

Schedule of Events	<p><b><u>Friday, October 12, 2018</u></b></p> <p><b>11:00 a.m. - Trustees Working Meeting (Charles Hunter Room)</b></p> <p><b>12:00 - Trustee Lunch (Yankee Meadows)</b></p> <p><b>1:00 - General Board of Trustee Meeting (Charles Hunter Room)</b></p> <p><b>8:00 - Forever Red (Upper Quad)</b></p> <p><b><u>Saturday, October 13, 2018</u></b></p> <p><b>9:00 - Alumni Pancake Breakfast</b></p> <p><b>10:00 - Homecoming Parade</b></p> <p><b>6:00 - Homecoming Football Game</b></p>
	<p><b>Next Board of Trustees Meeting - December 13, 2018 (President's Holiday Gala)</b></p>

<b>ACTION:</b>			
	1	Welcome and Review of Agenda	<b>Verbal</b>
	2	Minutes of August 23, 2018 Trustees Meeting	<b>Tab A</b>
	3	Proposed Meeting Schedule for 2019	<b>Tab B</b>
	4	R401:AAS in Aviation Maintenance Technician (AMT) Final Review	<b>Tab C</b>
	5	SUU/Stech Enrollment Updated Agreement	<b>Tab D</b>
<b>INFORMATION ONLY:</b>			
	6	SPARC Annual Report	<b>Tab E</b>
<b>REPORTS:</b>			
	7	Report of the Trustees Board Chair	
	8	Report of Staff Association	<b>Tab F</b>
	9	Report of Student Body President	<b>Tab G</b>
	10	Report of Alumni Board	<b>Tab H</b>
	11	Report of Alumni and Community Relations	<b>Tab I</b>
	12	Report of Advancement & Enrollment Management	<b>Tab J</b>
	13	Report of Athletics	<b>Verbal</b>
	14	Report of Finance & Administration	<b>Tab K</b>

	15		Report of Student Affairs	<b>Tab L</b>
	16		Report of Faculty Senate President	<b>Tab M</b>
	17		Report of Provost & Academic Affairs	<b>Tab N</b>
	18		Report of the President	<b>Verbal</b>

<b>CONSENT:</b>				
	19		Investment Reports (July & August 2018)	<b>Tab O</b>
	20		Early Retirement (Kay Anderson)	<b>Tab P</b>
	21		Personnel & Retirements	<b>Tab Q</b>

<b>Action</b>			Motion to go into Executive Session ( <i>if needed</i> )	<b>Verbal</b>
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## **Regular Business Meeting**

The Regular Business meeting called to order by Chair Leavitt at 12:30 p.m. in the Charles Hunter Room.

**Trustees Present:** Chair Eric Leavitt, Vice Chair Sherrie Hansen, Trustees Rich Christiansen, Marilee Eyre, Michael Wankier, Marshall Erb, Shannon Dulaney and Scott Johnson.

**Trustees Excused:** D’Mia Lamar, Jodi Wilson

**Others Present:** President Scott Wyatt; Jennifer Oberhelman, Secretary; Provost Brad Cook, Vice Presidents Marvin Dodge, Finance & Administration; Mindy Benson, Alumni and Community Relations; Stuart Jones, Advancement and Enrollment Management; Steve Meredith, Asst. to the President for Institutional Planning; James Sage, Assoc. Provost; Mitch Bealer, Nikki Koontz, Todd Petersen, Trisha Robertson, Mary Jo Anderson, Steve Carpenter, Camille Thomas, Robin Boneck, Jim Shakespear, Brandon Wright, and Zach Murray

### **Welcome by Chair Leavitt**

Chair Eric Leavitt called the meeting to order at 12:30 p.m., welcomed all attendees, and reviewed the day’s agenda. Chair Leavitt shared that there will be a “hard-stop” at 2:30 today so all can participate in the Student Induction events. Chair Leavitt introduced SUU’s new Trustee, Marilee Eyre. Jennifer Oberhelman officially swore Marilee Eyre in as Trustee.

### **Minutes of July 18 and 19, 2018**

The minutes of July 18 and 19, 2018 were presented for approval.

Motion to approve the minutes as amended was made by Scott Johnson; seconded by Shannon Dulaney. Vote – unanimous.

### **Policy #13.18 – Staff Association Constitution Revisions**

Staff Association President Jim Shakespear explained the revisions will provide a new procedure to address the replacement of the Staff Association President if they should leave mid-term, as well as provide a permanent URL reference to the Bylaws of the association. The VP of Finance was removed from the Office of Responsibility to allow the Staff Association to be responsible and present directly to the President’s Council for future modifications. These changes were approved by the Staff Association members on July 16, 2018.

Motion made to approve Policy #13.18 – Staff Association Constitution Revisions by Rich Christiansen; seconded by Marshall Erb. Vote – unanimous.

### **3-Year Report**

Provost Cook presented this 3-year report to comply with Regent's Policy R411 and SUU Policy 6.41 that require new academic programs give a brief follow-up three years after implementation. The following programs were reported on:

Exercise Science (BS) – Dr. Camille Thomas reported that the program is very well received by students and is aligned with student interest in terms of educational offerings and career preparation. A challenge is identified due to a 32.2% increase in students from year 1 to 3 with a 7.3% increase in total funding. This is resulting in overloads. Also, there is not a system for tracking students after graduation. It is recommended that a plan of action be implemented to address enrollment growth and tracking student placements upon graduation. These two recommendations are moving forward.

Accountancy (3 Emphases) – Dr. Robin Boneck reported the analysis provided good insights into the challenges related to creating three new emphases. It appears students are taking advantage of these opportunities. A mechanism to track enrollments is lacking, making it difficult to use enrollment data to make improvements. It is suggested that working with entities on campus to find a way to track students in the three emphases would be beneficial. It was suggested they ask industry partners whether they view the emphases as valuable.

Film and Screen Studies (Minor) – Dr. Todd Petersen reported that enrollment is strong and supports the initial proposal, indicating that this minor would be a popular and valuable addition. The only weakness identified was the lack of students graduating with this minor. Only eight students have graduated out of approximately 28-30 over the last three years. Useful data would be beneficial; this would require extra funding.

#### **Faculty Senate President Report**

Dr. Dave Berri reported that faculty salaries continue to be the main topic of discussion. He will be reporting to the Faculty Senate information about the data base and model for salaries and explain that this process is not arbitrary. Hiring a diverse faculty remains a high priority. Reforming of committees will be reviewed and their purposes will be looked at closely. They are working on the mechanics of the new policy for mid-term grades. (See written report for additional information.)

#### **Staff Association President Report**

Jim Shakespear reported that there are 728 staff members in the association and they are looking at gaps across campus for ways staff can become more involved. (See written report for additional information.)

#### **Alumni Board President Report**

Trustee Scott Johnson reported five members of the Council will be leaving as their terms are up. They held the first Legacy Luncheon today. This luncheon included alumni and their children who are attending SUU. He and Ron Cardon attended an Alumni conference at Northern Arizona University and picked up some great ideas. He reviewed some of the statistics from the civic engagement survey sent to SUU alumni. There was a 10% return on the survey. This survey

showed over 80% of the alumni who answered the survey are civically engaged (voted and/or involved in community service). (See written report for additional information.)

### **Alumni and Community Relations Report**

Mindy Benson reported 9,425 athletes participated in the Larry H. Miller Utah Summer Games; this is a 12% increase over last year. Athletes came from 26 Utah counties and 735 from out-of-state. Estimated sales tax revenue as a direct result of the USG in June was \$217,983. 515 of the incoming freshmen class identify one or both parents are SUU alumni. SUU hosted the 31<sup>st</sup> annual Utah Rural Summit this year. (See written report for additional information.)

### **Advancement and Enrollment Management Report**

Stuart Jones introduced Nikki Koontz as the new Executive Director of Brand Strategy for SUU. She will replace Ellen Treanor. He then introduced Brandon Wright, Asst. VP for Enrollment Management to talk about our incoming freshman class. This is the largest freshman class in history; enrollment for first-time freshman is up 16.9%, transfers up 9.5%, out-of-state is up 15.73%; these are just a few of the great statistics available. Every county in Utah is represented, along with 58 countries with over 600 international students. Campus tours this summer reached an all-time high (up by 38%) and “closure rates” were at 58% of students who came for a campus visit. They hope to have two additional full-time recruiters in Las Vegas and California and would like to work towards having one in the Phoenix area.

Stuart reminded all that the ribbon cutting for the new Business Building would be at 4 p.m. on Monday, August 27.

### **Athletics Report**

Debbie Corum reported that they have had a record-breaking fundraising year; this includes ticket sales, corporate sponsorships, and gifts. They also report that when student athletes come to campus for a visit, the percentage is very high that they will sign with SUU Athletics. Last year was a great year in Athletics and it is expected it will be better this year. Three new coaches have been hired (Pete Hoyer, Women’s Volleyball; Kortny Hall, Women’s Softball; and, Tracy Sanders, Women’s Basketball). She shared some demographics regarding the athletes that show the great diversity of our program. Athletics is currently looking for more “money” games to boost income. They are also reaching out to former athletes with hope they will become donors. She ended by inviting the Trustees to join the football team on their trip to Idaho in October.

### **Finance and Administration Report**

Marv Dodge reported that the Controller’s Office has been renamed Accounting Services to better reflect their goal – customer service to the campus. Mitch Bealer has been promoted to Assistant Vice President over this area. A new bookstore manager has been hired as well as a new director for Chartwells. Finances for SUU will be ending the year in the black and Budget is working on a newly automated E&G Budget Request Form and guidelines that will be used for the FY2020 budget season. The Business Building has been completed and work has started on the former building to transform it into the new Geosciences Building. HR, along with members of the

Compensation Committee has been working with consultant Mark Goldberg to update the University's Compensation Study. SUMA is doing well and Jessica Farling has worked to set new attendance goals for the coming year by 13% for students and 16% overall. Aviation has been in meetings with several Chinese universities to develop agreements involving flight and maintenance training both in China and on SUU's campus. It is expected Fixed Wing enrollments will reach capacity in Cedar City in fall of 2019. Work continues with academic leadership, flight-based operations, and the State Veteran's Administration to modify program curriculum necessary to ensure continued certification of US Veterans enrolling at SUU.

Marshall Erb reported that the Audit Committee met on August 22. Various audits are ongoing and work continues to make, and keep, SUU PCI compliant, but more work needs to be done. USF needs to update their system to become PCI compliant.

#### **Planning and Institutional Effectiveness Report**

Steve Meredith reported the first stage of dual-enrollment has begun between SUU and STech. Higher Ed Appropriations is pleased but has concerns that this won't be able to be implemented in other communities. It depends on community connections, which SUU has cultivated. The soft launch for the Computer Science program will begin August 27, 2018. Discussions on benefits for employees of both institutions have taken place and will be available in various forms.

#### **Student Affairs Report**

(See written report.)

#### **Diversity and Inclusion Report**

Schvalla Rivera reported steady growth of students of color. She has conducted and participated in various Allies on Campus trainings as well as awareness and cultural change training. Last year, 215 students of color graduated from SUU. (See written report for additional information.)

#### **Provost and Academic Affairs Report**

Brad Cook shared a video of faculty expressing their feelings about SUU and the students. (See written report for additional information.)

#### **President's Report**

President Wyatt expressed his appreciation for the amazing group of people he works with. He and Marv Dodge made a "pitch" for a new building to the Regents committee that visited campus today. The 3-year degree program is moving forward; it will go through the budget request process and the Commissioner's office prior to being introduced formally to the Legislators.

#### **Consent Items**

Motion made by Marshall Erb to approve the consent calendar items:

- Investment Reports for January – June 2018
- Endowment Reports (March and June, 2018)

- Leave of Absence (Wu)
- Early Retirements (Schwalb, McClanahan, and Hoover)
- Personnel and Retirements

Second on the motion made by Sherrie Hansen  
Vote - unanimous.

**Motion to Adjourn**

A motion for adjournment was made by Marshall Erb; second on the motion was made by Sherrie Hansen.  
Vote - unanimous.

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The meeting was adjourned at 2:40 a.m.



Date: August 22, 2018

To: Board of Trustees

From: Jennifer Oberhelman  
Secretary to the Board of Trustees

Subject: 2019 Board of Trustee Proposed Meeting Dates

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I propose the following dates for the 2019 Board of Trustees meetings:

February 1, 2019 (Board of Trustee Scholarship Interviews)

March 21 (Founder's Day)

May 2, 2019 (Commencement)

August 22, 2019 (Welcome Week)

September 27 (Homecoming)

December - TBD (President's Holiday Gala)

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**MEMORANDUM**

Date: September 5, 2018  
To: SUU Board of Trustees  
From: James Sage, Associate Provost   
RE: R401: AAS in Aviation Maintenance Technician (AMT) – Final Review & Approval

On behalf of Provost Brad Cook and our Aviation Program (Mike Mower, Sean Heiner, Rich Cannon, and Skip Jones), we are submitting for your final review and approval an R401 proposal for a new Associate of Applied Science (AAS) in Aviation Maintenance Technician (AMT). This new degree program builds on our successful Aviation Program and addresses an important need within the aviation industry, which is to train aircraft technicians in terms of airframe and power plant maintenance. The R401 template is included below as well as an “addendum” that addresses several questions that were raised back in May (including a pricing comparison with other schools and information from Boeing regarding employment outlook for pilots and technicians).

As a new degree program, the AAS in Aviation Maintenance Technician proposal has completed the Peer Review process by the Chief Academic Offices (CAOs) within USHE. Also attached below is a copy of the Peer Review Report from the Commissioner’s Office.

Thank you for considering this proposal to create a new AAS in Aviation Maintenance Technician. Please let us know if you have any additional questions or concerns.

**Utah System of Higher Education  
New Academic Program Proposal  
Cover/Signature Page - Full Template**

Institution Submitting Request: Southern Utah University  
 Proposed Program Title: Aviation Maintenance Technician  
 Sponsoring School, College, or Division: Academic Affairs  
 Sponsoring Academic Department(s) or Unit(s): Aviation Sciences  
 Classification of Instructional Program Code<sup>1</sup> : 49.0101  
 Min/Max Credit Hours Required of Full Program: 63 / 63  
 Proposed Beginning Term<sup>2</sup>: Spring 2019  
 Institutional Board of Trustees' Approval Date:

**Program Type (check all that apply):**

<input checked="" type="checkbox"/> (AAS)	Associate of Applied Science Degree
<input type="checkbox"/> (AA)	Associate of Arts Degree
<input type="checkbox"/> (AS)	Associate of Science Degree
<input type="checkbox"/>	Specialized Associate Degree (specify award type <sup>3</sup> : )
<input type="checkbox"/>	Other (specify award type <sup>3</sup> : )
<input type="checkbox"/> (BA)	Bachelor of Arts Degree
<input type="checkbox"/> (BS)	Bachelor of Science Degree
<input type="checkbox"/>	Specialized Bachelor Degree (specify award type <sup>3</sup> : )
<input type="checkbox"/>	Other (specify award type <sup>3</sup> : )
<input type="checkbox"/> (MA)	Master of Arts Degree
<input type="checkbox"/> (MS)	Master of Science Degree
<input type="checkbox"/>	Specialized Master Degree (specify award type <sup>3</sup> : )
<input type="checkbox"/>	Other (specify award type <sup>3</sup> : )
<input type="checkbox"/>	Doctoral Degree (specify award type <sup>3</sup> : )
<input type="checkbox"/>	K-12 School Personnel Program
<input type="checkbox"/>	Out of Service Area Delivery Program

**Chief Academic Officer (or Designee) Signature:**

I, the Chief Academic Officer or Designee, certify that all required institutional approvals have been obtained prior to submitting this request to the Office of the Commissioner.

Brad Cook, Provost \_\_\_\_\_ Date:

I understand that checking this box constitutes my legal signature.

<sup>1</sup> For CIP code classifications, please see <http://nces.ed.gov/ipeds/cipcode/Default.aspx?y=55>.

<sup>2</sup> "Proposed Beginning Term" refers to first term after Regent approval that students may declare this program.

<sup>3</sup> Please indicate award such as APE, BFA, MBA, MEd, EdD, JD

## Utah System of Higher Education Program Description - Full Template

### Section I: The Request

Southern Utah University requests approval to offer the following Associate's degree(s): Aviation Maintenance Technician effective Spring 2019. This program was approved by the institutional Board of Trustees on .

### Section II: Program Proposal

#### Program Description

*Present a complete, formal program description.*

The Federal Aviation Administration (FAA), under authority of CFR Title 14 Part 147, controls the requirements for Aviation Maintenance Technician (AMT) schools and has been reviewing and revising those requirements for the past two years. SUU has had representatives on the advisory committee assisting the FAA in the development of the new Part 147. The changes are scheduled to be completed and published after ? and will update antiquated requirements, moving training into the modern era. Training requirements will be based on credits, a change from a "seat time", or hours of time spent in training model. SUU is in an opportune position to develop a highly needed training program and emphasis due to these impending regulatory changes, and from its participation in the advisory process. The current Part 147 has not been changed in the last fifty years, and SUU will be uniquely positioned to be at the forefront of the AMT training industry.

AMT schools presently in operation will have to restructure their programs and revise their curriculum in order to meet the new compliance standards. SUU will leverage these changes to its advantage by launching the first AMT school under the re-issued Part 147, and will utilize the latest education technology. SUU is seeking partnerships with aviation industry leaders in aid of the development of a curriculum that best serves industry; and with partners that will help market the growth of the AMT profession.

SUU's AMT school will revolutionize the education of aviation technicians. The use of state of the art computer technology, including 3D modeling, will significantly reduce the traditional use of labs, while increasing retention and comprehension of the material. The curriculum will be delivered through online courses, utilizing interactive 3D modeling to deliver better education, and with less need for hands-on time. Traditional AMT students have had to sit through 2000 hours of instruction, with 40% of that time spent in labs. Mechanics acquired hands on experience by disassembling and reassembling components. This traditional form of education limited the ability of the student to understand the functions of the components. By using interactive 3D modeling, students will better be able to understand internal functions of the components, and their function as components of a larger assembly. The education can be delivered more rapidly, and maintaining a much higher quality than traditional methods. The final week of each course will be reserved for a minimal amount of necessary labs. All areas of the curriculum can be taught through online coursework, with a final lab to assess the student's ability to apply the skills and knowledge gained. The utilization of emerging technologies gives us the potential to truly revolutionize the world of AMT education by increasing the quality of instruction and reducing lab times.

By expanding SUU's Aviation Sciences Department to include a specialization of Airframe Maintenance Technician within the Aviation, A.A.S. degree, we diversify program offerings, increase enrollments into an area of high demand and reduce our dependency on Veteran Affairs funding.

The employment of a hybrid distance-learning program will allow SUU to expand its AMT training to comply with the requirements of aviation regulators throughout the world. The costs of expanding the School will be reduced due to the decreased need for physical space and the use of consumables.

International Expansion: Most European aviation activities are governed by the European Aviation Safety Administration (EASA). Our proposed degree will lend itself to easy modification to meet EASA requirements.

## Consistency with Institutional Mission

*Explain how the program is consistent with the institution's Regents-approved mission, roles, and goals. Institutional mission and roles may be found at [higheredutah.org/policies/policyr312/](http://higheredutah.org/policies/policyr312/).*

The proposed AAS degree in Aviation Maintenance Technician (AMT) expands SUU into a greater extension of technical education offerings. Technical education or "trade" education continually shows a positive job outlook, and the growing demand for trade professionals is predicted to rise over the next few decades. In addition, the majority of skilled trades such as AMT offer salaries much higher than the national average. Technical education typically costs less than a third of a standard bachelors degree, yet offers a much higher starting salary and job stability.

If approved, the proposed AMT will offer students both the opportunity to gain a technical education in the context of an AAS degree and eventually to acquire a B.S. degree. By offering a technical degree program SUU can create a wider range of opportunities and higher rate of job placement for SUU students. Many universities throughout the US have sought to offer technical training in order to remain competitive with other education outlets. SUU Aviation Sciences is by its nature a technical education department, and by adding the AMT degree we will offer more aspects of aviation training.

