

UVU BOARD OF TRUSTEES

February 26, 2026

4:00pm Gateway Building

Board of Trustee Members Present

Scott Smith, Chair
Jeanette Bennett, First Vice Chair
Blake Modersitzki, Second Vice Chair
Justin Olson
Kristin Andrus
Bradley Herbert
Shauna Smith
Jared Finch
Andrea Clarke
Kyle Cullimore

Others Present

Geoff Landward, USHE Commissioner
Nathan Savage, UVU Foundation Chair

UVU Attendees

Astrid S. Tuminez, President
Kat Brown, Deputy Provost
Kyle Reyes, Vice President, Institutional Advancement
Christina Baum, Vice President, Digital Transformation
Jim Mortensen, Vice President, Finance
Marilyn Meyer, Vice President, People & Culture
Val Peterson, Vice President, Administration & Strategic Relations
Michelle Kearns Vice President, Student Affairs
Kara Schneck, Vice President of Marketing and Communications
and Chief of Staff
Clark Collings, General Counsel
Rasha Qudisat, Chief Engagement & Effectiveness Officer
Nikki Scott, PACE President
Evelyn Porter, Faculty Senate President
Steve Anderson, Associate Vice President, University Relations
Scott Wood, Senior Director, Budgets
Jenny Christensen, Legal Secretary
Abbie Fisher, Student
Miguel Mayorga, Student

I. CALL TO ORDER

Chair Scott Smith welcomed those in attendance at the February 26, 2026, Board of Trustees meeting. He recognized Geoff Landward, Commissioner of the Utah System of Higher Education.

II. INFORMATION

1. Board Chair's Report

Chair Scott Smith shared his perspectives on artificial intelligence and what it means for the University.

2. President's Report

President Astrid S. Tuminez began her report by highlighting Michal Coombs, assistant professor, for showing exceptional care to student mother Kenidra Flamenco. She reflected on several meaningful moments with students as she concludes her time at Utah Valley University. She also recognized the recent 2026 Alumni Awards. President Tuminez shared updates on the University's continued growth and recent achievements, including the UVU Cheer Team winning first place at the USA Collegiate Championships and recognition from OnlineU naming UVU a national leader in affordable online education. She reported that more than 200 employees attended UVU's Working Parents Conference and highlighted a partnership with Trucordia to sponsor attendance for Title I school students at a performance by Yo-Yo Ma. Additional faculty and alumni accomplishments included research led by Associate Professor Nathan Goldfarb discovering a promising new strategy to combat Tuberculosis, Professor Brandon Truscott receiving an international AI design award, and alumnus Ben Kjar whose film Standout is now in theaters. She also noted UVU representation at the Olympics by Caleb Furnell and a new partnership between UVU and Loveland Living Planet Aquarium. She concluded by mentioning her campus wide thank you tour with departments across the University.

3. Legislative Update

Associate Vice President Steve Anderson provided a legislative update, beginning with a highlight of UVU Day on the Hill, which he reported was a great success. He invited trustees to attend next year's event on January 22, 2027. He reviewed budget priorities, including compensation and mandatory increases, as well as budget cuts and performance funding, and discussed requests for appropriations, both prioritized and not prioritized, while noting the limited availability of funding. He also summarized legislation expected to affect higher education and concluded by recognizing the legislative interns and emphasizing how much UVU interns are valued for their hard work.

4. Student Fee Recommendation

Student Body President Kyle Cullimore presented the student fee recommendations. The UVUSA-approved recommendation for FY27 includes a \$5.57 increase, bringing the total student fee to \$334.76. Trustee Bradley Herbert moved to approve the recommendation and forward it to the Utah Board of Higher Education. Trustee Blake Modersitzki seconded the motion. The motion carried unanimously.

5. Proposed 2026-27 Tuition and Fees Discussion

Senior Budget Director Scott Wood presented the 2026-27 tuition and fees proposal, outlining the process for setting tuition and fees and noting the recent statutorily required Notice of Hearing on UVU tuition. He reviewed the general principles guiding increases and provided an overview of the proposed tuition increase, current operating budget, and factors influencing tuition decisions, including tax fund support, enrollment changes, market trends, campus needs, and mandated costs. He discussed UVU's FY27 new tax fund budget request, the history of annual tuition and fees changes relative to inflation, and UVU's position compared with other Utah universities and peer institutions, as well as the national average for public four-year institutions, highlighting UVU's relatively low tuition. He also addressed compensation, mandated costs, the proposed change to general student fees, and the UBHE 2026-27 budget and tuition guidelines, as well as USHE's tuition increase estimates by institution. The presentation concluded with a summary, followed by questions and discussion.

III. CLOSED SESSION

Trustee Shauna Smith motioned to enter into closed session to discuss the character, professional competence, or physical or mental health of an individual, and pending or reasonably imminent litigation. Trustee Justin Olson seconded. The motion was carried out without opposition.

IV. ACTION AGENDA

1. Policy Approval

General Counsel Clark Collings reviewed proposed revisions to Policy 136 Intellectual Property. Deputy Provost Kat Brown presented revisions to Policy 637 Faculty Tenure. Trustee Justin Olson moved to approve the policies as presented. Trustee Herbert seconded the motion. The motion carried unanimously.

2. Program Approvals

Deputy Provost Kat Brown presented the proposed discontinuation of the Interreligious Studies Undergraduate Certificate. Trustee Kristin Andrus moved to approve the program action as presented. Trustee Bennett seconded the motion. The motion carried unanimously.

V. CONSENT AGENDA

Trustee Bradley Herbert moved to approve the consent agenda, which included the minutes of the January 29, 2026 Board Meeting and the November and December 2025 Investment Reports. Trustee Finch seconded the motion. The motion carried unanimously.

Chair Scott Smith expressed his thanks and adjourned the meeting.

President's Report



Utah Valley University
President Astrid S. Tuminez
February 26, 2026

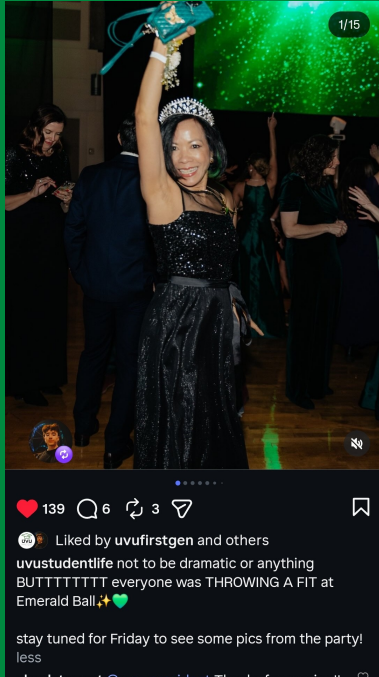
UNIVERSITY REPORT

Board of Trustees



**ASSISTANT PROFESSOR MICHAL COOMBS SHOWS EXCEPTIONAL
CARE TO STUDENT MOTHER, KENIDRA FLAMENCO**



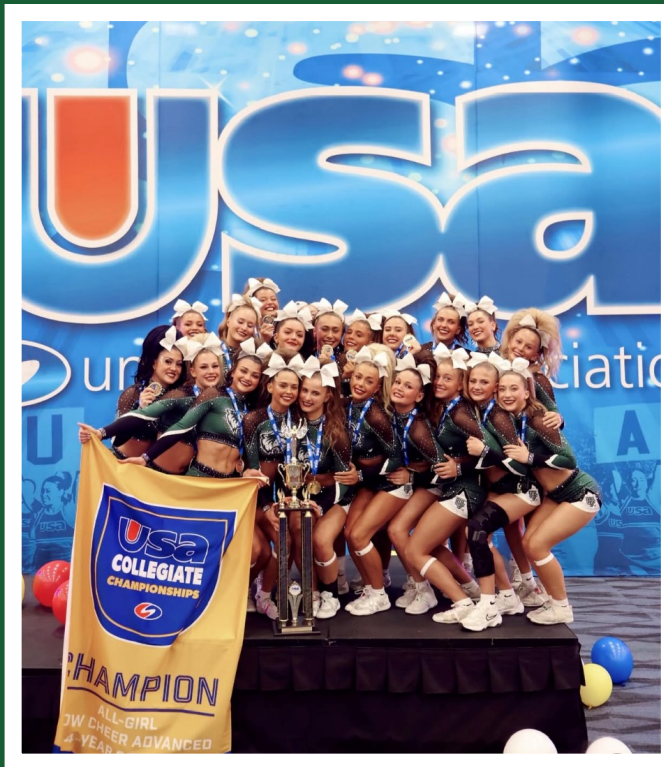


“Girls just wanna have fun!”

2026 ALUMNI AWARDS



UVU CHEER TEAM WINS 1ST PLACE AT USA COLLEGIATE CHAMPIONSHIPS



4 YEAR COLLEGE ALL GIRL SHOW CHEER ADV

- 1 UTAH VALLEY UNIVERSITY
- 2 CALIFORNIA BAPTIST UNIVERSITY
- 3 CALIFORNIA STATE UNIVERSITY-FRESNO

**ONLINEU 2026
RECOGNIZES UVU AS A
NATIONAL LEADER IN
AFFORDABLE ONLINE
EDUCATION**



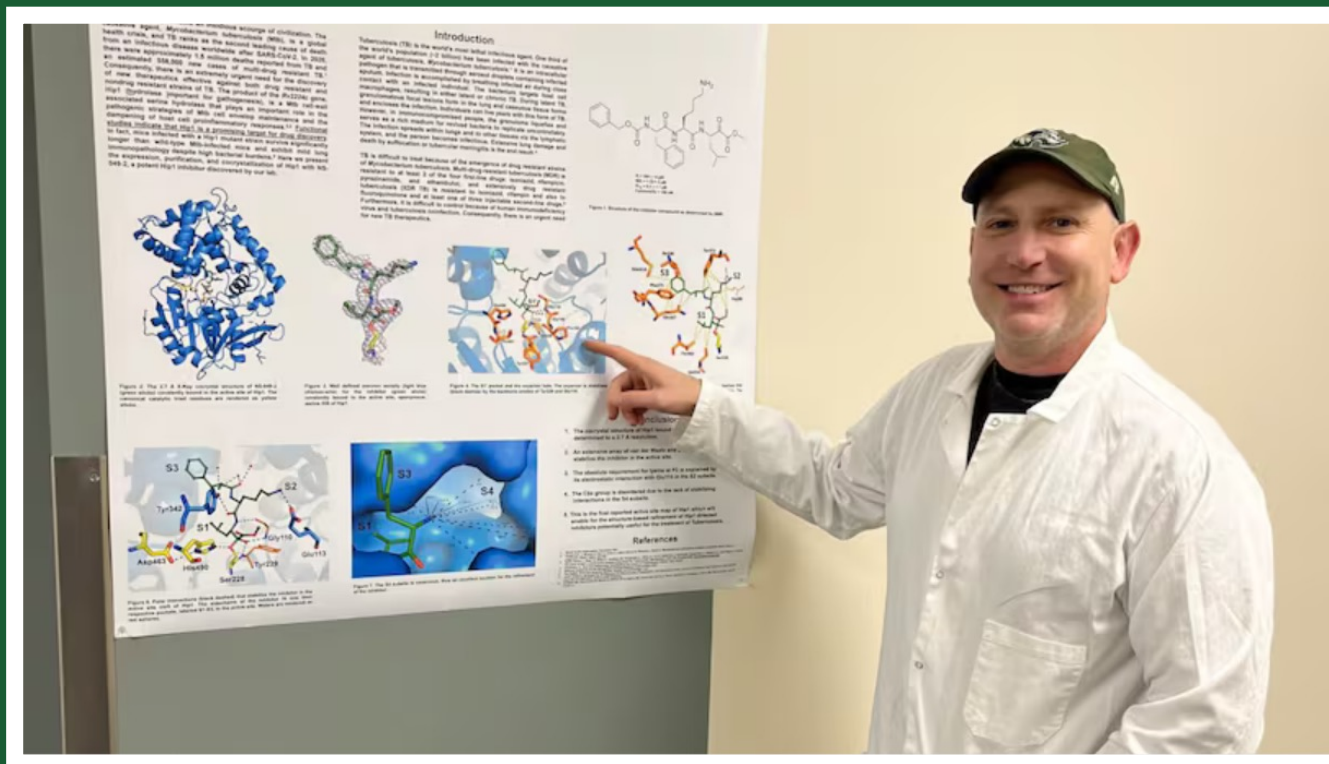
OVER 200 UVU EMPLOYEES ATTEND UVU'S WORKING PARENTS CONFERENCE



UVU PARTNERS WITH TRUCORDIA TO SPONSOR TITLE I SCHOOL ATTENDANCE TO YO-YO MA PERFORMANCE



ASSOCIATE PROFESSOR NATHAN GOLDFARB'S RESEARCH TEAM DISCOVERS PROMISING NEW STRATEGY TO COMBAT TUBERCULOSIS



PROFESSOR BRANDON TRUSCOTT WINS AN INTERNATIONAL AI DESIGN AWARD



NOW IN THEATERS: UVU ALUM STORY

A FILM BY **TANNER CHRISTENSEN**

STANDOUT

THE **BEN KJAR** STORY



ANGEL

PARENTAL GUIDANCE
SUGGESTED
PG

UVU REPRESENTATION AT THE OLYMPICS:

Caleb Furnell



UVU & LOVELAND LIVING PLANET AQUARIUM PARTNERSHIP



THANK YOU TOUR



THANK YOU

| UTAH VALLEY | | | UT ARLINGTON | | |
|-------------|-----|-----|--------------|-----|-----|
| PLR | PTS | FLS | PLR | PTS | FLS |
| 1 | 8 | 1 | 3 | 18 | 3 |
| 2 | 7 | 3 | 4 | 3 | 2 |
| 9 | 3 | 3 | 8 | 6 | 2 |
| 10 | 9 | 1 | 11 | 0 | 0 |
| 11 | 0 | 1 | 33 | 0 | 2 |



Legislative Update



2026 LEGISLATIVE SESSION UPDATE

Dr. Steve Anderson - AVP, University Relations

TM

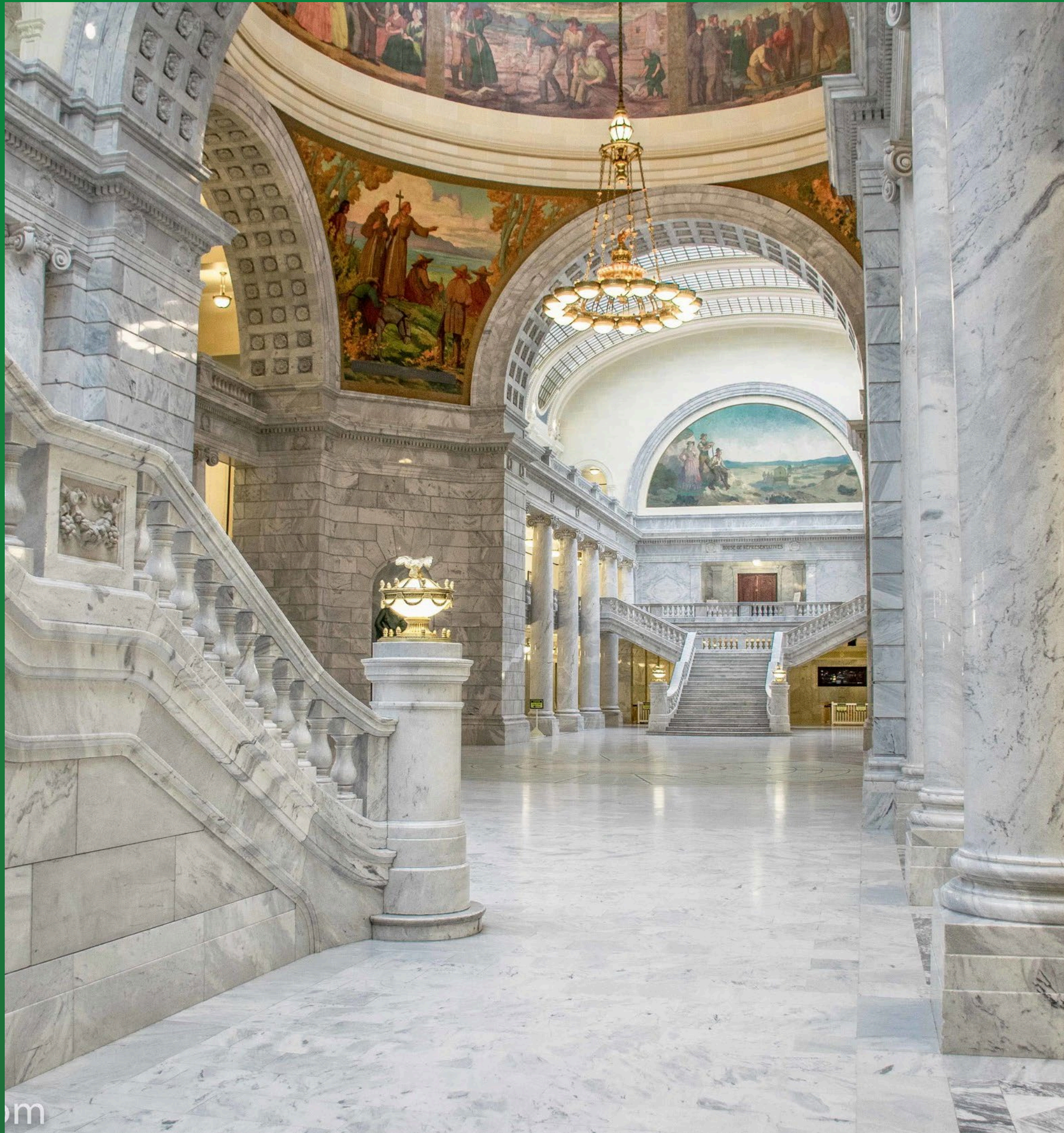
UVU DAY ON THE HILL



February 23, 2026 in the Capitol Rotunda

Mark your calendars for January 22, 2027





COMPENSATION AND MANDATORY INCREASES

- 2.6% Compensation increase (discretionary)
- 11.8% mandatory cost increases to insurance premiums.
- 4.9% dental insurance premium increase.

Budget Priorities 2026



BUDGET CUTS and Performance Funding

- 5% Proposed Cut to all Appropriations Subcommittees
- Performance Funding - \$1.6M and \$3M from newly recovered funding
- Executive Appropriations will release final recommendations tomorrow

Budget Priorities 2026

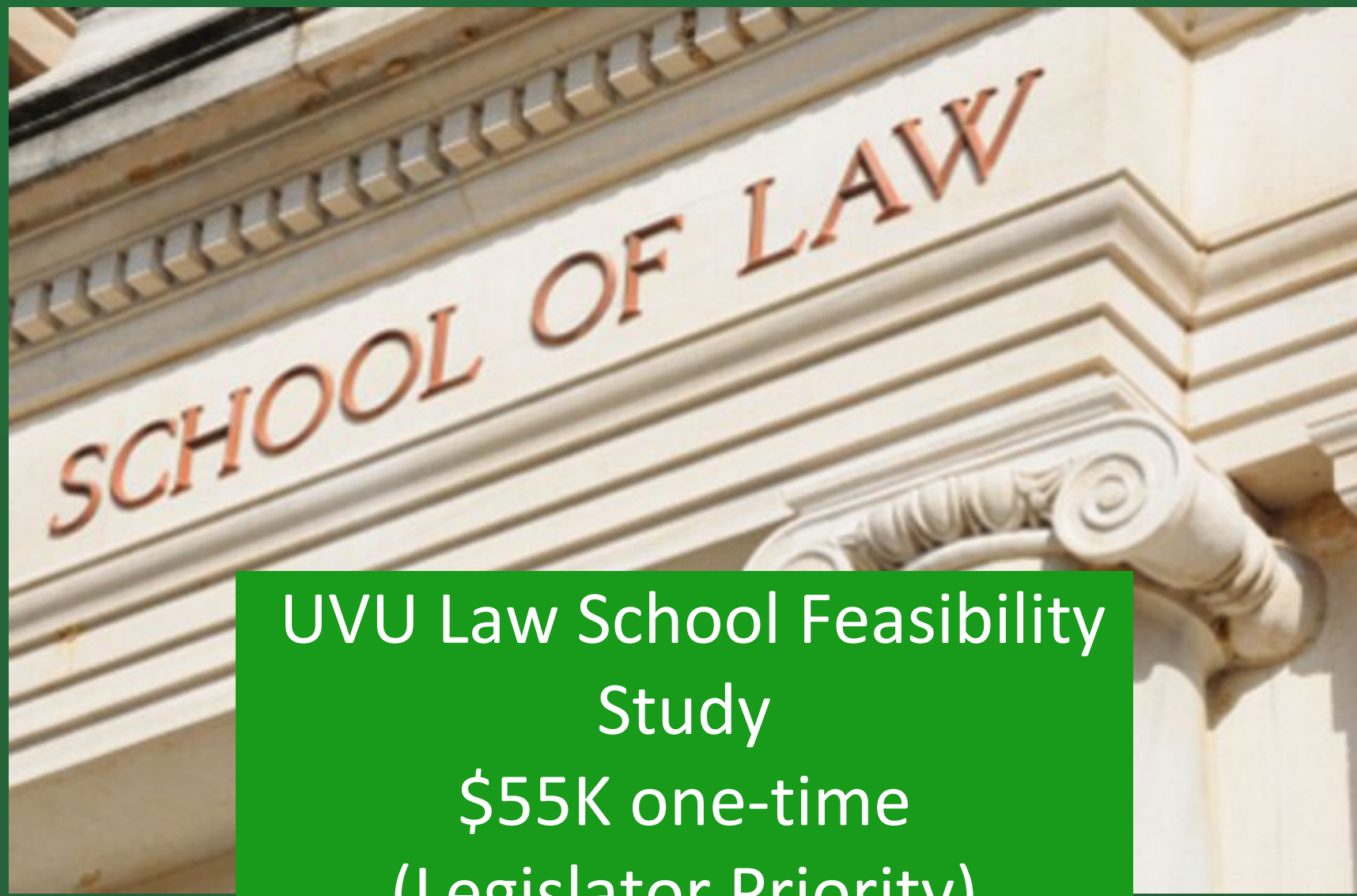
REQUESTS FOR APPROPRIATIONS



Workforce 2034 Initiative
\$2.5M ongoing
(UVU Priority)



Federalism Initiative
\$273K one-time
\$395K ongoing
(Legislator Priority)



UVU Law School Feasibility Study
\$55K one-time
(Legislator Priority)

Budget Priorities 2026

REQUESTS FOR APPROPRIATIONS (NOT PRIORITIZED)



Utah Lake Research
Center
\$17M one-time

Legislation 2026



BILLS:

- HB 84, 3rd Sub – Higher Education Dangerous Weapons Amendments
- HB 77 – Flag Amendments
- HB 204, 1st Sub – Higher Education Student Belief Accommodation
- HB 352 – Higher Education Alignment
- SB 216- Higher Education Performance and Enrollment Funding
- SB 152 – Public and Higher Education Collaboration

