review date: ~~N/A~~ [2025/MM/DD](#)

Next scheduled review date: ~~TBD~~ [2028/06/01](#)

Previous revision dates: ~~N/A~~ [N/A](#)

University Policy 4202: Course Fees

Category: Academic Affairs

Sub Category: Academic Fees & Awards

Responsible Executive: Executive Vice President and Provost

Policy Custodian: Office of the Provost, Assistant Provost

Last Revised: 2021/01/27

Previous USU Policy Number: 538: Course Fees

4202.1 PURPOSE AND SCOPE

Establishes the framework to ensure that proper stewardship, guidelines, and internal controls are in place to achieve the highest level of student trust. Ensure that collected fees are used for the direct benefit of the students paying them.

4202.2 POLICY

Course fees are used to enhance the educational experience and may be charged when other funding support for a specific course is inadequate or unavailable. General costs related to the development, instruction, and assessment of courses are borne by the department and college.

2.1 Course Fee Guidelines

Course fees are reviewed on a regular, rotating schedule. The fee is based on realistic estimates of the costs or previous records of actual costs and will be kept as low as possible. The charge cannot exceed the cost of providing the product or service available to the student. Course fees should be used each semester for the benefit of the students who paid the fees. In some cases, this may include charging fees for equipment used in the course that must be replaced or repaired on a rotating schedule. Course fees are disclosed to students at the time of registration. The amount and purpose of the course fee must be clearly stated on the first page of the course syllabus. Billing and payment of course fees are through standard University business practices. Collection of course fees in the classroom is not allowed.

2.2 Approved Use of Course Fees

Approved use of course fees may include:

- Computers: use, replacement, repairs, and maintenance
- Computer Software: use, upgrades, and licensing
- Equipment: use, replacement, repairs, and maintenance
- Materials, supplies, and consumables: use and replacement
- Student teaching assistants
- Field trips and class activities in which the entire class participates
- Visiting experts

2.3 Course Fee Accounts

The available balance in course fee accounts will be reviewed annually with investigation occurring if the balance is +/- 10% of the expected annual course fee revenue.

2.3.1 Account Surplus

If the annual review of course fee balances indicates an excess balance (+10% of annual revenue), a course fee reduction or a one-time course fee removal request should be submitted. If a course fee is deleted and a balance remains, the remainder of the revenue should be used in accordance with the original approved budget. If a course is discontinued and a balance remains, the remainder of the revenue should be used to support similar student-oriented costs. Remaining course fees cannot be transferred to general departmental funds.

2.3.2 Account Deficit

Departments are responsible for resolving course fee balance deficits by using departmental funds. If course fee revenue is found to be insufficient to cover approved expenses, departments can submit a course fee increase request.

2.3.3 Refund Policy

Under circumstances in which the purpose for the course fee is cancelled or unavailable, (e.g., a cancelled field trip), students will be refunded. Otherwise, no refunds will be given. In some cases, instructors may need to modify course activities. Instructors may exercise reasonable flexibility, as long as course fees are used to accomplish the same learning objectives and fees are expended during the semester they are accrued and in a manner consistent with policy.

2.3.3 Repair and Replacement of Equipment

Course fees may be accrued over several semesters or years to fund the repair and replacement of more expensive equipment. In these cases, the balance from course fees must be monitored to ensure that course fees are collected, held, and used appropriately.

2.3.4 Accountability

Internal auditors, external auditors, and Provost's Office personnel have authority to review the effectiveness of course fee controls. They may randomly select courses to be audited for compliance with course fee policy and require the responsible college to justify account balances and document compliance with course fee policy.

4202.3 RESPONSIBILITIES

3.1 Department Heads

Responsible for reviewing and approving fee requests, writing the Department Head Overview Report, and monitoring uses of course fees.

3.2 College Deans

Responsible for final approval of all fee requests prior to forwarding to Course Fee Review Committee.

3.3 Course Fee Review Committee

Responsible for assessing if the requested fee is approvable according to policy, ensuring that expenditures are appropriate, and issuing final approval.

3.4 Department Business Manager

Responsible for monitoring uses of course fees with department heads and providing support to correctly use course fees.

3.5 Controller's Office

Responsible for creating new indexes, preparing summary reports, and providing additional support and leadership as needed.

3.6 Provost's Office

Provide oversight and support of procedures for course fee request, approval, and accountability.

4202.4 REFERENCES

[Utah System of Higher Education Policy R510, Tuition.](#) The Board shall annually review price competitive tuition data including general and course fee data.

4202.5 RELATED USU POLICIES

- None

4202.6 DEFINITIONS

6.1 Course Fee

- Utah State University defines a course fee as a charge applied at the course level for expenses directly related to the students' participation in a course.

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, subject to review by the USU Policy Committee.

RESOURCES

Procedures

- [Course Fees.](#)

Guidance

- [Course Fees.](#)

Related Forms and Tools

- None.

Contacts

- Provost's Office, 435-797-1166

POLICY HISTORY

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