The growth of the Department of Aviation Sciences, including the addition of this new AAS degree in AMT will allow the department to better serve SUU's mission, of creating and supporting a "dynamic teaching and learning community that engages students in experiential education leading to growth, civic responsibility, and professional excellence." AMT students will receive a very dynamic and experiential education, and their professional excellence in the aviation industry will be sought after in the aviation professional community.

## Section III: Needs Assessment

### Program Rationale

*Describe the institutional procedures used to arrive at a decision to offer the program. Briefly indicate why such a program should be initiated. State how the institution and the USHE benefit by offering the proposed program.*

The University has fully embraced aviation pilot training and has been successful in offering the pilot degree programs. As the aviation industry is experiencing a devastating technician shortage, SUU Aviation Sciences has the technical experience and expertise to offer Aviation Maintenance Technician training. By offering an AAS in Maintenance Technician Training, SUU has the ability to help offset the technician shortages currently impacting Utah based aviation companies, as well as, update the training methods and techniques to better prepare technicians for industry. As SUU has been supplying pilots to the industry, there have been many aerospace companies that have cited the need for technicians outgrowing the need for pilots.

### Labor Market Demand

*Provide local, state, and/or national labor market data that speak to the need for this program. Occupational demand, wage, and number of annual openings information may be found at sources such as Utah DWS Occupation Information Data Viewer ([jobs.utah.gov/jsp/wi/utalmis/gotoOccinfo.do](http://jobs.utah.gov/jsp/wi/utalmis/gotoOccinfo.do)) and the Occupation Outlook Handbook ([www.bls.gov/oco](http://www.bls.gov/oco)).*

The Boeing Company (Boeing) projects a need for 679,000 new AMT technicians over the next 20 years. That conclusion is based on projected Boeing aircraft deliveries through 2037. Boeing retains roughly 40-50% of the aircraft manufacturing market, but the aircraft manufacturing market comprises less than 30% of the entire aviation market. Considering total aviation market needs over the next 20 years, the need for AMT's is well within the millions. The majority of currently licensed AMT's are nearing retirement, and the market is already feeling the shortage. SUU will spearhead a revolution in methods for AMT training, and will provide AMT's equipped with a higher quality education, at a higher rate, to the market.

### Student Demand

*Provide evidence of student interest and demand that supports potential program enrollment. Use Appendix D to project five years' enrollments and graduates. Note: If the proposed program is an expansion of an existing program, present several years enrollment trends by headcount and/or by student credit hours that justify expansion.*

The current aviation flight program will be at capacity by Fall of 2018. The evidence of demand for technicians has been published by Aviation Technical Education Counsel in their recent Pipeline Report, the Boeing Outlook Report, and by the

Oliver Wyman consulting group industry assessment report. Boeing has recently stated that 70% of their technician workforce will be eligible for retirement by 2021. This program will expand SUU Aviation Sciences by adding additional training specialized in maintenance. There is a clear industry need as 50% of all currently licensed technicians are over the age of 51, and 27% over the age of 65. With the average graduate currently taking their first job at a median income of \$50,000/year, SUU expects this number to rise as the shortage increases. As the aerospace industry is currently feeling the impact of the shortage, more and more partnerships are being formed between educational institutes and industry to try and bolster the output of technicians.

### Similar Programs

*Are similar programs offered elsewhere in the USHE, the state, or Intermountain Region? If yes, identify the existing program(s) and cite justifications for why the Regents should approve another program of this type. How does the proposed program differ from or compliment similar program(s)?*

Salt Lake Community College and Utah State University offer an AMT program. The shortage of global technicians combined with the lack of educational infrastructure will only exacerbate the current and future issues. The existing educational and training programs can't keep pace with the existing demand.

### Collaboration with and Impact on Other USHE Institutions

*Indicate if the program will be delivered outside of designated service area; provide justification. Service areas are defined in [higheredutah.org/policies/policyr315/](http://higheredutah.org/policies/policyr315/). Assess the impact the new program will have on other USHE institutions. Describe any discussions with other institutions pertaining to this program. Include any collaborative efforts that may have been proposed.*

The Department of Aviation Sciences presently does not hold any intention to offer this proposed program outside of its designated service area. The proposed program may marginally impact enrollments in the AMT programs at SLCC and USU. It's SUU's understanding that enrollments in the AMT programs at these institutions are strong. Some brief comments have been made in reference to this proposal to representatives in the other USHE AMT programs, either verbally or via email. Collaborations have not been discussed.

### External Review and Accreditation

*Indicate whether external consultants or, for a career and technical education program, program advisory committee were involved in the development of the proposed program. List the members of the external consultants or advisory committee and briefly describe their activities. If the program will seek special professional accreditation, project anticipated costs and a date for accreditation review.*

Representatives from SUU have a close relationship with representatives from the Aviation Technician Education Council (ATEC). ATEC representatives have been consulted regarding the concept and viability of the proposed program. SUU and ATEC have collaborated on visits to Washington D.C. to support AMT regulatory updates, letters to the FAA and Senators, and collaborative activity on the Federal Register regarding NPRMs and waivers. The proposed program does not intend to seek any particular professional accreditation.

## Section IV: Program Details

### Graduation Standards and Number of Credits

*Provide graduation standards. Provide justification if number of credit or clock hours exceeds credit limit for this program type described in R401-3.11, which can be found at [higheredutah.org/policies/R401](http://higheredutah.org/policies/R401).*

Students will be required to complete a minimum of 63 total credit hours to earn the Aviation Maintenance Technician, A.A.S. degree. Fifteen or sixteen General Education credits must be completed for graduation. The core Aviation Maintenance Technician courses consist of 43 credit hours. Students must complete a minimum of five credit hours of electives to satisfy the total credit hour requirement. Neither the number of credit hours nor clock hours are anticipated to exceed the credit limit for this type of program.

### Admission Requirements

*List admission requirements specific to the proposed program.*

There will be no special admission requirements for the proposed program.

## Curriculum and Degree Map

*Use the tables in Appendix A to provide a list of courses and Appendix B to provide a program Degree Map, also referred to as a graduation plan.*

## Section V: Institution, Faculty, and Staff Support

### Institutional Readiness

*How do existing administrative structures support the proposed program? Identify new organizational structures that may be needed to deliver the program. Will the proposed program impact the delivery of undergraduate and/or lower-division education? If yes, how?*

The current management structure that oversees the SUU Aviation Sciences program has the capacity to support the proposed program. Online and classroom resources to offer this new program are available at SUU. Space to conduct labs of this program is available at the SUU Aviation airport facilities. Equipment required to conduct this program will be donated by outside entities or purchased using SUU Aviation funds. As the program grows, additional facilities, equipment, and instructors may be required to support the lab training.

### Faculty

*Describe faculty development activities that will support this program. Will existing faculty/instructors, including teaching/graduate assistants, be sufficient to instruct the program or will additional faculty be recruited? If needed, provide plans and resources to secure qualified faculty. Use Appendix C to provide detail on faculty profiles and new hires.*

Instructors assigned to teach AMT courses must hold an FAA Airframe and Powerplant Mechanic license. Sufficient qualifications and ample capacity for overload work already exists among the faculty and staff already employed in the Department of Aviation Sciences. Assuming the proposed program is performing well, it's anticipated that a new full-time faculty position will be hired at the start of year 2 and another at the start of year 3. Added tuition and special fee funding will be used to support these anticipated positions. (See Appendix C and Appendix D in this document (below) for details.)

### Staff

*Describe the staff development activities that will support this program. Will existing staff such as administrative, secretarial/clerical, laboratory aides, advisors, be sufficient to support the program or will additional staff need to be hired? Provide plans and resources to secure qualified staff, as needed.*

The current staffing structure that supports the SUU Aviation Sciences program has the capacity to support the proposed program. Additional staff will be considered as necessary.

### Student Advisement

*Describe how students in the proposed program will be advised.*

The Department of Aviation Sciences has a dedicated Director of Aviation Advising. This individual will advise AMT students along with other students in the aviation program. As the number of aviation students may grow to exceed the capacity of one individual an additional aviation advisor will be considered. Funding from airport activity may be available to fund an additional advisor.

### Library and Information Resources

*Describe library resources required to offer the proposed program if any. List new library resources to be acquired.*

The impact on library resources will be minimal as the main library resources needed for this program are publicly available on

the FAA website and other aviation industry websites. Other publications and resources to support this class are the same resources and publications available at the SUU airport operations to support the aircraft maintenance activity at the hangar.

## **Projected Enrollment and Finance**

*Use Appendix D to provide projected enrollment and information on related operating expenses and funding sources.*

## **Section VI: Program Evaluation**

### **Program Assessment**

*Identify program goals. Describe the system of assessment to be used to evaluate and develop the program.*

The program is intended to provide students the theoretical knowledge and skill set necessary to be successful as Aircraft Maintenance Technicians in the aviation industry. More specific goals are for students to satisfy all of the FAA requirements to receive their Aircraft Maintenance Technician certificate with Airframe and Powerplant ratings. The program will be assessed by the graduates' ability to successfully pass the FAA tests and gain their certificate and ratings. Course evaluations, student evaluations, and industry feedback will be used to evaluate and develop the program.

### **Student Standards of Performance**

*List the standards, competencies, and marketable skills students will have achieved at the time of graduation. How and why were these standards and competencies chosen? Include formative and summative assessment measures to be used to determine student learning outcomes.*

At completion of the AAS degree, the students will be approved to take the FAA technician tests, once those are completed at a satisfactory level of 70% or above as administered by an FAA Representative, the students will obtain an Airframe and Powerplant License issued by the FAA. This license allows them to work freely on any U.S. registered aircraft, as well as all other country's that share bilateral agreements with the FAA. All standards and competencies are set forth by the FAA in FAR Part 147, which requires all courses to be passed at a 70% or higher. Graduation rates, job placement, and testing is all monitored and governed by the FAA regulations.

Upon completing the program each student will demonstrate the knowledge elements and skills required by the current versions of the following Practical Test Standards published by the Federal Aviation Administration (or any future publications which may supersede these standards):

- 1) Aviation Mechanic General Practical Test Standards
- 2) Aviation Mechanic Airframe Practical Test Standards
- 3) Aviation Mechanic Powerplant Practical Test Standards

These standards are chosen because they are the standards required by the FAA for Aircraft Maintenance Technician certification.



## Appendix A: Program Curriculum

List all courses, including new courses, to be offered in the proposed program by prefix, number, title, and credit hours (or credit equivalences). Indicate new courses with an X in the appropriate columns. The total number of credit hours should reflect the number of credits required to be awarded the degree.

For variable credits, please enter the minimum value in the table for credit hours. To explain variable credit in detail as well as any additional information, use the narrative box at the end of this appendix.

		Course Number	NEW Course	Course Title	Credit Hours
General Education Courses (list specific courses if recommended for this program on Degree Map)					
General Education Credit Hour Sub-Total					15
Required Courses					
+	-	AMTG 1100	×	AMT General I	2
+	-	AMTG 1200	×	AMT General II	2
+	-	AMTG 1300	×	AMT General III	3
+	-	AMTG 1400	×	AMT General IV	3
+	-	AMTA 1100	×	AMT Airframe I	4
+	-	AMTA 1200	×	AMT Airframe II	4
+	-	AMTA 1300	×	AMT Airframe III	2
+	-	AMTA 1400	×	AMT Airframe IV	2
+	-	AMTA 1500	×	AMT Airframe V	4
+	-	AMTA 1600	×	AMT Airframe VI	2
+	-	AMTP 1100	×	AMT Powerplant I	3
+	-	AMTP 1200	×	AMT Powerplant II	3
+	-	AMTP 1300	×	AMT Powerplant III	3
+	-	AMTP 1400	×	AMT Powerplant IV	3
+	-	AMTP 1500	×	AMT Powerplant V	3
Required Course Credit Hour Sub-Total					43
Elective Courses					
+	-	PILT 1010		Air Transportation	3
+	-	PILT 1100		Private Pilot Ground School	3
+	-	PILT 1140		FW Solo Lab	1
+	-	PILT 1145		Solo Pilot RW Lab	3
+	-	PILT 1150		FW Private Certification ASEL Lab	2
+	-	PILT 1155		Private Pilot RW Certification Lab	3
+	-	PILT 1420		Aircraft Systems	3
+	-	PILT 1740		Aviation Safety and Security	3
+	-	PILT 2160		Aviation Law	3
+	-	PILT 2890		Aviation Internship	1
Elective Credit Hour Sub-Total					5
Core Curriculum Credit Hour Sub-Total					63

## **Program Curriculum Narrative**

*Describe any variable credits. You may also include additional curriculum information.*

The proposed Aviation Maintenance Technician, A.A.S. degree requires the standard General Education requirements for A.A.S. degrees. Depending on the specific courses taken, students may complete fifteen or sixteen credit hours to satisfy the minimum General Education requirements.

The number of elective credit hours needed to satisfy the A.A.S. minimum total credit hours of 63 will be four or five depending on the General Education courses taken by the student.

PILT 2890 - Aviation Internship is a variable credit hour course. The student may select one to four credit hours for this course.

## Degree Map

Degree maps pertain to undergraduate programs ONLY. Provide a degree map for proposed program. Degree Maps were approved by the State Board of Regents on July 17, 2014 as a degree completion measure. Degree maps or graduation plans are a suggested semester-by-semester class schedule that includes prefix, number, title, and semester hours. For more details see <http://higheredutah.org/pdf/agendas/201407/TAB%20A%202014-7-18.pdf> (Item #3).

Please cut-and-paste the degree map or manually enter the degree map in the table below.

<b>First Year Fall</b>	<b>Cr. Hr.</b>	<b>First Year Spring</b>	<b>Cr. Hr.</b>
AMT 1501 - AMT General I	2	AMT 2501 - AMT Airframe I	4
AMT 1502 - AMT General II	2	AMT 2502 - AMT Airframe II	4
AMT 1503 - AMT General III	3	AMT 2503 - AMT Airframe III	2
AMT 1504 - AMT General IV	3	AMT 2504 - AMT Airframe IV	2
MATH XXXX - GE Math	3	ENGL XXXX - GE English	3
ELEC XXXX - Elective	4		
<b>Total</b>	<b>17</b>	<b>Total</b>	<b>15</b>
<b>Second Year Fall</b>	<b>Cr. Hr.</b>	<b>Second Year Spring</b>	<b>Cr. Hr.</b>
AMT 2505 - AMT Airframe V	4	AMT 2603 - AMT Powerplant III	3
AMT 2506 - AMT Airframe VI	2	AMT 2604 - AMT Powerplant IV	3
AMT 2601 - AMT Powerplant I	3	AMT 2605 - AMT Powerplant V	3
AMT 2602 - AMT Powerplant II	3	PHYS - General Education Physical Science	4
HUMAN XXXX - GE Humanities	3	Amlnst XXXX - GE American Institutions	3
<b>Total</b>	<b>15</b>	<b>Total</b>	<b>16</b>
<b>Third Year Fall</b>	<b>Cr. Hr.</b>	<b>Third Year Spring</b>	<b>Cr. Hr.</b>
<b>Total</b>		<b>Total</b>	
<b>Fourth Year Fall</b>	<b>Cr. Hr.</b>	<b>Fourth Year Spring</b>	<b>Cr. Hr.</b>
<b>Total</b>		<b>Total</b>	

### Appendix C: Current and New Faculty / Staff Information

#### Part I. Department Faculty / Staff

Identify # of department faculty / staff (headcount) for the year preceding implementation of proposed program.

	# Tenured	# Tenure -Track	# Non -Tenure Track
Faculty: Full Time with Doctorate		1	1
Faculty: Part Time with Doctorate			
Faculty: Full Time with Masters			2
Faculty: Part Time with Masters			
Faculty: Full Time with Baccalaureate			6
Faculty: Part Time with Baccalaureate			
Teaching / Graduate Assistants	////	////	
Staff: Full Time			8
Staff: Part Time			15

#### Part II. Proposed Program Faculty Profiles

List current faculty within the institution -- with academic qualifications -- to be used in support of the proposed program(s).

	First Name	Last Name	Tenure (T) / Tenure Track (TT) / Other	Degree	Institution where Credential was Earned	Est. % of time faculty member will dedicate to proposed program.	If "Other," describe
Full Time Faculty							
	Charles	Jones	Other	Ed.D	Nova Southeastern University	as needed	Staff
	Sean	Heiner	Other	MBA	Utah State University	as needed	Non-Tenure
	Jared	Britt	Other			as needed	Staff
Part Time Faculty							

#### Part III: New Faculty / Staff Projections for Proposed Program

Indicate the number of faculty / staff to be hired in the first three years of the program, if applicable. Include additional cost for these faculty / staff members in Appendix D.

	# Tenured	# Tenure -Track	# Non -Tenure Track	Academic or Industry Credentials Needed	Est. % of time to be dedicated to proposed program.
Faculty: Full Time with Doctorate					
Faculty: Part Time with Doctorate					
Faculty: Full Time with Masters					
Faculty: Part Time with Masters					
Faculty: Full Time with Baccalaureate			2	FAA AMT certificate with Airframe and Powerplant ratings	100%
Faculty: Part Time with Baccalaureate					
Teaching / Graduate Assistants	////	////			
Staff: Full Time			1	FAA AMT certificate with Airframe and Powerplant ratings	100%
Staff: Part Time					

## Appendix D: Projected Program Participation and Finance

### Part I.

*Project the number of students who will be attracted to the proposed program as well as increased expenses, if any. Include new faculty & staff as described in Appendix C.*

Three Year Projection: Program Participation and Department Budget						
	Year Preceding Implementation	New Program				
		Year 1	Year 2	Year 3	Year 4	Year 5
<b>Student Data</b>						
# of Majors in Department						
# of Majors in Proposed Program(s)		50	120	250	400	500
# of Graduates from Department						
# Graduates in New Program(s)				50	120	250
<b>Department Financial Data</b>						
	Department Budget					
	Year Preceding Implementation (Base Budget)	Year 1	Year 2	Year 3		
		Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)		
<i>Project additional expenses associated with offering new program(s). Account for New Faculty as stated in Appendix C, "Faculty Projections."</i>						
<b>EXPENSES – nature of additional costs required for proposed program(s)</b>						
<i>List salary benefits for additional faculty/staff each year the positions will be filled. For example, if hiring faculty in year 2, include expense in years 2 and 3. List one-time operating expenses only in the year expended.</i>						
Personnel (Faculty & Staff Salary & Benefits)	\$56,800	\$56,800	\$113,600	\$170,400		
Operating Expenses (equipment, travel, resources)		\$150,000	\$200,000	\$250,000		
Other: Lab facilities and lab equipment	\$600,000	\$750,000	\$1,000,000	\$5,000,000		
<b>TOTAL PROGRAM EXPENSES</b>		\$956,800	\$1,313,600	\$5,420,400		
<b>TOTAL EXPENSES</b>	\$656,800	\$1,613,600	\$1,970,400	\$6,077,200		
<b>FUNDING – source of funding to cover additional costs generated by proposed program(s)</b>						
<i>Describe internal reallocation using Narrative 1 on the following page. Describe new sources of funding using Narrative 2.</i>						
Internal Reallocation	\$1,000,000					
Appropriation		\$200,000	\$350,000	\$420,000		
Special Legislative Appropriation						
Grants and Contracts						
Special Fees		\$500,000	\$2,400,000	\$5,000,000		
Tuition		\$465,000	\$1,116,000	\$2,325,000		
Differential Tuition (requires Regents approval)						
<b>PROPOSED PROGRAM FUNDING</b>		\$1,165,000	\$3,866,000	\$7,745,000		
<b>TOTAL DEPARTMENT FUNDING</b>	\$1,000,000	\$2,165,000	\$4,866,000	\$8,745,000		
<b>Difference</b>						
Funding - Expense	\$343,200	\$551,400	\$2,895,600	\$2,667,800		

## Part II: Expense explanation

### Expense Narrative

*Describe expenses associated with the proposed program.*

The proposed program will provide additional revenue to the university in the form of additional tuition dollars and lab fees. Training equipment for the labs will be required. A brief discussion of both the revenue and expenses are discussed below.