Weekly updates can be found at
www.uvu.edu/universityrelations/legislative

Legislative Interns



THANK YOU



Student Fee Recommendation




2026-2027 (FY27) Student Fee Proposal

| FEE NAME | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | FY27 Requested Increase or Decrease | FY27 Request Total | UVUSA Approved Recommendation for FY27 Increase or Decrease | UVUSA Approved Recommendation FY27 Fee Total |
|---|-----------|-----------|-----------|-----------|-------------------------------------|--------------------|---|--|
| Building Bonds | \$91.50 | \$91.50 | \$91.50 | \$87.00 | \$0.00 | \$87.00 | \$0.00 | \$87.00 |
| <i>USHE R516-5.1.1 Student Approved Facility Construction Subtotal:</i> | | | | | | | | \$87.00 |
| Student Center O&M | \$33.58 | \$33.58 | \$36.08 | \$36.97 | \$0.88 | \$37.85 | \$0.88 | \$37.85 |
| SLWC O&M | \$24.34 | \$24.34 | \$25.84 | \$26.31 | \$0.00 | \$26.31 | \$0.00 | \$26.31 |
| <i>USHE R516-5.1.2 Student-Approved Facility Operations Subtotal:</i> | | | | | | | | \$64.16 |
| UTA | \$6.54 | \$6.54 | \$6.54 | \$6.54 | \$0.00 | \$6.54 | \$0.00 | \$6.54 |
| Campus Recreation | \$29.27 | \$29.27 | \$31.90 | \$32.70 | \$1.02 | \$33.72 | \$0.80 | \$33.50 |
| Athletics | \$78.21 | \$78.21 | \$81.06 | \$83.09 | \$2.16 | \$85.25 | \$1.17 | \$84.26 |
| Arts | \$1.71 | \$1.71 | \$1.71 | \$1.75 | \$0.65 | \$2.40 | \$0.71 | \$2.46 |
| Student Programs | \$53.01 | \$53.01 | \$53.81 | \$54.83 | \$2.89 | \$57.72 | \$2.01 | \$56.84 |
| <i>USHE R516-5.1.3 Student Activities, Programs, and Services Subtotal:</i> | | | | | | | | \$183.60 |
| TOTAL: | \$318.16 | \$318.16 | \$328.44 | \$329.19 | \$7.60 | \$336.79 | \$5.57 | \$334.76 |

| EXPLANATION FOR CHANGES: | |
|-------------------------------|--|
| Student Programming | Increase current fee by \$2.01. Parameters of increase: 1) COLA increase to support student-facing staff through payroll-only adjustments included at the same proportional increase; 2) enhanced staffing for the SLI Club to expand outreach and representation; 3) expansion of the CSI Impact Fellows program to responsibly increase involvement opportunities; 4) Spirit Squad and Game Day scholarships to provide equitable incentives across involvement programs and reduce financial barriers for highly engaged students; 5) increased security funding to ensure student safety at large events; and 6) the maintenance of core student facing programs within the Department of Student Leadership & Involvement. After fee hearing review and follow up with the fee steward it was determined that some area program enhancements could be made in multi-year phased approach to reduce the size of the increase for FY27. |
| Campus Recreation | Increase current fee by \$0.80. Parameters of increase: 1) COLA increase to support student-facing staff through payroll-only adjustments including student employee positions included at the same proportional increase. After fee hearing review and follow up with the fee steward, it was noted that only an \$0.80 increase was needed to bring the total student fee to \$33.50 for the COLA increase instead of the originally asked \$1.02 to bring it to \$33.72. |
| Student Center O&M | Increase current fee by \$0.88. Parameters of increase: 1) COLA increase to support student-facing staff through payroll-only adjustments including student employee positions included at the same proportional increase. |
| SLWC O&M | Maintain current fee. After fee hearing review and follow up, it was determined that the current fee provides adequate funding related to the financial needs to ensure services and continued enhancement to the student experience. |
| Athletics | Increase current fee by \$1.17. Parameters of increase: 1) COLA increase to support student-facing staff through payroll-only adjustments including student employee positions included at the same proportional increase. After fee hearing review and follow up with the fee steward it was determined that the student fee should not cover the inflationary increase rather just the COLA increase. |
| UTA | Maintain current fee. After fee hearing review and follow up, it was determined that the current fee provides adequate funding related to the financial needs to ensure services and continued enhancement to the student experience. |
| Arts | Increase current fee by \$0.71. Parameters of increase: 1) 90% of the fee will be used solely to cover the cost of student tickets. Each student/Noorda Series production will have a set amount of tickets available for student claim free of cost. 2) 10% of the fee will be used for on campus marketing of student/Noorda Series productions to the student body outside of the physical Noorda Arts building space. After further review, the steward was under the assumption that the student fee was at \$1.81 asking for \$0.65 totaling the request to \$2.46. Due to the discrepancy, we funded \$.71 to cover the reimbursement to student tickets, and increase the fee to the total of \$2.46. |
| Building Bonds | Maintain current fee. After fee hearing review and follow up, it was determined that the current fee provides adequate funding related to the financial needs to ensure services, space and facilities for student use, and continued enhancement to the student experience. |

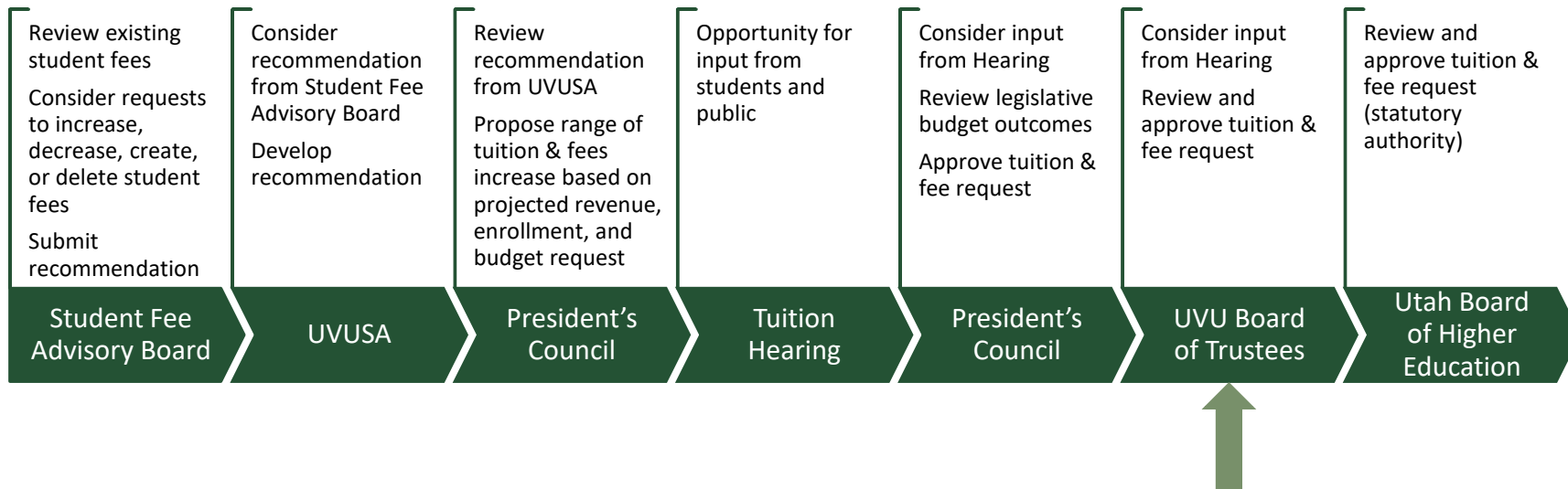
Proposed 2026-27 Tuition and Fees



Utah Valley University 2026-27 Tuition & Fees Proposal

Prepared for UVU Board of Trustees

February 26, 2026



Tuition and Fees Process

Purpose of Hearing

- Public presentation of proposed tuition changes
- Compliance with state statute and Utah Board of Higher Education policies
- Opportunity for student and public input (to be shared with Trustees and UBHE)

NOTICE OF HEARING ON UVU TUITION

Utah Valley University is anticipating an increase in full-time resident and non-resident undergraduate tuition for the 2026-27 academic year.

- Resident tuition increase of 1.85% to 3.27% (\$56 - \$98 per semester)
- Non-Resident tuition increase of 1.85% to 3.27% (\$170 - \$300 per semester)

ALL CONCERNED STUDENTS AND CITIZENS
ARE INVITED TO A PUBLIC HEARING ON THE
PROPOSED INCREASE TO BE HELD

THURSDAY, FEBRUARY 12, 2026

AT 1:30P.M. SL 114

Find Teams link at:

<https://www.uvu.edu/uvusa/student-fees/>



General Principles

- All alternative funding sources should be considered before increases to tuition are proposed.
- Tuition increases may occur for three reasons
 - Match legislative funding for compensation and other mandatory costs
 - Offset a reduction in student fees
 - Increase revenue for specific institutional needs

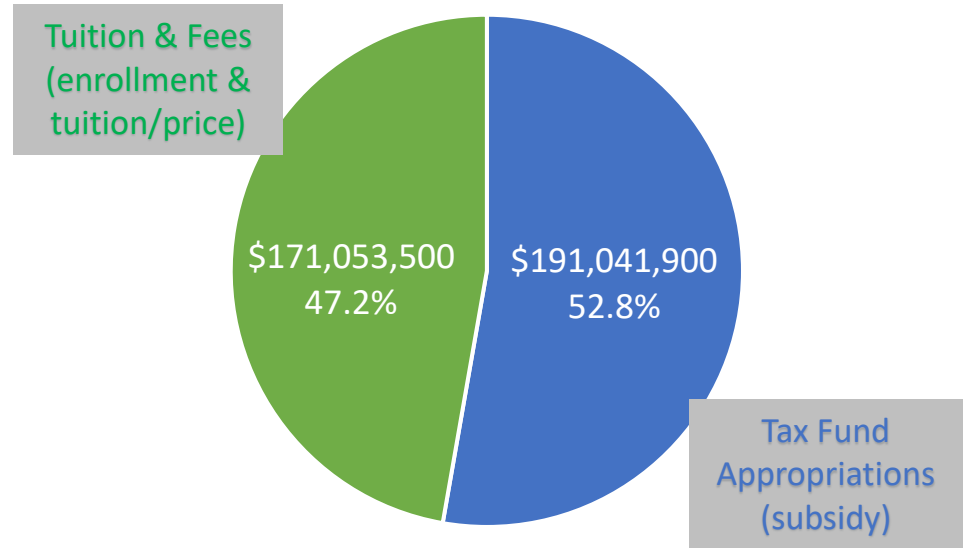
| Undergraduate (12-18 credits) | 2025-26 Tuition (per semester) | Proposed Percent Change | Proposed Amount Change |
|--|---|------------------------------------|-----------------------------------|
| Resident | \$3,008 | 1.85% to 3.27% | \$56 to \$98 |
| Nonresident | \$9,167 | 1.85% to 3.27% | \$170 to \$300 |

Proposed 2026-27 Tuition Increase

Utah Valley University is anticipating an increase in full-time resident and non-resident tuition of 1.85% to 3.27% for the 2026-27 academic year

UVU's Appropriated Operating Revenue

2025-26 Education & General Revenue Budget \$362,095,400



Factors in Tuition & Fees Setting



Level of tax fund support



Enrollment changes



Market trends & comparisons
balanced by access and affordability



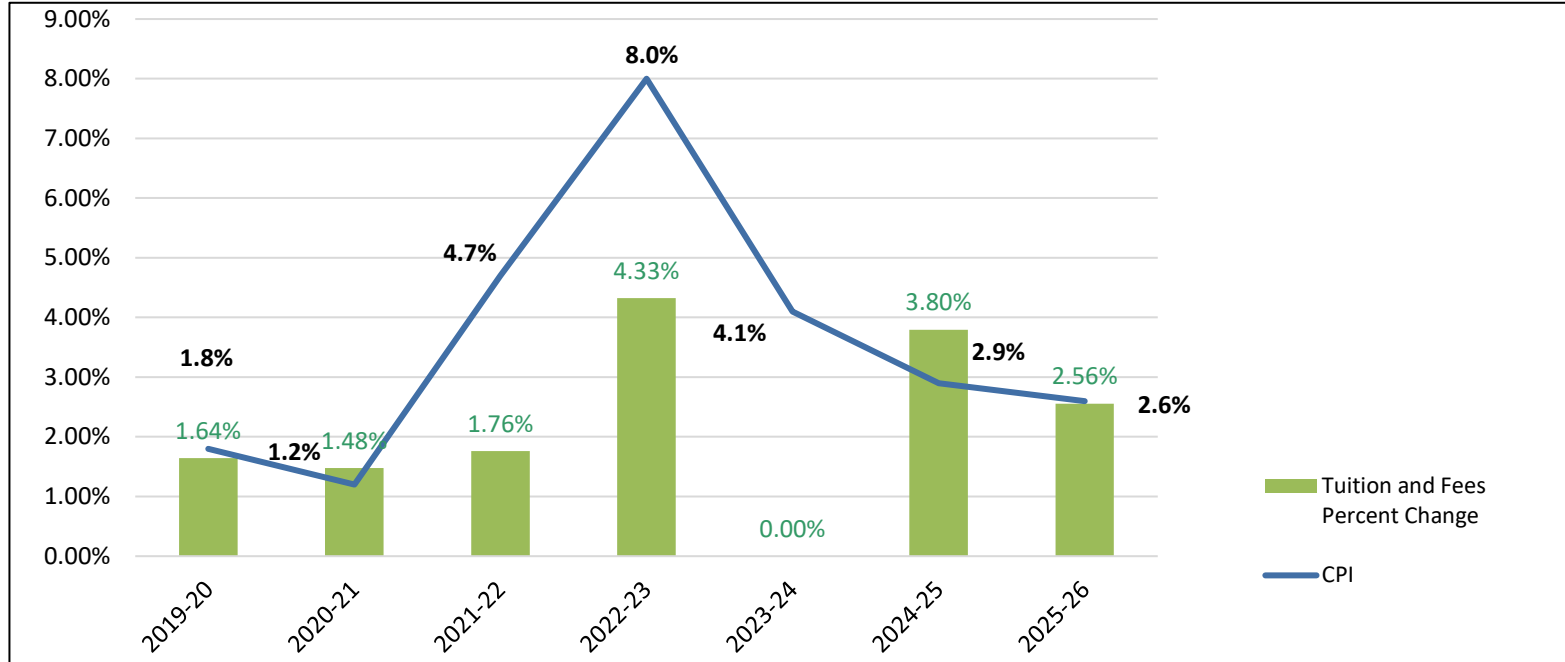
Campus needs and mandated costs

UVU's FY27 Tax Fund Budget Request

UVU's FY27 New Tax Fund Budget Request

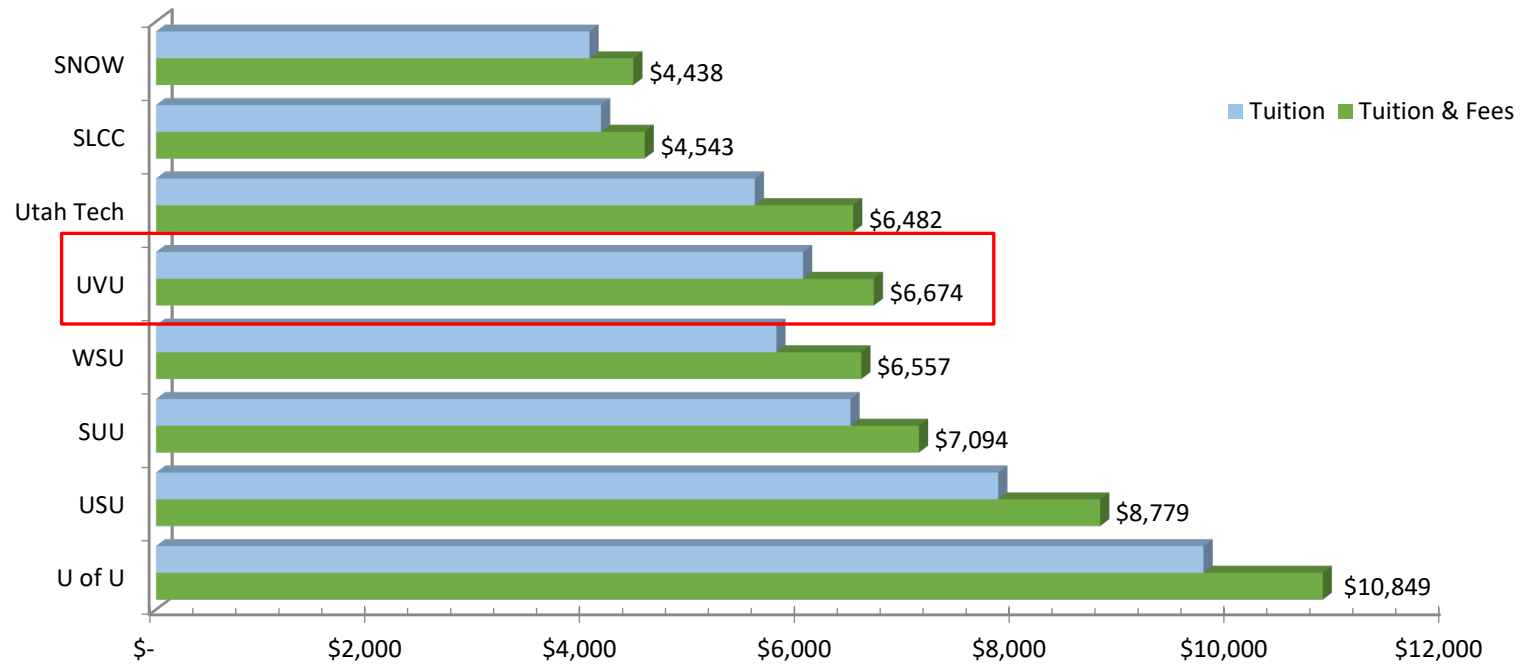
| Category | Amount Requested |
|--------------------------------------|--------------------|
| Employee Experience & Retention | 377,500 |
| Student Success & Timely Completion | 500,000 |
| Digital Transformation/Cybersecurity | 2,901,300 |
| High Demand Program Expansion | 1,000,000 |
| Total | \$4,778,800 |

History of Annual Tuition and Fees Change vs Inflation



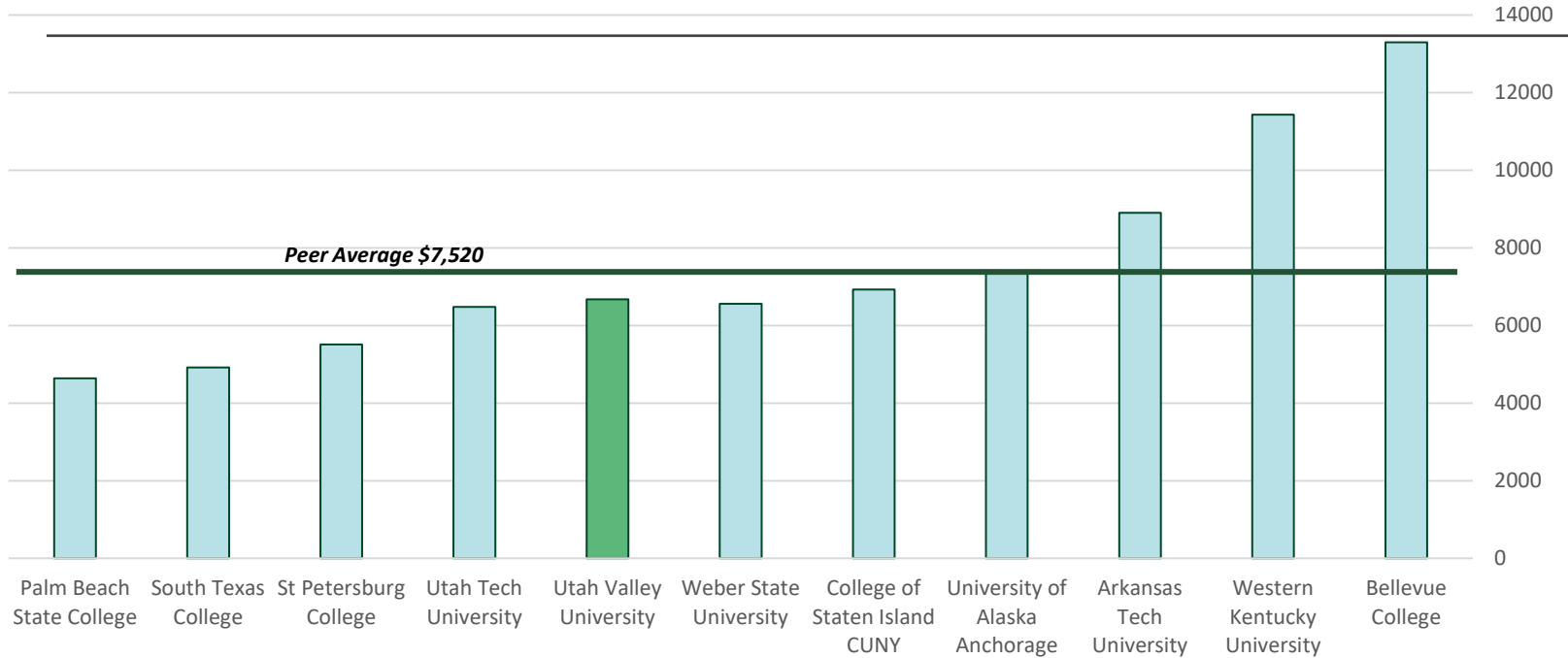
2025-26 Tuition & Fees

Academic Year, Resident Undergraduate

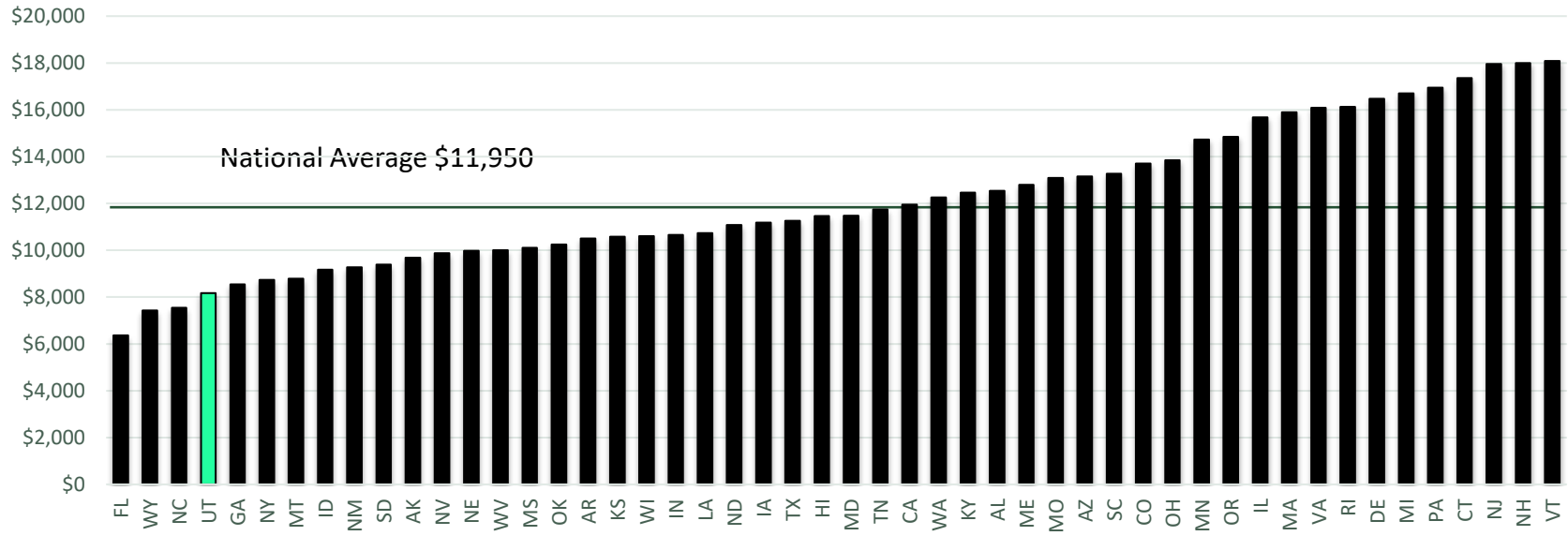


Peer Institution Comparison 2025-26

Resident, Undergraduate Tuition and Fees



2025-26 Average Tuition & Fees Public Four-Year Institutions by State



Compensation and Mandated Costs

2.6% COLA (Governor's Budget)

11.8% medical premium increase

4.9% dental premium increase

Risk Management insurance rate increase (decrease)

Attorney General rate increase

75% Tax Funds/25% Tuition

Tax Funds



Tuition



2026-2027 (FY27) Student Fee Proposal

| FEE NAME | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | FY27 Requested Increase or Decrease | FY27 Request Total | UVUSA Approved Recommendation for FY27 Increase or Decrease | UVUSA Approved Recommendation FY27 Fee Total |
|---|-----------------|-----------------|-----------------|-----------------|-------------------------------------|--------------------|---|--|
| Building Bonds | \$91.50 | \$91.50 | \$91.50 | \$87.00 | \$0.00 | \$87.00 | \$0.00 | \$87.00 |
| <i>USHE R516-5.1.1 Student-Approved Facility Construction Subtotal:</i> | | | | | | | | \$87.00 |
| Student Center O&M | \$33.58 | \$33.58 | \$36.08 | \$36.97 | \$0.88 | \$37.85 | \$0.88 | \$37.85 |
| SLWC O&M | \$24.34 | \$24.34 | \$25.84 | \$26.31 | \$0.00 | \$26.31 | \$0.00 | \$26.31 |
| <i>USHE R516-5.1.2 Student-Approved Facility Operations Subtotal:</i> | | | | | | | | \$64.16 |
| UTA | \$6.54 | \$6.54 | \$6.54 | \$6.54 | \$0.00 | \$6.54 | \$0.00 | \$6.54 |
| Campus Recreation | \$29.27 | \$29.27 | \$31.90 | \$32.70 | \$1.02 | \$33.72 | \$0.80 | \$33.50 |
| Athletics | \$78.21 | \$78.21 | \$81.06 | \$83.09 | \$2.16 | \$85.25 | \$1.17 | \$84.26 |
| Arts | \$1.71 | \$1.71 | \$1.71 | \$1.75 | \$0.65 | \$2.40 | \$0.71 | \$2.46 |
| Student Programs | \$53.01 | \$53.01 | \$53.81 | \$54.83 | \$2.89 | \$57.72 | \$2.01 | \$56.84 |
| <i>USHE R516-5.1.3 Student Activities, Programs, and Services Subtotal:</i> | | | | | | | | \$183.60 |
| TOTAL: | \$318.16 | \$318.16 | \$328.44 | \$329.19 | \$7.60 | \$336.79 | \$5.57 | \$334.76 |

2026-27 Proposed Change to General Student Fees

RECOMMENDED BY
STUDENT FEE BOARD
AND UVUSA

UBHE 2026-27 Budget & Tuition Guidelines

Budget Request Alignment with Tuition-Setting Process:

The intent of the Board's budget-setting process is to review and account for potential institutional needs such that tuition may be held to minimum increases. OCHE intends that tuition and fee increases for the 2026-2027 academic year will be minimal and that budget requests will be justifiable.

Justification

Alternative
Funding

Affordability
Impact

Value Creation

Compliance
with UBHE
Policy

Utah System of Higher Education

2026-27 Tuition Increase Estimates by Institution

| | (a) | (b) | | (c) | | (d) | | (e) | |
|-----------------------------|---------------------------------------|--------------------------------|--------------|--|--------------|---|--------------|-----------------------|--------------|
| | Net Tuition Revenue - FY26 R-1 Budget | 2.6% Salary & Related Benefits | | 11.8% Health and 4.9% Dental Insurance | | Internal Service Funds (General Liability, Auto, Property, AG, Aviation, Cyber Liability) | | 2026-27 Total Changes | |
| | Amount | Amount | % Change | | % Change | Amount | % Change | Amount | % Change |
| University of Utah | \$483,634,000 | \$4,625,353 | 0.96% | \$2,957,754 | 0.61% | \$18,137 | 0.00% | \$7,601,243 | 1.57% |
| Utah State University | 172,333,000 | 2,009,043 | 1.17% | 1,552,207 | 0.90% | 52,270 | 0.03% | 3,613,520 | 2.10% |
| Weber State University | 93,898,477 | 1,118,368 | 1.19% | 793,012 | 0.84% | 42,153 | 0.04% | \$1,953,533 | 2.08% |
| Southern Utah University | 76,716,600 | 687,295 | 0.90% | 413,861 | 0.54% | 29,768 | 0.04% | 1,130,924 | 1.47% |
| Snow College | 12,918,243 | 228,658 | 1.77% | 206,386 | 1.60% | 15,995 | 0.12% | \$451,040 | 3.49% |
| Utah Tech University | 46,530,000 | 523,362 | 1.12% | 420,969 | 0.90% | 44,648 | 0.10% | 988,980 | 2.13% |
| Utah Valley University | 169,742,300 | 1,750,115 | 1.03% | 1,325,436 | 0.78% | 61,873 | 0.04% | \$3,137,424 | 1.85% |
| Salt Lake Community College | 63,579,472 | 930,070 | 1.46% | 626,741 | 0.99% | 32,607 | 0.05% | 1,589,418 | 2.50% |
| Total | \$1,119,352,092 | \$11,872,264 | 1.06% | \$8,296,366 | 0.74% | \$297,451 | 0.03% | \$20,466,081 | 1.83% |

Summary

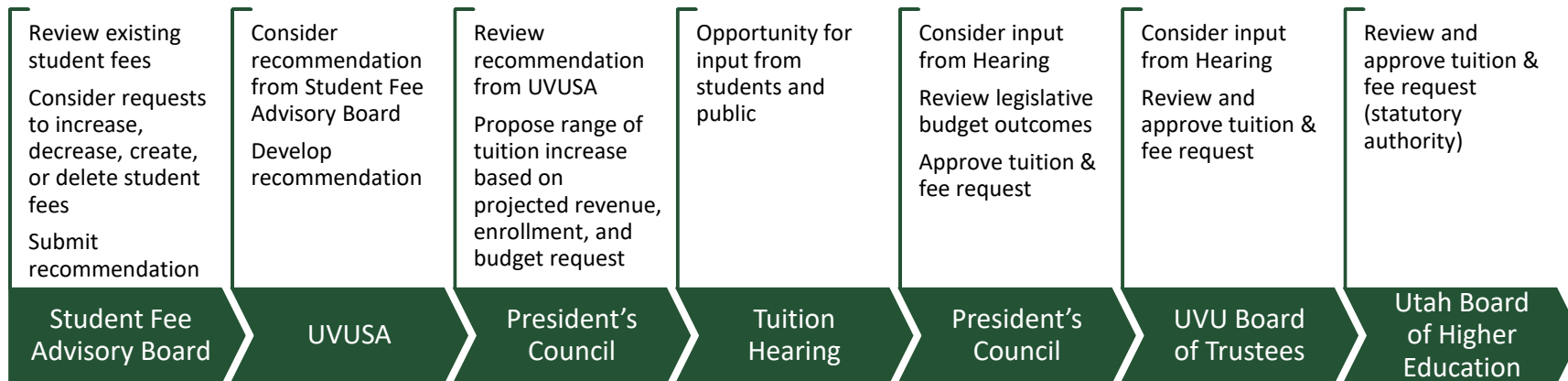
Dependent on legislative action and funding

Legislative session ends on March 6

Dependent upon Board of Higher Ed approval

| Scenario 1 & 2 | Revenue | Tuition Increase |
|--|--------------------|------------------|
| Compensation & Benefits Match with ISF rate increase | \$3,137,400 | 1.85% |
| Digital Transformation Technology Fee/Cybersecurity | \$2,410,000 | 1.42% |
| Total Proposed Tuition Increase | \$5,547,400 | 3.27% |

| Scenario 3 – 0% increase | Cost | % of FY26 Base Budget |
|--|--------------------|-----------------------|
| Compensation & Benefits Match with ISF rate increase | \$3,137,400 | .87% |
| Calculated Base Budget Reduction | \$3,137,400 | .87% |



The Utah Board of Higher Education will set UVU's 2026-27 Tuition and Fees during their March 27, 2026, Board Meeting

Details for this virtual meeting will be available at <https://ushe.edu/>

Utah Valley University Annual Tuition Review

2026-27 Tuition Setting Process

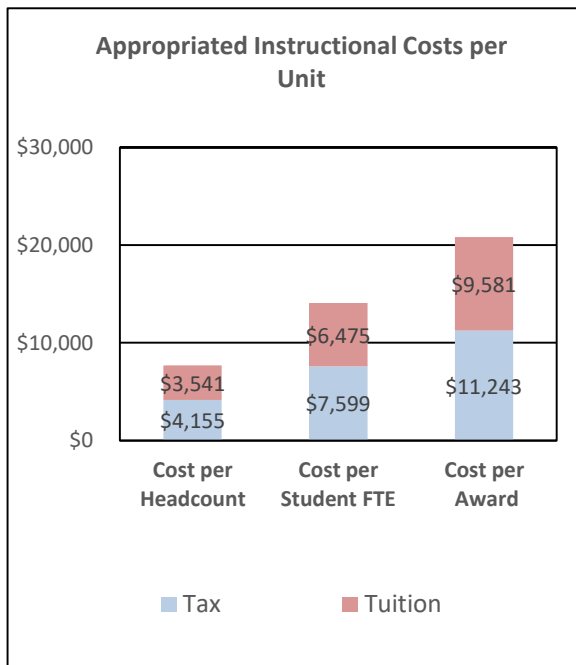
| Appropriated Instructional Expenses | 2024-25 Actual Expenses | 2025-26 Budgeted Expenses |
|-------------------------------------|-------------------------|---------------------------|
| Tax Funds | \$194,296,900 | \$191,706,900 |
| Tuition | \$165,569,701 | \$171,053,500 |
| Other Funds | \$135,000 | \$0 |
| Total Revenues | \$360,001,601 | \$362,760,400 |

2024-25 Enrollment and Completion

| Fall Headcount | Annualized Student FTE | Total Awards |
|----------------|------------------------|--------------|
| 46,760 | 25,569 | 17,281 |

2024-25 Inflation, Income, and Costs

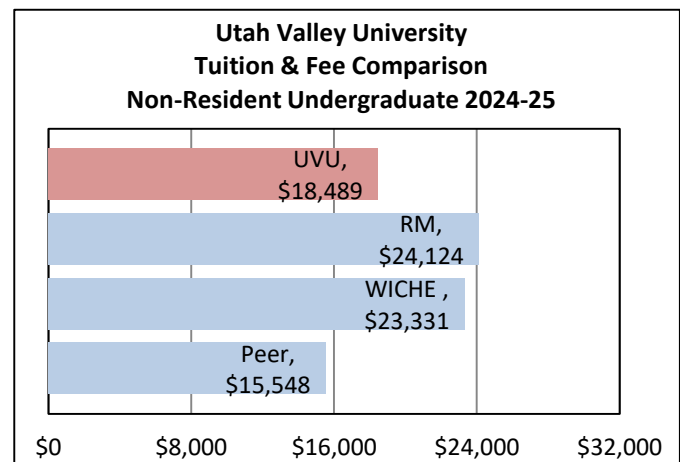
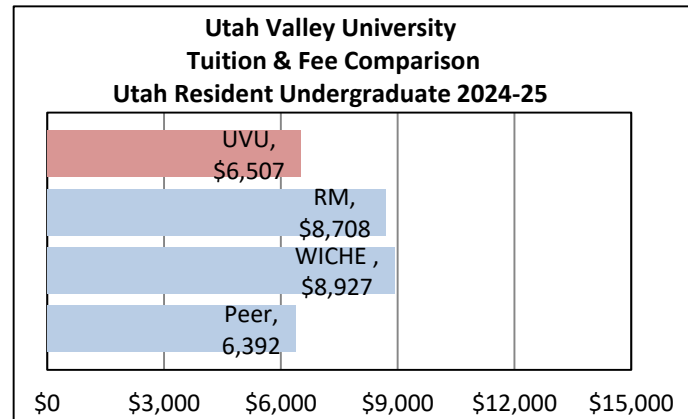
| | |
|--------------------------------|----------|
| Consumer Price Index | 2.6% |
| Higher Education Price Index | 3.6% |
| Median Household County Income | \$96,877 |
| Average Net Cost | \$8,721 |

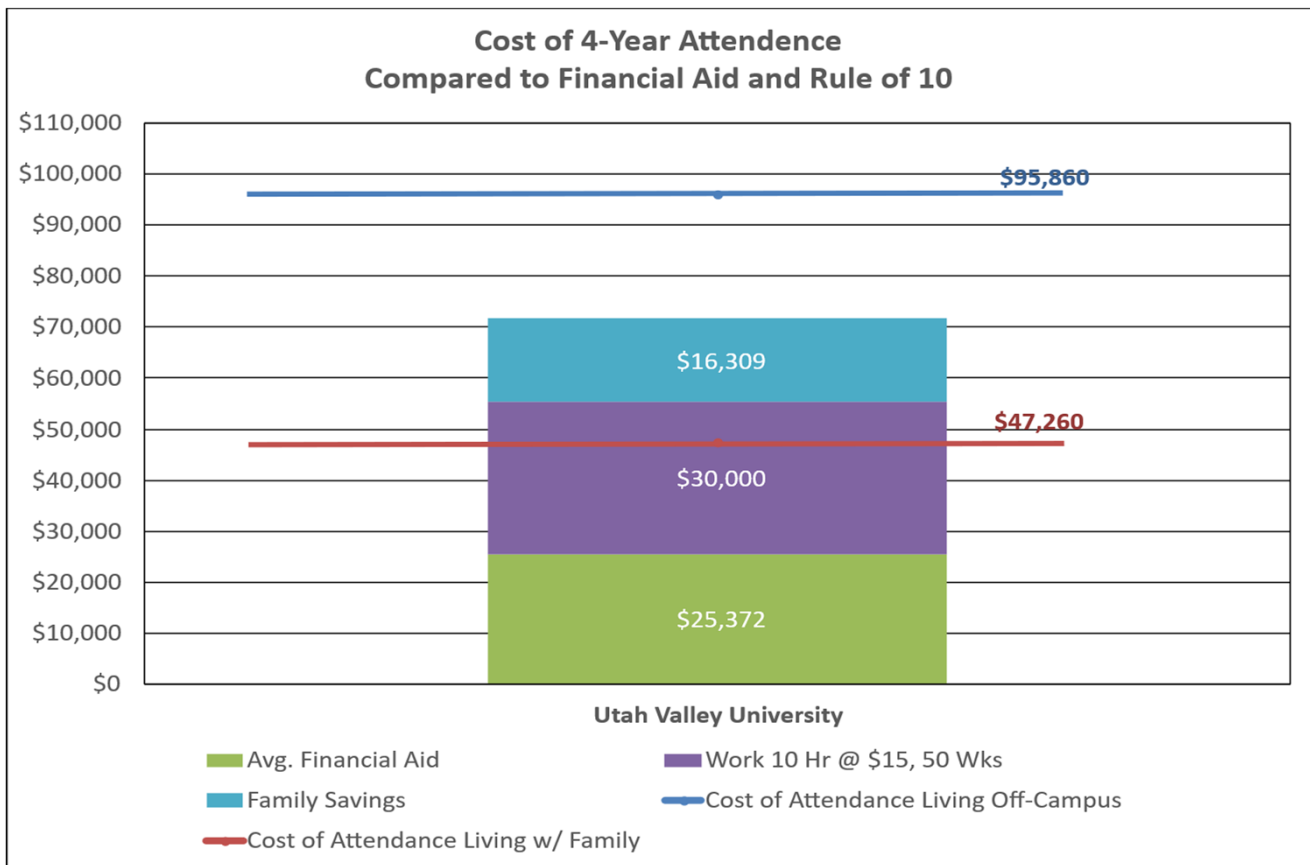


| Tuition and Fees | 2024-25 Tuition & Fees | 2025-26 Tuition & Fees |
|-------------------------|------------------------|------------------------|
| In-State Undergraduate | 6,507 | \$6,674 |
| Out-of-State Undergrad. | 18,489 | \$18,992 |
| In-State Graduate | 8,480 | \$8,722 |
| Out-of-State Graduate | 24,248 | \$24,922 |

2023-24 Student Financial Aid

| | Number | Average |
|--------------------------|--------|---------|
| Any Grant or Scholarship | 15,029 | \$6,343 |
| Pell Grants | 10,026 | \$5,913 |
| Federal Student Loans | 3,965 | \$7,445 |





Sources and Notes:

- 1) Appropriated Instructional Expenses - A-1 actual and budgeted total tax and tuition appropriations
- 2) Tuition and Fees - Data Book Table 4 two semesters of 15 credit hours
- 3) Enrollment and Completion - Institutional Data Resources dashboard all enrollments and awards
- 4) Inflation, Income, and Costs - CPI, HEPI, U.S. Census income by county, IPEDS net price
- 5) Student Financial Aid - IPEDS student financial aid all students
- 6) Appropriated Instructional Costs per Unit - Calculated based on data in 1 and 3
- 7) Tuition & Fee Comparison - WICHE and College Board surveys
- 8) Financial Aid and Lumina Rule of 10 - Individuals can reasonably afford to contribute 10% of their discretionary income, work 10 hours per week, and save for 10 years.
- 9) R510.5.1 - Tuition Annual Review Board policy

2026-27 Proposed Tuition Range

2/18/2026

Tuition Public Hearing Announcement

Utah Valley University is anticipating an increase in full-time resident and non-resident tuition for the 2026-27 academic year.

Resident undergraduate tuition increase of 1.85% to 3.27% (\$56 to \$98 per semester)

Non-resident undergraduate tuition increase of 1.85% to 3.27% (\$170 to \$300 per semester)

Scenario 1 -- 1.85% Tuition Increase -- to cover mandatory cost match

Funds match for compensation including medical insurance, dental insurance, and Internal Service Funds (ISF) rate increase (decrease)

| | |
|---|-------------|
| Salary/wage increase of 2.6% | \$1,750,115 |
| Medical Premium increase of 11.8% and Dental 4.9% | \$1,325,436 |
| Internal Service Funds Rate Increase | \$61,873 |

| | |
|-------|-------------|
| Total | \$3,137,424 |
|-------|-------------|

Calculated Tuition & Fees Rate Increase

Calculated Tuition Rate Increase **1.85%**

A 1.85% Tuition Rate Increase equals \$56 per semester for resident students and \$170 per semester for nonresident students

Scenario 2 -- 3.27% Tuition Increase

Funds match for compensation including medical insurance, dental insurance, Internal Service Funds (ISF) rate increase (decrease), and funding for Technology Fee (2nd Half of fee) and Cybersecurity

| | |
|--|-------------|
| Salary/wage increase of 2.6% | \$1,750,115 |
| Medical Premium increase of 11.8% and Dental 4.9% | \$1,325,436 |
| Internal Service Funds Rate Increase | \$61,873 |
| Digital Transformation Technology Fee/Cybersecurity (from Budget Request year 2) | \$2,410,000 |

| | |
|-------|-------------|
| TOTAL | \$5,547,424 |
|-------|-------------|

Calculated Tuition Rate Increase **3.27%**

A 3.27% Tuition Rate Increase equals \$98 per semester for resident students and \$300 per semester for nonresident students

Scenario 3 -- 0% Tuition Increase (Required for Board of Higher Ed)

In order to fund the 25% match for compensation, medical insurance, dental insurance, and Risk Management rate increase, UVU would need implement internal budget reductions

| | |
|---|-------------|
| Salary/wage increase of 2.6% | \$1,750,115 |
| Medical Premium increase of 11.8% and Dental 4.9% | \$1,325,436 |
| Internal Service Funds Rate Increase | \$61,873 |

| | |
|-------|-------------|
| TOTAL | \$3,137,424 |
|-------|-------------|

Calculated Base Budget Reduction **0.87%**

Policies



**UVU BOARD OF TRUSTEES
Agenda Item Coversheet**

| | |
|--|--|
| DATE: | February 26, 2026 |
| TITLE: | UVU Policy 136 Intellectual Property |
| EXECUTIVE/RESPONSIBLE STAFF MEMBER: | Wayne Vaught, Provost Dan Fairbanks, University Research Officer Brad Baugh, Associate General Counsel |
| SUBJECT: | UVU Policy 136 Intellectual Property |
| BACKGROUND: | <p>Limited scope changes were made to provide (a) consistent treatment of Special Programs and Sponsored Programs, and (b) more clarity regarding certain Intellectual Property (IP) issues</p> <p>A new section, “4.6 Incorporating Non-UVU Intellectual Property” was added to clarify that</p> <ol style="list-style-type: none">1) a faculty member may use or incorporate their own IP into university-related teaching or activities; however, incorporation of such grants UVU a non-exclusive license to use that IP in connection with university-related purposes; and2) if a third-party permission is required before using or incorporating third-party IP into university-related teaching or activities, a faculty member should consult with the Office of General Counsel to obtain appropriate rights or permissions. |
| ALTERNATIVES: | <ul style="list-style-type: none">• Approve as presented, “I move to approve Policy 136 Intellectual Property.”• Amend and approve, “I move to approve, as amended, Policy 136 Intellectual Property.” |

| | |
|--------------------------|--|
| | <ul style="list-style-type: none">• No action, “I move that we go to the next agenda item...” |
| FINANCIAL IMPACT: | |
| EXHIBITS: | a. UVU Policy 136 Intellectual Property |



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| | | |
|--|--|--|
| Proposed Policy Number and Title: 136 Intellectual Property | | |
| Current Policy Number and Title: 136 Intellectual Property | | |
| Approval Process* | | |
| <input checked="" type="checkbox"/> Regular | <input type="checkbox"/> Temporary | <input type="checkbox"/> Compliance Change |
| <input type="checkbox"/> New <input type="checkbox"/> Revision <input checked="" type="checkbox"/> Revision—Limited Scope <input type="checkbox"/> Deletion | <input type="checkbox"/> New <input type="checkbox"/> Revision <input type="checkbox"/> Revision—Limited Scope | <input type="checkbox"/> New <input type="checkbox"/> Revision—Limited Scope <input type="checkbox"/> Deletion |
| *See UVU Policy 101 <i>Policy Governing Policies</i> for process details. | | |

| | |
|-------------------------------------|--|
| Draft Number and Date: | <u>Stage 3 Regular, February 26, 2026, Board of Trustees</u> |
| President’s Council Sponsor: | <u>Wayne Vaught</u> |
| Policy Steward: | <u>Dan Fairbanks, Bradley Baugh</u> |

| POLICY APPROVAL PROCESS DATES | | |
|---|---|--|
| REGULAR | TEMPORARY | COMPLIANCE |
| Drafting and Revision Entrance Date: <u>5/8/2025</u> | Drafting and Revision Entrance Date: <u>N/A</u> | President’s Council Approval Approval Date: <u>N/A</u> |
| University Entities Review Entrance Date: <u>5/8/2025</u> Close Feedback: <u>10/2/2025</u> | Board of Trustees Review Entrance Date: <u>N/A</u> Approval Date: <u>N/A</u> | Board of Trustees Ratification Ratification Date: <u>N/A</u> |
| Board of Trustees Review Entrance Date: <u>1/22/2026</u> Approval Date: <u>2/26/2026</u> | | |



UTAH VALLEY UNIVERSITY Policies and Procedures

| | | | |
|---------------------------|---|-----------------------|-----|
| POLICY TITLE | Intellectual Property | Policy Number | 136 |
| Section | Governance, Organization, and General Information | Approval Date | |
| Subsection | Publications, Reports, Research, and Records | Effective Date | |
| Responsible Office | Office of the Provost/Senior Vice President of Academic Affairs | Last Review | |

1.0 PURPOSE

1.1 This policy promotes the University's educational mission and the scholarly, academic, and service endeavors that are part of that mission by establishing a framework for the ownership, distribution, and commercialization of rights associated with intellectual property developed at the University. The University is committed to supporting its employees and students in their new discoveries; ~~in the~~ creation of original works of authorship, technology, and the arts, and the application and dissemination of these discoveries and works to benefit the public.

2.0 REFERENCES

- 2.1 ~~The Bayh-Dole Act, (35 U.S.C. §200–212 (1980))~~
- 2.2 ~~U.S. Copyright Act, (17 U.S.C.) (1976)~~
- 2.3 ~~U.S. Patent Act, (35 U.S.C.) (1953)~~
- 2.4 ~~The Utah Employment Inventions Act, (Utah State Code § 34–39 (1989))~~
- 2.5 Utah Board of Higher Education Policy R555 *Providing Facilities, Goods, and Services in Competition with Private Enterprise*
- 2.6 UVU Policy 114 *Conflict of Interest and Commitment*
- 2.7 UVU Policy 137 *Sponsored Programs (Grants, Contracts, Cooperative Agreements)*
- 2.8 UVU Policy 231 *Fundraising Authority, Responsibility, and Coordination*
- 2.9 UVU Policy 247 *Contract Review and Signature Authority*
- 2.10 UVU Policy ~~365 Consulting Leave~~ ~~323 Guidelines for Consulting~~



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2.11 UVU Policy 447 *Information Security*

2.12 UVU Policy 452 *Electronic and Information Technology Accessibility*

2.13 UVU Policy 542 *FERPA (Student Records Act)*

2.14 UVU Policy 606 *Adoption of Course Materials and Textbooks*

2.15 UVU Policy 640 *Faculty Sabbatical Leave*

3.0 DEFINITIONS

3.1 Course development program: A program, [such](#) as described in section 4.5, in which the University substantially invests in the production of course and instructional materials and retains ownership of intellectual property.

3.2 Creator: Any inventor, author, or developer of intellectual property.

3.3 Employee: A person employed by the University in any capacity, whether faculty, staff, administration, or student, and whether employed full-time, part-time, or in a temporary capacity.

3.4 Employee-initiated class recording: A recording of a class as further defined in section 4.4.2.

3.5 Generating unit: The college, department, or other organizational entity of the University with which the creator is associated.

3.6 Gross revenue: Revenue actually received by the University or its designee as a result of the assigning, licensing, or otherwise transferring of UVU IP, including license fees, royalty payments, and revenues derived as a result of equity such as dividends and proceeds from the sale of shares. Revenue and funding received from the following sources are excluded and are not to be included in the calculation of gross revenue, unless otherwise approved by the IP Official in writing: (1) funding from a sponsored program, (2) university tuition or activity fees, (3) revenue generated from a work created as part of an administrative assignment for or on behalf of the University, (4) revenue generated from a work specifically commissioned by the University under a written agreement, (5) revenue generated from a work created under a special program, and (6) revenue from a UVU trademark.

3.7 Intellectual property (IP): Any and all types of legally recognized intellectual property, including but not limited to, any invention, discovery, creation, know-how, technology, scientific or technological development, idea, research or other data, computer software, work of



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authorship, design, mark, or logo, regardless of whether subject to protection under patent, trademark, copyright, trade secret, or other applicable laws.

3.8 Intellectual Property Committee: A committee advising the IP Official on matters of research, UVU IP, and this policy, as further set forth in section 5.2.3.

3.9 Internal grant program: A program established within any unit of the University that provides funding in the form of grants designed and managed by that unit with no commitments or reporting to an external entity. Internal grant programs specifically exclude external grants managed through the Office of Sponsored Programs.

3.10 IP Evaluation Committee: A committee advising IPTT on the commercial potential of UVU IP as further set forth in section 5.2.7 of this policy.

3.11 IP Official: The Research Officer at the University or other individual designated by the President of the University to manage and oversee UVU IP.

3.12 Net revenue: Gross revenue minus (1) all out-of-pocket expenses incurred by the University in creating, protecting, maintaining, marketing, licensing, and enforcing rights in the UVU IP; (2) an administrative fee of 15% retained by IPTT for internal expense costs, unless otherwise agreed in writing with the creator of the UVU IP; and (3) fees or payments the University is required to pay to a third party in connection with the UVU IP, such as, for example, pursuant to an inter-institutional affiliation agreement or collaboration agreement.

3.13 Office of Intellectual Property and Technology Transfer (IPTT): The organization within the University reporting to the IP Official that promotes the protection and facilitates the transfer of UVU IP.