Revenue - Each new AMT student will be charged standard tuition for general education and classroom based courses. This revenue will not be discussed in this proposal. In addition to the standard tuition, each student will be charged lab fees for the hands on courses listed in the curriculum section (this includes all of the Airframe and Powerplant courses totaling 33 credit hours). Lab fees will be approximately \$606 per credit hour. The combined lab fees will total \$20,000 per student over a 2 year period. It is anticipated that 20 students will start each semester. This will result in 50 students year one and 120 students year two. At this level, the lab fee income will be approximately \$1,200,000 per year.

Expense - There will be an initial outlay as well as ongoing expenses to provide the AMT labs. The initial outlay will consist of purchasing required testing/training equipment, aircraft hulls and used aircraft engines (piston and turbine). Skywest Airlines, Air Methods and Helicopter Association International have already indicated their ability to provide used engines and aircraft hulls in addition to monetary donations. After the anticipated donations, an initial outlay of \$500,000 will be required for new testing/training equipment. This initial outlay will be funded out of the Aviation Sciences Department's existing budget. Ongoing expenses will consist of program instructors and minor consumable materials (sheet metal, safety wire, etc). Consumable materials will be approximately \$150,000 per year.

Lab training will initially be delivered in one of the existing aviation hangars. As such, there is no immediate need for an additional facility. As enrollments increase an additional facility will be required. The additional facilities will be funded out of excess revenue from the AMT program.

The revenue for lab fees less the projected ongoing expenses will result in excess revenue of approximately \$700,000 per year. This excess revenue will be used to further expand the AMT program equipment and facilities.

All budgetary impacts will be self contained within the Aviation Sciences Department.

## Part III: Describe funding sources

### Revenue Narrative 1

*Describe what internal reallocations, if applicable, are available and any impact to existing programs or services.*

The source of the internal reallocation of funding indicated during the year preceding program implementation will be a reallocation of airport operations funds.

### Revenue Narrative 2

*Describe new funding sources and plans to acquire the funds.*

Appropriation funding indicated in years 1, 2, and 3 will be derived from workforce development efforts. Special Fees are estimated to be \$10,000 per student per year. Special course fees will be attached to AMT courses and collected from students along with tuition and other student fees. Tuition income is estimated to be \$9,300 per year per student.

## **R401 Addendum: Aviation Maintenance Technician AAS Degree Program**

### **Spending Plan**

- Amortize start-up costs.
- Fund school personnel growth requirements.
- Fund the capability of continuing to work with the newest technologies.
- Fund the capability of acquiring updated complete aircraft and/or systems mockups.
- Fund the capability of continuing to meet all new FAA regulations.
- Fund the capability of continuing to work with the newest tooling.
- Fund continuous academic program growth and expansion.
- Fund the continuous marketing the SUU Aviation Maintenance Technology program.
- Fund an AAS AMT scholarship program directed at local low income students.

### **Itemization of Costs**

- Start-up costs: facilities, personnel, tooling, actual aircraft and/or aircraft systems mockups, consumables, initial marketing, and personnel.
- Operating costs: facilities maintenance and modifications, replacement of tooling, replacement of consumables, marketing, and salaries.
- Growth Costs: additional personnel, new technologies, new regulations, updated tooling, updated aircraft and/or systems mockups, updated and continued marketing.

### **Pricing Comparison with Other Schools**

- See attached price comparison with other schools offering the FAA Approved Part 147 Aircraft Maintenance Technology program.
- SUU is at the high end of the cost spectrum but we are starting our program incorporating the latest curriculum and aviation industry technologies. Existing schools will have to play catch-up to meet the new FAA requirements and to meet the curriculum and aviation industry technologies standards that SUU will be setting. These schools will have to adjust their fees upward to enable them to meet these new standards.
- The FAA estimates that the curriculum upgrade cost alone for existing Part 147 schools will be \$14,656.80 for the initial submission and that at least 10% of the submissions will be rejected on every submission / resubmission. This does not include the cost of upgraded aircraft, mock-ups, tooling, and consumables that will be required to implement the new curriculum.

## **The SUU Aviation Maintenance Technology Program**

- One of only three AMT programs in Utah and the only AMT program south of Salt Lake City.
- Incorporating the latest aviation maintenance technology curriculum and the latest aircraft technologies, tooling, materials, practices, and procedures.

## **Advantages of the FAA A&P License in Today's Aviation Environment**

- The Boeing Study (data review attached) predicts significant shortages of licensed aircraft maintenance technicians worldwide over the next 20-30 years.
- Graduates will enter an exciting, growing profession with high earning potential (new graduates can start at 40K – 50K / year with a major airline).
- Excellent opportunities also exist outside of the aviation field (many A&Ps are employed in non-aviation positions – Disney employs more A&Ps than any company in Florida to work on their animatronics).
- Holders of an A&P license can live virtually anywhere and can work virtually anywhere (many A&Ps work at airline maintenance bases on a schedule that allows them to live anywhere and commute back and forth on their airline just like the pilots do).
- Opportunities are global with many A&Ps working at maintenance bases outside of the United States (the maintenance regulations governing US registered aircraft require that the holder of an FAA A&P license sign off all work performed at maintenance bases located outside of the US).

## **Marketing the SUU Aviation Maintenance Technology Program**

- Marketing to students located inside the state of Utah: military personnel based in Utah who want to acquire their FAA A&P license, joint program with Southwest Technical College (Cedar City), bridge programs with area high schools, and SkyWest Airlines (require 40 A&Ps a month to sustain operations and growth).
- Participating with Governor Herbert's Aerospace Pathways Initiative to involve Utah high school students in educational activities related to aviation. SUU already has over 20 students in this program.
- Marketing to students located outside of the state of Utah: military personnel based outside Utah wanting to acquire their FAA A&P license, students from throughout the US wanting to acquire their FAA A&P license in a state-of-the-art program located in a great environment.
- Marketing to students located outside of the United States: foreign students who qualify and want to acquire their FAA A&P license.
- Marketing to students who want an upwardly mobile aviation career but who cannot qualify for a flight crew position due to medical considerations.
- Will be able to offer financial aid through the normal university channels.
- Will be able to offer benefits to eligible students through the VA.



FAR Part 147 A&P School Cost Comparison		
Name	Pricing	Includes
Andrews University	\$56,200.00	
Arkansas State University Mid-South	\$10,929.00	
Augusta Technical College	\$13,833.00	
Columbus State Community College	\$31,000.00	
Community College of the Airforce	\$47,534.00	
Embry-Riddle Aeronautical University	\$22,500.00	tuition
Idaho State University	\$24,425.50	tuition
MIAT	\$33,014.00	
North Idaho College	\$8,680.00	
Portland Community College	\$8,500.00	
Salt Lake Community College	\$14,900.00	tuition, books, tools
Seattle College	\$18,408.00	
Spartan College of Aeronautics and Technology	\$41,780.00	tuition, fees, books
Tarrant Community	\$18,408.00	
Utah State University	\$17,500.00	5 semesters tuition (resident \$3500/semester)
Vaughn College	\$33,540.00	
Wichita Area Tech	\$26,806.00	
Kansas State Polytechnic - <b>BACHELOR'S DEGREE ONLY</b>	\$44,183.00	tuition & fees, tools, lab fees, certification exams, books,
Perdue University - <b>BACHELOR'S DEGREE ONLY</b>	\$43,170.00	tuition & fees, books/supplies, program fees
Liberty University	\$38,410.00	tuition, course fees

# **Pilot and Technician Outlook 2017-2036**

As global economies expand and airlines take delivery of tens of thousands of new commercial jetliners over the next 20 years, there is extraordinary demand for people to fly and maintain these airplanes.

Between now and 2036, the aviation industry will need to supply more than 2 million new commercial airline pilots, maintenance technicians, and cabin crew.

The 2017 Boeing Pilot & Technician Outlook, a respected industry forecast of personnel demand, projects that 637,000 new commercial airline pilots, 648,000 new maintenance technicians, and 839,000 new cabin crew will be needed to fly and maintain the world fleet over the next 20 years.

Educational outreach and career pipeline programs will be essential to inspiring the next generation of pilots, technicians, and cabin crew. Early student engagement and defined aviation career paths will help expand the reach to new demographics. The growing diversity and mobility of aviation personnel will require instructors to have cross-cultural, cross-generational, and multilingual skills to engage with tomorrow's workforce.

As personnel demand increases over the next two decades, the aviation industry will need to find innovative solutions to keep pace with training requirements. Course curriculums will need to be tailored to enable optimum learning and knowledge retention. Immersive technologies, adaptive learning, and new teaching methods will also be needed to effectively meet a wide range of learning styles.

<http://www.boeing.com/commercial/market/pilot-technician-outlook/>

May 23, 2018

Eric Leavitt, Board of Trustees Chair  
c/o Jennifer Oberhelman, Board of Trustees' Secretary  
Southern Utah University  
351 W University Blvd  
Cedar City, UT 84720

Dear Chair Leavitt,

Pursuant to Utah Code Annotated 53B-16-102(5)(b)(ii), attached is the Peer Review Report for the following program, which the Southern Utah University Board of Trustees is to consider in reviewing this program for approval:

- **Associate of Applied Science in Aviation Maintenance Technician**

Please let me know if you have any questions regarding this report. If your Board approves the program, the institution's Chief Academic Officer will notify our office of your action so we can keep an accurate record of the programs available in the Utah System of Higher Education.

Thank you for giving this your attention.

Sincerely,



David L. Buhler  
Commissioner of Higher Education

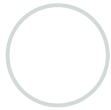
CC: Scott L. Wyatt, President – Southern Utah University  
Brad Cook, Executive Vice President & Provost

## Peer Review Report

<b>Institution</b>	<b>Southern Utah University</b>
<b>Name of Proposal</b>	<b>Associate of Applied Science in Aviation Maintenance Technician</b>
<b>Date of Peer Review Report</b>	<b>May 23, 2018</b>

Southern Utah University's proposal for a new Associate of Applied Science in Aviation Maintenance Technician received comments from Utah Valley University, Utah State University, Salt Lake Community College, and the Commissioner's office. Questions centered on various technical aspects of the proposal including congruence between large projected student enrollments in relation to number of faculty assigned to the program, the program's impact on state labor market demand relative to related programs in the state, and the justification for student fees associated with the program. In addition to the on-line discussion among USHE institutions, the proposal was discussed during a meeting with Chief Academic Officers on May 15, 2018. Southern Utah University addressed the questions that were raised and made technical adjustments to the proposal based on feedback received through the peer review process.

Attachment: Transcript of Comments



## MAY IP VIDEO - Southern Utah University - AAS in Aviation Maintenance Technician

[Trina Weller](#)

[All Sections](#)

4 5

Please use this page for comments.

### [SUU - AAS - Aviation Maintenance Technician](#)

1. Does the proposed curriculum meet the standards of the degree area as assessed by your relevant faculty- specify specific concerns based on your accepted curriculum or national standards, and/or accreditation standards?
2. Do the resources exist to adequately offer a quality program of study and are future resource needs adequately specified? Provide examples of how the resources available in your program look so as to give context on where and why you feel deficiencies exist.
3. Are there any structural or programmatic concerns with the degree? Will students be able to transfer without difficulty (3000 and 4000 level curriculum in the first 2 years, etc.), etc., etc.- Be specific in your examples
4. Are there any other concerns not addressed above?



← [Reply](#)



[Blair Carruth](#)

<https://uen.instructure.com/courses/44955/users/555886>

Wednesday



The Commissioner's office provides the following items for consideration relative to the SUU AAS in Aviation Maintenance Technician proposal.

1. The CIP code selected for the program is 49.0101 Aeronautics/Aviation/Aerospace Science and Technology, General. Another CIP code is available that may align more specifically to the program, 47.0607 Airframe Mechanics and Aircraft Maintenance Technology/Technician. Is

there a reason 49.0101 was chosen over 47.0607?

2. How will students who take the course via distance technologies be able to develop the applied skills required to be proficient in maintaining aircraft systems?
3. The enrollment projection shows 500 students in the program by the fifth year. It would be helpful to describe the marketing plan that will attract such a large number of students into the program.
4. Even with two new faculty hires, how will faculty be able to manage instructional loads with 500 additional students and maintain the necessary instructional quality to build student proficiencies?
5. The graduation projection shows 250 graduates by the fifth year. Is there an estimate of how many of these graduates will be living in Utah and may wish to compete for positions within the state? Having a clearer description of the local and state labor market and the program's potential impact on that market would be helpful to better understand how the proposed program may affect program graduates from SUU, SLCC, and USU who wish to be employed in Utah.
6. Course prefixes and numbers in the degree map do not align to course prefixes and numbers on the program curriculum table.
7. The budget table shows revenues over expenses at \$2,667,800 by year three. Why charge students a \$10,000 fee if there is going to be such a large surplus?

← [Reply](#)



[Sabine Berlin](#)

<https://uen.instructure.com/courses/44955/users/454693>

Friday

UVU faculty in the School of Aviation Sciences have looked over the proposal and offer the following comments:

We wholeheartedly support Southern Utah University's (SUU) R401 to develop a 2 year Part 147 program leading to an Associate of Applied Science degree. The proposed curriculum meets FAA part 147 standards. Based on the R401, SUU will have the requisite resources to develop a part 147 school. There are no programmatic concerns noted. SUU's program will be beneficial to the university, local area, and the state.

← [Reply](#)



[Michele Hillard](#)<https://uen.instructure.com/courses/44955/users/679381>

8:20am

USU has reviewed and discussed this proposal and offers the following comments for your consideration:

- 1) Current Part 147 compliant training requires 1 instructor/25 students in laboratory settings. Will this proposal be able to meet current Part 147 regulations or is it contingent upon the implementation of revised CFR Title 14 Part 147 authority?
- 2) An online program will obviously have potential impacts to existing in-state programs as the program designed clearly intends to expand/be offered predominantly outside of its existing designated service area.
- 3) Relate to faculty resources - "Sufficient qualifications and ample qualifications for overload work already exist among the faculty and staff.." This statement suggests that faculty resources are not readily available to develop and implement a new program. Appendix C indicates 1 faculty member and 2 staff appointments with % time indicated 'as needed'. It is not apparent that existing faculty and staff have the time necessary to implement a revolutionary training program. It is further difficult to suggest that this program will meet revised Part 147 regulations as they are not actually published or applicable at this time.
- 4) 'Special fees' of ~\$10,000 per student per year in addition to standard SUU tuition and fees are well above fees and total programmatic costs in other AAS AMT programs.

Edward M. Reeve  
Interim Vice Provost  
Utah State University

← [Reply](#)

[https://](#)[Rachel Lewis](#)<https://uen.instructure.com/courses/44955/users/697075>

11:50am

The addition of another Part 147 AMT school within the state of Utah would not adversely affect the SLCC AMTT program. We may see a drop of 10 to 15 students per entry per year. Industry needs of aircraft mechanics is high and the ability of the part 147 schools on a national level to keep up with demand is low and does not feel the void of attrition through retirement let alone changing careers. I would not be opposed to seeing another school in the State be certificated by the FAA. Our entry classes are always at capacity in the fall semesters with a waiting list of 5 to 6 students.

There is enough potential students to warrant this initiative. Keep in mind that historical Data shows that less than 50% of students follow through with obtaining their FAA certification after completing the Aviation Maintenance Technician schooling , this is a national trend.

Have a great Day, Fly safe and True

Todd M. Baird  
Program Coordinator/Site administrator  
Aviation Maintenance Salt Lake Community College  
I/A DME  
801-957-2061

← [Reply](#)



[James Sage](#)

(<https://uen.instructure.com/courses/44955/users/1548922>)

1:58pm

Colleagues,

We appreciate the feedback/questions/comments offered in response to our proposal for a new AAS in Aviation Maintenance Technician program. Below are a few remarks from my colleagues in response to this feedback.

**A) Feedback/Questions from the Commissioner's Office:**

**1. The CIP code selected for the program is 49.0101 Aeronautics/Aviation/Aerospace Science and Technology, General. Another CIP code is available that may align more specifically to the program, 47.0607 Airframe Mechanics and Aircraft Maintenance Technology/Technician. Is there a reason 49.0101 was chosen over 47.0607?**

There is no reason why CIP 47.0607 should not be used over CIP 49.0101. We just overlooked it.

**2. How will students who take the course via distance technologies be able to develop the applied skills required to be proficient in maintaining aircraft systems?**

In the regulation that governs the establishment and operation of aircraft maintenance technician schools (14CFR147) the Federal Aviation Administration (FAA) distinguishes between classroom instruction and hands-on shop activities. The classroom work provides the theory and knowledge required while the shop projects reinforce the classroom work and provides the hands-on skills necessary to use the appropriate tools and equipment and to



work on aircraft and their components and parts.

Under 14CFR147 the FAA allows for the use of distance learning as appropriate. Distance learning would only be appropriate for the classroom content which will be approximately 60% - 70% of the program. Our program is intended to be a five semester program with the first semester being done entirely online.

**3. The enrollment projection shows 500 students in the program by the fifth year. It would be helpful to describe the marketing plan that will attract such a large number of students into the program.**

A survey of five of the top university aircraft maintenance technician programs in the United States indicates that these programs operate with four or five concurrent classes of around 20 students each for a total enrollment of 80 to 100 students. Likewise, a foreign source is very interested in sending students to our aircraft maintenance technician program.

There is nothing in 14CFR147 that limits the size of a single school but as a single school site becomes larger there are capacity and scheduling issues with student housing and support, school instructors and staff, the availability of FAA designated maintenance examiners, classroom facilities, shop facilities, tooling and equipment requirements, and the associated non-aviation university courses and university services.

A program where all of the classroom work is accomplished through distance learning would alleviate some of these issues and could allow for a larger program but the extent that the FAA will allow distance learning to be used under the new regulation is still unclear.

Although there is nothing in 14CFR147 that limits the size of a single school, the industry standard seems to be in the 100 student range. The FAA may have issues with certifying a single school that is significantly larger than that - especially in the early stages of a new school's operation.

Since our school will be one of the first, if not the first, to be certified under the new regulation we will attract students from a wide variety of backgrounds and locations who want the very latest in aircraft maintenance education and training.

**4. Even with two new faculty hires, how will faculty be able to manage instructional loads with 500 additional students and maintain the necessary instructional quality to build student proficiencies?**

The regulation (14CFR147) requires a maximum class size of 25 students per instructor. Most of the top university aircraft maintenance technician programs are operating with class sizes of closer to 18 - 20.

A program of 500 students would require a minimum instructional staff of 20 plus the required school support staff. We currently have 16 qualified maintenance professionals in our maintenance facility here in Cedar City who can teach as adjuncts to establish the initial program in Cedar City.

**5. The graduation projection shows 250 graduates by the fifth year. Is there an estimate of how many of these graduates will be living in Utah and may wish to compete for positions within the state? Having a clearer description of the local and state labor market and the program's potential impact on that market would be helpful to better understand how the proposed program may affect program graduates from SUU, SLCC, and USU who wish to be employed in Utah.**

Considering our physical location in the southwestern corner of the state, the relatively sparse population of that area, and the existence of two other such schools in the central and northern parts of the state, the Utah student base for this program will tend to be somewhat limited although Skywest which is based in St. George, Utah, has indicated a demand for 40 technicians a month. A foreign source is very interested in sending students to our aircraft maintenance technician program. Our goal is to use our unique rotorcraft expertise and other options to attract students both nationally and internationally.

The spin-off opportunities for this program are significant both in aircraft maintenance and in aircraft manufacturing. Offering certificate courses in advanced maintenance operations such as rotorcraft maintenance and inspection and advanced composites maintenance and inspection are excellent possibilities.

Considering the FAA licenses and the associated knowledge and skills that our graduates will have, it would be a very easy transition into the manufacturing world as well. There is not only a shortage of flight crew and maintenance professionals but manufacturers are also having increasing difficulties locating and hiring knowledgeable employees. Partnering with manufacturers to offer certificate courses designed to meet their specific needs is a significant potential market for our program.

**6. Course prefixes and numbers in the degree map do not align to course prefixes and numbers on the program curriculum table.**

The course prefix numbers in the degree map need to be updated to match the numbers on the program curriculum table. The prefix numbers in the degree map were the proposed numbers when the courses were anticipated being PILT courses. Matching these course numbers was missed in our significant efforts to generate and submit the R401 in a short time frame.