3.14 Sabbatical leave: A program offered to qualified employees under UVU Policy 640 *Faculty Sabbatical Leave*.

3.15 Scholarly work: Work created by an employee within the scope of their employment (as defined under the *U.S. Copyright Act* and judicial interpretations thereof) in connection with teaching, research, or scholarship and without significant university resources. Examples of scholarly work include but are not limited to [syllabi](#), [course planning materials](#), [course outlines](#), [curriculum outlines](#), course materials, lecture notes, textbooks, journal articles, scholarly papers, conference presentation materials, books, works of fiction and nonfiction, musical compositions/arrangements and recordings, poems, play scripts, dance choreography, photography, video, film, works of visual art, and other artistic creations, regardless of the medium in which the works are fixed or disseminated. Subject to contractual terms under a sponsored program to the contrary, scholarly work also includes a work resulting from the sponsored program that is ancillary to the purpose of the sponsored program or is a scholarly



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publication presenting findings of the research under the sponsored program.

However, the following are specifically excluded from a scholarly work: (1) inventions, discoveries, processes, machines, articles of manufacture, and compositions of matter, that are potentially patentable subject matter under past, present, or future versions of the *U.S. Patent Act* or patent laws of any foreign jurisdiction worldwide, even if incorporated into a scholarly work; (2) work created as a required deliverable under a sponsored program; (3) work created as part of an administrative assignment for or on behalf of the University or for the purpose of affecting in any way the operation of the University; (4) computer software created by an employee in connection with administrative, research, or other activities funded through the University; (5) work specifically commissioned by the University under a written agreement; (6) work created under a special program; and (7) work that if transferred would put the University in violation of or in conflict with an applicable contract or law.

3.16 Scholarly work license: A license between a creator of a scholarly work and the University as set forth in sections [4.3.1](#) and [4.3.3](#).

3.17 Significant university resources: ~~Utilization~~ Use of university resources in excess of what is customarily allocated to employees and students as part of regular employment or regular academic studies. Examples of significant university resources include computer infrastructure, equipment, data services, and other university computing resources beyond ordinary use; instructional design or media production services; a reduction in teaching load or additional compensation beyond regular salary from the University, such as stipends for the creation of course and instructional materials; funding allocated for asynchronous or distance learning programs; funding from a course development program or an internal grant program; and library resources, laboratories, research equipment, or production facilities beyond what is available to the general public or customarily used by similarly situated colleagues of the creator.

The following does not constitute significant university resources: (1) receipt of a regular wage, salary, or employment benefit by an employee, and receipt of financial aid by a student; (2) use of office space, office equipment, and university-owned personal computers; (3) customary administrative support; (4) incidental and reasonable use of university equipment; and (5) ordinary use of instructional materials, instructional labs, and instructional facilities by a student in fulfillment of degree requirements at the University.

3.18 Special programs: Course development programs, internal grant programs, workshop programs, training programs, and other programs as further set forth in section 4.5.1 of this policy.

3.19 Sponsored program: A potentially revocable transfer of monetary funds, or personal or real property, made to the University by a sponsoring organization for a specified purpose



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designated by the sponsoring organization, or for a specified benefit or intended beneficial outcome in return for the award, and usually made by an enforceable contract. Sponsored programs do not include institutional procurement or charitable gifts from private sources. Funds appropriated by the State of Utah for purposes of funding non-contractual university activities are not considered sponsored programs.

3.20 Student: A person registered or enrolled in one or more courses through the University.

3.21 Third-party IP: Intellectual property owned or controlled by a party other than the University, including patent, trademark, copyright, and trade secret rights of the party.

3.22 Trademark and Licensing Office (TLO): The organization within the University that oversees and manages UVU trademarks.

3.23 University-directed class recording: A recording of a lecture or other class-related activity created at the specific direction of the University and pursuant to a written agreement between the University and the employee responsible for the class as further described in section 4.4.1.

3.24 UVU IP: All intellectual property for which the University claims ownership under this policy.

3.25 UVU trademark: A name, logo, or indicia of identity, whether registered or unregistered, associated with the University or academic colleges and departments, programs and events, athletics, or other goods or services provided by the University.

3.26 Work: A copyrightable work as defined under the *U.S. Copyright Act*.

3.27 Work made for hire: In accordance with the *U.S. Copyright Act*, a work made for hire is (a) “a work prepared by an employee within the scope of his or her employment,” or (b) “A work specially ordered or commissioned for use . . . if the parties expressly agree in a written instrument signed by them that the work shall be considered a work made for hire.”

4.0 POLICY

4.1 Statement of Policy

4.1.1 The purpose of this policy is to

4.1.1.1 provide a framework for ownership of rights in intellectual property developed at the University or through the use of university resources and that respects both individual rights and the University’s reasonable interests;



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4.1.1.2 ~~t~~Transfer certain copyrights the University holds in scholarly works to the employees who created such works;

4.1.1.3 ~~s~~Support the discovery of new knowledge and foster creative expression and innovation at the University;

4.1.1.4 ~~p~~Protect the integrity of the research emanating from the University;

4.1.1.5 ~~f~~Facilitate appropriate commercial development of intellectual property owned by the University;

4.1.1.6 ~~e~~Encourage and support teaching and research activities of employees and students; and

4.1.1.7 ~~c~~Comply with the *Utah Employment Inventions Act* and the *Bayh-Dole Act*. This policy applies to all full- and part-time university employees, including faculty, administration, staff, and students.

4.1.2 This policy also applies to all students at the University and to any individual or entity that creates intellectual property with significant use of university resources, under a special program, or under a sponsored program. Noncompliance with this policy could lead to disciplinary action, up to and including termination.

4.1.3 Under federal copyright law, employers own the copyright of works created by employees acting within the scope of employment as “works made for hire.” This policy strives to place the copyright back with the creators of traditional scholarly works, and at the same time protect the interest of the University in works that are created with significant university resources. Although this policy provides a framework for determining intellectual property ownership, faculty are strongly encouraged to clarify issues of ownership through the IP Official by specific written agreement at the outset of a project or otherwise as soon as practicable.

4.2 Ownership of UVU IP

4.2.1 Subject to the exceptions in section 4.2.2, aAll intellectual property that meets one or more of the following criteria, shall be considered UVU IP that is owned by the University, ~~and~~ subject to the exceptions in section 4.2.2:

4.2.1.1 ~~c~~Created by an employee within the scope of their employment at the University;

4.2.1.2 ~~c~~Created using significant university resources;

4.2.1.3 ~~c~~Created under a sponsored program, in accordance with UVU Policy 137 *Sponsored Programs (Grants, Contracts, Cooperative Agreements)*, unless ownership is allocated otherwise pursuant to contractual obligations with the sponsor; ~~or~~



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[4.2.1.4 created under a special program, unless ownership is otherwise allocated in a writing by the University; or](#)

[4.2.1.4.2.1.5](#) Transferred to the University through a signed, written agreement with the IP Official.

4.2.2 The University's claim to ownership is altered-

4.2.2.1 by the scholarly work exception set forth in section 4.3 of this policy;

4.2.2.2 when it puts the University in violation of or conflict with an applicable contract or law; or

4.2.2.3 by a written agreement signed by the IP Official.

4.3 Scholarly Work Exception

4.3.1 Under the *U.S. Copyright Act*, works created by employees who are acting within the scope of their employment are "works made for hire" and owned by the University. Because of the University's commitment to academic freedom, the University hereby transfers any copyright it holds in a scholarly work to the creator of the scholarly work. The *U.S. Copyright Act* requires this transfer be done through a signed writing between the parties. The University shall maintain and update as needed a procedure through the Office of Intellectual Property and Technology Transfer (IPTT) to facilitate this signed writing requirement.

4.3.2 As the copyright holder, the creator has full copyright rights in the scholarly work, including publishing rights and rights to transfer to another. The creator's exercise of such rights is to be consistent with the University's policies, including UVU Policy 606 *Adoption of Course Materials and Textbooks* and UVU Policy 114 *Conflict of Interest and Commitment*.

4.3.3 The University's transfer of ownership under section 4.3.1 is contingent upon the creator hereby granting the University a non-exclusive, irrevocable, worldwide, ~~fully paid-up, perpetual license~~ [transferrable, sublicensable, fully paid-up, royalty-free, perpetual license to reproduce, adapt, create derivative works, distribute, publicly perform, publicly display, make, use, and exploit](#) to the scholarly work solely for [one or more of the purposes](#) of education, research, ~~and~~ [or](#) furtherance of [the](#) mission of the University (this license is the "scholarly work license"). The scholarly work license does not transfer copyright ownership, which remains with the creator under this policy.

4.3.4 The creator may request in writing an exception to the scholarly work license requirement under section 4.3.3. Any approval is at the sole discretion of the University and upon conditions as the University deems beneficial and fair to all parties. In consultation with the appropriate



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dean or equivalent supervisor of the creator and IPTT, the creator must obtain written approval signed by the IP Official.

4.3.5 Unless an exception is granted under section 4.3.4, the creator of a scholarly work will provide an electronic copy of the scholarly work to the University upon request so ~~that~~ the University may exercise its rights as set forth in this policy and comply with any obligations to a sponsor or third party. This expressly includes the right for the University to preserve, archive, and host the scholarly work in a university or third-party repository.

4.3.6 When creators collaborate to create a work, it often results in a “joint work” under the *U.S. Copyright Act* in which the creators jointly hold non-exclusive rights to use the work. Employees and students who collaborate with each other or with non-university third parties are encouraged to describe or determine in writing the disposition of the copyright prior to creating the work.

4.4 University-Directed Class Recordings and Employee-Initiated Class Recordings

4.4.1 Any recording of a course or other classroom activity created at the specific direction of the University for the University’s ownership and use, known as a university-directed class recording, shall be pursuant to a written agreement between the University and the employee responsible for the course.

4.4.2 When an employee responsible for a course initiates the recording of a lecture or other classroom activity in that course without significant university resources and this employee-initiated class recording is not a university-directed class recording, the University hereby transfers any copyright it holds in the employee-initiated class recording to the employee as a scholarly work under section 4.3 ([Scholarly Work Exception](#)) of this policy.

4.4.3 The University may archive an employee-initiated class recording. Before an employee-initiated class recording is used in a future university course, the University shall consult the employee whose course was recorded, if possible, to ensure academic quality and to verify the currency of the recorded content. For any commercialization or external use of an employee-initiated class recording by the University, the University must obtain in writing permission from the employee whose course was recorded. The contribution of the employee shall be appropriately acknowledged in any future use of an employee-initiated class recording if the employee indicates a desire for such attribution.

4.4.4 Employee-initiated class recordings and university-directed class recordings in which personally identifiable student activity is included may be subsequently performed, displayed, or made available online in accordance with UVU Policy 542 *FERPA (Student Records Act)* and the obtaining of any necessary image and likeness releases.

4.5 Special Programs



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4.5.1 Pursuant to other relevant policies, the University may provide at its discretion financial support, a reduced teaching load, or other substantial resources of definable value for course development programs, internal grant programs, workshop programs, training programs, or other special programs. These special programs constitute significant university resources under this policy. For information on significant university resources, see [section 3.17](#) ~~of~~ this policy.

4.5.2 ~~A creator may wish to bring their own prior intellectual property into a special program. In such case, the creator shall provide advance notice to the University so that a written contract may be put in place identifying the prior intellectual property and any license(s) granted from the creator to the University. Absent a written contract stating otherwise, the University owns a work created under a special program as a work made for hire, regardless of whether the creator is provided any additional compensation (e.g., financial support, a reduced teaching load, or other resource or resources), and the creator hereby grants to the University a non-exclusive, irrevocable, worldwide, fully paid up, perpetual license to use any prior intellectual property of the creator embodied in the work solely for the purpose of education, research, and furtherance of the mission of the University.~~

4.6 Incorporating Non-UVU Intellectual Property (IP)

4.6.1 Creator IP. ~~A creator may wish to use or incorporate their own intellectual property into their university-related teaching or activities, a work that falls within the scope of their employment, into a special program, or a sponsored program. Unless a written contract states otherwise, the creator hereby grants the University a non-exclusive, irrevocable, worldwide, transferrable, sublicensable, fully paid-up, royalty-free, perpetual license to reproduce, adapt, create derivative works, distribute, publicly perform, publicly display, make, use, and exploit any prior intellectual property of the creator embodied in the work that incorporates the creator's intellectual property solely for one or more of the purposes of education, research, or furtherance of a mission of the University.~~

4.6.2 Third-Party IP. ~~An employee may wish to use or incorporate a third party's intellectual property into their university-related teaching or activities, into a work that falls within the scope of their employment, into a special program, or into a sponsored program. In each case, before any incorporation, the employee should confirm that their usage complies with section 4.11 (Respect for Third-Party's Rights) of this policy. -If third-party permission is required (e.g., the content is copyrighted, UVU is not a licensee, and fair use does not apply), the employee shall provide advance written notice to the University so that a written agreement may be put in place that identifies the third-party intellectual property and obtains any necessary license(s) from the third party.~~

4.6.4.7 Outside Consulting



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4.6.14.7.1 An employee may perform consulting for an outside third party in accordance with applicable university policies, including UVU Policy [365323-Guidelines for Consulting Leave](#) and UVU Policy 114 *Conflict of Interest and Commitment*. However, an employee may not use UVU IP in performing consulting work nor transfer UVU IP by assignment, license, or otherwise, unless authorized in writing pursuant to section 4.2.2.3 of this policy. Any purported transfer in violation of this policy is void and unenforceable.

4.6.24.7.2 For purposes of this policy, the University makes no claim to intellectual property created by an employee outside the scope of their employment for personal or non-university consulting activities, provided (1) no UVU IP is included in the intellectual property produced from such efforts, and (2) the intellectual property is not created with significant university resources.

4.74.8 Student-Created Intellectual Property and Coursework

4.7.14.8.1 Except as noted in section 4.8.2 and as applicable relative to section 4.2 (*Ownership of UVU IP*), as a general rule, a student holds the ~~copyright intellectual property rights~~ in any work ~~they create~~. Except as set forth in section 4.2, the University does not claim ownership of any intellectual property created by a student. An employee is not permitted to assert or claim personal ownership of intellectual property created by a student in a course taught by the employee. The University may retain works created by students for its internal educational purposes, such as retention of student materials for assessment and pedagogical purposes, plagiarism detection, and addressing dissemination of student works.

4.7.24.8.2 A student may be required to assign rights in intellectual property created during participation in certain industry-sponsored capstone projects, third-party funded projects, [special programs](#), and sponsored programs.

4.84.9 UVU Trademarks

4.8.14.9.1 The University is required to monitor all uses of UVU trademarks to comply with and ensure protection under federal and state trademark law.

4.8.24.9.2 Except as otherwise stated in section 4.98.4, written authorization from the University's Trademark and Licensing Office (TLO) is required before use of a UVU trademark.

4.8.34.9.3 UVU trademarks used on commercial merchandise are licensed by the TLO through its exclusive licensing agent. Royalty income from the licensing of UVU trademarks is administered by the TLO.

4.8.44.9.4 Authorization from the TLO is not required in the following situations:



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4.8.4.14.9.4.1 An employee may use a UVU trademark in performance of official duties for the University. An employee may self-identify using a current position title as is usual and customary in the academic and professional communities.

4.8.4.24.9.4.2 A UVU trademark may be used for noncommercial purposes for scholarly works, academic documents, and presentations of scholarly work at professional meetings and conferences, as is a commonly accepted practice, for the sole purpose of indicating ~~that~~ the content represents scholarly work conducted in whole or in part at the University. When necessary, a specific disclaimer must be included to avoid confusing, misleading, or false impressions of particular sponsorship or endorsement by the University.

4.8.54.9.5 Employees and students may consult with the TLO about disclaimer language and for other questions about UVU trademarks.

4.94.10 Incoming Donation of Intellectual Property

4.9.14.10.1 An employee, student, or other individual or entity who owns intellectual property may choose to offer to the University all or part of their intellectual property for the purpose of research or facilitating commercial development. The University may accept the assignment and management of such intellectual property upon determination that the intellectual property is of sufficient interest and value to the University. The assignor shall be entitled to the same revenue sharing and other rights and responsibilities of the creators under this policy. The assignor may contact Institutional Advancement to determine qualifications for a charitable donation and whether the intellectual property is acceptable to the University as a charitable gift. All such charitable gifts will be accepted or denied in accordance with policy, including the procedures set forth in UVU Policy *231 Fundraising Authority, Responsibility, and Coordination*.

4.104.11 Respect for Third-Party Rights

4.10.14.11.1 Employees and students shall respect third-party IP and comply with applicable intellectual property laws in their teaching, learning, research, creative, and other university activities. The University also supports full ~~utilization-use~~ of the rights of fair use and the rights granted to educational institutions and libraries under the *U.S. Copyright Act* and judicial interpretations thereof. Employees are expected to seek guidance from the Office of General Counsel when questions arise regarding third party IP, copyright compliance, and fair use.

4.10.24.11.2 Employees and students are responsible for knowing the terms and conditions of applicable software licenses prior to using software and shall ensure ~~that~~ any such use of the software complies with this policy and with Policies 447 *Information Security* and 452 *Electronic and Information Technology Accessibility*.



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4.10.34.11.3 Prior to ~~utilizing~~ using software (including open-source software) as part of a sponsored program, in a special program, or in combination with UVU IP, employees and students shall consult with the Office of General Counsel to ensure compliance with agreements, including sponsorship or funding agreements.

5.0 PROCEDURES

5.1 Responsibilities of the Creator

5.1.1 The creator shall promptly disclose in writing to IPTT when any patentable UVU IP is created. The University will adopt a disclosure form and make the form readily available to the creator to assist with disclosure obligations. IPTT is available to provide assistance in ~~filling out~~ completing the disclosure form.

5.1.2 Under the *U.S. Patent Act*, public disclosure of a patentable invention prior to filing for a patent application may preclude the availability of patent protection. Public disclosure may include any non-confidential written or oral disclosure that describes the invention (e.g., scientific meeting, journal article, informal discussion with outside colleague). The creator will disclose any patentable UVU IP to IPTT via a disclosure form prior to any public disclosure, including publishing, and shall provide sufficient notice, detail, and time for IPTT to evaluate the commercial potential of the patentable UVU IP and determine whether to seek legal protection prior to such public disclosure. The University does not intend for this policy to impede an employee's ability to publish. When necessary, IPTT will make every effort to expedite the evaluation process.

5.1.3 Any intellectual property created as a result of outside consulting must be disclosed to IPTT if there is potential that the intellectual property may be classified as patentable UVU IP under this policy. Disclosure of any actual or potential conflicts of interest shall also be made pursuant to UVU Policy 114 *Conflict of Interest and Commitment*.

5.1.4 Each creator hereby assigns to the University all right, title, and interest in and to the UVU IP. The creator will cooperate fully with the University and execute all documentation necessary for the University to establish, confirm, or perfect its ownership interest in the UVU IP. This may include documentation for recordation purposes and to secure protection of UVU IP in all countries as designated by IPTT.

~~5.1.5 The employee may provide a list of intellectual property created prior to employment at the University that is to be specifically excluded from UVU IP.~~

~~5.1.65.1.5~~ Sabbatical leave, under UVU Policy 640 *Faculty Sabbatical Leave*, is offered to qualified faculty to engage in scholarly and creative activities that enhance their capacity to contribute to the University. Sabbatical leave is a program for professional development and



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creativity that benefits the entire educational enterprise and is granted by the University in consideration thereof. A faculty member on sabbatical leave falls under this policy as an employee, including any and all disclosure responsibilities. It is the responsibility of the faculty member to ensure ~~that~~ off-site work, along with any agreement entered, while consulting or visiting with other academic institutions, industry, governmental agencies, or sponsoring entities, does not conflict with obligations and commitments to the University under this and other policies. Any exception to section 5.1.56 must be approved by the IP Official.

5.2 Responsibilities of the University

5.2.1 Subject to applicable law and any contractual obligations with third parties, the University shall decide, in its sole discretion, if, how, when, and where UVU IP is to be protected and/or commercialized. The University may assign, license, or otherwise transfer any rights in UVU IP by way of written agreement under this policy. Any transfer of UVU IP to an employee or student must not create an unmanageable conflict of interest and is subject to UVU Policy 114 *Conflict of Interest and Commitment*.

5.2.2 The University designates the IP Official to oversee the management of UVU IP and IPTT in accordance with the requirements of this policy and applicable law. The IP Official may exercise discretion in deciding among the following options with respect to UVU IP:

5.2.2.1 Patenting or otherwise protecting for future commercialization;

5.2.2.2 Licensing, assigning, selling, or optioning to (1) a creator, (2) a third party, or (3) an intellectual property management organization for commercial development, such as an affiliated innovation foundation established for the purpose of commercializing intellectual property;

5.2.2.3 Archiving by the University; ~~and~~

5.2.2.4 Releasing under a Creative Commons or other public copyright license; or dedicating to the public domain.

5.2.3 The IP Official appoints, in consultation with the appropriate supervisor, an Intellectual Property Committee of faculty ~~and~~ staff that may advise the IP Official on matters of intellectual property. A representative of IPTT or the Office of General Counsel shall serve as an ex officio member of the Intellectual Property Committee. The Intellectual Property Committee may advise on protecting, managing, marketing, and commercializing UVU IP. The Intellectual Property Committee may assist with issues concerning interpretation of this policy and may recommend revisions or updates to this policy. The Intellectual Property Committee may assist the IP Official as a resource in clarifying issues of ownership at the outset of a proposed project, approving any scholarly work license exceptions, resolving any disputes between creators and the University concerning ownership of works and what constitutes significant university



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resources, mediating other disputes involving UVU IP, authorizing special exceptions to procedures and revenue distributions, and other matters under this policy.

5.2.4 A creator may appeal in writing the actions or decisions of the IP Official to the Intellectual Property Committee. A creator may appeal in writing the actions or decisions of the Intellectual Property Committee to the Provost, whose decision is final. The Provost will submit a report to the Intellectual Property Committee explaining the basis of their decision.

5.2.5 IPTT promotes the dissemination and commercial development of UVU IP to benefit the general public. This is accomplished through identifying, securing, licensing, and transferring rights in the UVU IP. IPTT works with the IP Official in developing a plan to protect, manage, and transfer the UVU IP.

5.2.6 IPTT receives and reviews all intellectual property disclosures from the creators. Upon receipt of an intellectual property disclosure, IPTT will ensure ~~that~~ all ownership rights, including UVU IP, are properly defined. The UVU IP will then be evaluated on protectability and commercial feasibility.

5.2.7 IPTT may form an ad hoc IP Evaluation Committee of employees, students, or outside experts with relevant expertise in particular fields to assist IPTT in determining commercial potential of UVU IP. Members of the IP Evaluation Committee are to be approved by the IP Official.

5.2.8 If IPTT determines not to initiate or continue with commercialization of the UVU IP, the creator may request that the UVU IP be assigned, licensed, or otherwise transferred to the creator. This request must be made in writing to IPTT and include the creator's plans and intended use of the UVU IP. The University may require that any out-of-pocket expenses previously incurred by the University in creating, protecting, maintaining, marketing, licensing, and enforcing rights in the UVU IP be reimbursed to the University.

5.2.9 The UVU IP may be transferred to the creator if the transfer does not (1) create a prohibitive conflict of interest between the creator and the University, (2) violate any legal obligations of or to the University, (3) unreasonably limit use by the University, (4) impact significant commercial or public value that may best be commercialized by the University, and (5) otherwise conflict with the University's goals or policies.

5.2.10 Any agreement transferring rights in UVU IP must be approved by the Office of General Counsel and signed by the IP Official. Prior to the transfer, IPTT will use reasonable efforts to consult with the creator of the UVU IP if the creator is employed by the University at that time.

5.2.11 IPTT retains records and documents necessary to evidence, record, register, commercialize, enforce, and support the University's interest in the UVU IP. IPTT maintains



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accounts for documenting the revenues derived from UVU IP and the out-of-pocket expenses incurred by the University in creating, producing, protecting, maintaining, marketing, licensing, and enforcing rights in the UVU IP.

5.2.12 IPTT provides training to employees on this policy and ~~also~~ answers any general policy-related questions that may arise.

5.2.13 Where actions or decisions under this policy are to be taken by the University, the IP Official will have decision-making authority. Any written agreement signed by the IP Official shall be in accordance with procedures in UVU Policy 247 *Contract Review and Signature Authority*. The IP Official will consult with IPTT, the Intellectual Property Committee, the Office of General Counsel, and the Provost, as appropriate. The creator may appeal actions or decisions of the IP Official as set forth in section 5.2.4.

5.2.14 The University does not generally engage in product manufacturing, company support functions, customer service, technology maintenance, or work for hire for the private sector. Commercial activity is permitted only if the activity is deemed consistent with the educational mission and academic programs of the University and is compliant with Utah [System Board](#) of Higher Education policies (e.g., USHE Policy R555 *Providing Facilities, Goods and Services in Competition with Private Enterprise*) and applicable law.

5.3 Revenue Sharing and Distribution Schedule

5.3.1 The University reserves the sole right and discretion to retain ownership, seek patent protection, obtain copyright or trademark registration, access, license, transfer, enforce, or otherwise administer UVU IP. UVU IP is to be managed in the best interests of the University. This may include the generation of revenue, but nothing in this policy is to be interpreted as a requirement or implicit agreement that revenue be generated or maximized for a creator.

5.3.2 Any expenses incurred by the University in securing, licensing, and transferring rights in the UVU IP will be paid by the University. Gross revenue received by the University for the UVU IP will be first used to reimburse the University for UVU IP expenses prior to distribution of any net revenue.

5.3.3 If revenue is generated through assigning, licensing, or otherwise transferring UVU IP, the net revenue will be shared with the creator of the UVU IP in accordance with this policy. The University's portion of the net revenue will be used in support of the mission of the University and activities relevant to the generation of UVU IP. An accurate accounting of expenses used in the calculation of net revenue will be made available to the creator upon request.

5.3.4 In the event the University receives equity from a licensee or assignee, the University shall determine in its sole discretion the timing of any liquidation of such equity. The University is not



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required to distribute the proceeds until after complete liquidation. The University shall have no liability in the event the value of the equity changes before a liquidation event is completed.

5.3.5 Unless otherwise specified by written agreement, the University shall distribute the net revenue from UVU IP on a quarterly basis as follows:

5.3.5.1 The creator receives fifty (50) percent of net revenue.

5.3.5.2 The University receives fifty (50) percent of net revenue.

5.3.6 Where there are multiple creators, the creators shall agree in writing on the percentage of the creator share of the net revenue that each shall receive. This agreement shall be signed by all creators and provided to IPTT. This agreement shall be made at the time of the disclosure of the UVU IP or within a reasonable time thereafter. In the absence of such an agreement, the creator's share shall be divided equally among the creators. Creators with concerns regarding specific percentages of the creator share may appeal under Section 5.2.4.

5.3.7 A creator may choose to waive all or a portion of the creator's allocated distribution of net revenue and may direct the waived distribution to the creator's generating unit to fund continuing research and creative work activities at the University.

5.3.8 Distribution of net revenue shall be made to the creator irrespective of the creator's employment or enrollment status at the University. It is the creator's responsibility to keep the University and IPTT informed of the creator's contact information.

5.3.9 The University does not provide tax advice. The creators are encouraged to seek their own legal or tax counsel to determine how distribution of revenue under this policy is treated for tax purposes.



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| POLICY HISTORY | | |
|-----------------------|--|-----------------------|
| Date of Last Action | Action Taken | Authorizing Entity |
| August 10, 2006 | Approved. | UVU Board of Trustees |
| July 23, 2019 | Non-substantive change: <ul style="list-style-type: none"> • Section 3.5 “his or her” changed to singular “their” • Section 4.1.1 “his or her” changed to singular “their” • Section 4.2.2.1 “his or her” changed to “their” and “he or she” changed to “the creator” | UVU Policy Office |
| March 28, 2024 | Revised policy with limited scope changes approved. | UVU Board of Trustees |
| | Limited scope changes approved | UVU Board of Trustees |



**UVU BOARD OF TRUSTEES
Agenda Item Coversheet**

| | |
|--|--|
| DATE: | February 26, 2026 |
| TITLE: | UVU Policy 637 Faculty Tenure |
| EXECUTIVE/RESPONSIBLE STAFF MEMBER: | Wayne Vaught, Provost Kat Brown, Deputy Provost |
| SUBJECT: | UVU Policy 637 Faculty Tenure |
| BACKGROUND: | Policy 637 required updates to (1) revise submission and review procedures and timelines to better align with Policy 632 Assignment and Advancement in Academic Rank and 633 Faculty Performance Evaluation and Feedback; (2) omit various criteria and required documentation that are unnecessary; (3) simplify guidelines for the organization of materials in the digital faculty portfolio; (4) clarify and describe the RTP committee purpose and procedure; and (5) update procedures for faculty responses during the review process to align with Policies 632 and 633. |
| ALTERNATIVES: | <ul style="list-style-type: none"> • Approve as presented, “I move to approve UVU Policy 637 Faculty Tenure.” • Amend and approve, “I move to approve, as amended, UVU Policy 637 Faculty Tenure.” • No action, “I move that we go to the next agenda item...” |
| FINANCIAL IMPACT: | |
| EXHIBITS: | a. UVU Policy 637 Faculty Tenure. |



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|--|--|--|
| Proposed Policy Number and Title: Policy 637 Faculty Tenure | | |
| Current Policy Number and Title: Policy 637 Faculty Tenure | | |
| Approval Process* | | |
| <input checked="" type="checkbox"/> Regular | <input type="checkbox"/> Temporary | <input type="checkbox"/> Compliance Change |
| <input type="checkbox"/> New <input checked="" type="checkbox"/> Revision <input type="checkbox"/> Revision—Limited Scope <input type="checkbox"/> Deletion | <input type="checkbox"/> New <input type="checkbox"/> Revision <input type="checkbox"/> Revision—Limited Scope | <input type="checkbox"/> New <input type="checkbox"/> Revision—Limited Scope <input type="checkbox"/> Deletion |
| *See UVU Policy 101 <i>Policy Governing Policies</i> for process details. | | |

| | |
|-------------------------------------|---|
| Draft Number and Date: | <u>Stage 3 Regular, February 26, 2026, Board of Trustees Review</u> |
| President’s Council Sponsor: | <u>Wayne Vaught</u> |
| Policy Steward: | <u>Kat Brown</u> |

| POLICY APPROVAL PROCESS DATES | | |
|--|---|---|
| REGULAR | TEMPORARY | COMPLIANCE |
| Drafting and Revision Entrance Date: <u>9/29/2023</u> | Drafting and Revision Entrance Date: _____ | President’s Council Approval Approval Date: _____ |
| University Entities Review Entrance Date: <u>8/14/2025</u> Close Feedback: <u>10/3/2025</u> | Board of Trustees Review Entrance Date: _____ Approval Date: _____ | Board of Trustees Ratification Ratification Date: _____ |
| Board of Trustees Review Entrance Date: <u>1/12/2026</u> Approval Date: <u>2/26/2026</u> | | |



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| | | | |
|---------------------------|---|-----------------------|-----|
| POLICY TITLE | Faculty Tenure | Policy Number | 637 |
| Section | Academics | Approval Date | |
| Subsection | Faculty | Effective Date | |
| Responsible Office | Office of the Provost/Senior Vice President of Academic Affairs | Last Review | |

1.0 PURPOSE

1.1 This policy establishes the requirements and procedures for achieving tenure at Utah Valley University.

2.0 REFERENCES

2.1 *Duties and Responsibilities of the President of a Degree-granting Institution of Higher Education—Approval by Board of Trustees*, Utah Code § 53B-2-106

2.2 Utah Board of Higher Education Policy R312 *Institutional Missions and Roles*

2.3 Utah Board of Higher Education Policy R481 *Academic Freedom, Professional Responsibility, Tenure, Termination, and Post-Tenure Review*

2.4 Utah Board of Higher Education Policy R482 *Bona Fide Financial Exigency and Personnel Reduction*

2.5 UVU Policy 165 *Discrimination, Harassment, and Affirmative Action*

2.6 UVU Policies 600 *Academic Series Policies*

2.7 American Association of University Professors, *1940 Statement of Principles on Academic Freedom and Tenure*

3.0 DEFINITIONS

3.1 Academic year: The period beginning Fall semester and ending with the subsequent Spring semester.

3.2 Department: A group of salaried, benefits-eligible faculty members from the same or related disciplines that is authorized by the dean and the Provost to act as an academic unit in evaluating faculty members for retention, tenure, and promotion (RTP).



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3.3 Faculty portfolio (portfolio): A collection of documents prepared by a faculty member as evidence of their contributions in teaching, scholarly/creative works, and service to their profession and the University. (See section 5.5.1.)

3.4 Faculty Senate retention, tenure, promotion, and appeals committee (RTP&A committee): A standing committee of the Faculty Senate that encourages equity and rigor in department rank and promotion criteria; promotes adherence to university policies; evaluates all appeals of midterm review, tenure review, and promotion decisions; and advises on matters of tenure and promotion.

3.5 Good standing: Describes the status of an employee who has no disciplinary action imposed or pending and has completed all mandatory trainings and faculty annual reviews.

3.6 Midterm review: A comprehensive review of a faculty member's portfolio to evaluate progress toward achieving tenure. This review typically takes place during the third year of the probationary period and considers the faculty member's contributions throughout the previous two years of tenure-track employment.

3.7 Missing material: Material that the faculty member neglected to include in their portfolio, whether intentional or unintentional.

3.8 Probationary period: The timeframe during which a faculty member is in a tenure-track position (but is not yet tenured) and is being evaluated against tenure criteria.

3.9 Retention, tenure, and promotion committee (RTP committee): A group of tenured faculty members that evaluates faculty members and makes recommendations for or against retention, tenure, or promotion. An RTP committee may serve a single academic department, a cluster of academic departments in the same school, or an entire school as authorized by the dean and provost. (See section 5.2.)

3.10 Service: For the purposes of this policy, service refers to service activities at the University, in the community and to one's profession that are clearly related to the faculty member's role.

3.11 Student Rating of Instruction (SRI): A standard, university-wide student rating of faculty teaching that is used for formative and summative purposes. These are administered in the university-approved system.

3.12 Tenure: A condition of continuing employment, awarded to qualified faculty members, which promotes academic freedom, attracts professionals of ability, and enhances the quality of the University's academic programs.

3.13 Tenure Criteria: Approved criteria that establish the expected levels of faculty performance in teaching, scholarly/creative works, and service for a tenure-track faculty member.



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3.14 Tenure plan: An outline and timeline of work, to be completed by a faculty member during the probationary period, which should facilitate earning tenure. Note that faculty portfolios are evaluated against the approved tenure criteria, not the faculty member's tenure plan or their adherence to their tenure plan.

3.15 Tenure review: A comprehensive review of a faculty member's portfolio to determine whether or not the faculty member shall be awarded tenure. This review typically takes place during the sixth year of the probationary period and considers the faculty member's contributions throughout the previous five years.

4.0 POLICY

4.1 Awarding of Tenure

4.1.1 In consultation with the Board of Trustees, tenure is awarded by the President of the University, based upon the recommendations of the RTP committee, department chair, dean, and Provost.

4.1.2 The reviewing bodies must base their recommendations upon university policies, approved department tenure criteria, and portfolio evaluations.

4.1.3 As set forth in UVU policy and approved department tenure criteria, a faculty member earns tenure by demonstrating sustained, expected levels of the following: teaching effectiveness; scholarly/creative works; and service. Faculty must comply with all department tenure criteria, university policies, Utah Board of Higher Education policies, and state and federal laws.

4.1.4 A faculty member's tenure award is tied to one specific academic department. When a faculty member transfers to another department during the probationary period, the faculty member is subject to the tenure criteria of the new department but may request to remain under the old criteria, subject to the approval by the department chair, dean, and Provost. (See section 5.10.) Tenured faculty who transfer to a different department will be recognized as tenured faculty of their new department.

4.1.5 Tenured status shall become effective on July 1 following approval from the President.

4.2 Development and Review of Criteria for Awarding Tenure

4.2.1 Unless they are subject to college- or school-wide tenure criteria, each department shall develop tenure criteria establishing the expected levels of faculty performance in teaching, scholarly/creative works, and service. These criteria must be consistent with the mission of the University, adhere to university policy and reflect the standards of relevant disciplines, especially UVU Policy 635 *Faculty Rights and Professional Responsibilities*.



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4.2.2 Tenure criteria documents shall be sufficiently detailed so that a faculty member can develop a plan during their first year to achieve tenure by the end of the probationary period. This plan shall provide for variations in assigned workload.

4.2.3 Tenure criteria must be reviewed and approved at least every five years to ensure clarity and consistency of expectations for tenure across the University. (See section 5.1.)

4.3 Eligibility and Probationary Period

4.3.1 Tenure is only awarded to a faculty member or administrator who has successfully completed a probationary period of tenure-track employment at UVU or another regionally accredited or recognized institution.

4.3.2 The probationary period for tenure shall be six years of full-time, tenure-track employment.

4.3.3 Probationary years may be fulfilled through previous employment in a tenure-track position at another regionally accredited or recognized institution as agreed upon at time of hire by the dean and Provost.

4.3.4 The probationary period may be altered by circumstances that may include but are not limited to stoppage of the tenure clock, department transfer, administrative appointment during the probationary period, or agreements made at the time of hire.

4.3.5 If a faculty member has been notified before the commencement of the final year of the probationary period that their employment shall not be continued, they are not eligible to apply for tenure.

4.4 Review Process for Midterm and Tenure

4.4.1 The review process for midterm and tenure includes an annual review, which may also include a review of a tenure plan, and subsequent written feedback from the department chair to the probationary faculty member. Comprehensive reviews shall occur at the midterm of the probationary period and at the time of consideration for tenure in the final year of the probationary period.

4.4.2 Evaluations for midterm or tenure review shall be based only on the materials in the portfolio, as specified in this policy in section 5.6.

4.4.3 The RTP committee, department chair, and dean shall make recommendations regarding retention of a probationary faculty member during midterm review; the Provost makes the final determination regarding retention.

4.4.4 The RTP committee, department chair, dean, and Provost make recommendations regarding tenure and promotion to associate professor for a probationary faculty member during



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the tenure review; the President of the University, in consultation with the Board of Trustees, makes the final determination regarding tenure and promotion to associate professor.

5.0 PROCEDURES

5.1 Development and Application of Tenure Criteria

5.1.1 Tenure criteria developed by departments, colleges, or schools are subject to review and approval by the appropriate department faculty, dean, and Provost. A school or college dean may require a level of standardization for department or school tenure advancement criteria.

5.1.2 In collaboration with the Provost's Office, the Faculty Senate Retention, Tenure, Promotion and Appeals Committee (RTP&A Committee) shall be responsible for reviewing tenure criteria for compliance with university policy. The committee shall initiate the review of approximately 20% of the department tenure criteria documents each year, ensuring that each tenure criteria document is reviewed at least once every five years. The committee may recommend changes so that the criteria are in compliance with this policy. Departments must address these recommended compliance changes within an academic year.

5.1.3 Deans may also recommend changes to the tenure criteria, subject to review and approval by the department faculty and Provost. The Provost shall resolve any discrepancies between the recommendations of the department faculty and the dean. Resolution must take place in a timely manner.

5.1.4 Faculty members are evaluated for tenure in accordance with the approved tenure criteria and the tenure policy in place at the time of hire. Candidates for tenure may, upon their request and if approved by the department chair, dean, and Provost, be evaluated according to more recent tenure criteria, if the criteria are revised during their probationary period.

5.1.5 The tenure criteria approval process is as follows:

5.1.5.1 The department chair (or chairs if the criteria are for a collection of departments or an entire school or college) submits new or revised tenure criteria to the dean during Fall semester.

5.1.5.2 Near the beginning of Spring semester, the dean approves the proposed criteria or provides the department(s) a detailed list of recommended revisions based on university policy.

5.1.5.3 If the dean requests revisions to tenure criteria, the department chair(s) then consults with the department(s). If the department(s) agrees with the suggested revisions, the RTP committee will make the changes. If the department does not agree with the suggested revisions, the department chair will provide a rationale to the dean in writing.



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5.1.5.4 The dean either approves the resubmitted proposed criteria or provides a written response to the department's comments and resubmission. The dean then forwards the following to the department chair and the Provost:

- The proposed tenure criteria;
- The department's response(s) if any; and
- Dean's response to the department, if any.

5.1.5.5 The Provost evaluates the tenure criteria, the dean's recommendation(s), and the department's response(s), and then approves or provides a detailed list of recommended revisions to the dean and department chair based on university policy.

5.1.5.6 In cases where the Provost recommends revisions, the department chair shall respond in writing. The Provost shall then review the department chair's responses and make final revisions before approving the tenure criteria.

5.1.6 This process must be completed by May 1.

5.2 RTP Committee Composition

5.2.1 A department or college-/school-wide RTP committee shall consist of an odd number of at least five tenured faculty members elected by a simple majority of the tenured and tenure-track faculty of the department.

5.2.2 When a sufficient number of tenured faculty members are not available and elected in a department, or other conditions exist that make clustering of departments desirable for evaluating faculty, the following options are available:

- 1) Under the direction of the dean, members may be elected from among tenured faculty members in other departments of related disciplines by the department tenured and tenure-track faculty.
- 2) Under the direction of the dean, departments of related disciplines may share the same RTP committee consisting of tenured faculty members elected by the tenured and tenure-track faculty of the affected departments.
- 3) The final composition of the RTP committee must be approved by the dean.

5.2.3 Department chairs may vote as a faculty member for election of members to serve on RTP committees.

5.2.4 Faculty members in full-time administrative positions may not vote for election of members to serve on RTP committees.



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5.2.5 The RTP committee annually elects one of its members as a chair.

5.2.6 All members of the RTP committee must be in good standing. If any member of the RTP committee is found to be not in good standing, there must be a new election except when there is not enough time for a new election. Under such circumstances, the dean may appoint a temporary member of the RTP committee until a new election can take place.

5.2.7 A department chair may not serve on the RTP committee of their own department.

5.2.8 RTP recommendations are decided by a simple majority vote of the committee.

5.2.9 RTP committee members serve a three-year term. Faculty members may serve an unlimited number of terms, but preferably no more than two terms in succession.

5.3 Tenure-Related Decisions at the Time of Hire

5.3.1 Faculty tenure status is determined at the time of initial hire. Faculty with no previous years as a tenure-track faculty member typically begin their career at UVU their first year of the probationary period.

5.3.2 In some cases, a candidate for hire into a tenure-track position may be granted up to four years toward tenure for equivalent tenure-track experience at other institutions if approved by the dean and Provost. The department determines the necessity and timing of a midterm review for candidates who are granted years toward tenure at the time of hire, and the dean and Provost approve the department's recommendation. Years awarded toward tenure shall not exceed the number of years actually served at previous institutions in a tenure-track position.

5.3.3 Typically, if a newly hired faculty member or administrator has been awarded tenure previously at another regionally accredited institution or equivalent, they may receive no years toward tenure but may go up for midterm and tenure review early. In rare cases, a newly hired faculty member may be awarded tenure at hire, or after a specified period of full-time employment after hire as agreed upon at the time of hire. Tenure agreed upon at hire must be approved by the President, who shall consider recommendations by the appropriate RTP committee and in consultation with the Board of Trustees.

5.3.4 Faculty granted years toward tenure must include material from their previous institution in their portfolio for each of those years awarded.

5.3.5 Years awarded toward tenure or the granting of tenure at the time of hire shall be communicated to the faculty candidate in the letter of appointment. This letter must be included in the faculty member's portfolio.



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5.3.6 For faculty members who begin their employment in a tenure-track position with UVU at some time other than the beginning of Fall semester of the regular academic year, the dean shall recommend and the Provost shall approve the year in which the affected faculty member shall apply for midterm review and/or tenure. This determination shall be made in consultation with the prospective faculty member and documented at time of hire. A letter from Academic Affairs detailing this determination must be included in the faculty member's portfolio.

5.4 Orientation of New Faculty, Development, and Annual Review of the Tenure Plan

5.4.1 The department chair shall provide a copy of this tenure policy and the approved department tenure criteria to each newly hired tenure-track faculty member within the first month of their first semester of work at UVU.

5.4.2 Within the first semester of hire in a tenure-track position, a new faculty member shall meet jointly with the department chair and the chair of the RTP committee to develop the expectations of the faculty member's performance during the probationary period, consistent with established department tenure criteria. The expectations agreed upon constitute the candidate's initial tenure plan. Such expectations shall be clear and reasonable, yet not overly prescriptive, allowing for a broad range of faculty achievement. The tenure plan shall be written by the faculty member in consultation with the department chair to ensure the faculty member is setting appropriate goals to achieve tenure. This plan may be revised as needed to ensure faculty stay on track to achieve tenure, that they can take advantage of unanticipated opportunities, and adapt to unforeseen obstacles. The faculty member should address the progress they are making toward achieving tenure in their annual reviews.

5.4.3 Department chairs shall review and document the faculty member's progress toward tenure in annual reviews.

5.5 The Faculty Portfolio

5.5.1 Candidates for midterm or tenure review are responsible for maintaining a digital portfolio in the institutionally approved system that documents their contributions and accomplishments in teaching, scholarly/creative works, and service, consistent with their department tenure criteria and university policy. The portfolio for tenure-track faculty members shall contain at least the following:

5.5.1.1 A copy of the officially approved tenure criteria under which the faculty member is applying for midterm or tenure.

5.5.1.2 For portfolios submitted for tenure, copies of all midterm review recommendations.

5.5.1.3 An introduction, not to exceed 1,500 words, in which the faculty member explains in what ways they have met the department's tenure criteria, discusses any factors that supported or



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hindered their progress, and provides any additional information that may assist reviewers in evaluating their portfolio. This is not to be confused with self-assessments (see below).

5.5.1.4 A current curriculum vitae with sections on teaching, scholarship, and service. The curriculum vitae may also include work before hire at UVU.

5.5.1.5 A section containing evidence of achievements in teaching, including

1) a self-assessment of the faculty member's teaching performance and effectiveness, including the extent to which students meet the established learning outcomes and any changes faculty members made over time to ensure students receive a rigorous and supportive educational experience;

2) department chair assessment of in-person and/or virtual teaching, including reviews of course materials and whether the faculty member is helping students achieve the student learning outcomes. A minimum of two department chair observations are required, one before and one after midterm review, except in extenuating circumstances as approved by Academic Affairs;

3) peer observations of in-person and/or virtual teaching, including reviews of course materials and whether the faculty member is helping students achieve the student learning outcomes. A minimum of two peer observations are required, one before and one after midterm review, except in extenuating circumstances as approved by Academic Affairs;

4) complete and unaltered university-approved student ratings of instruction (SRIs) from all course sections taught during all years of the probationary period (note that courses offered on a special term may not have SRIs available);

5) professional development related to teaching—for example, attending teaching conferences or completing Office of Teaching and Learning classes or certifications;

6) evidence of improving curriculum at the course or program level based on student feedback, teaching observations, or student performance as well as evidence of involvement in the assessment of student learning outcomes; and

7) other evidence related to teaching in accordance with department tenure criteria or as desired by the candidate.

5.5.1.6 A section containing evidence of achievements in scholarship/creative works, including

1) a self-assessment of the faculty member's scholarly/creative works performance, effectiveness, and contributions to the faculty member's discipline at the regional, national, or international level;



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- 2) evidence of scholarly/creative works related to the faculty member's position and discipline at UVU in accordance with institutional standards (see Policy 635 *Faculty Rights and Professional Responsibilities* and department tenure criteria), which must include at least one work that has been published, presented, or exhibited, and that it must have been either competitively judged or peer-reviewed; and
- 3) clinically relevant scholarly or creative works—such as practice guidelines, professional trainings, applied research, or other discipline-recognized contributions—may fulfill this requirement when they are subject to appropriate forms of review or evaluation within the field; and
- 4) if applicable to the discipline and allowed by department tenure criteria, discipline-related professional development, such as licenses, certifications, and continuing education credits relevant to the faculty member's discipline; and
- 5) publications and conference proceedings and presentations in predatory or deceptive publishers or organizations are not considered scholarship/creative works.

5.5.1.7 A section containing evidence of substantive contributions in service at one or more of the following levels as it pertains to the faculty member's role at the University, including

- 1) a self-assessment of the faculty member's service performance and effectiveness;
- 2) department-related service, as outlined in Policy 635 *Faculty Rights and Professional Responsibilities*;
- 3) college/school service, such as Perkins grants, recruitment, college/schools designated by the dean, may be included but is not required, unless required by department tenure criteria;
- 4) university service may be included but is not required, unless required by department tenure criteria;
- 5) profession/discipline service may be included but is required, unless required by department tenure criteria; and
- 6) community service directly related to the mission of the University and the faculty member's position at UVU may be included but is not required, unless required by department tenure criteria.

5.5.1.8 All annual reviews (see Policy 633 *Faculty Performance Evaluation and Feedback*) from the evaluation period. If an annual review was not conducted, the faculty member must include a detailed explanation as to why it was not conducted.



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5.5.1.9 Any notable awards or commendations related to the faculty member's role at the University.

5.5.1.10 Any improvement plans with documentation of resolution (see Policy 633 *Faculty Performance Evaluation and Feedback*); written warnings; written sanctions, to which the candidate may include a written rebuttal (see Policy 649 *Faculty Sanction and Dismissal for Cause*); or previous letters of adverse decisions regarding advancement with documentation of resolution.

5.5.2 Faculty members are responsible for including all required materials in the portfolio. Faculty must provide a detailed explanation as to why required materials were not completed or not included in accordance with policy. Materials that are not included in the portfolio cannot be relied on to help a candidate's case, but the absence of required materials could negatively impact a candidate's case.

5.6 Midterm Review Processes

5.6.1 Unless the faculty member has been notified that their employment shall not be continued, the chair of the RTP committee shall notify the faculty member in writing by March 1 of the second probationary year that they must apply for midterm review by September 15 of the next academic year. By March 15 of the second probationary year, the chair of the RTP committee shall have consulted with the faculty member for input in determining suitable candidates from whom to solicit external evaluations, if required by department tenure criteria. (See section 5.6.1)

5.6.2 If a faculty member does not submit a portfolio by September 15 of their third probationary year for midterm review, the department chair shall discuss the employment status of the faculty member with the dean. The dean shall consult with Academic Affairs about the employment options available under UVU policy, up to and including termination.

5.6.3 The RTP committee shall review the portfolio according to university policy and approved department tenure criteria. They shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. They must also state whether the portfolio is missing any required documentation. The RTP committee shall add its written review and recommendation for or against retention to the portfolio, including the vote tally that led to their recommendation.

5.6.4 No later than October 15, the chair of the RTP committee shall forward the portfolio along with the committee's written recommendation to the department chair.