**7. The budget table shows revenues over expenses at \$2,667,800 by year three. Why charge students a \$10,000 fee if there is going to be such a large surplus?**

Since our program is intended to be a five semester program the total lab fees will be \$20,000.00 (\$4,000.00 per semester for five semesters).

This program will require a significant initial capital investment that will include a building and property to be located adjacent to the Cedar City airport. It will also include a significant investment in classroom and shop fixtures, tooling, equipment, mock-ups, an engine run facility, a paint booth, advanced electrical and composites labs, running piston and turbine engines, and operational (but not necessarily flight worthy) aircraft for the school's use.

The lab fees were set at a level that will allow us to compete with other schools and also allow the school to amortize these initial investments and to continuously supply, update, and enhance the capabilities of the program as FAA regulations change and as new technologies and equipment enter service in the aviation industry.

The lab fee for the first semester will go toward updates and improvements to the online program. That number could be revised as necessary in either direction. We are using it for financial planning purposes for the start-up. We estimate that the consumables expenses per student will be around \$1,500.00 per semester for semesters 2 thru 5.

**B) Feedback/Questions from USU:**

**1) Current Part 147 compliant training requires 1 instructor/25 students in laboratory settings. Will this proposal be able to meet current Part 147 regulations or is it contingent upon the implementation of revised CFR Title 14 Part 147 authority?**

The 25:1 requirement is from the old Part 147. Everyone is assuming that that it will remain the same under new Part 147. Most schools operate with a ratio of 18-20:1 rather than 25:1.

**2) An online program will obviously have potential impacts to existing in-state programs as the program designed clearly intends to expand/be offered predominantly outside of its existing designated service area.**

The way we have set it up it is a five semester program. The first semester is done entirely online. The remaining four semesters the all lab requirements.

**3) Relate to faculty resources - "Sufficient qualifications and ample qualifications for overload work already exist among the faculty and staff.." This statement suggests that faculty resources are not readily available to develop and implement a new program. Appendix C indicates 1 faculty member and 2 staff appointments with % time indicated 'as needed'. It is not apparent that existing faculty and staff have the time necessary to**

**implement a revolutionary training program. It is further difficult to suggest that this program will meet revised Part 147 regulations as they are not actually published or applicable at this time.**

We currently have 16 properly credentials and qualified maintenance professionals in the SUU aircraft maintenance department at the Cedar City Airport who have indicated that they are interested in teaching on an adjunct basis.

**4) 'Special fees' of ~\$10,000 per student per year in addition to standard SUU tuition and fees are well above fees and total programmatic costs in other AAS AMT programs.**

Since our program is intended to be a five semester program the total lab fees for the program will be \$20,000.00 (\$4,000.00 per semester for five semesters). The lab fee for the first semester will go toward updates and improvements to the online program. We estimate that the consumables expenses per student will be around \$1,500.00 per semester for semesters 2 thru 5. When you factor in the SUU tuition the total program cost is in line with other major university A&P programs (Embry-Riddle, Purdue, MTSU, etc.). Some smaller schools and some private technical school programs are less expensive but they will not be delivering the product that SUU will be delivering. That number could be revised as necessary in either direction. We are using it for financial planning purposes for the start-up.

Once again, we appreciate the feedback provided by the Commissioner's Office and USU. We take this feedback seriously and hope that our responses address the questions/concerns raised. Responding to these issues has helped to refine our planning and has prompted additional deliberations here on campus.

--james

James Sage, Associate Provost  
Southern Utah University

[← Reply](#)



**ACTION ITEM REQUEST**

This request from the Office for Planning and Institutional Effectiveness asks that the SUU Board of Trustees vote to approve the proposed dual enrollment partnership between Southern Utah University (SUU) and Southwest Technical College (STECH) in Cedar City, Utah. An affirmative vote for the partnership would include approval of:

1. The curriculum articulation agreements found in Appendix A;
2. The addendum to the original MOU regarding shared employee benefits found in Appendix B;
3. The addendum to the original MOU regarding student fee structure found in Appendix C;
4. The dual enrollment processes and procedures outlined in the attached document;
5. The orientation materials found at a link in the attached document;
6. The submission of the partnership for review by the Northwest Commission on Colleges and Universities (NWCCU).

Also attached to this document is a spreadsheet outlining the goals, strategies and key performance indicators that have guided the project, as well as a calendar outlining the proposed timeline of events leading to implementation.

The dual enrollment partnership between SUU and STECH has gone through significant initial planning and development. It is the opinion of this office that, despite the fact that planning and development will continue, the point has been reached that action by responsible parties should be taken to approve the implementation of the partnership. We respectfully request that the Board of Trustees consider this action item for approval.



**Southwest Tech/SUU Partnership  
Board of Trustees Action Item  
October 12, 2018**

**ACTION ITEM REQUEST**

This request from the Office for Planning and Institutional Effectiveness asks that the SUU Board of Trustees vote to approve the proposed dual enrollment partnership between Southern Utah University (SUU) and Southwest Technical College (STECH) in Cedar City, Utah. An affirmative vote for the partnership would include approval of:

1. The curriculum articulation agreements found in Appendix A;
2. The addendum to the original MOU regarding shared employee benefits found in Appendix B;
3. The addendum to the original MOU regarding student fee structure found in Appendix C;
4. The dual enrollment processes and procedures outlined in the document below;
5. The orientation materials found at a link in the document below;
6. The submission of the partnership for review by the Northwest Commission on Colleges and Universities (NWCCU).

**INTRODUCTION**

During the late fall of 2017, President Scott Wyatt (SUU) and President Brennan Wood (Southwest Tech or STECH) held meetings to discuss any measures that could be taken between the two institutions to benefit students and help with retention and completion. These discussions led to a proposed dual-enrollment partnership between the two schools. This proposal was made to the Utah State Legislature in February of 2018, and \$200,000 in ongoing funds were committed to STECH to establish recruitment and liaison positions specifically for the new program. An additional \$35,000 was made available to SUU by the Governor’s Office in support of the articulation process. A Memo of Understanding was signed by the two institutions on March 23, 2018, and the process of creating the dual-enrollment partnership was set in motion. It is anticipated that the partnership will be fully implemented by fall semester 2019.

**TASK FORCES**

During the months of May-August of 2018, the effort has pushed forward on several fronts, particularly relating to the development of articulation agreements between the institutions, policies related to the actual admittance, enrollment, and tracking of students between the two entities, the development of marketing and orientation materials, and the benefits that might be shared between staff at the two schools. Five groups have handled this work: the Articulation Task Force, the Dual Enrollment Task Force, the Marketing and Orientation Task Force, the Shared Benefits Task Force, and the Student Fee Task Force. The resulting work of these groups may be found in document and appendices that follow.

Articulation Task Force

Meetings were convened in May and June of 2018 between faculty and leadership at both institutions. The goal was to create course-by-course articulated agreements between STECH and SUU so that STECH students could earn university credit as they completed their STECH courses. The Articulation Task Force has thus far completed agreements in the following areas:

1. Digital Media
2. Engineering Technology
3. Nursing
4. Accounting
5. Business Specialist
6. Culinary Arts

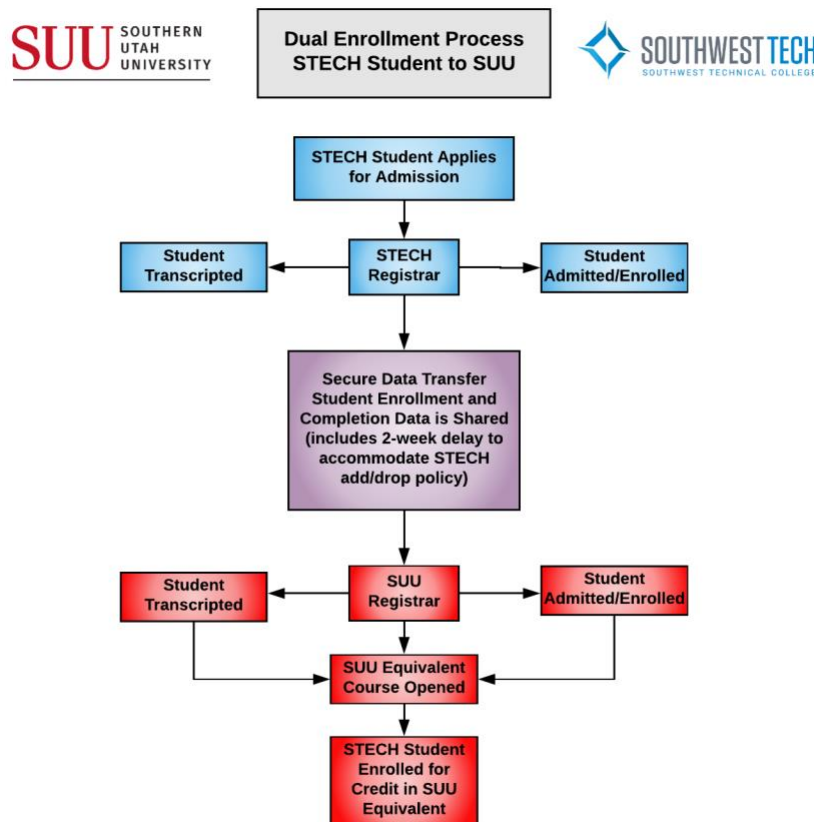
7. Agriculture
8. Information Technology
9. Arts and Design

The initial agreements were then reviewed by departmental faculty, and a draft of a formal articulation agreement was completed. The proposed articulation agreements were then reviewed by faculty a second time and areas were identified that will require curriculum adjustments on both sides of the articulation agreements. After that review, the agreements were “handed off” to a subcommittee from the SUU undergraduate curriculum committee for further review. The initial articulation agreements were approved by the SUU undergraduate curriculum committee on September 27. It is anticipated that additional clean-up work may be done during the fall of 2018 to make certain that the articulation agreements are as comprehensive as possible, but the current articulation agreements for consideration represent a remarkable “first step” in the dual enrollment process, and it is recommended that they be approved at this time. The articulation agreements can be seen in Appendix A at the end of this document.

Dual Enrollment Task Force

Leaders from both schools met as a committee to discuss the various processes that need to be in place to create and facilitate the new dual enrollment model. The meetings of this group centered primarily on the “nuts-and-bolts” strategies and processes through which the creation of a new dual enrollment model could be accomplished. The dual enrollment model that was agreed upon can be seen in the flowchart below.

Flowchart #1 - Dual Enrollment Process



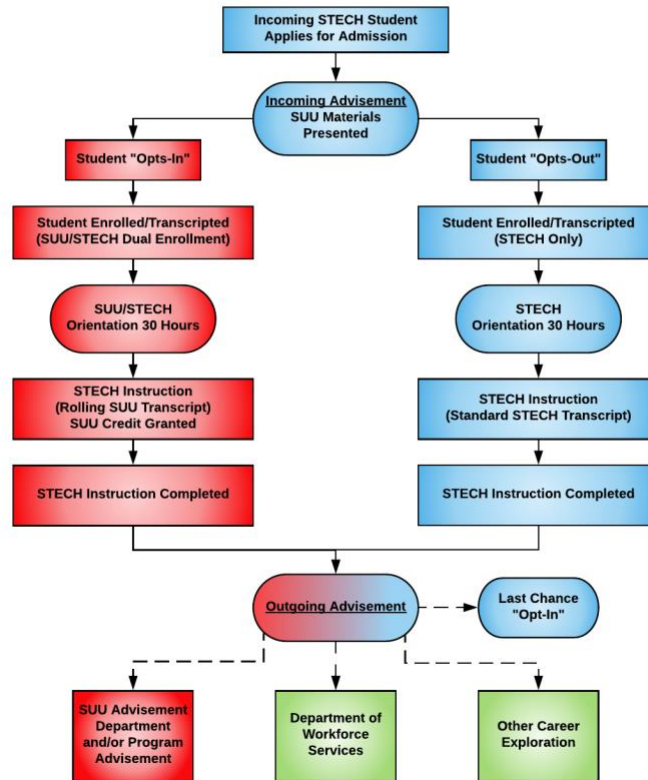
Students applying to STECH will choose to “opt-in” or opt-out” of the dual enrollment process as they complete their application forms. After students complete the application process, and the “opt-in/opt-out” designation, their progress through the STECH/SUU dual enrollment program will follow the process outlined in the advisement flowchart, below:



## Flowchart #2 - Dual Enrollment Advisement



SUU/STECH Dual Enrollment Partnership  
Application/Advisement Process



### Marketing and Orientation Task Force

The Marketing and Orientation Task Force has centered on the creation of orientation and marketing materials that would inform prospective STECH students of the benefits of the partnership. As part of these materials, an orientation video has been completed, and can be seen at the following link: <https://youtu.be/yrFJSUd6CWE>. It is anticipated that this group will continue to meet during the fall of 2018 to finalize the co-branding of STECH student activity cards, the creation of marketing materials, and other activities related to “rolling-out” the proposed partnership.

### Shared Employee Benefits Task Force

This group was assembled to discuss the benefits that might be shared between the employees of SUU and STECH with regards to the “perks” of employment - - e.g., tuition waivers, admission to events, etc. The following benefits sharing plan has been agreed to for **EMPLOYEES** at SUU and STECH:

#### Tuition Agreed: STECH --> SUU

- STECH Full-time/benefit eligible employees, spouses & dependents: 50% Waiver for in-state tuition
- No limit on credits, except as may be required for the employee work hours by STECH
- Dependents must be part of the employee insurance or benefit plan, unmarried, and younger than 27-years old
- STECH Part-time employees: 50% Waiver for in-state tuition
- Employee only - no spouse or dependent benefit
- Up to 6 credits per semester only



#### Tuition Agreed: SUU --> STECH

- SUU Full-time/benefit eligible employees, Spouses & Dependents: 50% Waiver for in-state tuition
- up to 30 clock-hours of instruction per week
- Dependents must be part of the employee insurance or benefit plan, unmarried, and younger than 27-years old
- SUU Part-time employees: 50% Waiver for in-state tuition
- Employee only - no spouse or dependent benefit
- Up to 6 clock-hours of instruction per week

#### Other Benefits Agreed:

- Co-branded employee identification cards, with home institution as the top or pre-eminent logo
- STECH employees to receive SUU employee admission at athletic events (minus football)
- STECH employees to receive SUU employee admission to fine arts events
- STECH employees to receive SUU employee admission benefits at SUU Fitness Center
- STECH employees to receive SUU employee discount at the SUU Bookstore

A Memo of Understanding outlining these terms has been completed and signed by Presidents Wyatt and Wood. A copy of that document appears in Appendix B at the conclusion of this report.

#### Student Fees Task Force

A group of student leaders and administrators was convened discuss the issue of shared student benefits between SUU and STECH students. The idea of shared student benefits raises several important issues related to the status of students in the STECH/SUU dual enrollment program, including:

- SUU students are required to pay a student fee each semester of \$381.75 and cannot opt out of paying the fee
- STECH students pay significantly less in tuition than SUU students
- Because of the tuition and fee differential between the two institutions, charging STECH students the full amount of the SUU student fee would be a significant barrier to STECH students exercising the dual enrollment option, but not charging any fee would be unfair to SUU students
- STECH students exercising the dual enrollment option should be able to access their SUU account and have access to the SUU library for little or no fee, because this level of student service is provided to all students who are admitted to SUU

Ultimately, the group arrived at a two-tier solution that provided an option for **STECH students** to be dually enrolled with no student fee, but also provided them with an additional option to participate in some SUUSA fee-sponsored events:

#### Tier 1 - No Student Fee

- STECH students have access to SUU Student Portal, student email account, library, transcript, access to SUU advisers and other student services typically provided when a student is admitted to SUU
- STECH students in this tier will not have access to SUUSA, athletics, fine arts, fitness center, or other student fee-sponsored events
- As they do for other community organizations, SUU Athletics may provide complimentary tickets for events that can accommodate the additional crowd, but this is on an "as-available" basis, and no guarantee of tickets for a specific event is made

#### Tier 2 - Limited Student Fee (\$50.00)

- STECH students have access to SUU Student Portal, student email account, library, transcript, access to SUU advisers and other student services typically provided when a student is admitted to SUU
- As they do for other community organizations, SUU Athletics may provide complimentary tickets for events that can accommodate the additional crowd, but this is on an "as-available" basis, and no guarantee is made

- STECH students in this tier have access to a limited number of SUUSA student fee-funded events including:
  - STECH students will have access to SUUSA and SPB-sponsored events, including dances, concert events, holiday parties and other social or educational events sponsored by SUUSA or SPB;
  - Access to the SUU Fitness Center (PE Building) and participation in intramural sports
  - Access to the climbing wall, and other SUU Outdoor Recreation activities
  - Admission to SUU Music Department Events
  - Admission to SUU Theater Arts and Dance Events
  - Access to the *University Journal* student newspaper
- STECH students enrolling during the first six weeks of the start date of any SUU semester will be charged the \$50 fee for that semester, and may pay an additional \$50 at the start of the subsequent semester, should they choose to be involved in SUU student activities
- STECH students enrolling after the 6<sup>th</sup> week of the start date of the any SUU semester will be covered by the initial \$50 payment through the end of the subsequent semester.

An addendum to the original MOU related to the student fee agreement has been drafted and is awaiting signature approval from both institutions. A copy of that draft can be seen in Appendix C and It is anticipated that this document will be signed shortly.

#### **INITIAL ARTICULATION AND DUAL ENROLLMENT EFFORTS**

During the fall semester of 2018, students enrolled at STECH in Computer Science became the first students to be dually enrolled at SUU and STECH. The articulation agreement between the SUU and STECH in Computer Science is the first fully-integrated, course-by-course articulation agreement approved between the schools, and it served as a template for all those agreements that followed. In discussions between the two institutions and NWCCU, it was determined that this group of STECH students would serve as a “test case” for the dual enrollment process. A copy of the articulation agreement between the two schools is included in Appendix D at the conclusion of this report.

As of the draft date of this report, 29 students have signed up at STECH in the Computer Science program that is part of the dual enrollment test. Of those 29 students, all have indicated a desire to take part in the program, although final numbers will not be available until after the “add/drop” period of two weeks is completed at STECH and the report is made to SUU. It is anticipated, however, that 100% of eligible students in the STECH program will opt in to participation in the dual enrollment agreement.

#### **SUMMARY**

In summary, the dual enrollment partnership between SUU and STECH has gone through significant initial planning and development. It is the opinion of this office that, despite the fact that planning and development will continue, the point has been reached that action by responsible parties should be taken to approve the implementation of the partnership. We respectfully request that the Board of Trustees consider this action item for approval.

**APPENDIX A**  
**Articulation Agreements**

- 1. Accounting**
- 2. Agriculture**
- 3. Art and Design**
- 4. Business Specialist**
- 5. Culinary Arts**
- 6. Engineering Technology**
- 7. Graphics and Media**
- 8. Information Technology**
- 9. Nursing**

**Credit Articulation Agreement for  
Accounting  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH) specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1<sup>st</sup> day of July 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Accounting Program.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Accounting within the School of Business at SUU is responsible for the overall administration of this program.
- 1.4 In March of each year, the Department Chair of Accounting and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Department of Accounting at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.

2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.

2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

### 3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation

## Course-by-Course Equivalency List

### Accounting

STech Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
BTEC 1140	Spreadsheet Applications I	60	BA 1000E	Business Administration Elective	2
BTEC 2140	Spreadsheet Applications II	60	<b>BA 2010</b>	Computer Applications <b>SWTech</b>	2
BTEC 1510A	Business English	60	BA 1000E	Business Administration Elective	2
BTEC 1040	Records Management	30	MGMT 1000E	Management Elective	1
BTEC 1130A	Word Processing Applications I	60	BA 1000E	Business Administration Elective	2
BTEC 2130	Word Processing Applications II	90	BA 1000E	Business Administration Elective	3
ACCT 1320A	Financial Records	60	FIN 2000E	Finance elective	2
ACCT 1330	Accounting I	60	ACCT 2010	Accounting principles	3
ACCT 1340	Accounting II	60			
BTEC 4017	EDC II Supervisor	30	MGMT 1000E	Management Elective	1
ACCT 2310	Computerized Accounting	60	ACCT 2000E	Accounting Elective	2
WFSK 1400	Work Place Relations	60	BA 1000E	Business Administration Elective	2
SKSKS 1500	Job Seeking Skills	30	BA 1000E	Business Administration Elective	1
BTEC 2000	Keyboarding/Calculator	30	BA 1000E	Business Administration Elective	1
SWDM 1028	e-Portfolio	30	BA 1000E	Business Administration Elective	1

**Credit Articulation Agreement for  
Agriculture  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH), a UTEC institution, specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1st day of July, 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Agriculture Program.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Agriculture and Nutrition Science within the College of Science and Engineering at SUU is responsible for the overall administration of this program.
- 1.4 In March of each year, the Department Chair of Agriculture and Nutrition Science and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Department of Agriculture and Nutrition Science at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.