5.6.5 No later than October 31, the department chair shall forward the portfolio along with a written recommendation to the dean. They shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. They must also state whether the portfolio is missing any required



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documentation. If the department chair disagrees with the RTP committee's recommendation, they must provide a detailed rationale.

5.6.6 No later than November 20, the dean will provide the candidate a copy of the external evaluations (when required by department criteria, with the identifying information of the external evaluator redacted) and the recommendations of the RTP committee, department chair, and dean. They shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. They must also state whether the portfolio is missing any required documentation. If the dean disagrees with the RTP committee's or department chair's recommendation, they must provide a detailed rationale.

5.6.7 No later than December 1, the faculty member may submit a written rebuttal to any recommendations up to and including the dean's review for inclusion in the portfolio. A written rebuttal may not include any additional evidence that is not already available in the portfolio.

5.6.8 After considering the faculty member's written rebuttal, the dean may add an addendum that either confirms or changes their recommendation. No later than December 10, the dean shall forward the portfolio along with all written recommendations and, if applicable, the faculty rebuttal and addendum, to the Provost.

5.6.9 The Provost shall review the portfolio and render a written decision to the faculty member, dean, department chair, and chair of the RTP committee no later than March 1. If the decision is that the midterm faculty member is not to be retained, the candidate shall lose probationary status. The candidate may be terminated at the end of the academic year or be offered a one-year, terminal appointment for the next academic year, as determined by the dean and Provost, in consultation with People and Culture, and the Office of General Counsel.

5.6.10 If a deadline specified in this policy does not fall on a business day, the deadline shall be extended to the next business day. Reasonable exceptions to these dates due to extraordinary circumstances may be allowed if approved by the Provost.

5.7 Tenure Review Processes

5.7.1 Unless the faculty member has been notified that their employment shall not be continued, the chair of the RTP committee shall notify the faculty member in writing by March 1 of the fifth probationary year that they must apply for tenure review by September 15 of the next academic year. By March 15 of the fifth probationary year, the chair of the RTP committee shall have consulted with the faculty member for input in determining suitable candidates from whom to solicit external peer evaluations, if required by department tenure criteria. (See section 5.6.1.)

5.7.2 If a faculty member does not submit a portfolio by September 15 of their sixth probationary year for tenure review, the department chair shall discuss with the dean the employment status of



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the faculty member. The dean shall consult with Academic Affairs about the employment options available under UVU policy, up to and including termination.

5.7.3 The RTP committee shall review the portfolio according to university policy and approved department tenure criteria. They shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. They must also state whether the portfolio is missing any required documentation. The RTP committee shall add its written review and recommendation for or against retention to the portfolio, including the vote tally that led to their recommendation.

5.7.4 No later than October 15, the chair of the RTP committee shall forward the portfolio along with the committee's written recommendation to the department chair (or dean, if the faculty member is a department chair).

5.7.5 No later than October 31, the department chair shall forward the portfolio along with a written recommendation to the dean (unless the faculty member is a department chair, in which case the RTP committee forwards the portfolio directly to the dean). They shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. They must also state whether the portfolio is missing any required documentation. If the department chair disagrees with the RTP committee's recommendation, they must provide a detailed rationale.

5.7.6 No later than November 20, the dean provides the candidate a copy of the external evaluations (when required by department tenure criteria, with the identifying information of the external evaluator redacted) and the recommendations of the RTP committee, department chair, and dean. They shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. They must also state whether the portfolio is missing any required documentation. If the dean disagrees with the RTP committee's or department chair's recommendation, they must provide a detailed rationale.

5.7.7 No later than November 27, the faculty member may submit a written rebuttal to any recommendations up to and including the dean's review for inclusion in the portfolio. A written rebuttal may not include any additional evidence that is not already available in the portfolio.

5.7.8 After considering the faculty member's written rebuttal, the dean may add an addendum that either confirms or changes their recommendation. No later than December 4, the dean shall forward the portfolio along with all written recommendations and, if applicable, the faculty rebuttal and addendum, to the Provost.

5.7.9 The Provost reviews the portfolio and forwards the portfolio and all written recommendations to the President of the University no later than March 1.



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5.7.10 The President of the University, in consultation with the Board of Trustees, decides whether to award or deny tenure. Within 14 calendar days of the President's decision, the Provost conveys the decision of the President to the faculty member, dean, and department chair. The candidate may be terminated at the end of the academic year or be offered a one-year, terminal appointment for the next academic year, as determined by the dean and Provost.

5.7.11 If a deadline specified in this policy does not fall on a business day, the deadline shall be extended to the next business day. Reasonable exceptions to these dates due to extraordinary circumstances may be allowed if approved by the dean, in consultation with the Provost.



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5.8 Summary of Dates in the Midterm and Tenure Review Processes

| | Midterm and Tenure Review Process |
|--------------|--|
| March 1 | RTP chair informs candidate of pending tenure application deadline and requests input in choosing external evaluators, if required by department tenure criteria. |
| March 15 | RTP chair receives input from faculty member concerning potential external evaluators, if required by department tenure candidate criteria. Requests for extensions or reductions of the probationary period must be received by the department chair (see sections 5.12 and 5.13). |
| April 15 | Extensions or reductions are approved or denied by the Provost. |
| September 15 | Candidate must submit their portfolio using the university-approved systems. |
| October 15 | RTP committee submits the portfolio and recommendation to the department chair. |
| October 31 | Department chair submits the portfolio and recommendation to the dean. |
| November 20 | A copy of the external evaluations, if required by department tenure criteria, and the recommendations of the RTP committee, department chair, and dean becomes available to the candidate. |
| November 27 | Final date for candidate to submit a written rebuttal to the dean. |
| December 4 | Dean forwards the portfolio along with all written recommendations and, if applicable, the faculty rebuttal and addendum, to the Provost. |
| March 1 | Provost makes the midterm decision or submits their tenure recommendation to the President of the University. Provost conveys the midterm decision to the faculty member, dean, and department chair. |
| Late March | The President of the University, in consultation with the Board of Trustees, approves or denies awarding tenure. |
| March/April | Provost conveys the decision of the President to the faculty member, dean, and department chair through the university-approved systems. |
| April/May | Appeal process begins, if faculty member appeals. |

5.9 Evaluation of the Portfolio



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5.9.1 All reviews of the candidate by the RTP committee, department chair, dean, and Provost shall be added to the portfolio as each respective review is completed.

5.9.2 During the evaluation process, the contents of the portfolio shall be kept confidential and only made available to those with responsibility for reviewing the faculty member's portfolio.

5.9.3 Faculty portfolios are evaluated against the approved tenure criteria, not the faculty member's tenure plan or their adherence to their tenure plan.

5.9.4 Student evaluations are one of multiple measures of teaching effectiveness and do not carry more weight than the other listed measures. Student evaluations must be interpreted in context with reviewers noting limitations, potential bias, and course contexts that may systematically yield lower overall evaluations. Teaching effectiveness must be demonstrated holistically across multiple forms of evidence including peer observations, self-reflections, course materials, and evidence of student learning.

5.9.5 Service should be evaluated on quality and impact rather than breadth or quantity.

5.9.6 In the case of midterm review, the RTP committee, department chair, and dean shall recommend for or against retention of the faculty member in a detailed report. The detailed report shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. The committee must also state whether the portfolio is missing any required documentation. The RTP committee shall include the vote tally that led to their recommendation.

5.9.7 In the case of tenure review, the RTP committee, department chair, and dean shall recommend for or against awarding tenure to the faculty member in a detailed report. The detailed report shall comment on the specific strengths and weaknesses, referencing evidence presented within the portfolio relative to the department tenure criteria and university policy. The committee must also state whether the portfolio is missing any required documentation. The RTP committee shall include the vote tally that led to their recommendation. The Provost shall provide a written recommendation for or against awarding tenure to the President.

5.9.8 Candor is expected in all reviews and is critical to both the University and the candidate.

5.9.9 During the midterm or tenure review process, recommendations by the RTP committee, department chair, dean, and Provost, addressed to the person at the next level of review, become part of the portfolio as it passes to each level of review.

5.9.10 All portfolios and subsequent reviews shall be submitted via the university-approved system.

5.10 Department Transfer During the Probationary Period



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5.10.1 Probationary years may be fulfilled in more than one department, subject to the recommendation of the respective department chairs, with input from the faculty involved, and if approved by the respective deans and the provost.

5.10.2 When possible, transfers during the probationary period shall be avoided in the years of midterm or tenure review unless the disciplines are so closely related that the tenure plan of the transfer candidate is applicable to the discipline of the new department. The tenure criteria under which a faculty member will be evaluated is decided on a case-by-case basis and in consultation with Academic Affairs.

5.10.3 Any change to the length of the probationary period due to the transfer must be requested by the faculty member and approved by the chair of the new department, the dean of the new college/school, if applicable, and the provost.

5.11 Tenure Clock Stoppage

5.11.1 Upon request of a faculty member, the recommendations of the department chair and dean, and the approval of the Provost, the probationary period may be interrupted for a specified time when unplanned circumstances would justifiably prevent the faculty member from making progress toward tenure. Examples of such circumstances that may receive consideration include but are not limited to childbirth or adoption, military duty, or other extenuating medical, professional, or personal circumstances.

5.11.2 Upon learning of qualifying extenuating circumstances, faculty members should submit a written request to their department chair for tenure clock stoppage. The department chair sends the request and their recommendation to the dean for review. The dean forwards the request and their recommendation to the Provost. The Provost shall make their final decision and convey it in writing to the faculty member.

5.12 Request for Extension of the Probationary Period

5.12.1 Extensions to the probationary period for tenure, while granted when reasonable circumstances justify, are possible. If the faculty member requests an extension, they shall submit a letter requesting and justifying the extension to the department chair by March 15 of the fifth year of the probationary period. Extensions to the probationary period shall be approved or denied by the department chair, dean, and Provost by April 15 of the faculty member's fifth year of the probationary period.

5.12.2 Faculty members should submit a written request to their department chair for an extension through the university-approved systems. The department chair sends the request and their recommendation to the dean for review. The dean forwards the request and their recommendation to the Provost. The Provost shall make their final decision and convey it in writing to the faculty member.



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5.13 Request for Reduction of the Probationary Period

5.13.1 Faculty who were awarded tenured or in tenure-track positions at accredited institutions previous to being hired on a tenure-track position at UVU may request a reduction of the probationary period. Faculty must provide evidence of teaching, scholarship/creative works, and service toward tenure at the previous institution. Evidence allowed must be determined in consultation with the department chair, dean and Provost or their designee.

5.13.2 Faculty who were not previously awarded tenure and who were not previously in tenure-track positions at accredited institutions before being hired into a tenure-track position as UVU in rare cases, and when accompanied by evidence of extraordinary performance in teaching, scholarship/creative works, and service by the faculty member, the probationary period for tenure may be reduced if requested by the faculty member and approved by the RTP committee, department chair, dean, and Provost. Evidence must demonstrate sustained extraordinary work comparable to faculty who are completing their full probationary period.

5.13.3 Faculty members should submit a written request for a reduction to their department chair with required evidence attached. The department chair sends the request and their recommendation to the dean to review. The dean forwards the request and their recommendation to the Provost. The Provost shall make the final decision and convey it in writing to the faculty member.

5.14 Administrative Appointments during the Tenure-Track Period

5.14.1 A tenure-track faculty member shall normally retain probationary status, and their tenure clock will continue to run while serving in an administrative position within the University. In unusual circumstances, the faculty member's tenure clock may be stopped while serving in an administrative position, if approved by the dean and Provost.

5.15 Appeals

5.15.1 A faculty member may appeal decisions relating to a denial of tenure or a non-renewal of appointment resulting from a midterm review according to the provisions and timelines outlined in UVU Policy 646 *Faculty Appeals for Retention, Tenure, and Promotion*.



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| POLICY HISTORY | | |
|--|---|-------------------------|
| Date of Last Formal Review: Click here to enter a date. | | |
| Due Date of Next Review: Click here to enter a date. | | |
| Date of Last Action | Action Taken | Authorizing Entity |
| June 10, 2017 | Limited Scope changes, Regular policy process, approved. | UVU Board of Trustees |
| June 22, 2017 | Revised policy approved | UVU Board of Trustees |
| April 29 2021 | Revised policy with limited scope revisions approved. | UVU Board of Trustees |
| April 25, 2024 | Compliance change, mandated by HB 438, Utah Legislature, approved | UVU President’s Council |
| May 6, 2024 | Compliance change ratified | UVU Board of Trustees |
| | Policy revised under regular process. | UVU Board of Trustees |



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| | | | |
|---------------------------|--|-----------------------|----------------|
| POLICY TITLE | Faculty Tenure | Policy Number | 637 |
| Section | Academics | Approval Date | April 29, 2021 |
| Subsection | Faculty | Effective Date | April 29, 2021 |
| Responsible Office | Office of the Provost/Academic Affairs | | |

1.0 PURPOSE

~~1.2 This policy establishes the requirements and procedures for achieving tenure at Utah Valley University.~~

2.0 REFERENCES

~~American Association of University Professors' 1940 Statement of Principles on Academic Freedom and Tenure~~

~~Utah Board of Higher Education Policy R312 Configuration of the Utah System of Higher Education and Institutional Missions and Roles~~

~~Utah Board of Higher Education Policy R481 Academic Freedom, Professional Responsibility, Tenure, Termination, and Post-Tenure Review~~

~~Utah Board of Higher Education Policy R482 Bona Fide Financial Exigency and Personnel Reduction~~

~~UVU Policy 165 Discrimination, Harassment, and Affirmative Action~~

~~UVU 600 Series Academic Policies~~

3.0 DEFINITIONS

~~**Academic year:** The period beginning Fall semester and ending with the subsequent Spring semester.~~

~~**Department:** A group of salaried, benefits-eligible faculty members from the same or related disciplines that are authorized by the Provost to act as an academic unit in evaluating faculty peers for retention, tenure, and promotion.~~



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Faculty portfolio: A collection of documents prepared by a faculty member as evidence of their contributions in teaching, scholarly and creative works, and service to their profession and the University. Documents may be stored electronically. (See section 5.6.1.)

Midterm review: A comprehensive review of a faculty member's faculty portfolio to evaluate progress on their tenure plan. This review typically takes place during the third year of the probationary period and considers the faculty member's contributions throughout the previous two years of tenure-track service.

Probationary year: A year in which a faculty member is in a tenure-track position but is not yet tenured.

Retention, tenure, and promotion committee (RTP committee): A group of tenured faculty members that evaluates faculty peers for recommendations for or against retention, tenure, or promotion. RTP committees may serve a single academic department, a cluster of academic departments in the same school, or an entire school. (See section 5.2.)

Service: For the purposes of this policy, refers to service activities at the University, to one's profession, and in the community that are clearly related to the faculty member's role.

Tenure: A condition of continuing employment, awarded to qualified faculty members, that promotes academic freedom, attracts professionals of ability, and enhances the quality of the University's academic programs.

Tenure plan: An outline of proposed goals and achievements, to be completed by a faculty member during the probationary period, related to teaching, scholarly and creative works, and service.

Tenure review: A comprehensive review of a faculty member's faculty portfolio to determine whether or not the faculty member shall be awarded tenure. This review typically takes place during the sixth year of the probationary period and considers the faculty member's contributions throughout the previous five years.

Tenure review portfolio: The collection of documents consisting of a faculty member's faculty portfolio submitted for evaluation for tenure or midterm review, a copy of the relevant tenure criteria, copies of annual reviews, peer and other evaluations solicited by the RTP committee during the review process, Students Ratings of Instruction (SRI) for the evaluation period, and all applicable recommendations from the RTP committee, department chair, dean, Provost, President of the University, and Board of Trustees, as applicable, as well as any optional written responses of the faculty member submitted during the review process in response to letters of the various reviewers.



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Termination for cause: Dismissal of tenured faculty for professional incompetence, serious misconduct or unethical behavior, serious violation of university policies and procedures, or substantially impaired performance due to health reasons. (See Utah Board of Regents Policy R481.)

University Tenure Advisory Committee (Advisory Committee): A Faculty Senate committee charged with reviewing tenure candidates' tenure review portfolios and advising the Provost on whether each portfolio satisfies department and university criteria for tenure review portfolios. (See section 5.3.)

Faculty Senate Retention, Tenure, Promotion and Appeals Committee (RTP&A Committee): A standing committee of Faculty Senate that encourages equity and rigor in department tenure criteria, promotes adherence to the policies of the University, considers appeals of tenure decisions, and advises on matters of tenure policy.

4.0 POLICY

4.5 Awarding of Tenure

4.5.1 Tenure is awarded by the Board of Trustees based upon the recommendations of the RTP committee, department chair, dean, Provost, and the President of the University.

4.5.2 Recommendations of the reviewing bodies are to be based upon university policies and evaluations of the tenure review portfolio with respect to approved department tenure criteria.

4.5.3 Tenure shall be awarded when a faculty member demonstrates sustained, expected levels of teaching effectiveness, scholarly and creative endeavors, and service to the profession, the University, and the community, as set forth in the approved department tenure criteria and in accordance with all 600-series academic policies relevant to the faculty member's position. Faculty are also expected not to discriminate on the basis of race, color, religion, national origin, sex, sexual orientation, gender identity, gender expression, age (40 and over), disability, veteran status, pregnancy, childbirth, or pregnancy-related conditions, genetic information, or other bases protected by applicable federal, state, or local law, as consistent with the University's Policy 165 on prohibited discrimination, harassment and related misconduct.

4.5.4 A faculty member's tenure award is tied to one specific academic department. When a faculty member transfers to another department during the probationary period or after tenure, the approved procedures of the new department determine the transfer candidate's tenure status. (See section 5.9.1.)

4.5.5 Tenured status shall become effective on July 1 following approval from the Board of Trustees.



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4.6 Development and Review of Criteria for Awarding Tenure

~~4.6.1 Each department shall develop tenure criteria that establish the expected levels of faculty performance in teaching, scholarly and creative endeavors, and service in accordance with the standards of their respective disciplines, consistent with the principles and practices specified in UVU Policy 635 *Faculty Rights and Professional Responsibilities*, and in accordance with the mission of the University.~~

~~4.6.2 Tenure criteria documents shall be sufficiently detailed that faculty members can develop a plan for achieving tenure by the end of the probationary period and shall provide for variations in assigned workload.~~

~~4.6.3 Tenure criteria shall undergo multiple levels of review and approval at least every five years to assure clarity and consistency of expectations for tenure across the University. (See section 5.1.)~~

4.7 Eligibility and Probationary Period

~~4.7.1 Tenure is only awarded to a faculty member or administrator who has successfully completed a probationary period of tenure track service at the University or another regionally accredited or recognized institution.~~

~~4.7.2 The probationary period for tenure shall be six years of full-time, tenure-track service.~~

~~4.7.3 Probationary years may be fulfilled through previous employment in a tenure-track position at other regionally accredited or recognized international institutions as agreed upon at time of hire.~~

~~4.7.4 The probationary period and conditions for awarding tenure may be altered by circumstances that may include but are not limited to stoppage of the tenure clock, department transfer, administrative appointment during the probationary period, or agreements made at the time of hire.~~

~~4.7.5 Faculty members who have been notified before the commencement of the final year of the probationary period that their employment shall not be continued are not eligible to apply for tenure.~~

4.8 Review Process for Tenure

~~4.8.1 The review process for tenure includes an annual review of the tenure plan and subsequent written feedback from the department chair to a probationary faculty member. Comprehensive reviews shall occur at midterm in the probationary period and at the time of consideration for tenure in the final year of the probationary period.~~



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~~4.8.2~~ Evaluations for midterm or tenure review shall be based only on the material in the tenure review portfolio. (See section 5.6.2.)

~~4.8.3~~ Recommendations regarding retention of a probationary faculty member at midterm shall be made by the RTP committee, department chair, and dean, with final determination regarding retention made by the Provost.

~~4.8.4~~ Recommendations regarding tenure for a probationary faculty member shall be made by the RTP committee, department chair, dean, Provost, and President of the University, with final determination regarding tenure made by the Board of Trustees.

~~4.9 Responsibilities of the Tenured Faculty Member and the University~~

~~4.9.1~~ A tenured faculty member shall make ongoing contributions in teaching, scholarly and creative work, and service in support of the mission of the University. Tenure presupposes reciprocal responsibilities between the faculty member and the University. The University shall respect the rights of faculty pertaining to academic freedom and may not dismiss a tenured faculty member without cause except in the case of a bona fide program or unit discontinuance, or under circumstances of financial exigency.

5.0 PROCEDURES

Development and Application of Tenure Criteria

~~5.15.2~~ Each department shall develop discipline-appropriate tenure and promotion criteria, consistent with university policy and mission, and subject to review and approval by the department faculty, dean, and Provost.

~~5.15.3~~ The Faculty Senate Retention, Tenure, Promotion and Appeals Committee (RTP&A Committee) shall have responsibility for reviewing department tenure criteria for compliance with this policy. The committee shall review approximately 20% of the department RTP criteria documents each year, ensuring that each RTP document is reviewed at least once every five years. The committee may recommend changes in the criteria, which shall be subject to review and approval by the department faculty, dean, and Provost.

~~5.15.4~~ Deans may also recommend changes to the department tenure criteria, subject to review and approval by the department faculty and Provost. The Provost shall resolve any discrepancies between the recommendations of the department faculty and the dean.

~~5.15.5~~ Faculty members are evaluated for tenure in accordance with the approved department, program, or school tenure criteria, and university policy in place at the time of hire. Candidates for tenure may, upon their request and if approved by the department chair, dean, and Provost, be



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evaluated according to more recent tenure criteria, if the criteria is revised during their probationary period.

5.15.6 The following is the timeline for RTP criteria approval:

| Task | Timeline (fall or spring semester) |
|---|------------------------------------|
| The department chair provides new or revised RTP criteria to the dean. | September 15 or January 17 |
| Dean approves the proposed criteria or provides a detailed list of recommended revisions based on university policy to the department. | By October 4 or February 7 |
| If the dean requests revisions to RTP criteria, department chair consults with the department. If the department agrees with the suggested revisions, the RTP committee will make the changes. If not, the department chair will provide a rationale to the dean in writing. | By October 25 or February 28 |
| Dean approves the proposed criteria or provides a written response to the department's comments and forwards the following to the department chair and the Provost: <ul style="list-style-type: none"> • The proposed RTP criteria, • The department's response(s) if any, • Dean's response to the department if any. | By November 15 or March 20 |
| Provost evaluates the RTP criteria, the dean's recommendation(s), and the department's response(s), and then approves or provides a detailed list of recommended revisions to the dean and department chair based on university policy. | By December 6 or April 10 |
| In cases where the Provost recommends revisions, the department chair shall respond in writing; then the Provost shall review the department chair's responses and make final revisions before approving the RTP criteria. | By January 5 or May 1 |

RTP Committee Composition

5.15.7 A retention, tenure, and promotion committee (RTP committee) shall consist of an odd number of at least five tenured faculty members elected by a simple majority of the tenured and tenure track faculty of the department.



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~~5.15.8~~ When a sufficient number of tenured faculty members is not available and elected in a department, or other conditions exist that make clustering of departments desirable for evaluating faculty, the following options are available:

- ~~1) Under the direction of the dean, members may be elected by the department tenured and tenure track faculty from among tenured faculty members in other departments of related disciplines.~~
- ~~2) Under the direction of the dean, departments of related disciplines may share the same RTP committee consisting of tenured faculty members elected by the tenured and tenure track faculty of the affected departments.~~
- ~~3) In either case, the final composition of the RTP committee must be approved by the dean.~~

~~5.15.9~~ Department chairs may vote as a faculty member for election of members to serve on RTP committees.

~~5.15.10~~ Faculty members in full-time administrative positions may not vote for election of members to serve on RTP committees.

~~5.15.11~~ The RTP committee elects annually one of its members as a chair.

~~5.15.12~~ A department chair may not serve on the RTP committee of their own department.

~~5.15.13~~ RTP recommendations are decided by a simple majority vote.

~~5.15.14~~ RTP committee members serve a three-year term. Faculty members may serve an unlimited number of terms, but preferably no more than two terms in succession.

~~5.16 Composition of the University Tenure Advisory Committee~~

~~5.16.1~~ The University Tenure Advisory Committee (Advisory Committee) shall consist of one tenured faculty member from each college/school. These committee members shall be nominated through and elected by the college/school tenured and tenure track faculty. College/school elections shall be conducted by the Faculty Senate Elections Committee through common procedures. The initial cohort will serve staggered two-year, three-year, or four-year terms. After the members of the initial cohort have completed their term of service, three-year terms shall become the standard term length.

~~5.16.2~~ Advisory Committee members shall elect a committee chair from among the members of the committee. The committee chair shall serve in this capacity until their term on the committee ends.



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~~5.16.3 Advisory Committee members must demonstrate commitment to the teaching mission of the University, maintain confidentiality, and attend required meetings for the evaluation of tenure review portfolios.~~

~~5.16.4 Advisory Committee members are expected to read, understand, and apply~~

~~1) University RTP criteria,~~

~~2) Department/college RTP criteria as they apply to each candidate being considered for tenure, and~~

~~3) University policies.~~

~~5.16.5 Advisory Committee members are also expected to critically review tenure review portfolios against approved department and university requirements and university policies.~~

5.17 Tenure-Related Decisions at the Time of Hire

~~5.17.1 Faculty tenure status is determined at the time of initial hire. Faculty hired on the tenure-track typically enter the track in their first probationary year.~~

~~5.17.2 A candidate for hire into a tenure-track position may be granted up to four years toward tenure for equivalent tenure-track experience at other institutions if approved by the dean and Provost. A determination of the necessity and timing of a midterm review of candidates for hire who are granted three or four years toward tenure at the time of hire is recommended by the department and approved by the dean and Provost. Years awarded toward tenure shall not exceed the number of years actually served at previous institutions in tenure-track.~~

~~5.17.3 If a newly hired faculty member or administrator has been awarded tenure previously at another regionally accredited institution or equivalent, he or she may be awarded tenure at hire, or after a specified period of full-time employment after hire as agreed upon at the time of hire, if approved by the Board of Trustees which shall consider recommendation by the appropriate RTP committee.~~

~~5.17.4 Years awarded toward tenure or the granting of tenure at the time of hire shall be communicated to the faculty candidate in the letter of appointment.~~

~~5.17.5 For faculty members who begin their employment in a tenure-track position with UVU at some time other than the beginning of Fall semester of the regular academic year, the dean shall recommend and the Provost approve the year in which the affected faculty member shall apply for midterm review and/or tenure. This determination shall be made in consultation with the prospective faculty member and documented at time of hire.~~



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5.18 Orientation of New Faculty, Development, and Annual Review of the Tenure Plan

5.18.1 The department chair shall provide a copy of this tenure policy and the approved department-specific tenure criteria to each newly hired tenure-track faculty member within the first month after hire.

5.18.2 Within the first semester of hire in a tenure-track position, a new faculty member shall meet jointly with the department chair and the chair of the RTP committee to develop the expectations of the faculty member's performance during the probationary period, consistent with established department tenure criteria. The expectations agreed upon constitute the candidate's initial tenure plan. Such expectations shall be clear and reasonable, yet not overly prescriptive, allowing for a broad range of faculty achievement. The tenure plan shall be written; signed by the faculty member, department chair, and RTP committee chair; and a copy shall be placed in the faculty member's official personnel file.

5.18.3 Department chairs shall review and document the faculty member's progress toward tenure in annual reviews. If the faculty member is serving as a department chair while on tenure-track, the dean shall review and document the department chair's progress toward tenure in annual reviews during the faculty member's tenure as department chair.

5.19 The Faculty Portfolio and the Tenure Review Portfolio

5.19.1 Candidates for tenure are responsible for maintaining a faculty portfolio that documents their contributions and accomplishments in teaching, scholarly and creative works, and professional service, consistent with department tenure criteria. The faculty portfolio shall contain at least the following:

- 1) A detailed table of contents listing every entry in the portfolio
- 2) A brief statement wherein the faculty member describes the nature of their contribution to the profession and to the University, the extent to which department expectations were met, any circumstances that helped or hindered their progress, and any other information that shall be beneficial to the reviewers in evaluating the material in the portfolio
- 3) A current curriculum vitae
- 4) A section containing evidence of achievements in teaching, including a self-assessment of the faculty member's teaching performance and experiences, a supervisor assessment, peer assessments, Students Ratings of Instruction (SRI) from all courses taught during the evaluation period, evidence of contributions to curriculum and course development, professional development related to teaching, and any other evidence related to teaching



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~~5) A section containing evidence of scholarly and/or creative works, such as publications, presentations, performances, and discipline-related professional development~~

~~6) A section containing evidence of discipline-related service to the department, the college/school, the University, the profession, and the community~~

~~**5.19.2** The tenure review portfolio is created by the chair of the RTP committee when the faculty member submits their faculty portfolio at the time of midterm or tenure review. The RTP committee chair creates the initial tenure review portfolio by combining the following with the faculty portfolio: (1) Copies of the faculty member's annual reviews from the evaluation period, (2) the tenure criteria against which the faculty member shall be evaluated, and (3) all solicited peer evaluations. All reviews of the candidate by the RTP committee, department chair, dean, Provost, and President of the University shall be added to the tenure review portfolio as each respective review is completed.~~

~~**5.19.3** During the evaluation process, the contents of the tenure review portfolio shall be kept confidential and only made available to those with responsibility for reviewing the faculty member's portfolio.~~

5.19.4 Evaluations

~~**5.19.4.1** Student evaluations of teaching shall take place each semester for each course assigned to the faculty member. Additional student evaluations may be conducted as determined by the department chair or dean. All student evaluation results shall be included by the faculty member in the faculty portfolio. (See UVU Policy 631 *Student Evaluations of Faculty and Courses*.)~~

~~**5.19.4.2** In the year of midterm or tenure review, the RTP committee, in consultation with the faculty member and the department chair, shall solicit peer evaluations of the teaching, scholarly or creative works, and service of the faculty member. Soliciting evaluations of scholarly and/or creative work from peers outside the University is encouraged. These evaluations shall be added to the tenure review portfolio by the RTP committee chair. Identification of the peer reviewers shall be known to the RTP committee and others charged with reviewing the tenure review portfolio, but shall not be disclosed to the tenure candidate unless identification becomes material during a tenure appeal.~~

~~**5.19.4.3** In the case of midterm review, the RTP committee shall recommend for or against retention of the faculty member in a detailed report. The report shall comment on the strengths and weaknesses of the faculty member relative to the department tenure criteria and shall include the vote tally that led to the final decision. If the decision is to retain the probationary faculty member, the report shall provide comments and recommendations concerning the faculty member's progress toward tenure.~~



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~~5.19.4.4 In the case of tenure review, the RTP committee shall recommend for or against tenure of the faculty member in a detailed report. The report shall comment on the strengths and weaknesses of the faculty member relative to the department tenure criteria and shall include the vote tally that led to the final decision.~~

~~5.19.4.5 Candor is expected and is critical to both the University and the candidate for tenure in all reviews.~~

~~5.19.5 During the midterm or tenure review process, recommendations by the RTP committee, department chair, dean, and Provost, addressed to the person at the next level of review, become part of the tenure review portfolio as it passes to each level of review. Recommendations that disagree with those made at a previous level of review shall be explained in the accompanying recommendation document.~~

~~5.19.6 The tenure review portfolio shall be returned to the faculty member within 14 days after the final decision for midterm or tenure review. Copies of the peer reviews with the identifying information of the peer reviewer redacted shall be included in the candidate's faculty tenure review portfolio when it is returned to the candidate at the end of the review process. Peer reviews with the identifying information of the peer reviewer intact shall be retained in a confidential file in the Office of the Provost. In the case of a negative decision, a copy of the tenure portfolio shall be kept with Academic Affairs until any associated appeal process has concluded.~~

~~5.19.7 Electronic portfolios and hard copy portfolios shall be handled in the same way. Electronic files used in midterm and tenure reviews must reside in systems provided or approved by the University.~~

Midterm and Tenure Review Processes

~~5.19.8 Unless the faculty member has been notified that their employment shall not be continued, the chair of the RTP committee shall notify the faculty member in writing by March 1 of the fifth probationary year that he or she must apply for tenure by September 15 of the next academic year. By March 15 the chair of the RTP committee shall have consulted with the faculty member for input in determining suitable candidates from whom to solicit peer evaluations. (See section 5.6.4.2.)~~

~~5.19.9 Faculty members apply for midterm review or tenure in the Fall semester of the third or sixth year of the probationary period, respectively. By September 15, faculty members shall apply for midterm review or tenure by submitting a letter of application and their faculty portfolio to the chair of the RTP committee. Portfolios and letters of application may be delivered electronically.~~



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5.19.10 If a faculty member does not submit a portfolio for midterm review or tenure, the RTP committee shall discuss with the department chair the possibility and propriety of a one-year-terminal appointment. The department chair shall write a recommendation for or against a one-year terminal appointment and submit it to the dean. The dean shall write a similar recommendation and submit it to the Provost. The Provost shall make a final determination regarding the faculty member's terminal appointment, and shall inform the faculty member, department chair, and dean of the decision in writing.

5.19.11 The RTP committee creates the faculty member's tenure review portfolio, which consists initially of the faculty portfolio and the evaluations described in section 5.6. The RTP committee may request any additional information from the faculty member and/or peers that it deems appropriate. The RTP committee shall review the tenure review portfolio according to approved university policy and department tenure criteria. The RTP committee adds its written review and recommendation for or against retention or tenure, as appropriate, to the tenure review portfolio.

5.19.12 By October 7, the chair of the RTP committee shall forward the tenure review portfolio along with the committee's written recommendation to the department chair (or dean, if the faculty member is a department chair).

5.19.13 No later than October 21, the department chair shall forward the tenure review portfolio along with a written recommendation to the dean (unless the faculty member is a department chair, in which case the RTP committee forwards the tenure review portfolio directly to the dean).

5.19.14 By November 7, the dean provides a copy of the solicited peer evaluations (with the identifying information of the peer reviewer redacted) and the recommendations of the RTP committee, department chair, and dean to the candidate. No later than November 14, the faculty member may deliver a written response to all recommendations up to that point to the dean for inclusion in the tenure review portfolio.

5.19.15 No later than December 1, the dean shall forward the tenure review portfolio along with all written recommendations and faculty response, if any, to the Provost.

5.19.16 The Provost's office shall provide to the Advisory Committee a list of all of the tenure candidates, so that tenure review portfolio assignments for committee members can be made prior to but no later than December 1.

5.19.17 The Advisory Committee shall assess each tenure review portfolio. Each portfolio will be reviewed by a minimum of three Advisory Committee members. The process and portfolio content assessment form used by the committee shall be based on university criteria as defined in section 4.2 of this policy and in UVU Policy 635 *Faculty Rights and Professional Responsibilities*. The Advisory Committee review shall verify that each tenure review portfolio (1) fulfills university and department requirements, (2) is complete, (3) has been considered



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equitably at the prior levels of review, and (4) represents procedural fairness and quality at the prior levels of review. The Advisory Committee shall not review the quality of a tenure review portfolio's specific contents. The Advisory Committee shall complete an assessment form for each tenure review portfolio and classify it as either unproblematic or problematic. If a portfolio is found to be problematic, the committee shall provide comments explaining the reason(s). This assessment form will be made available to tenure candidates at the beginning of the tenure process to assist them in the preparation and organization of their tenure review portfolio.

5.19.17.1 Tenure review portfolios shall be deemed unproblematic if they contain all of the following elements:

- 1) The tenure review portfolio contains, in order, all requisite documents addressing the relevant criteria for promotion, tenure, or both.
- 2) The department RTP committee vote was unanimous and clearly based on department and university criteria and university policies.
- 3) A detailed department RTP committee recommendation letter unambiguously, and clearly based on department and university criteria and university policies and without a dissenting or concurring opinion, unanimously recommends promotion and/or tenure, or denial of the same.
- 4) The detailed recommendation letters from the tenure candidate's department chair and dean also unambiguously and clearly based on department and university criteria and university policies, recommend promotion and/or tenure, or denial of promotion and/or tenure.
- 5) The tenure candidate does not submit in writing within timeframes established by other RTP policies any objection to the criteria applied to their review or point to some other factor sufficient to change the review result in response to factors 1-4 above.

5.19.17.2 Tenure review portfolios may be deemed problematic if they contain one or more of the following issues:

- 1) The tenure review portfolio does not contain, in order, all requisite documents addressing the relevant criteria.
- 2) The department RTP committee vote was not unanimous or was not clearly based on department and university criteria and university policies.
- 3) The department RTP letter contains a dissenting or concurring view, sufficient to raise a problem with the tenure candidate's application for tenure.



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~~4) The tenure candidate's department chair and/or dean failed to unambiguously support the applicant or placed a letter in the applicant's file disclosing one or more substantive problems with the applicant meeting the relevant criteria for promotion and/or tenure.~~

~~5) The tenure candidate contests the result of any of the deficiencies or problems contained within items 1-4 above and raises plausible reasons to suspect that the result might have been erroneous.~~

~~6) The Provost notes that required documents appear to be missing or present, contrary to the recommendations at any lower level, and wishes additional review for timely clarification.~~

~~**5.19.17.3** If a portfolio is deemed unproblematic, no further evaluation by the Advisory Committee is required; the Advisory Committee reports that the tenure review portfolio is in order and that no further assessment is necessary. If the portfolio is found to be problematic, the Advisory Committee shall conduct a thorough review of the tenure review portfolio and provide its views on the portfolio as a whole, as well as its views on any of the deficiencies or problems noted. If any problem or deficiency found in the tenure review portfolio is potentially rectifiable or was not adequately considered, the tenure candidate will be given an opportunity to address the problem or deficiency, and the tenure candidate's response shall be included with the Advisory Committee's report. The committee may set a reasonable timeframe of no more than 14 calendar days for the candidate to respond in writing.~~

~~**5.19.18** The Advisory Committee shall forward the findings for each tenure review portfolio to the Provost no later than February 15. The Provost shall make final tenure recommendations based upon university policies and the quality and content of a candidate's tenure review portfolio.~~

~~**5.19.19** In cases of midterm review, the Provost shall review the tenure review portfolio and render a written decision to the faculty member, dean, department chair, and chair of the RTP committee no later than March 1. If the decision is that the midterm faculty member is not to be retained, the candidate shall lose probationary status. The candidate shall be offered a one-year, terminal appointment for the next academic year.~~

~~**5.19.20** In cases of tenure review, the Provost reviews the tenure review portfolio and forwards their written recommendation to the President of the University no later than March 1.~~

~~**5.19.21** The President of the University forwards their recommendation to the Board of Trustees for consideration at its next meeting. The Board of Trustees decides whether to award or deny tenure. Within 14 days, the Provost conveys the decision of the Board of Trustees to the faculty member by letter. Copies of the letter are sent to the dean and department chair. Faculty members who are denied tenure shall be offered a one-year, terminal appointment for the next academic year, except in cases of termination for cause, due to a bona fide program or unit discontinuance, or financial exigency.~~



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~~5.19.22 If a deadline specified in this policy does not fall on a business day, the deadline shall be extended to the next business day. Reasonable exceptions to these dates due to extraordinary circumstances may be allowed if approved by the Provost.~~



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5.20 Summary of Dates in the Midterm and Tenure Review Processes

| - | Candidate is NOT a Department Chair | Candidate IS a Department Chair |
|--------------|---|---|
| March 1 | RTP chair informs candidate of pending tenure application deadline and requests input in choosing peer evaluators. | |
| March 15 | RTP chair receives input from faculty member concerning candidate peer evaluators. Requests for one-year extensions to the probationary period must be received by the department chair by this date (see section 5.10.1). | |
| April 15 | One-year extensions approved or denied by the RTP committee, department chair, dean, and Provost. | |
| September 15 | Candidate requests midterm review or tenure by submitting a letter of application and faculty portfolio to the RTP chair. | |
| October 7 | RTP committee submits the tenure review portfolio and recommendation to the department chair. | RTP committee submits the tenure review portfolio and recommendation to the dean. |
| October 21 | Department chair submits tenure review portfolio and recommendation to the dean. | N/A |
| November 7 | Dean delivers a copy of the solicited peer evaluations and the recommendations of the RTP committee, department chair, and dean to the candidate. | |
| November 14 | Final date for candidate to submit a written response to the dean. | |
| December 1 | Dean submits tenure review portfolio, which includes all recommendations and the faculty response, if any, to the Provost. | |
| February 15 | Advisory Committee forwards findings for each tenure review portfolio to the Provost. | |
| March 1 | Provost midterm decision due, or Provost final tenure recommendation submitted to the President of the University. | |
| March | The President of the University presents recommendation to the Board of Trustees. | |
| Late March | Board of Trustees approves or denies tenure. | |
| March/April | Decision delivered to candidate in writing. | |
| April/May | Appeal process, if candidate appeals. | |



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| | |
|--------------------------|---|
| At Conclusion of Process | Candidate retrieves tenure review portfolio (with identifying information of peer reviewers redacted) from the Provost. |
|--------------------------|---|

5.21 Adjustments to the Probationary Period

5.21.1 Department Transfer during the Probationary Period

5.21.1.1 Probationary years may be fulfilled in more than one department, subject to the recommendation of the respective department chairs, with input from the faculty involved, and if approved by the respective deans and the Provost.

5.21.1.2 When possible, transfers during the probationary period shall be avoided in the years of midterm or tenure review unless the disciplines are so closely related that the tenure plan of the transfer candidate is applicable to the discipline of the new department.

5.21.1.3 Any change to the length of the probationary period must be requested by the faculty member and approved by the chair of the new department, the dean of the new college/school, if applicable, and the Provost.

5.21.2 Tenure Clock Stoppage

5.21.2.1 Upon request of a faculty member, the recommendations of the department chair and dean, and the approval of the Provost, the probationary period may be interrupted for a specified time when circumstances would justifiably prevent the faculty member from making progress on the tenure plan. Examples of such circumstances that may receive consideration include, but are not limited to, childbirth or adoption, military duty, or other extenuating medical, professional, or personal circumstances.

5.22 Request for Extension of the Probationary Period

5.22.1 One year extensions to the probationary period for tenure, while rarely granted, are possible. If the faculty member requests a one-year extension, he or she shall submit a letter requesting and justifying the extension to the department chair by March 15 of the fifth year of the probationary period. Extensions to the probationary period shall be approved or denied by the RTP committee, department chair, dean, and Provost by April 15 of the faculty member's fifth probationary year.

5.11 Request for Reduction of the Probationary Period

5.11.1 In rare cases, and when accompanied by extraordinary performance by the faculty member, the probationary period for tenure may be shortened if requested by the faculty member and approved by the applicant's RTP committee, department chair, dean, and Provost.



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5.12 Administrative Appointments during the Tenure Track Period

5.12.1 A tenure-track faculty member shall normally retain probationary status while serving in an administrative position within the University. In unusual circumstances, the faculty member's tenure clock may be stopped while serving in an administrative position, if approved by the dean and Provost.

5.13 Appeals

5.13.1 Faculty members may appeal decisions relating to a denial of tenure or a non-renewal of appointment resulting from a midterm review according to the provisions and timelines outlined in UVU Policy 646 *Faculty Appeals for Retention, Tenure, and Promotion*.

| POLICY HISTORY | | |
|-----------------------|--|-----------------------|
| June 10, 2017 | Limited Scope changes, Regular policy process, approved. | UVU Board of Trustees |
| June 22, 2017 | Revised policy approved | UVU Board of Trustees |
| April 29 2021 | Revised policy with limited scope revisions approved. | UVU Board of Trustees |

Program

Program Proposals for UVU Board of Trustees - February 2025

| Approval Type | School/College | Program Name | Justification |
|----------------|--|---|---|
| Discontinuance | College Humanities and Social Sciences | Interreligious Studies, Undergraduate Certificate | Request of Steven Clark, Dean of College of Humanities & Social Sciences. |

"I move to approve the (Creation/Modification/Inactivation) of (Program) from the (College/School)."

Program Inactivation Proposal

Date Submitted: 2025-11-17T19:11:40Z

Viewing: **ACER-1IRS : Interreligious Studies,
Undergraduate Certificate**

Last approved: 2025-05-12T22:49:42Z

Last edit: 2026-01-05T16:19:56Z

Changes proposed by: 10003452

Final Catalog
2026-2027

Rationale for Inactivation

Request of Steven Clark, Dean of the College of Humanities & Social Sciences.

Attachment

Program Discontinuance Request - Interreligious Studies UC.docx

Faculty Member:

UVID:

Name:

E-mail:

No Approval Workflow

Proposed Effective Term

Effective Catalog Year

2026-2027

Department

PHIL - Philosophy and Humanities

College/School

HS - College Humanities and Social Sciences

Program type

Undergraduate Certificate

Program title

Interreligious Studies, Undergraduate Certificate

CIP Code

38.0201 - Religion/Religious Studies.

Program code

ACER-1IRS

Will this program be offered fully online?

Does this program have specialized accreditation or will it be pursued?

Is this program designed to lead to professional licensure or certification (whether Utah-specific or national)?

Articulation/Pathway Agreement

Date Verified

List any program(s) that this program stacks into

Effective Term

Justification for offering/changing this program

Program Description

Interreligious Studies is an interdisciplinary field that 1) critically engages questions of religious, spiritual, and secular identities, 2) examines how people orient around religion differently, and 3) engages the implications of these interactions for communities, civil society, and global politics. The certificate integrates classroom learning and experiential activities for students to help them develop the theoretical and practical skills necessary to meet the challenges of a complex and dynamic world.

What are the PLOs (Program Learning Outcomes) for the program? (List 3-5)

| PLO | |
|------------|--|
| 1 | Critically reflect upon religious, spiritual, secular identities and other ethical worldviews. |
| 2 | Navigate the conceptual and ethical complexities of diverse religious and worldview communities. |

| PLO | |
|------------|--|
| 3 | Apply the virtues and best practices of equity and inclusion in communication and interaction. |
| 4 | Evaluate and articulate one's own values and their relationship with other worldview identities. |

Do all the courses in this program proposal currently exist?

Does the program have matriculation requirements?

No

Program listing/schedule

| Code | Course List Title | Credit Hours |
|--|---|--------------|
| Total Credit Hours | | 16 |
| Discipline Core Requirements | | 13 Credits |
| <u>PHIL 3680</u> | Interreligious Studies Practicum | 3 |
| <u>PHIL 3670G</u> | Engaging Religious Diversity | 3 |
| <u>PHIL 1610</u> | Introduction to Western Religions | 3 |
| <u>PHIL 1620</u> | Introduction to Eastern Religions | 3 |
| <u>PHIL 2950R</u> | Directed Readings | 1 |
| Elective Requirements | | 3 Credits |
| Complete 3 credits from among the following: | | 3 |
| <u>ANTH 3400</u> | Myth Magic and Religion (3) | |
| <u>ANTH 3420</u> | Andean Religion (3) | |
| <u>ANTH 3450</u> | Shamanism and Indigenous Religion (3) | |
| <u>ANTH 3480</u> | Global Christianity (3) | |
| <u>ENGL 3740G</u> | Literature of the Sacred (3) | |
| <u>HIST 3160</u> | Renaissance and Reformation Europe 1350 to 1600 (3) | |
| <u>PHIL 3660R</u> | Issues in Religious Studies (3) | |
| <u>PHIL 3620</u> | Mormon Theology and the Christian Tradition (3) | |

| Code | Course List Title | Credit Hours |
|-------------------------------|----------------------------|--------------|
| PHIL 3600 | Philosophy of Religion (3) | |
| SOC 3400 | Sociology of Religion (3) | |
| other advisor-approved course | | |

Degree Map

Plan of Study Grid

First Year

Semester 1

Credit Hours

Complete the following:

[PHIL 1610](#) Introduction to Western Religions 3

[PHIL 1620](#) Introduction to Eastern Religions 3

Credit Hours 6

Semester 2

Certificate elective 3

[PHIL 3670G](#) Engaging Religious Diversity 3

[PHIL 2950R](#) Directed Readings 1

[PHIL 3680](#) Interreligious Studies Practicum 3

Credit Hours 10

Total Credit Hours 16

Program Total Credits

Do the total credits for the program exceed the standard amount allowed for the degree type?

Graduation Requirements

Graduation Requirements

1. Complete 16 credits of course work.
2. Earn a minimum 2.5 GPA in all certificate course work with no grades lower than a C-.
3. Residency hours -- Minimum of 4 credits required through course attendance at UVU.

Should students be able to select this program as a degree choice on the UVU admissions application?

Yes

Supporting Documentation

Contingencies

The following documents must be attached before submitting a NEW program: R401 document, Program assessment plan, Program financial plan, Program feasibility report, Program strategic enrollment management plan, and Library research.

Attach Supporting Documentation

IRI Fact Sheet working (2021-22).pdf

ISP Syllabus (working draft).pdf

ERD Syllabus (working draft).pdf

Market Data.pdf

Interreligious Studies Certificate 80 mile.pdf

Interreligious Studies Certificate Utah.pdf

Interreligious Studies Certificate National.pdf

Interreligious Studies Certificate Final ex sum .pdf

Administrative Comments

Reviewer Comments

Debbie Ferguson (debbie.ferguson) (Wed, 03 Dec 2025 23:22:20 GMT): This proposal will need a completed R401 and teach out plan attached to the proposal.

Justin Atkins (justin.atkins) (Fri, 12 Dec 2025 15:43:15 GMT): The following is the Office of Accreditation and Academic Assessment's, in partnership with the Curriculum Office, UCC Chair, Faculty Director of Assessment, among others, recommendations related to the program proposal. There is no teach-out plan. Reach out to the Justin Atkins, Director of Accreditation and Academic Assessment for a teach-out plan.

Debbie Ferguson (debbie.ferguson) (Wed, 17 Dec 2025 20:39:06 GMT): Rollback:
Accidentally sent on from Compliance

Justin Atkins (justin.atkins) (Wed, 17 Dec 2025 20:57:56 GMT): Rollback: Hey Brian, I sent an email about a teach-out plan. If you can review it and approve it, I will add it and share it amongst the registrars office and student affairs. Once uploaded, of course I will also approve.

Justin Atkins (justin.atkins) (Mon, 05 Jan 2026 16:19:35 GMT): Last catalog year, the final year the program will be in the catalog is AY 27-28. @Debbie, can you update this please?