2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.

2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

### 3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation



## Course-by-Course Equivalency List

### Advanced Swine Production, Pork Production, and Herd Technician

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
PORK 3010	Onboarding—Pork Production	180	AGSC 1200	Introduction to Swine Production	4
<b>Advanced Swine Production Core (358 hours)</b>					
PORK 5000	Environmental Controls	57	AGSC 2200	Advanced Swine Production	6
PORK 5010	Culling and Euthanasia	6			
PORK 5020	Production	40	and		
PORK 5020	Advanced Production	105	AGSC 3200	Swine Management	3
PORK 5040	Leadership and Management	150			
<b>One complete specialization (listed below)</b>					<b>9 total</b>
<b>Breeding Management (585 hours)</b>					
PORK 3020	Feeding for Breeding and Gestation	90	AGSC 1950 and AGSC 2600	<i>Complete any one (1) specialization for the following credits:</i>  Agriculture Enterprise Practicum Production	12
PORK 3021	Site Sanitation in Breeding and Gestation Barns	23			
PORK 3022	Recordkeeping in Breeding and Gestation Barns	45			
PORK 3023	Heat Check and Artificial Insemination I	205			
PORK 3024	Heat Check and Artificial Insemination II	200			
PORK 3025	Vaccinating and Treating Animals in Breeding and Gestation Barns	22			
OR	<b>Farrowing Management (585 hours)</b>				
PORK 3030	Feeding in the Farrowing Barn	45			
PORK 3031	Vaccinating & Treating Animals in the Farrowing Barn	90			
PORK 3032	Record Keeping in the Farrowing Barn	90			
PORK 3033	Lactating Sow and Piglet Care I	180			
PORK 3034	Lactating Sow and Piglet Care II	180			
OR	<b>Finishing Herd Technician (585 hours)</b>				
PORK 4020	Pig Health and Treatment in the Finishing Barn I	180			
PORK 4021	Pig Health and Treatment in the Finishing Barn II	180			
PORK 4022	Feeding and Watering in the Finishing Barn	135			
PORK 4023	Safety for Finishing Technicians	90			
OR	<b>Late Lactation Management (585 hours)</b>				
PORK 3040	Vaccinating and Treating Animals in Late Lactation	90			
PORK 3041	Site Sanitation in Late Lactation	180			
PORK 3042	Feeding in Late Lactation	45			
PORK 3043	Lactating Sow and Piglet Care	180			
PORK 3044	Record Keeping for Late Lactation	45			
PORK 3045	Moving Animals in Late Lactation	45			
OR	<b>Nursery Herd Technician (585 hours)</b>				
PORK 4010	Pig Health and Treatment in the Nursery Barn I	180			
PORK 4011	Pig Health and Treatment in the Nursery Barn II	180			
PORK 4012	Feeding and Watering in the Nursery Barn	135			
PORK 4013	Safety for Nursery Technicians	90			

**Credit Articulation Agreement for  
Art and Design  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH) specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1<sup>st</sup> day of July 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Arts and Design Program.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Art and Design (within the College of Performing and Visual Arts) and the Department of Communication (within the College of Humanities and Social Sciences) at SUU will share responsibility for the overall administration of this program.
- 1.4 In March of each year, the Department Chairs and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Departments at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.

2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.

2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

### 3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation

## Course-by-Course Equivalency List

### Art and Design

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
SWDM 1021	Digital Photography II	60	ART 1050	Introduction to Photography	3
SWDM 1012	Intro to Media Design	60	COMM 2010	Media and Society	3
SWDM 1030	Typography	30	ART 3240	Graphic Design I	3
SWDM 1031	Intro to Design Principles	30			
BETC 2050	Social Media and the Internet	60	COMM 2030	Social Media and Branding	3
SWDM 1026	Digital Audio	60	COMM 1560	Audio Production	3
SWDM 1013	Designs Applications (In Design)	60	COMM 3070 <i>or</i> ART 2210	Communications Graphics <i>or</i> Digital Tools	3 <i>or</i> 3
SWDM 1020	Digital Photography (Photoshop)	60			
SWDM 1022	Computer Illustration (Adobe Illustrator)	60			

**Credit Articulation Agreement for  
Business Specialist  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH) specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1<sup>st</sup> day of July 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Business Specialist Program.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Management, Marketing, and Hospitality within the School of Business at SUU is responsible for the overall administration of this program.
- 1.4 In March of each year, the Department Chair of Management, Marketing, and Hospitality and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Department of Management, Marketing, and Hospitality at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.

2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.

2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

### 3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation

## Course-by-Course Equivalency List

### Business Specialist

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
ACCT 1101	Accounting Basics	30	ACCT 1000E	Accounting elective	1
BTEC 1130A	Word Processing Applications I	60	BA 1000E	Business administration elective	2
BTEC 1140	Spreadsheet Applications I	60	BA 1000E	Business administration elective	2
ACCT 2310	Computerized Accounting	60	ACCT 2000E	Accounting elective	2
BTEC 1040	Records Management	30	MGMT 1000E	Management elective	1
BTEC 2050	Social Media and the Internet	60	MKTG 1000E	Marketing elective	1
BTSC 2530A	Customer Service	60	BA 1000E	Business administration elective	2
BTEC 3100	Professionalism (Softskills)	30	BA 1000E	Business administration elective	1
WKSK 1400	Work Place Relations	60	BA 1000E	Business administration elective	2
WKSK 1500	Job Seeking Skills	30	BA 1000E	Business administration elective	1
BTEC 2000	Keyboarding/Calculator	30	BA 1000E	Business administration elective	1
SWDM 1028	e-Portfolio	30	BA 1000E	Business administration elective	1
ACCT 1101	Accounting Basics	30	ACCT 1000E	Accounting elective	1
BTEC 1510A	Business English	60	BA 1000E	Business administration elective	2
BTEC 2130	Word Processing Applications II	90	BA 1000E	Business administration elective	3
BTEC 2140	Spreadsheet Applications II	60	<b>BA 2010</b>	<b>Computer application SW Tech</b>	<b>2</b>
BTEC 1160	Electronic Presentations	60	BA 1000E	Business administration elective	2
BTEC 4017	EDC II Supervisor	30	MGMT 1000E	Management elective	1
BTEC 1520A	Business Correspondence	60	<b>BA 2040</b>	<b>Business Communication SW Tech</b>	<b>2</b>
BTEC 1530	Communications	90	BA 1000E	Business administration elective	3

## Course-by-Course Equivalency List

### Business Specialist *(continued)*

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
BTEC 2040A	Office Procedures	60	MGMT 1000E <i>and</i> MGMT 3240	Management elective	3
BTEC 4025	Leadership	60		<i>and</i>	
BTEC 4035	Human Resources	60		Human Resource Management	3
SWDM 1015	Entrepreneurship I	90	BA 1010	Business and Society	3
SWDM 1016	Entrepreneurship II	60	MGMT 3210	Entrepreneurship	3
ACCT 1101	Accounting Basics	30			
BTEC 2365	Marketing	90	MKTG 3010	Marketing Principles	3
BTEC 3020	e-Commerce	60	CSIS 1010	e-Commerce-Global Society	3
BTEC 2050	Social Media and the Internet	60			

### Conditions of Articulation:

The BTEC 3020 to CSIS 1010 articulation will need approval from the CSIS department (pending).



**Credit Articulation Agreement for  
Culinary Arts  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH) specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1<sup>st</sup> day of July 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Culinary Arts Program.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Management, Marketing, and Hospitality within the School of Business at SUU is responsible for the overall administration of this program.
- 1.4 In March of each year, the Department Chair of Management, Marketing, and Hospitality and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Department of Management, Marketing, and Hospitality at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.

2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.

2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

### 3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation

## Course-by-Course Equivalency List

### Culinary Arts

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
CULA 3000	Kitchen Safety, Equipment Safety, and Sanitation	40	HRHM 1000E	Hospitality elective	1.5
CULA 3010	Introduction to Professional Cuisine	60	HRHM 1000E	Hospitality elective	2
CULA 3020	Methods and Fabrication	50	HRHM 1000E	Hospitality elective	1.5
CULA 3030	Flavor Essentials	50	HRHM 1000E	Hospitality elective	1.5
CULA 3040	Professional Culinary Technique	60	HRHM 1000E	Hospitality elective	2
CULA 3060	Advanced Culinary Technique	100	HRHM 1000E	Hospitality elective	3
CULA 3050	Advanced Flavor Essentials	50	HRHM 3250	International Cuisine	3
CULA 3070	Culinary Artistry	40			
CULA 3080	Restaurant Practical	110	HRHM 3110	Quantity Food Production	3
CULA 3090	Introduction to Baking and Pastry	75	HRHM 1000E	Hospitality elective	2.5
CULA 3100	Baking and Pastry Fundamentals	75	HRHM 1000E	Hospitality elective	2.5
CULA 3110	Intermediate Baking	60	HRHM 1000E	Hospitality elective	2
CULA 3120	Intermediate Pastry Arts	60	HRHM 1000E	Hospitality elective	1
CULA 3130	Black Box Skills	40	HRHM 1000E	Hospitality elective	1
CULA 3140	Food Ethics and Social Responsibility	40	HRHM 1000E	Hospitality elective	1.5
CULA 3150	Job Preparedness and Interviewing Skills	30	HRHM 1000E	Hospitality elective	1

**Credit Articulation Agreement for  
Engineering and Technology  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH), a UTEC institution, specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1st day of July, 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Engineering Technology Program.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Engineering Technology within the College of Science and Engineering at SUU is responsible for the overall administration of this program.
- 1.4 In March of each year, the Department Chair of Engineering Technology and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Department of Engineering and Technology at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.
- 2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.
- 2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation

## Course-by-Course Equivalency List

### Southwest Tech/SUU Engineering Technology

Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
INMA 1020	Mechanical Devices & Principles	60	EET 1600	Robotics and Automation I	3
INMA 1050	Electrical Safety, Meters, and Motor Controls	60			
INMA 1060	Electronics, PLCs, & Process Instrumentation	60			
INMA 1070	Fluid Power Devices & Principles	60			
WELD 1015	Welding Safety	40	TECH 1210	Introduction to Welding, Safety, and Testing	3
WELD 1705	Welding Inspection & Testing	50			
WELD 1145	Welding Metallurgy Basics	40			
WELD 1215	Oxy-fuel Gas Welding	35	TECH 1215	Oxy-fuel Gas Welding Lab	1
WELD 1305	SMAW Welding	155	TECH 1235	SMAW Welding Lab	1
WELD 1405	GMAW Welding I	95	TECH 1255	GMAW Welding I Lab	1
WELD 1510	FCAW II (Self Shield)	90	TECH 1275	FCAW II (Self Shield) Lab	1
WELD 1610	GTAW Welding II (Aluminum)	60	TECH 1295	GTAW Welding II (Aluminum) Lab	1
WELD 2540	GMAW Aluminum	30	TECH 1305	GMAW Aluminum Lab	1



**Credit Articulation Agreement for  
Graphics and Media  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH), a UTEC institution, specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1st day of July, 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Graphics and Media Program.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Art and Design (within the College of Performing and Visual Arts) and the Department of Communication (within the College of Humanities and Social Sciences) at SUU will share responsibility for the overall administration of this program.
- 1.4 In March of each year, the Department Chairs and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Departments at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.
- 2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student



and SUU.

2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

### 3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation

## Course-by-Course Equivalency List

### Graphics and Media

STech #	STech Course Name	Hours	SUU #	SUU Course Name	Credit
SWDM 1013	Designs Applications (In Design)	60	COMM 3070	Communications Graphics	3
SWDM 1020	Digital Photography (Photoshop)	60	<i>or</i>	<i>or</i>	<i>or</i>
SWDM 1022	Computer Illustration (Adobe Illustrator)	60	ART 2210	Digital Tools	3
SWDM 1026	Digital Audio	60	COMM 1560	Audio Production	3
SWDM 1023	Video Production	60	COMM 4750	Advanced Digital Editing	3
SWDM 1029	Video Production II	60	COMM 4760	Television Field Production	3
SWDM 1021	Digital Photography II	60	ART 1050	Introduction to Photography	3
SWDM 1030	Typography	30	ART 3240	Graphic Design I	3
SWDM 1031	Intro to Design Principles	30			
SWDM 1012	Intro Media Design	60	COMM 2010	Media and Society	3
BETC 2050	Social Media & the Internet	60	COMM 2030	Social Media and Branding	3

*Also requires a student portfolio to demonstrate competencies.*

**Credit Articulation Agreement for  
Information Technology  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH), a UTEC institution, specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1st day of July, 2018.

## 1. TERMS OF AGREEMENT

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for the Information Technology Program, and the AAS in Information Technology.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Computer Science and Information Systems within the College of Science and Engineering at SUU is responsible for the overall administration of this program.
- 1.4 In March of each year, the Department Chair of Department of Computer Science and Information Systems and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Department of Computer Science and Information Systems at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

## 2. STUDENTS

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.
- 2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.
- 2.4 Unless otherwise specified, STECH students will have five years in which to start SUU

coursework using the conditions outlined in this AGREEMENT.

3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation

## Course-by-Course Equivalency List

### Southwest Tech CS/SUU CSIS Articulation

STech #	STech Course Name	Hours	SUU #	SUU Course Name	Credit
CSCI 1160	Computer Science Fundamentals	90	CSIS 1030	Foundations of Computer Science	3
CSCI 1105	Introduction to Programming	90	CSIS 1400	Fundamentals of Programming	3
CSCI 1110	Object Oriented Programming	90	CSIS 1410	Object Oriented Programming	3
CSCI 1115	Algorithms & Data Structures	90	CSIS 2420	Introduction to Algorithms and Data Structures	3
ITEC 2915	HTML and CSS	120	CSIS 2000	Web Development	3
ITEC 2838	JavaScript	90			
ITEC 1310	A+ Courses	180	EET 2750	PC Hardware	3
ITEC 1500	Networking Technology	120	CSIS 2600	Data Communications & Networking	3
ITEC 2701	Linux Fundamentals	90	CSIS 2620	Network Administration I	3
ITEC 2211	Security Professional	60	CSIS 2670	Information Security & Assurance	3
ITEC 2532	Installing and Configuring Windows Server	90	CSIS 3620	Network Administration II	3
ITEC 2530	Administering Windows Server	90			
ITEC 2533	Configuring Advanced Windows Server Services	90			

## Program Summary for A.A.S. Degree Program *(updated from April 2018)*

### Associate of Applied Science (A.A.S.) in Information Technology

Course & Number	Course Title	Credits			
<b>General Education Requirements from SUU:</b>					
CSIS 1010	E-Commerce in a Global Society	3			
MATH 1040	Statistics	4			
ENGL 1010	Introduction to Academic Writing	3			
Gen Education	American Institutions Course (POLS 1100, HIST 1700, or ECON 1740)	3			
LM 1010	Information Literacy	1			
Gen Education	One course from two of five Knowledge Areas	6			
<b>Total General Education Requirements:</b>		<b>19</b>			
<b>Program Requirements:</b>					
<b>Courses from STECH:</b>		<b>Equivalent SUU Course:</b>			
Course Prefix & Number	Course Title	Clock Hrs	Course Prefix & Number	Course Title	Credits
CSCI 1105*	Introduction to Programming	90	CSIS 1400	Fundamentals of Programming	3
CSCI 1110*	Object Oriented Programming	90	CSIS 1410	Object Oriented Programming	3
CSCI 1115*	Algorithms & Data Structures	90	CSIS 2420	Introduction to Data Structures & Algorithms	3
ITEC 1310	A+ Courses	180	EET 2750	PC Hardware	3
ITEC 1500	Networking Technology	120	CSIS 2600	Data Communications & Networking	3
ITEC 2701	Linux Fundamentals	90	CSIS 2620	Network Administration I	3
ITEC 2211	Security Professional	60	CSIS 2670	Information Security & Assurance	3
ITEC 2532	Installing and Configuring Windows Server 2012	90	CSIS 3620	Network Administration II	3
ITEC 2530	Administering Windows Server	90			
ITEC 2533	Configuring Advanced Windows Server	90			
ITEC 2915	HTML and CSS	120	CSIS 2000	Web Development	3
ITEC 2838	JavaScript	90			
<b>Requirements from STECH/SUU:</b>					<b>27</b>
<b>Additional Required Courses from SUU:</b>					
CSIS 2010 <i>or</i> CSIS 2810	Computer Applications <i>or</i> Computer Architecture				3
CSIS 3100	Systems Analysis and Design				3
CSIS 3200	Database Design & Management				3
CSIS 3650	Network Security				3
CSIS 3600	Operating Systems				3
CSIS 3660	Network Design & Implementation				3
<b>Additional Requirements from SUU:</b>					<b>18</b>
<b>A.A.S. in Information Technology Grand Total:</b>					<b>64</b>

#### Conditions of Articulation:

\* Must be taught in the same language (preferably Java, but could be C/C++ or Python). State articulation prefers all three courses be taken at the same institution, so that students get these introductory courses in the same language, which provides a firm foundation in a programming language.

**Credit Articulation Agreement for  
Department of Nursing  
Southern Utah University  
and  
Southwest Technical College**

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This agreement (hereafter AGREEMENT) between Southern Utah University (SUU) a USHE credit-granting institution, and Southwest Technical College (STECH), a UTEC institution, specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed at STECH. The parties enter this AGREEMENT on the 1st day of July, 2018.

**1. TERMS OF AGREEMENT**

- 1.1 This AGREEMENT covers the course-to-course articulation between SUU and STECH for health care programs.
- 1.2 A current description of this program will be maintained both at the STECH and SUU websites.
- 1.3 The Department of Nursing working with the Deans office in the College of Science and Engineering at SUU is responsible for the overall supervision of this program.
- 1.4 In March of each year, the Department Chair of The Department of Nursing and the Vice President of Instruction at STECH will review the current STECH courses and the SUU courses, to ensure they still meet SUU requirements.
- 1.5 STECH will notify the Department of Nursing at SUU if there are any changes to the programs covered under this AGREEMENT during the academic year.
- 1.6 This AGREEMENT will be in effect unless terminated by either party. If a party decides to terminate this AGREEMENT, they will give the other party four months' notice.

**2. STUDENTS**

- 2.1 Students that transfer from STECH must meet current SUU admission requirements and deadlines, provide an official transcript from STECH to SUU, and pay all appropriate application/admission fees associated with the awarding of credit and acceptance into SUU.
- 2.2 All STECH programs have end-of-course assessments, which grant certification and state-approved licensure where applicable.

2.3 Before declaring a major at SUU, STECH students must meet with a Student Success Advisor (SSA) over their intended major at SUU and complete a degree plan in Degreeworks, once the plan is created and locked by the SSA it becomes the articulation contract between the student and SUU.

2.4 Unless otherwise specified, STECH students will have five years in which to start SUU coursework using the conditions outlined in this AGREEMENT.