Investment Reports



**CASH AND INVESTMENT
REPORT
November 2025**

Monthly Composite Performance Review

UTAH VALLEY UNIVERSITY

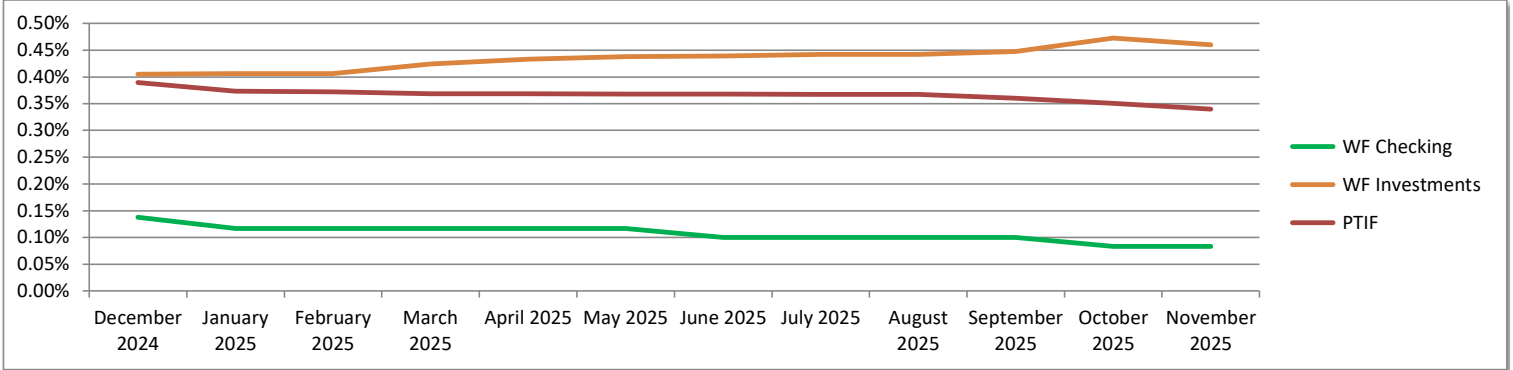
November 2025



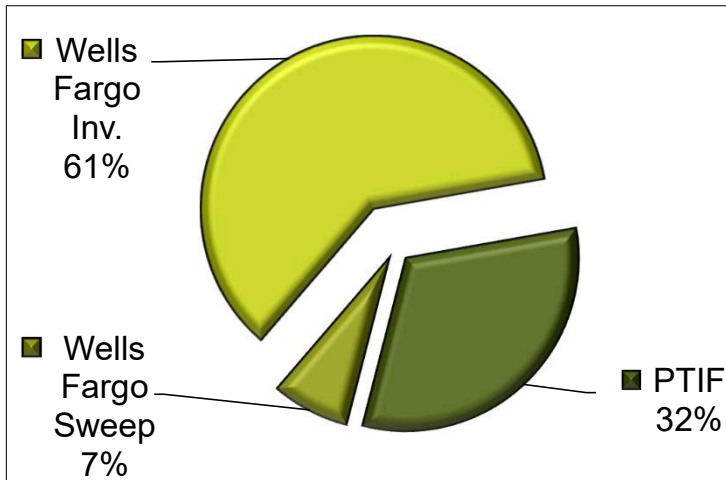
| Account Activity | Checking/Sweep | Investments | PTIF | Total University Cash and Investments | Past Twelve Months of Activity |
|--------------------------|----------------|----------------|---------------|---------------------------------------|--------------------------------|
| Beginning Balance | \$ 14,013,808 | \$ 134,966,660 | \$ 89,650,793 | \$ 238,631,261 | \$ 239,388,759 |
| Interest/Earnings Credit | 9,279 | 446,569 | 264,552 | 720,400 | 11,501,118 |
| Acquisitions/Credits | 2,084,368 | - | 15,005,956 | 17,090,324 | 377,998,498 |
| Dispositions/Debits | - | - | (30,000,000) | (30,000,000) | (411,033,822) |
| Unrecognized Gain/Loss | - | (19,214) | - | (19,214) | 266,045 |
| Fees | (4,403) | - | - | (4,403) | (174,001) |
| Transfers * | - | (446,569) | (4,484,258) | (4,930,827) | 3,540,944 |
| Ending Balance | \$ 16,103,052 | \$ 134,947,446 | \$ 70,437,043 | \$ 221,487,541 | \$ 221,487,541 |

* Transfers consist of activity between UVU and the Foundation and interest transferred to UVU.

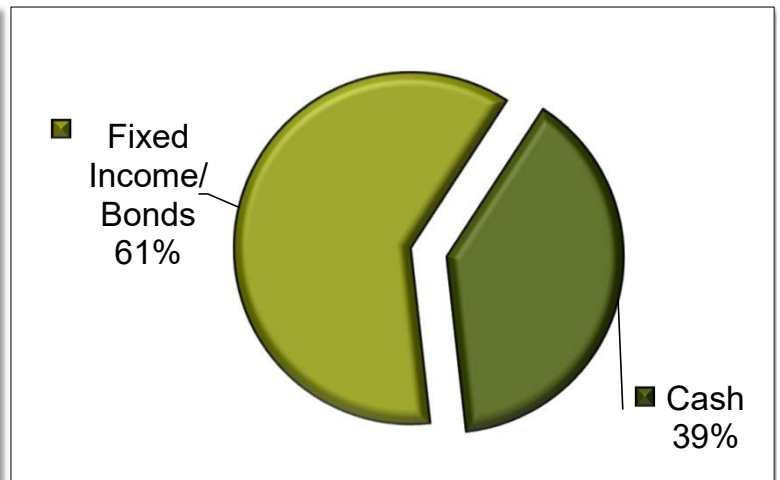
| Performance Returns | Wells Fargo Checking/Sweep | Wells Fargo Investments | PTIF |
|---------------------|----------------------------|-------------------------|-------|
| December 2024 | 0.14% | 0.41% | 0.39% |
| January 2025 | 0.12% | 0.41% | 0.37% |
| February 2025 | 0.12% | 0.41% | 0.37% |
| March 2025 | 0.12% | 0.42% | 0.37% |
| April 2025 | 0.12% | 0.43% | 0.37% |
| May 2025 | 0.12% | 0.44% | 0.37% |
| June 2025 | 0.10% | 0.44% | 0.37% |
| July 2025 | 0.10% | 0.44% | 0.37% |
| August 2025 | 0.10% | 0.44% | 0.37% |
| September 2025 | 0.10% | 0.45% | 0.36% |
| October 2025 | 0.08% | 0.47% | 0.35% |
| November 2025 | 0.08% | 0.46% | 0.34% |
| Monthly Average | 0.11% | 0.43% | 0.37% |
| 12 Month Return | 1.29% | 5.22% | 4.39% |



UVU Cash and Investments as a Percent of Total



UVU Cash and Investments Investments by Type



Monthly Composite Performance Review

UVU Foundation

November 2025



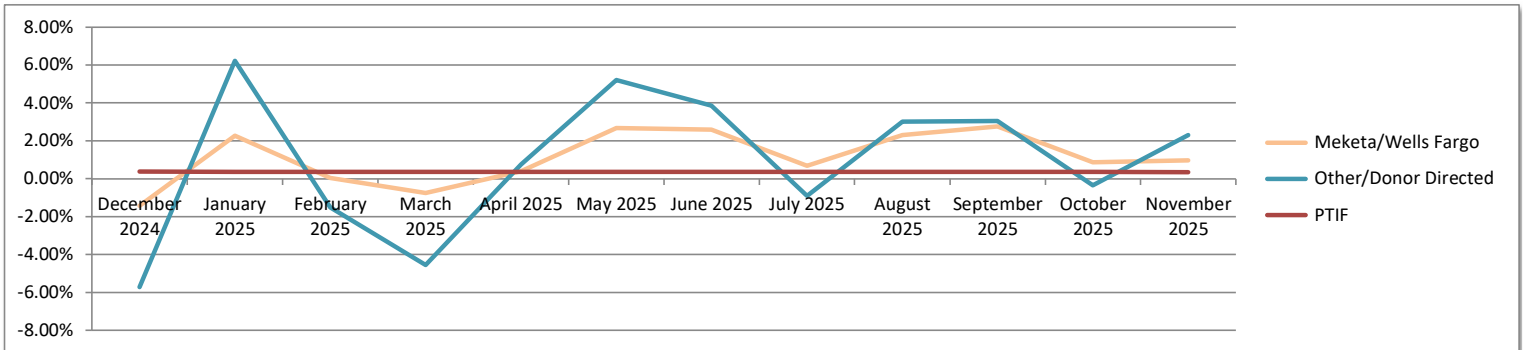
Account Activity

| | Unrestricted | Temporarily Restricted | Permanently Restricted - Endowments | Total Foundation Investments | Past Twelve Months of Activity | Notes Due From University ^ |
|------------------------|--------------|------------------------|-------------------------------------|------------------------------|--------------------------------|--------------------------------|
| Beginning Market Value | \$ 3,438,564 | \$ 46,492,416 | \$ 132,794,660 | \$ 182,725,640 | \$ 167,801,934 | Beginning Balance \$ 4,623,466 |
| Interest | 14,652 | 190,477 | 179,346 | 384,475 | 4,981,792 | Additional Notes - |
| Acquisitions | - | - | 2,241,785 | 2,241,785 | 81,122,567 | Principal Received (249,995) |
| Dispositions | - | - | (2,241,785) | (2,241,785) | (65,205,561) | Ending Balance \$ 4,373,470 |
| Gain/Loss Rec & Unrec | - | - | 1,026,362 | 1,026,362 | 10,826,666 | Interest Received \$ 28,655 |
| Fees | - | - | (7,106) | (7,106) | (89,709) | Rate 5.5% |
| Transfers * | (1,005,293) | 5,480,269 | 9,282 | 4,484,258 | (10,824,060) | ^ Fiscal Year Activity |
| Ending Market Value | \$ 2,447,923 | \$ 52,163,162 | \$ 134,002,544 | \$ 188,613,629 | \$ 188,613,629 | |

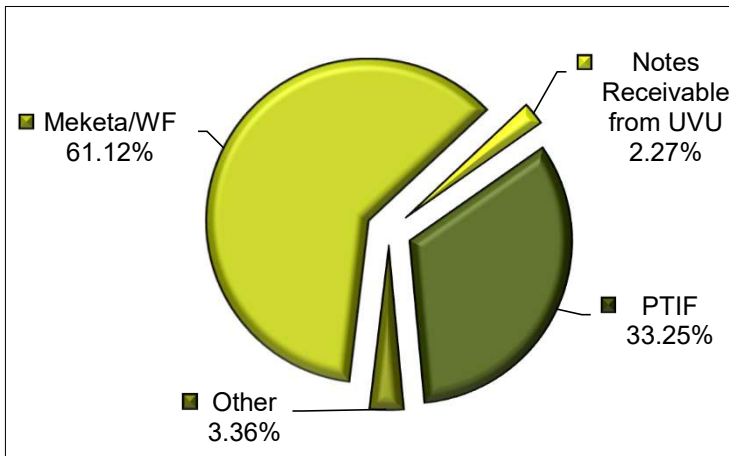
* Transfers consist of activity between money market accounts and other investment accounts as well as activity between the University and the Foundation.

Performance Returns

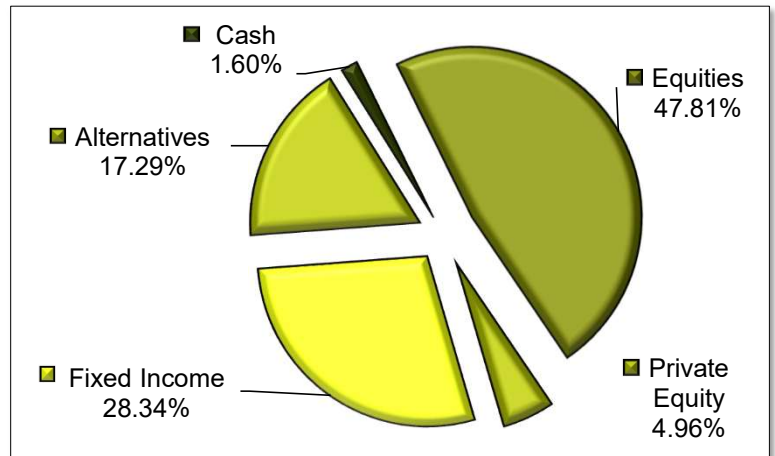
| | Meketa/ Principal | Other - Donor Directed | PTIF |
|-----------------|----------------------|---------------------------|-------|
| December 2024 | -1.43% | -5.71% | 0.39% |
| January 2025 | 2.27% | 6.23% | 0.37% |
| February 2025 | 0.04% | -1.51% | 0.37% |
| March 2025 | -0.75% | -4.55% | 0.37% |
| April 2025 | 0.40% | 0.75% | 0.37% |
| May 2025 | 2.67% | 5.21% | 0.37% |
| June 2025 | 2.60% | 3.85% | 0.37% |
| July 2025 | 0.69% | -0.91% | 0.37% |
| August 2025 | 2.30% | 3.02% | 0.37% |
| September 2025 | 2.76% | 3.04% | 0.36% |
| October 2025 | 0.87% | -0.35% | 0.35% |
| November 2025 | 0.98% | 2.30% | 0.34% |
| Monthly Average | 1.12% | 0.95% | 0.37% |
| 12 Month Return | 13.41% | 11.36% | 4.39% |



UVU Foundation
All Funds as a Percent of Total



UVU Foundation
Investments by Type/Long-Term Investment Fund





**CASH AND INVESTMENT
REPORT
December 2025**

Monthly Composite Performance Review

UTAH VALLEY UNIVERSITY

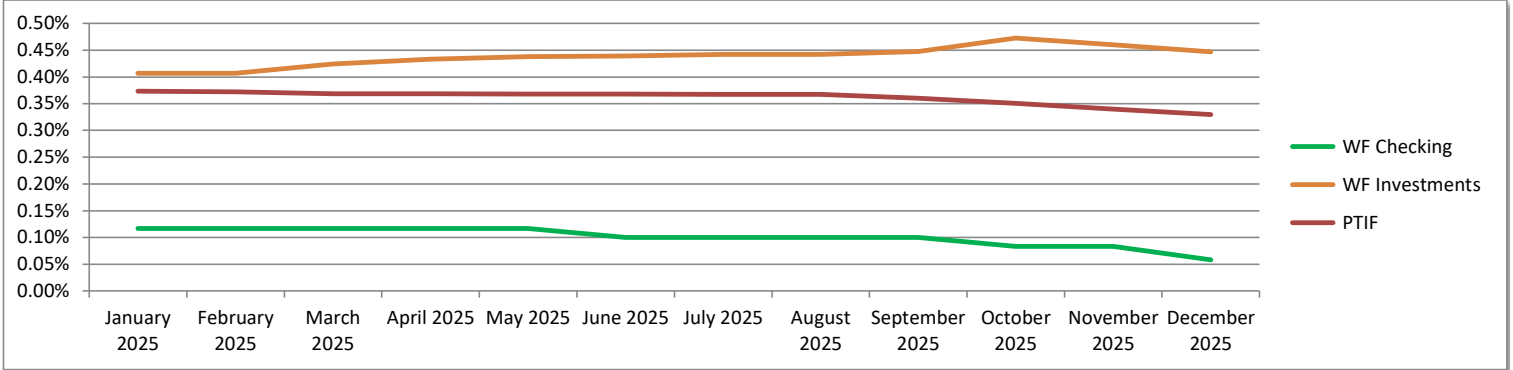
December 2025



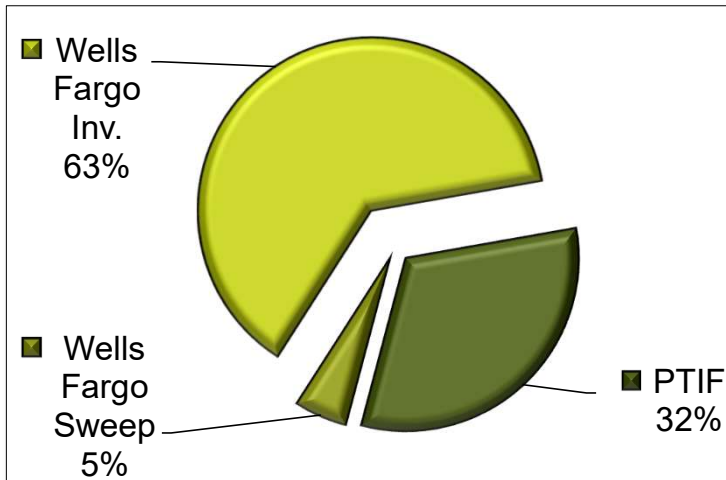
| Account Activity | | | | Total University | Past |
|--------------------------|----------------|----------------|---------------|----------------------|---------------------------|
| | Checking/Sweep | Investments | PTIF | Cash and Investments | Twelve Months of Activity |
| Beginning Balance | \$ 16,103,052 | \$ 134,947,446 | \$ 70,437,043 | \$ 221,487,541 | \$ 233,582,244 |
| Interest/Earnings Credit | 8,051 | 433,426 | 252,989 | 694,466 | 11,184,880 |
| Acquisitions/Credits | - | - | 19,740,670 | 19,740,670 | 370,381,348 |
| Dispositions/Debits | (5,548,867) | - | (24,000,000) | (29,548,867) | (406,082,689) |
| Unrecognized Gain/Loss | - | 1,129 | - | 1,129 | 233,827 |
| Fees | (3,905) | - | - | (3,905) | (147,859) |
| Transfers * | - | (433,426) | 1,748,098 | 1,314,672 | 4,533,955 |
| Ending Balance | \$ 10,558,331 | \$ 134,948,575 | \$ 68,178,800 | \$ 213,685,706 | \$ 213,685,706 |

* Transfers consist of activity between UVU and the Foundation and interest transferred to UVU.

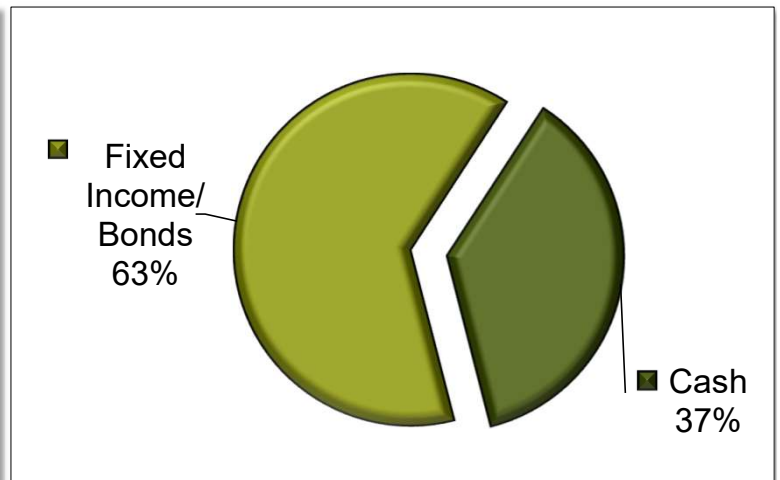
| Performance Returns | Wells Fargo | Wells Fargo | PTIF |
|---------------------|----------------|-------------|-------|
| | Checking/Sweep | Investments | |
| January 2025 | 0.12% | 0.41% | 0.37% |
| February 2025 | 0.12% | 0.41% | 0.37% |
| March 2025 | 0.12% | 0.42% | 0.37% |
| April 2025 | 0.12% | 0.43% | 0.37% |
| May 2025 | 0.12% | 0.44% | 0.37% |
| June 2025 | 0.10% | 0.44% | 0.37% |
| July 2025 | 0.10% | 0.44% | 0.37% |
| August 2025 | 0.10% | 0.44% | 0.37% |
| September 2025 | 0.10% | 0.45% | 0.36% |
| October 2025 | 0.08% | 0.47% | 0.35% |
| November 2025 | 0.08% | 0.46% | 0.34% |
| December 2025 | 0.06% | 0.45% | 0.33% |
| Monthly Average | 0.10% | 0.44% | 0.36% |
| 12 Month Return | 1.21% | 5.26% | 4.33% |



UVU Cash and Investments as a Percent of Total



UVU Cash and Investments Investments by Type



Monthly Composite Performance Review

UVU Foundation

December 2025



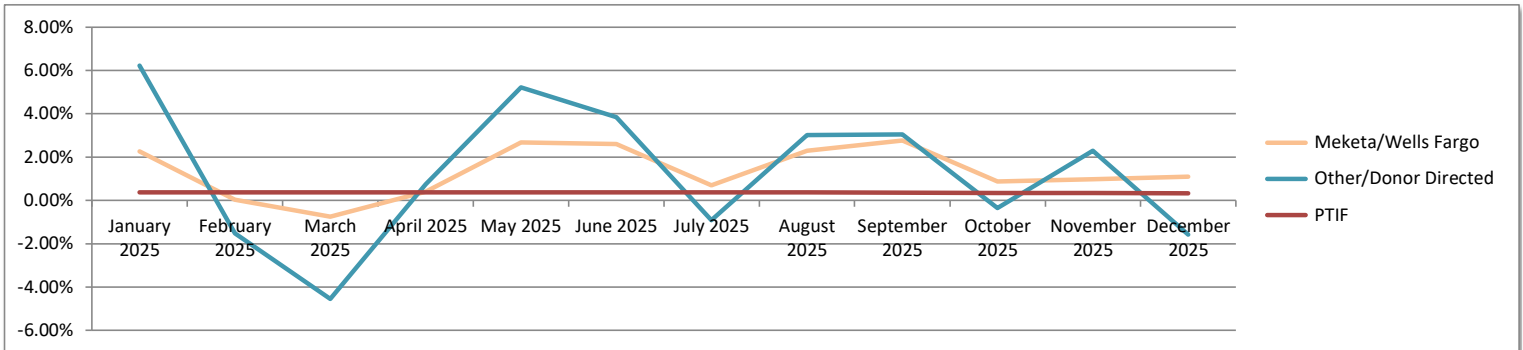
Account Activity

| | Unrestricted | Temporarily Restricted | Permanently Restricted - Endowments | Total Foundation Investments | Past Twelve Months of Activity | Notes Due From University ^ |
|------------------------|--------------|------------------------|-------------------------------------|------------------------------|--------------------------------|--------------------------------|
| Beginning Market Value | \$ 2,447,923 | \$ 52,163,162 | \$ 134,002,544 | \$ 188,613,629 | \$ 165,869,539 | Beginning Balance \$ 4,623,466 |
| Interest | 9,341 | 189,159 | 208,973 | 407,473 | 5,015,314 | Additional Notes - |
| Acquisitions | - | - | 14,952,577 | 14,952,577 | 95,696,507 | Principal Received (406,436) |
| Dispositions | - | - | (14,952,577) | (14,952,577) | (79,779,501) | Ending Balance \$ 4,217,029 |
| Gain/Loss Rec & Unrec | - | - | 1,126,044 | 1,126,044 | 13,293,284 | Interest Received \$ 127,145 |
| Fees | - | - | (6,997) | (6,997) | (57,358) | Rate 5.5% |
| Transfers * | 985,909 | (2,881,094) | 147,087 | (1,748,098) | (11,645,734) | ^ Fiscal Year Activity |
| Ending Market Value | \$ 3,443,173 | \$ 49,471,227 | \$ 135,477,651 | \$ 188,392,051 | \$ 188,392,051 | |

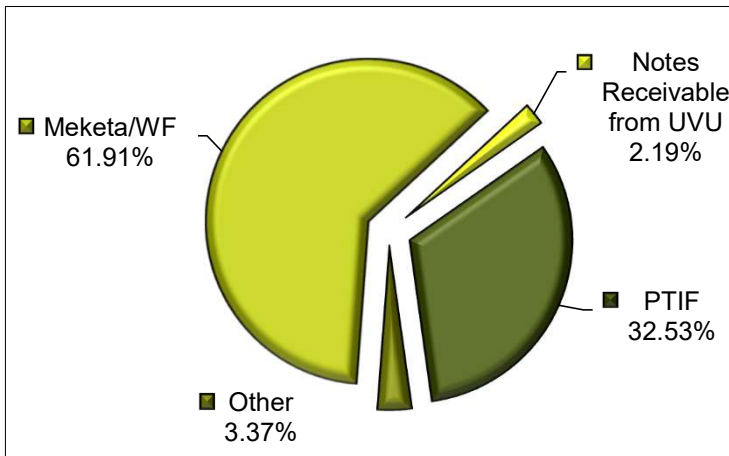
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Performance Returns

| | Meketa/ Principal | Other - Donor Directed | PTIF |
|-----------------|----------------------|---------------------------|-------|
| January 2025 | 2.27% | 6.23% | 0.37% |
| February 2025 | 0.04% | -1.51% | 0.37% |
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| May 2025 | 2.67% | 5.21% | 0.37% |
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| August 2025 | 2.30% | 3.02% | 0.37% |
| September 2025 | 2.76% | 3.04% | 0.36% |
| October 2025 | 0.87% | -0.35% | 0.35% |
| November 2025 | 0.98% | 2.30% | 0.34% |
| December 2025 | 1.10% | -1.59% | 0.33% |
| Monthly Average | 1.33% | 1.29% | 0.36% |
| 12 Month Return | 15.94% | 15.49% | 4.33% |



UVU Foundation
All Funds as a Percent of Total



UVU Foundation
Investments by Type/Long-Term Investment Fund