### 3. EXECUTION

This AGREEMENT is hereby consented to and agreed by:

For Southern Utah University

BY: \_\_\_\_\_

Senior Vice President for Academic Affairs

For Southwest Technical College

BY: \_\_\_\_\_

Vice President of Instruction and Accreditation



## Course-by-Course Equivalency List

Department of Nursing

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
NA 8010	Nurs Assist	90	SCI 1030 Elective	Foundational Healthcare Skills	2.0
NA 8010X	NA clinicals	30			
PHLB 1010	Phlebotomy	60	SCI 1040 Elective	Foundational Healthcare Skills	2.0
PHLB 1010X	Phlebotomy clinical	40			
EMT 1105	EMT Classwork	190	SCI 2300 Elective	Foundational Healthcare Skills	4.0
EMT 1105X	EMT Practicum	24			
AEMT 1110	AEMT Classwork	142	SCI 3300 Elective	Foundational Healthcare Skills	3.0
AEMT 1110X	AEMT Practicum	24			
*****	PN Program	930	Articulation Transition	(see below)	*****
MEDA 1105	Med Term	60	SCI 1010	Medical Terminology [Direct Articulation]	2.0
MAC II A		45	SCI 1011	Competency Based	1.0
MAC II A Lab		30			
MAC II B		45	SCI 1011	1 credit per course + lab completed	1.0
MAC II B Lab		30			
MAC III A		39	SCI 1011	(i.e., MAC IIA and IIA lab = 1 credit SCI Foundational Health Care Skills 1011 )	1.0
MAC III A Lab		36			
MAC III B		39	SCI 1011		1.0
MAC III B Lab		36			
Pharm	Pharmacology/Pharmacology Lab	36/24	SCI 1020	Pharm Dire Direct Articulation	1.0

**Conditions of Articulation:** The Department of Nursing will create an LPN to BSN curriculum and develop a direct admission program for students graduating from the SWATC LPN program who earn their license. Graduates from SWATC will have an opportunity to transition into the LPN to BSN program directly following graduation if they have completed the pre-requisites for the SUU program. (These are the same as for the pre-licensure students). If the student has pre-requisites that still need to be completed at graduation from SWATC, they will apply to the SUU PN2BSN nursing program upon completion of the necessary pre-requisites and general education classes. The PN2BSN curriculum is anticipated to be a four-semester program.

### Southern Utah University LPN to BSN (PN2BSN) Program

The Department of Nursing at Southern Utah University will develop a LPN to BSN program, which will provide a pathway for graduates from STECH, and other Licensed Practical Nurses to efficiently obtain their BSN degree and be qualified to take the NCLEX-RN.

Graduates from STECH will have an opportunity to transition into the LPN to BSN program directly following graduation if they have completed the pre-requisites for the SUU program. (These are the same as for the pre-licensure students). If the student has pre-requisites that still need to be completed at graduation from STECH, they will apply to the SUU PN2BSN nursing program upon completion of the necessary pre-requisites and general education classes. Licensed Practical Nurses who do not graduate from STECH will also complete the pre-requisites and full application to apply to the PN2BSN program.

The PN2BSN curriculum is anticipated to be a four-semester program. We may consider teaching some courses during the summer semester to maximize learning opportunities in clinical and classroom spaces.

The PN2BSN program and courses will be separate from the pre-licensure program. Although there may be some joint learning activities, the two groups of students will not be joined for courses, either classroom or clinical.

Details of the curriculum for the PN2BSN program will be developed over the 2018-2019 academic year with the goal of being implementation ready by summer semester 2019. Actual implementation will depend upon SUU providing funding for a minimum of two additional nursing faculty members and an additional \$20,000 to the Department of Nursing appropriated budget to support the additional program needs.

**APPENDIX B**  
**Addendum to Memorandum of Understanding**  
**Shared Employee Benefits**

ADDENDUM NO. 1 TO THE MEMORANDUM OF UNDERSTANDING

Between

Southern Utah University (also referred to as SUU)  
& Southwest Technical College (also referred to as STECH)

On March 23, 2018, SUU and STECH entered into Memorandum of Understanding (MOU) for the purpose of providing enhanced opportunities for the students of both institutions. The parties now mutually desire and agree to make the following additions. The purpose of addendum No. 1 is to provide enhanced opportunities for the employees of both institutions.

WHEREAS, parties agree that the dual enrollment partnership should proceed as quickly as possible, with implementation starting Fall Semester 2018.

AND WHEREAS, SUU has just less than 1,000 employees that would qualify for proposed benefits, of which approximately 870 are full-time benefit-eligible employees.

AND WHEREAS, STECH has approximately 120 employees that would qualify for proposed benefits, of which approximately 45 are full-time benefit eligible employees.

AND WHEREAS, SUU and STECH will work to co-brand an employee identification card, with home institution having the top or pre-eminent logo.

NOW THEREFORE THE PARTIES RESOLVE AS FOLLOWS:

1. Tuition agreement for STECH employees wishing to attend SUU.
  - a. STECH Full-time benefit eligible employees, spouses & dependents will receive a 50% tuition waiver for in-state tuition. There is no limit to amount of credits taken at SUU, except as may be required by STECH in order for the employee to maintain a full-time work load.
  - b. Dependents must be eligible for the employee insurance or benefit plan, unmarried and 26 years of age or younger.
  - c. STECH Part-time employees will receive a 50% tuition waiver for in-state tuition. Only Part-time employees are eligible for tuition waiver while spouses & dependents will not be eligible. Part-time employees qualify for a tuition waiver for one class up to 6 credits per semester.
2. Tuition agreement for SUU employees wishing to attend STECH.
  - a. SUU Full-time benefit eligible employees, spouses & dependents will receive a 50% tuition waiver for up to <sup>30</sup>~~15~~ clock-hours of instruction per week.
  - b. Dependents must be eligible for the employee insurance or benefit plan, unmarried and 26 years of age or younger.
  - c. SUU Part-time employees will receive a 50% tuition waiver for up to 6 clock-hours of instruction per week. Part-time employees are eligible for tuition wavier while spouses and dependents will not be eligible.

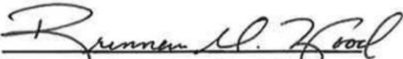
3. Other benefits


- a. STECH employees to receive employee admission at SUU athletic events and fine art events with the exception of SUU football.
- b. STECH employees to receive employee admission benefits at the SUU fitness center.
- c. STECH employees to receive SUU employee discount at SUU bookstore.
- d. SUU employees to receive STECH employee discount at Southwest Café.
- e. STECH employees will not have access to the CAPS mental health program.

Dated this 10<sup>th</sup> day of Aug, 2018

SOUTHWEST TECHNICAL COLLEGE

SOUTHERN UTAH UNIVERSITY

  
Brennan M. Wood, President

  
Scott L. Wyatt, President

**APPENDIX C**  
**DRAFT Addendum to Memorandum of Understanding**  
**STECH/SUU Student Fees**

**ADDENDUM NO. 2 TO THE MEMORANDUM OF UNDERSTANDING**

Between

Southern Utah University (also referred to as SUU)

& Southwest Technical College (also referred to as STECH)

On March 23, 2018, SUU and STECH entered into Memorandum of Understanding (MOU) for the purpose of providing enhanced opportunities for the students of both institutions. The parties now mutually desire and agree to make the following additions. The purpose of addendum No. 2 is to delineate student fees for STECH students participating in the dual enrollment agreement between the two schools.

WHEREAS, parties agree that the dual enrollment partnership between STECH and SUU will begin in Computer Science in the fall of 2018, with STECH students having the option to participate in the dual enrollment agreement;

AND WHEREAS, parties agree that the dual enrollment partnership between STECH and SUU will begin for all other eligible STECH students (those in articulated, certificate programs) in fall semester of 2019;

AND WHEREAS, STECH students opting to participate will be dually admitted, enrolled, and begin to receive SUU credit as they complete STECH courses;

AND WHEREAS, SUU students pay a student fee each semester in support of student activities, which allows them access to such activities and facilities as SPB-sponsored events, the SUU Fitness Center, and Intramural Sports;

AND WHEREAS, Southern Utah University Student Association (SUUSA), the SUU student government oversees the spending of much of the money collected in student fees, and operates activities through the Student Program Bureau (SPB);

AND WHEREAS, STECH students do not pay a similar student fee, and in addition, STECH students pay tuition that is significantly lower than SUU tuition rates;

AND WHEREAS, it is the desire of both parties to facilitate the dual enrollment process with as few additional fees or requirements for STECH students as is possible and equitable;

NOW THEREFORE THE PARTIES AGREE TO A TWO-TIERED STUDENT FEE PLAN FOR PARTICIPATING STECH STUDENTS AS FOLLOWS:

Tier 1 - No Student Fee (\$0.00)

- STECH students will have access to the SUU Student Portal, student email account, student transcript, access to all library services, access to SUU advisers, and other student services typically provided when a student is admitted to SUU.
- STECH students in this tier will not have access to SUUSA, athletics, fine arts, fitness center, or other student fee-sponsored events.
- As they do for other community organizations, SUU Athletics may provide complimentary tickets for events that can accommodate the additional crowd, but this is on an "as-available" basis, and no guarantee of tickets for a specific event is made.

Tier 2 - Limited Student Fee (\$50.00)

- STECH students have access to SUU Student Portal, student email account, library, transcript, access to SUU advisers and other student services typically provided when a student is admitted to SUU

- As they do for other community organizations, SUU Athletics may provide complimentary tickets for events that can accommodate the additional crowd, but this is on an "as-available" basis, and no guarantee is made
- STECH students in this tier have access to a limited number of SUUSA student fee-funded events including:
  - STECH students will have access to SUUSA and SPB-sponsored events, including dances, concert events, holiday parties and other social or educational events sponsored by SUUSA or SPB;
  - Access to the SUU Fitness Center (PE Building) and participation in intramural sports
  - Access to the climbing wall, and other SUU Outdoor Recreation activities
  - Admission to SUU Music Department Events
  - Admission to SUU Theater Arts and Dance Events
  - Access to the *University Journal* student newspaper
- STECH students enrolling during the first six weeks of the start date of any SUU semester will be charged the \$50 fee for that semester, and may pay an additional \$50 at the start of the subsequent semester, should they choose to be involved in SUU student activities
- STECH students enrolling after the 6<sup>th</sup> week of the start date of the any SUU semester will be covered by the initial \$50 payment through the end of the subsequent semester.

THE PARTIES FURTHER AGREE: that the optional Tier 2 \$50.00 per semester fee for STECH students is based on the comparable fee each SUU student pays (currently \$50.25) in support of the activities and facilities described above. As the fee for SUU students' changes, the STECH student fee may change correspondingly.

Dated this \_\_ day of \_\_\_\_\_, 2018

SOUTHWEST TECHNICAL COLLEGE

SOUTHERN UTAH UNIVERSITY

\_\_\_\_\_  
Brennan M. Wood, President

\_\_\_\_\_  
Scott L Wyatt, President





**Strategy**

**Goal 1:** Increase the number of associates degrees and bachelor's degrees awarded to technical college students by eliminating the administrative obstacles that currently discourage technical college students from transferring to SUU.

**Strategy 1**

Develop course-level articulation agreements for all Southwest Tech certificated programs, and create articulated and meaningful AA/AS/AAS degree pathways.

X

**Strategy 2**

Admit and enroll students at both institutions, providing Southwest Tech students access to SUU facilities and programs not currently available for no additional tuition cost.

X

**Strategy 3**

Simultaneously award credit at both institutions (clock hour completion at STECH=SUU credit and immediately satisfies degree requirement for articulated course at SUU without any additional paperwork). SUU credit granted to STECH students will primarily be competency-based.

X

**Strategy 4**

Help at-risk SUU students as they transition to Southwest Tech through advisement and the partial transfer of SUU tuition paid to offset tuition costs for coursework at STECH

**Strategy 5**

Develop integrated SUU bachelor's degree programs that require technical college coursework delivered at STECH as part of the BA/BS curriculum.

**Strategy 6**

Develop integrated employee and student benefits between the two institutions

**Strategy 7**

Develop integrated SUU bachelor's degree programs that require technical college coursework delivered at STECH as part of the BA/BS curriculum.

X

# Northwest Tech Dual Enrollment Project

## Project Goals

<b>Goal 2:</b> Decrease the number of local (living in the service region) first-time, full-time SUU students who discontinue postsecondary education prior to obtaining a credential whether from SUU or STECH.	<b>Goal 3:</b> Provide SUU students with an education consisting of an ideal balance in theoretical and practical coursework.	<b>Goal 4:</b> Increase the number of SUU students who take technical courses at STECH while pursuing a bachelor's or associate's degree, or a certificate program at SUU.
X	X	
		X
X	X	
X		X
	X	X
X	X	

<b>Goal 5:</b> Create a culture of institutional integration between SUU and STECH.
X
X
X
X
X
X

# SUU and Southwe

## KPIs

## Measurements

**Goal 1:** Increase the number of associates degrees and bachelor's degrees awarded to technical college students by eliminating the administrative obstacles that currently discourage technical college students from transferring to SUU.

Articulation Agreements	% of course articulations	<b>x</b>
	% of SUU programs with integrated STECH courses	
Institutional Integration	Shared employee/student benefits for those eligible.	<b>x</b>
Degree/Certificate Completions	# of eligible Stech students opting into the dual enrollment agreement	<b>x</b>
	% of dually admitted STECH students enrolling in SUU classes	<b>x</b>
	% of dually admitted STECH students obtaining SUU degree/certificate	
	% of local SUU students obtaining SUU and/or STECH degree/certificate/certification	
	# of SUU students taking, and receiving credit, for technical/professional course offerings at STECH while pursuing a bachelor's or associate's degree, or a certificate program at SUU	

# st Tech Dual Enrollment Project

## Project Goals

**Goal 2:** Decrease the number of local (living in the service region) first-time, full-time SUU students who discontinue postsecondary education prior to obtaining a credential whether from SUU or STECH.

**Goal 3:** Provide SUU students with an education consisting of an ideal balance in theoretical and practical coursework.

**Goal 4:** Increase the number of SUU students who take technical courses at STECH while pursuing a bachelor's or associate's degree, or a certificate program at SUU.

**Goal 5:** Create a culture of institutional integration between SUU and STECH.

x

x

x

x

x

x

x

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x

x

x

x

x

x

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x

x

x

x

# SUU and Southwest Tech Dual Enrollment Pr

<u>KPIs</u>	<u>Measurement</u>	<u>Target</u>	<u>Fall 2019</u>
Articulation Agreements	Percentage of course-to-course articulations	95% of all courses in Southwest Tech certificate programs have SUU equivalent courses for dual enrollment	
	Percentage of SUU programs with integrated STECH courses in the curriculum	25% of all SUU programs have STECH coursework integrated into them	
Institutional Integration	Shared employee/student benefits for those eligible.	Completion of benefit agreements	
Enrollment & Degree/Certificate Completions	# of eligible Stech students opting into the dual enrollment agreement	400 students	
	% of dually admitted STECH students enrolling in SUU classes	10% of dually admitted STECH students will enroll in SUU	
	% of dually admitted STECH students obtaining SUU degree/certificate	50% of those enrolling in SUU classes will obtain a degree or certificate	
	% of local SUU students obtaining SUU and/or STECH degree/certificate/certification	This # of students will include 60% of those considered "at-risk" for non-completion at SUU	
	# of SUU students taking, and receiving credit, for technical/professional course offerings at STECH while pursuing a bachelor's or associate's degree, or a certificate program at SUU	>500 by fall 2023 with incremental increases each year	





**MEMORANDUM**

Date: October 12, 2018  
To: SUU Board of Trustees  
From: James Sage, Associate Provost  
RE: SPARC Annual Report



On behalf of Provost Brad Cook and my colleagues in the Office of Sponsored Projects, Agreements, Research, and Contracts (SPARC), please find attached a copy of the FY18 Annual Report. This is provided to members of the SUU Board of Trustees as an information item in support of the Academic Affairs report.

Commonly referred to as the “grants office,” SPARC works to support faculty and staff who submit proposals to off-campus agencies (including state and federal agencies). These agencies provide financial resources in support of important projects and research. These funds pay for summer employment for faculty in support of advancing their creative and scholarly work. These funds also pay for student workers to assist with laboratory-based experiments, complete detailed field work, and other important aspects of research.

Julia Anderson is the Director of SPARC and oversees all aspects of the office, including crucial collaborations both on-campus and off-campus. Karen Wilson is the Pre-Award Grant Facilitator and works closely with faculty and staff to prepare all aspects of each funding request (grant narrative and a proposed budget). Suzette Bulloch is the Post-Award Grant Facilitator and ensures that external funds are managed according to appropriate financial accounting guidelines and that follow-up reports are submitted. The SPARC office also employs undergraduate student workers who have an interest in grant writing (i.e., technical writing or professional writing) to assist with various aspects of the process.

On a personal note, I wish to express my deepest appreciation for the hard work and dedication of my three colleagues. This report captures only a broad summary of their overall contributions to our campus community. In particular, their collegiality, collaboration, and day-to-day leadership have helped many faculty and staff become better writers, better budget managers, and better professionals.

Moreover, the external funds that SPARC helped bring to campus in FY18 supported our faculty, staff, and students through wages, benefits, travel, and equipment. These efforts also helped to promote the discovery and/or application of new knowledge, engage students in experiential education (such as internships or undergraduate research), and allow SUU sustain projects with a wide variety of partners. All of these activities raise the profile of SUU and contribute to our overall success as an institution.

Finally, the indirect revenues generated by SPARC’s efforts contributed to student scholarships, college-based faculty support, community outreach programs, and SUU’s facilities, grounds, and campus-wide business operations. In short, SPARC’s overall accomplishments during FY18 are truly commendable, and we are all lucky to have them as colleagues. Thank you, Julia, Karen, and Suzette for all that you do!

Please let Julia or me know if you have any follow-up questions or would like any further clarification about what appears in the SPARC Annual Report for FY18.

(Note: Learn more about SPARC by visiting their website: <https://www.suu.edu/academics/provost/sparc/>)

# SPARC - 2018 Fiscal Year

## Summary of SPARC Financial and Organizational Activity

In FY 2018 SPARC submitted 86 grant proposal requests. We received 127 awards and funding documents in 2018. This included 55 awards from the 86 requests and 19 awards from previous 2017 requests that were pending at prior year end. It also included 53 modifications for previous awards. The modifications were a result of sponsors who were pleased with the deliverables and awarded added funding towards achieving additional goals and objectives. Total generated from these three sources was \$14,328,576, a 39% increase in funding awards over FY 2017.

Below is the financial data showing the composition of these funding sources. They are provided by funding source (federal, state, and private) and also by college.

## Sponsored Programs, Agreements, Research and Contracts

Julia Anderson, Director  
 Karen Wilson, Pre-Award Grant Facilitator  
 Suzette Bulloch, Post-Award Grant Facilitator



## 2018 Fiscal Year Funding Requests - SPARC

Funding Source	Requested		FY18 Requests Awarded		FY17 Requests Awarded		Modifications Awarded		TOTAL Awarded	
	Federal	\$7,986,461	41	\$4,989,412	25	\$414,247	3	\$6,613,905	42	\$12,017,564
Federal-Subaward	\$929,105	11	\$314,525	6	\$31,700	3	\$67,083	6	\$413,308	15
State	\$1,538,227	18	\$717,807	11	\$790,432	9	\$38,177	2	\$1,546,416	22
State-Subaward	\$94,698	5	\$14,000	3	\$3,500	1	\$0	0	\$17,500	4
Private	\$318,045	10	\$235,371	9	\$32,966	3	\$4,451	3	\$272,788	15
Private-Subaward	\$61,000	1	\$61,000	1	\$0	0	\$0	0	\$61,000	1
<b>Grand Total</b>	<b>\$10,927,536</b>	<b>86</b>	<b>\$6,332,115</b>	<b>55</b>	<b>\$1,272,845</b>	<b>19</b>	<b>\$6,723,616</b>	<b>53</b>	<b>\$14,328,576</b>	<b>127</b>

Proposals by College	Requested		FY18 Requests Awarded		FY17 Requests Awarded		Modifications Awarded		TOTAL Awarded	
	Education & Human Development	\$353,000	3	\$55,000	1	\$60,000	1	\$22,000	1	\$137,000
Humanities & Social Sciences	\$226,963	4	\$1,500	1	\$27,514	1	\$25,000	2	\$54,014	4
Performing & Visual Arts	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0
Science & Engineering	\$3,302,703	30	\$808,939	14	\$20,892	4	\$98,624	7	\$928,455	25
Library	\$31,025	4	\$32,125	4	\$8,900	1	\$0	0	\$41,025	5
Office of the President	\$572,313	10	\$58,400	4	\$34,900	3	\$0	0	\$93,300	7
Office of the Provost	\$3,000	1	\$3,000	1	\$3,000	1	\$0	0	\$6,000	2
Business	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0
SIEL	\$1,770,393	18	\$1,098,283	17	\$767,607	4	\$1,876,836	27	\$3,742,726	48
Alumni & Community Relations	\$3,900,229	12	\$3,854,572	11	\$310,116	2	\$4,674,779	13	\$8,839,467	26
Student Affairs	\$767,910	4	\$420,296	2	\$39,916	2	\$26,377	3	\$486,589	7
<b>Grand Total</b>	<b>\$10,927,536</b>	<b>86</b>	<b>\$6,332,115</b>	<b>55</b>	<b>\$1,272,845</b>	<b>19</b>	<b>\$6,723,616</b>	<b>53</b>	<b>\$14,328,576</b>	<b>127</b>

## Expenditures - Seven Year Summary – 2012 - 2018

Below is a seven-year comparison of expenditures within a fiscal year.

Funding Source	2012	2013	2014	2015	2016	2017	2018	Grand Total
Federal	\$5,702,741	\$6,158,447	\$5,793,458	\$6,785,592	\$7,108,516	\$7,729,498	\$9,604,989	\$48,883,241
State	\$1,107,608	\$1,081,990	\$1,093,161	\$1,077,279	\$949,279	\$889,677	\$747,236	\$6,946,231
Private	\$121,244	\$113,389	\$84,918	\$70,575	\$223,829	\$137,850	\$231,969	\$983,775
<b>Grand Total</b>	<b>\$6,931,593</b>	<b>\$7,353,827</b>	<b>\$6,971,538</b>	<b>\$7,933,446</b>	<b>\$8,281,625</b>	<b>\$8,757,024</b>	<b>\$10,584,194</b>	<b>\$56,813,247</b>

## Summary of Indirect Cost Revenue

As of June 30, 2018

Fund Code	Fund Description	FY18 Revenue	Cumulative Fund Balance
000200	President's Indirect	569,994.10	647,771.68
000202	Pres Indirect - Marketing	-	(94,534.26)
000203	Special Initiatives	-	(9,079.47)
000205	Provost's Indirect	63,569.51	118,596.84
000206	Sponsored Research & Grants Of	58,463.88	107,076.70
000207	V.P. Regional Services	877.10	46,196.71
000208	Finance Administrative Overhea	47,903.33	240,512.75
000209	VP Student Affairs - Indirect	822.71	822.71
000210	Dean HSS Indirect	6,047.02	7,584.57
000211	Social Science Indirect	135.73	3,044.85
000213	Psychology Indirect	734.55	2,597.95
000217	Political Science & Criminal J	487.21	1,200.70
000219	Student Support - Indirect	822.71	822.71
000230	Dean Business Indirect	-	637.08
000233	Economics & Finance Indirect	-	17.44
000240	Engineering Indirect	304.31	3,131.30
000250	Dean Education Indirect	349.88	48,417.52
000253	Kinesiology & Outdoor Rec Indi	349.88	666.72
000270	Dean Science Indirect	4,064.33	83,001.78
000271	Biology Indirect	1,093.63	2,842.86
000272	Physical Science Indirect	2,637.11	12,625.60
000273	Math & Computer Science Indire	29.28	29.28
000274	Nursing Indirect	-	156.62
000280	School of Integ & Engage Learn	-	273,399.32
000281	Outdoor Engagement Indirect	108,559.82	129,365.65
000290	Library Indirect	20,596.72	20,599.87
<b>Total</b>		<b>887,842.81</b>	<b>1,647,505.48</b>

## Program Accomplishments

### Increased Programs for the Underserved

In May 2018, the Commissioner's Office organized a state-wide retreat focused on the recent Lumina Foundation publication *Beyond Financial Aid*. Under the leadership of Dr. Jared Tippetts (Vice President for Student Affairs), participants from SUU participated in this day-long retreat and learned about specific retention and completion challenges faced by low-income students. This important perspective has informed the decision to include a new dedicated section on underrepresented students in this year's annual report. Using the definition of the underserved to mean, ethnic and racial minorities, women, and socio-economic status based on low income, the funding that SPARC received to serve these categories was \$9,193,065. This total represents 86% of SPARC expenses in 2018. This population receives the bulk of the resources we are able to obtain from sponsors.

### eRA System Procurement

SUU, DSU, and UVU worked collaboratively to develop the technical requirements for a technology system to enable all three universities to better manage their grants through the grant life-cycle, including all pre-award activities, post-award monitoring and management, and the close out process. We collectively developed the technical requirements, researched and conducted site visits of all universities in the state of Utah, and conducted four vendor demonstrations before selecting SmartGrants as the vendor. SmartGrants scored the highest on the selection criteria for the best fit for capability and price point. This technology capability will assist each university with independent tracking and provide better internal controls and quality management of our systems and processes. The implementation of this product will begin in the Fall of 2018. The first-year cost for SUU including implementation is \$25,500 and thereafter, \$10,500 annually.

### Grant Writing Expertise Provided

In FY 2018 the Provost's office provided \$20,000 to incentivize SUU faculty individually or in teams to apply for larger, more substantive grant funding opportunities. SPARC assembled a team from COSE (Matthew Weeg, Nathan Werner, and Carrie Jo Bucklin) and sent them to the Council on Undergraduate Research (CUR) conference. At the conference, they interacted with NSF Program Officers and attended a workshop on applying for the SSTEM Scholarship Grant. They returned to SUU and applied their expertise as a team to apply for the SSTEM Scholarship for \$1M for scholarships for COSE students over a five year period. We also engaged a professional grant writer who had assisted UVU with a successful SSTEM award to guide us through the proposal development. This award is still pending. We spent about \$12,000 on this proposal submission including training and development.

In addition, SPARC sent Dezhi Wu and Jackie Grant to other NSF opportunities. With the remaining financial resources, we have engaged a consultant to work with three individuals (Carrie Jo Bucklin, Jason Kaiser, and Leilani Nautau) on funding opportunities over the next six months to prepare and submit major NSF proposals. We opted for this more strategic approach with the goal of getting larger awards for SUU.

### Pre Award and Post Award Interns

In FY 2018 we had two SPARC Interns. We have one each assigned for Pre-Award and Post-Award. They provided additional support in these areas since we were not given the additional staff requested. These same interns are returning this year and these valued students add to our institutional capacity. Also, noteworthy, any student who has worked with SPARC in the last 3 years has gained employment in sponsored program offices and have left here with very marketable skills.

## **Professional Development**

SPARC has continued to provide professional development through the National Council of University Research (NCURA) Conferences, both regionally and nationally. All staff have participated in at least one conference a year. In addition, we have attended the Grant Resource Center (GRC) Conference for professional development opportunities to better understand funding sources, the Council on Undergraduate Research, (CUR) and Utah Sponsored Programs Network (USPAN) for administrative training. We also participated in the Intermountain University Research Administration network (IMURA). One staff member attended the CLASP conferences to learn more about how smaller colleges and universities are successfully competing for funding opportunities. These activities give us invaluable insight and networking opportunities. In addition, we also do team building activities within the office. In 2018 we completed the DISC assessment to assess and build upon our strengths within the team. We also are doing a book study on First Things First to increase our time management skills and we have included other individuals on campus.

## **Summary**

FY 2018 was a busy year for the SPARC office. While juggling deadlines and managing an increase in funding awards by 39% and an increase of 153% in modifications from the previous year, both the pre-award and post award sides struggled to keep up and maintain the quality of our services. The implementation of the new eRA Software System will hopefully increase some efficiencies and effectiveness. However, in the short term the system will increase the burden throughout the implementation in 2019. We look forward to more experienced PI's who can manage their proposal development with the aid of some consultant expertise. We continue to enjoy a staff and interns who are fully engaged in their work.

## Staff Association Report for October 2018

### Staff Opening Social

This year's opening social was held on September 13th. Attendance was around 270 members of the Staff Association.

We were privileged to have all 5 of our Staff Association Scholarship awardees attend, and two of them addressed us to share their stories and backgrounds that led them to SUU. I believe they motivated many of our staff to either contribute or increase contributions to the scholarship fund.

After this social, we have solicited feedback, which has been mostly positive along with additional ideas for improvement and awareness of what the staff tend to enjoy the most. Some of the ideas and feedback included:

- "I'd love other kinds of get-togethers to get to know each other better. I feel like I knew 10% of the room or less."
- "I wonder if there would be any success is smaller 'meet and greet' type events where we could get to know staff better. There are always so many new staff that I don't know."
- "Service events within the community could be awesome and good for community relations. Golfing or Bowling for Dollars (haha) scholarship dollars that is. :)"

### Current Developments

In our Utah Higher Education Staff Association (UHESA) group, the President-Elect position became vacant and has now been filled by one of our SUU staff members, Sheri Butler. Sheri has filled positions in our Staff Association as well as UHESA positions in previous years, so we look forward to her expertise in helping us at this state level again.

In our September, our Staff Association board discussed whether or not we should undergo any changes to our organizational structure. Our discussion led us to an idea to add a Public Relations/Marketing Liaison, who would be tasked with educating our association on policies and procedures, organizing a group of staff members across campus to provide two-way communication lines outside of email, and providing guidance on how to improve communication about issues we face.



## SUUSA President Report

### SUUSA

- **Budget & Finance Committee**
  - Polishing up the SUUSA Funding Policy, as well as looking for ways we can improve the Funding Request form.
  - Approved over \$2,000 of funding transfers to a several clubs, with several more requests on their way to the Student Senate.
  - Helped many clubs find out how much funding they have available currently, as well as looking for other ways we can support clubs, other than just financially.
  
- **Clubs & Organizations Committee**
  - Club President's Training (Sept. 12, 2018) - Trained club presidents on: how to use TBird Connection, how to request funds from SUUSA
  - Finishing the last details in the SUUSA Club handbook
  - Registered over 100 SUU Clubs
  
- **Student Life Enhancement Committee**
  - Created, worked in, and then disband the Smoking policy ad hoc committee
  - Many "My SUU Voice" submissions received and responded to
  - TBird Tirad radio talk show (Tuesdays @ 2-3pm on Thunder 91.1)
  
- **Administrative Committee**
  - Campus Cup (Student voter registration challenge) w/ The Leavitt Center: Sept. 4-Nov. 6
  
- **Student Senate**
  - Tobacco/Smoke Free initiative, Health & Wellness Center
  - "Nothing About Us Without Us," Representative Boren
  - AFEC Student Section move, SUU Athletics

### SPB

- **Event Attendance**
  - "Welcome Week" (Aug. 27-Sept. 1, 2018)
    - Food & Faith BBQ (Aug. 27, 2018) - 837 students

- Comedian Pete Lee (Aug. 28, 2018) - 599 Students
- Outdoor Movie: "Ocean's 8" (Sept. 28, 2018) - 973 students
- Party on the Hill (Aug. 29, 2018) - 616 students
- Paint the Town Red (Aug. 31, 2018) - 1,456 students
- Paint Dance (Sept. 1, 2018) - 953 students
- Color Fest (Sept. 4, 2018) - 267 students
- Thunder Crew Kickoff Party (Sept. 7, 2018) - 121 students
- Meet Your SUUSA (Sept. 6, 2018) - 290 students
- Casino Night (Sept. 7, 2018) - 1,619 students
- Custom T-Shirt Day (11, 2018) - 150 students
- Foam Dance (Sept. 14, 2018) - 823 students
- Mr. SUU (Sept. 18, 2018) - 372 students

Total # of students who have attended at least one event/program this semester - 3,329 students

## USA

- Campus Safety: Campus Should Be Your Home, and Your Home Should Be Safe
  - Initiative video script is in the process of being written.
- BYUSA is working on USA's mental health initiative.
- Campus Cup (Student voter registration challenge): Sept. 4-Nov. 6





Southern Utah University  
National Alumni Council  
October 2018 Report to the Board of Trustees

We are very excited to welcome four new individuals to our National Alumni Council. They all bring an energy and love of SUU to our council and we look forward to their ideas and contributions. The new council members are: Kristin Cowan '96, Kristie McMullin '92, Kye Norfelt '04, and Kim Bateman '97. All are planning on being on campus during Homecoming week. We are looking forward to being together as a council to strategize and formulate plans for alumni activities during the coming year.

As a council, we look forward to participating in the many upcoming homecoming events. Homecoming is October 8th-13<sup>th</sup>. Our annual alumni awards banquet will be held on the evening of October 12<sup>th</sup> and we have some very distinguished honorees this year. Mvemba Dizolele is our Outstanding Alumnus; Kathryn Berg receives the Distinguished Service award; and Rhett Guter is our Young Alumnus award recipient. Mvemba Dizolele will also be the speaker at the APEX convocation on the afternoon of October 12<sup>th</sup>.

We will be recognizing our alumni in attendance at homecoming events this year by their graduation year in an effort to help them better connect with one another. We are expecting a large group of alumni to be on campus that weekend.

In addition to our planning meetings, the council members will be very busy during homecoming week assisting with many of the events. We are especially excited to welcome several members to the alumni 50-year club and presenting them with their pins. This is always a highlight for the alumni.

On the day of the new student induction ceremony, the alumni held their very first alumni legacy event which was a concept generated by the National Alumni Council. As a reminder, of the 2,219 registered freshman this year, 515 identified themselves as having at least one alumni parent. The council and alumni staff really wanted to reach out to these parents and help their students and them connect and reconnect to SUU. A lunch was provided in the living room of the student center and alumni legacy parent shirts were available. Council members were there as well as alumni staff to greet them and answer any questions they had. Approximately 85 people attended this event. We look forward to improving this event as well as consider other legacy events in the future, but we were very pleased with the outcome of this first effort.

# SUU ALUMNI & COMMUNITY RELATIONS

## Alumni Relations – Ron Cardon

- We hosted a mix & mingle for legacy parents during Thunder U. We will integrate the 515 legacy students into the Student Alumni Association in order to aid retention
- The Alumni Magazine was mailed to 61,000 individuals and businesses. This magazine focuses on the new buildings on campus, homecoming events, retention, and the alumni legacy program
- The Alumni Ambassadors from Las Vegas sent 40 students from Skypoint Academy and Shadow Ridge on a campus tour, furthering our efforts of out of state recruitment
- Upcoming events:
  - October 7-13 – Homecoming Week (visit [www.suu.edu/homecoming](http://www.suu.edu/homecoming) for a complete event list)
  - October 29 - Thor's Thunder Classic Golf Tournament
  - December 13 – The Oak Ridge Boys in Concert

## Community Relations

- In ongoing community outreach efforts, President Wyatt met with the mayor and city council, along with Community Education, the Utah Shakespeare Festival, the Tourism Bureau to discuss summer programming. They also met with leaders of Southwest Tech to further discuss our partnership
- Our office hosted a community forum with President Wyatt on September 5<sup>th</sup> to report to the community about SUU's growth and listen to community concerns. Parking and sustainable growth were the two highest concerns from the community

## Larry H. Miller Utah Summer Games – Pace Clarke

- Will host the state 4A basketball tournament in March
- Planning to host a mountain biking tournament in Cedar City in April, which will attract 1,000 high school athletes and their families
- Finalizing hosting the state 1A and 2A football tournament in November 2019

## Regional Services – Wes Curtis

- Hosted the Partners for Rural America annual meeting in Cedar City. The PRA consists of State Directors for rural economic development. They were taken on a two-day tour of rural Utah and educated on Utah and Western challenges such as public lands and wildfires

### **Rural Health Scholars (RHS)**

- RHS was awarded a \$25,000 grant for rural communities' opioid response planning, which will aid students and the region in understanding health crises in rural environments

### **SUU Business Resource Center (BRC) & Small Business Development Center (SBDC)**

- Two new partners are being added to the BRC: a new Women's Business Center to serve the counties in southern Utah and a Silicon Slopes office, which is part of the Silicon Spokes Program
- America's Small Business Development Center visited our local center to review our operations, and we passed their review, as did the rest of the State Network

#### **TRiO Educational Talent Search**

- Received a 4.25% increase in our federal grant. With this increase came the requirement to serve more students, upping the total from 636 to 663

#### **Upward Bound (UB)**

- Former Upward Bound student, Dr. Karletta Chief, received a national award given to those who distinguish themselves in their chosen profession and are making remarkable contributions to their community
- Eric Fielding was hired as the new Upward Bound Assistant Director

## Trustee Reports 9/24/18

### Advancement

- The key fund raising priority for COSE continues to be the renovation of the current Business Building. This project has a budget of \$4.7 million of which \$4.5 million is secured to date. This renovated building will house the Geoscience program thanks to a lead gift from Mark and Julie Svoboda.
- COSE has also completed a Master Plan for the Engineering and Technology Building. This plan includes a \$5 million renovation project of the building featuring a 5,000 square foot two story addition to the southeast corner of the building.
- Nov. 2 - Representatives from the George S. and Dolores Doré Eccles Foundation will be on campus to celebrate the dedication of the new George S. Eccles Sports Performance Center. We have also invited representatives from other donors: Larry H. and Gail Miller Family Foundation and the Carter Family.
- Entrepreneur Leadership Council expansion - SUU is inviting three new members to join the ELC which is established to support and guide students with business ideas and start up needs.
- Aviation Sciences - continued research into expansion and potential sponsor and donors.
- Scholarships - continued development of funding requests for student scholarships from corporate, foundation and individual donors.
- Business building - five rooms remain to be named, with pending requests for three naming opportunities.
- Annual donor reports on endowed funds and scholarship awards, with student thank you letters to be mailed this semester.
- Ongoing - Data integrity processes, biographical updates in Banner, SPARC office coordination, prospect research, paperless office scanning project.
- College of Humanities & Social Sciences is accessing fundraising needs and projects with Dean Boreen. Case statements for each Department will be created by January 2019.
- College of Performing & Visual Arts-The 2018 Drive for the Arts occurred on September 13th at Sleepy Ridge Course. Approximately \$14,642.94 was raised (\$5,000 from new donors located in the Utah County region).

### Graduate and Online Enrollment

- Recruiting Grad students: we recovered from a 48% deficit to break even for Fall and we are looking for growth in Spring).
- Recruiting Online Students: We have created the online consortium to work with faculty to determine what will SUUOnline become in the upcoming years,

additionally we have seen 125 new 100% online students start at SUU in the past 6 months.

- Focused on our region: We are establishing relationships and building partnerships with businesses in our region in order to provide education.)
- Assisting International: We have developed a number of partnerships to help grow enrollments of international students.

## Enrollment Management

- SUU will see the largest freshmen class in history with a 7% overall growth in enrollment for Fall '18, and double digit growth in new freshmen both in and out of state.
- SUU's new freshmen quality index increased from 111.62 to 112.96.
- Net Tuition Revenue will also exceed last year's fall numbers.
- The recruitment team is currently on the road recruiting in high schools throughout UT, NV and CA.

## Marketing Communication

- In August, our office in coordination with Brad Cook, created a new faculty video which highlights SUU's amazing professors and the connections they make with students everyday. It's currently the homepage video and received more than 4000 views on Facebook with 131 likes, 5 comments and 45 shares. Please enjoy [A Community of Caring](#).
- We helped organize a very successful Business Building Opening Celebration. More than 300 people attended the event along with the following media outlets- KSL, Channel 2, Southern Utah Radio, The Spectrum, St George News and The Iron County Today. Here's a video that highlights the new [Business Building](#).
- Our Digital Marketing Coordinator, Lexi Carter, has developed a [Social Media Training Guidebook](#) and is offering training sessions to campus departments, so far we've had a great response from people who appreciate us reaching out and offering our expertise. The Guidebook provides information on social media best practices, how to create an online strategy, delete old accounts and easy to implement tips to improve engagement.
- Another notable achievement is SUU's ranking in Rival IQ's Higher Ed Social Media Report (full report is in the attached PDF). SUU is ranked in the top 10 schools nationally for overall social media engagement for the 2017-18 school year. We are ranked at #9 in the nation (above BYU) for best social media engagement along side much larger universities like James Madison, University of Iowa, US Military Academy and Colorado State University.
- The Chronicle of Higher Education featured the [President's Podcast in a recent article](#), which continues to further elevate SUU's reputation on a national scale.

## Report of Finance and Administrative Services

October 12, 2018

### Finance & Auxiliary Operations

- ✓ Accounting Services hired two new accounting staff members: Melanie Orton, CPA, for Investments, Gifts, and Endowments (11 years of experience) and Angel Murnan for Payroll (25 years of experience). The office is now fully staffed and moving forward with its new management structure.
- ✓ The Bookstore and Chartwells are working through the hectic rush time of the start of a new semester.
- ✓ Motor Pool and Receiving will soon be Motor Pool and Parking Services. Changes are underway in transitioning Parking Services from Emilee Ballard and Facilities to Casey Bowns in Motor Pool. Minor remodeling to the Motor Pool Office is in design to accommodate the addition of Parking Services.
- ✓ Purchasing is investigating a potential virtual payment solution with US Bank that would significantly increase the University's P-Card rebate from US Bank. Coordination with Information Technology and Accounts Payable will be required to implement a solution.
- ✓ Currently working with Facilities staff on furnishings, fixtures, and equipment for the Geo Sciences Building (remodel of the old Business Building).

### Budget Office

- ✓ The Budget Office is currently developing a Google form which will be available to employees to submit cost savings ideas and suggestions.
- ✓ Reconciling accounts and preparing departmental reports to roll forward FY18 budget carryforward funds (unused operating budget appropriations).
- ✓ Processing FY 2020 E&G funding requests for Dean/Departmental review and prioritization. All prioritized budget requests are due November 1<sup>st</sup>.
- ✓ Working on reports for Ruffalo Noel Leavitz consultant to create a comprehensive 4-year financial model – primarily focused on tuition revenue fluctuations.

### Facilities Management

- ✓ Capital Improvements and significant projects underway are the Valley Farm restrooms, ADA paths and landscape improvements along University Blvd., refreshing Athletic facilities in the Harris Center and Football suites, remodel

of the Braithwaite, and Mountain Center safety improvements.

- ✓ Upcoming Capital projects include chiller replacement at the Randall Jones Theatre, Eccles Coliseum mechanical system replacements, General Classroom elevator modernization, campus storm water drainage improvements, main electrical witching upgrades at the Heat Plant, and Engineering and Technology data cable upgrades.
- ✓ Strategic Focus includes Engineering and Technology Master Plan and development of a Staffing Model to establish defensible staff metrics for appropriate staffing levels within FM.
- ✓ Capital Development include completing the punch list on the new Business Building, demo and renovation of the Geosciences Building (anticipated move-in is Spring Break 2019).
- ✓ President Wyatt presented SUU's Technology, Engineering, and Design building proposal to the Board of Regents on September 20<sup>th</sup>.

### Human Resources

- ✓ VP Dodge, David McGuire and Anthony Beal met with the Faculty Senate Executive Committee, the full Senate, and the Staff Association to discuss progress with the University's Compensation Study. This study covers SUU's market compensation model, appropriate market benchmarks, and best practices. Based on SUU's new peer set of 47 universities, the overall market comparison for faculty is 1% above market and 2% below market for staff. There remain issues to address with employees below minimum salaries, compression within departments, recruitment pressure, with other items to be addressed in the final report.
- ✓ A new Benefits Manager, Lori Ann Barnson, was hired and began work on Sept. 4th. Lori Ann brings a wealth of HR experience to this position and is a great addition to the new HR team.
- ✓ A new Staff Employee Orientation program has been developed and implemented to help individuals gain a better understanding of the mission, vision, and culture of SUU as they begin their service. The goal is to conduct this monthly for incoming employees.

- ✓ HR recently signed a contract with PayFactors, a cloud based compensation data management tool, to manage its compensation equity model and streamline data gathering to establish benchmarks, market comparisons, and update the annual compensation plan. This program allows data sharing with the Banner system helping to eliminate data entry errors of the past. Implementation is underway and should be fully functional by the end of 2018.

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### Internal Audit

- ✓ Developing data analytics for continuous monitoring of purchasing card transactions.
- ✓ Beginning audit work for several Regents required audits.
- ✓ Beginning discussions with leadership and the University Risk Committee to develop the annual campus-wide risk assessment.
- ✓ Held training meetings at the request of several departments on matters including: state requirements for document retention of expenses, revenues, inventory, and travel. Reviewed University policies regarding these issues including best practices for proper segregation of duties, controls, and general office procedures to reduce the risk of misappropriation of assets.

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### SUMA

- ✓ In August, SUMA welcomed Emily Ronquillo, the new Manager of Marketing and Communications for the museum. Emily graduated from SUU with a BA in Communications and a Master's in Professional Communication and is excited at the opportunity to return to Cedar City.
- ✓ During Thunder U, SUMA launched a new, free membership program for SUU students called "SUMA Sidekicks." It is designed to engage students through museum events and create more meaningful connections with them because of their ongoing support through student fees. Each Sidekick is provided a punch card to track their visits to SUMA through the academic year to earn special prizes and experiences. More than 250 students have enrolled in the program to date.

### Information Technology

- ✓ Created an online waiver form for use by Thunder U participants saving them from printing more than 1,100 waivers so far.
- ✓ Expanded "Program Finder" to include career possibilities, helping current or prospective students search by career classifications to determine which SUU degrees lead to that career.
- ✓ Updated carousel/slideshow scripting across SUU's website to improve efficiency and accessibility.
- ✓ Completed installation of all new category 6A (CAT6A) data cable in the science building bringing it up-to-date with industry standards.
- ✓ Purchased 250 new computers for our replacement program in classrooms and student labs.
- ✓ Cascaded 10+ computer labs to new areas and reimaged 500+ lab computers.
- ✓ Implemented a new online direct deposit change system thereby eliminating related paper forms and manual processing through the Human Resource Office.

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### SUU Aviation

- ✓ SUU's CFR Part 147 exemption request (to be exempted from the current FAA part 147 A&P teaching requirements) was denied. We are appealing the process and using Senator Hatch's office to continue to apply pressure on the FAA.
- ✓ SUU hosted senior leadership from Helicopter Assoc. International (HAI). This included President Wyatt and Eric Leavitt, Chair of the Board of Trustees. They expressed interest in assisting to grow SUU's rotor program and are particularly involved with our 147 application and retaining Veterans Benefits.
- ✓ SUU is making progress with three potential international partners in Peru, Korea, and China. There is interest in both rotor and fixed wing students. In an effort to diversity funding for the Aviation program, we continue to explore enrollment growth options through international students and partners.
- ✓ Air Methods, the largest EMS helicopter operator in the world, is interested in establishing a direct pathway to employment for our flight instructors. This would be a tremendous accomplishment for the program if details can be finalized. They will be on campus in October for further discussions.

# Southern Utah University

## Division of Student Affairs Report

### October 12, 2018

#### **Academic Advising**

- Student Success Advisors (SSAs) helped get our new incoming freshmen ready for fall classes by hand-registering over 2,000 students over the summer.
- SSAs met with over 2,200 students during the first 3 weeks of classes.
- SSAs participated in tailgate activities at the first home football game and will do so again Homecoming Weekend as a way to connect with students and community members outside their offices.

#### **Assistant Coaches for Excellence and Success (ACES)**

- ACES help over 1,700 students during the first three weeks of school (answering questions, walking to class, rearranging schedules, connecting to other offices, etc.).
- ACES have made a meaningful connection with 1,058 incoming students through the first three week of the semester. That number represents 39% of the incoming cohort.
- During the summer ACES conducted over 800 Personalized Visits with incoming students. A post-visit survey gave an average rating of 9.8 out of 10 for students feeling more comfortable starting at SUU as a result of their personalized visit.
- ACES compiled a communication plan for each student (first-year and transfer) in the incoming class and average over 14 contacts over the summer.

#### **Career Center**

- Hired Geoffrey Lewis as the new Assistant Director for Employer Relations. Came to us by way of BYU-Hawaii with significant experience in employer relations.
- Hired MaCail Evans as a Career Advisor. Was working as the Administrative Assistant in the Career Center.
- Career Advisors completed training in both the Myers Briggs Personality Assessment and the Strong Interest Inventory. These national certifications prepares them to assist students through the decision making process of a major and/or career.
- Geoffrey Lewis just completed meeting with employers on the Silicon Slopes to increase employment and internship opportunities for our students. He met with the following companies
  - NUVI, SaltStack, Digicert, Stack Real Estate, Weave, Adobe, Oracle, Costa Vida, Boostability, Silicone Slopes Group, Workfront, MX, Jane.com, Zija, PMA Media Group, Young Living, Visa, Jolt, Nexeo, Ancestry, Big Leap, Blender Bottle, Enso Rings, Convergys, FamilySearch, Micro Focus, Instructure, Colliers International, Vivo, Dental Intelligence, DOMO, Sling TV, IM Flash, Mountain America Credit Union, LUMEA, Marriott International, Zagg, FL Smith, CHG Healthcare, Savage, Overstock, JetBlue, Proversity, Backcountry, Supplemental Healthcare, and Skullcandy.
- Student Jobs Fair
  - Over 30+ local employer and on-campus employers attended to provide job opportunities to the approximately 500 students who came and were looking for jobs.

#### **COMPASS Program (formerly known as College Connections)**

- The College Connections program has changed its name to the COMPASS program. Compass stands for Comprehensive Academic Support & Success; however, it is anticipated the we will simply refer to the Compass program and Compass Scholars or Compass Students. The program still aims to connect students to valuable campus resources. We believe the new name better represents the increased emphasis on providing students with direction about how to be successful in college-level courses and navigating the demands of higher education through increasing academic literacy skills.
- Obtained a \$100,000 grant through USHE's Access, Affordability, Completion, and Workforce Development Funds. This allowed the program to hire an additional Academic Literacy instructor, as well as provide career assessments and tutoring for COMPASS scholars and students on academic probation.

#### **Counseling and Psychological Services (CAPS)**

- Demand remains high. National and regional figures show that every 1% increase in student enrollment translates into a 5% increase in demand for counseling services. This trend holds true at SUU.



- To cope with high demand and the waitlist, CAPS is creating two new groups open to all students seeking services. Both groups are short-term and focus on distress management and self-compassion. Students are encouraged to become a part of these groups as counseling slots open up. This is in addition to our traditional crisis and triage services.
- High demand also means CAPS will continue to actively encourage students with financial means and insurance, to seek services with providers in the community. That being said, nearly 40% of students who have the means indicate they will not seek counseling if required to rely on insurance or need to ask family for help.
- The SAFE UT App (crisis phone/text/tip line) instituted by the state legislature is up and running.
  - Students can talk or text with a licensed mental health professional in Utah, confidentially, anytime day or night.
  - CAPS is hiring a Mental Health Intervention Specialist, who is also a licensed counselor, to help with the anticipated demand and case-management responsibilities associated with such a service. It is hoped this position may be able to also see some students for regular counseling.
  - We hope this will become a powerful suicide prevention tool.

### **Disability Resource Center (DRC)**

- Carmen Alldredge and Mike Humes have been appointed as co-chairs for the University Accessibility Task Force at SUU. A great opportunity to move forward accessibility issues at SUU.
- The DRC office grew from 280 students being served to 550 this fall.
- Because of increased students' numbers we updated our Kurzweil software to Unlimited Licenses.
- Thomas Sorenson has introduced JAWS software to the office and other assistive technology ideas for Visually Impaired and students with learning disabilities.
- The Sonocent program is off and running, reducing the number of Audio Recorders checked out and easing some of the peer note taking.
- We have implemented a continuous feedback system to ensure that students' accommodations are being served in a timely and effective manner. This includes a feedback log of all Exams to ensure the student has the most comfortable and productive environment for testing.
- We received the grant from the state to help with more mentors for students, training for our office, workshops for students we serve, and teaching soft skills.
- Summer internships paid for students with disabilities and a full time position to keep track of the data, services and budget tracker as we use the grant (2 year grant, possibly 3, then on going if we do a good job and produce results).
- We will also have the opportunity to present at state level highlighting collaboration between different state entities working with the same population (people with disabilities).

### **Parent and Family Services**

- Our Parent and Family Newsletter now goes out monthly to over 4,000 people.
- Parents of our students are active on Facebook. Our page likes are now over 500. We post 2 -3 times a week, and use the phrase "Tag a T-Bird". The parents love to tag their T-Birds for career fairs, campus activities, and campus support resources.
- Parent Orientation 2018 was a huge success. We had family info tents at Thunder U Check-in, a reserved family section for New Student Induction and the Bell Tower Tradition, and held four full orientation sessions in the Church Auditorium on August 23.
- We are busy preparing for Parent and Family Weekend, which will be held October 12 -13 in conjunction with Homecoming. We already have over 500 family members registered for the weekend.

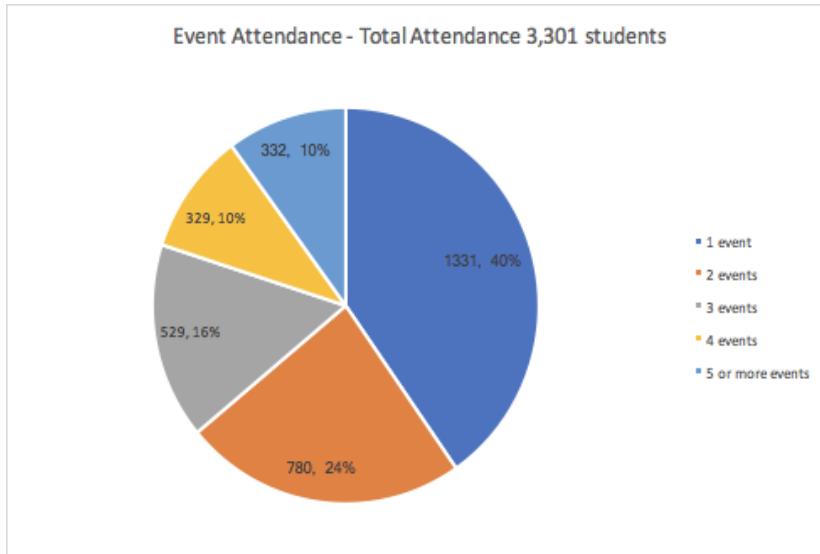
### **Registrar's Office**

- Schedule optimization resulting in no room overlap errors and improved space utilization, for the first time since implementation.
- Ongoing effort with Facilities to improve space coding for classrooms, labs, and conference rooms for reporting to the state.
- Have begun testing of paperless registration approval system, targeting fall 2019.

### **Student Involvement and Leadership (STIL)**

- Since the beginning of fall semester the total number of students checked in at STIL sponsored events is 8,502. This is 350-400 more than this point of time last year.
- The new MySUU Voice webpage was implemented by SUUSA.

- 7,502 current students have downloaded the MySUU App and are receiving notifications.
- Working with American First Credit Union all T-cards (campus ID's) were rebranded and 2,050 have been distributed. The AFCU Combo Card (debt and student ID) has also been implemented with the support of IT.
- 2nd Annual Summer Leadership Conference was held in July. Conference participants included current students from ROTC, International Affairs, Center for Diversity and Inclusion, and the Leavitt Center and incoming student leaders involved with SUUSA, Student Programming Board and the STIL Marketing Team.
- Best Paint the Town RED event held so far with 100 student clubs represented.
- 3,301 unique students have attended STIL events so far this year. The table shows the breakdown of events attended per student.



### **Student Support Services**

- For 2017-18, we obtained 85% retention rate.
- For 2017-18 active students, we obtained 67% graduation rate.
- We had over 2,000 tutoring hours.
- We hired Madison Hugie as the new SSS Coordinator. She is responsible for the entire freshman and sophomore cohort.

### **Tutoring Center**

- The Tutoring Center has served 490 unique students in the first 3 weeks of the fall term (unduplicated headcount). That is a 35% increase compared to the same time period last fall.
- Added group tutoring as a new service. Kicked off Fall 2018 with 22 Peer-Assisted Learning Groups (PAL Groups) for courses in Biology, Chemistry, Math, Accounting, Economics, and History.
- New last fall, one-on-one tutoring is gaining in popularity. Matches as of 9/19/18 = 40 (surpassing last fall's total of 24 and approaching last spring's total of 60).

### **Testing Services**

- For the first year ever, Testing Services participated in the Thunder U Resource Fair.
- Testing Center usage has increased this semester due to the increase in enrollment and more faculty using the Testing Center to administer exams than in prior semesters.

### **University Police**

- SUU Police has taken the lead and helped start the Crisis Management Team comprised of all Law Enforcement, medical response, Cedar City Hospital, and fire agencies in Iron County.
- This team has trained monthly since January. In August SUUPD planned a multi-agency training where all agencies came together and trained on an active shooter scenario. All agencies were able to work together taking part in their responding rolls.

## **Faculty Senate Report for Board of Trustees**

**David Berri, Professor of Economics and President of the Faculty Senate**

**October 12, 2018**

*As I consistently note to the Board of Trustees (and often remind the faculty): The purpose of the Faculty Senate is to give a chance for faculty to voice their concerns and guide the direction of SUU. The Faculty Senate is important because of the vital role the faculty play on campus. There are two products that SUU produces: Teaching students and academic research. Both of these products are produced solely by the faculty at SUU.*

Thus far the Faculty Senate has only had one meeting. There were two issues raised at the meeting that seems relevant to Board of Trustees.

- **Faculty Salaries:** This past year the faculty, staff and administration have worked to construct a new approach to pay at SUU. We now have a database that compares our compensation to a peer group comprised of schools similar to SUU. This means that we now have a better idea of what each person should be paid according to a clear and transparent estimate of the market. Going forward Marvin Dodge and I seem to be in agreement on what has to happen. We need to make a database available to all faculty so that each person can see what our estimate of the market says each person should be paid. Yes, transparency can cause some issues. But SUU will likely have more problems if we don't communicate to faculty how their pay has been determined.
- **Diversity at SUU:** SUU is seeking to grow in the near future. Related to the issue of growth is the issue of increasing diversity on campus. The hiring of Dr. Schvalla Rivera signals our commitment to improving the level of diversity at SUU. We had our first meeting on this issue last week and that meeting was encouraging. It should be noted that for us to make progress, we should make every effort to ascertain where we are at with respect to diversity and then devise concrete steps to address our deficiencies. Diversity definitely enhances the education we offer at SUU. It is also crucial to our desire to grow SUU.

**MEMORANDUM**

Date: October 10, 2018  
To: SUU Board of Trustees  
From: Brad Cook, Provost   
RE: Report from Academic Affairs for October 2018

Policy 6.1 Faculty Evaluation, Promotion, and Tenure: Through a faculty-driven process, this policy was revised to be better aligned with SUU's mission and to provide a more developmental approach to faculty evaluation. During the 2018-2019 transition year, seven departments will "opt in" to the revised policy to find areas of improvement and to become leaders for other departments. All departments will adopt the new policy by fall 2019.

General Education (GE) Program: The GE Committee is working with six pairs of faculty members who are preparing 6-credit GE courses that each integrate two Knowledge Areas in an exciting, relevant, team-taught course. An example is Western Women and Medicine, which combines life sciences and humanities to discuss the evolution of biology, medicine, and women's status in North America from a multicultural perspective. These 6-credit integrated GE courses will redefine how some students engage with general education.

Center of Excellence for Teaching and Learning (CETL): The CETL held a New Faculty Orientation for approximately 50 new full-time faculty, including tenure-track and non-tenure-track faculty. The CETL is also offering four Learning Communities for faculty development during fall semester.

Honors Program: The SUU Honors Program has exactly 350 students this year. The retention rate of honors students is consistently higher than that of students with similar incoming GPAs and ACT scores. This shows the important contribution the honors learning community brings to campus.

Care and Support Team (CAST): CAST funded 12 faculty, staff, and students to participate in the 8-hour QPR Gatekeeper training, which certifies them to provide QPR Suicide Prevention trainings to members of the SUU community. Our plan is for each of the trainers to provide at least three trainings during the 2018-2019 academic year, which will hopefully result in training close to 1,000 members of our community. This effort aligns with the Board of Regents' priority regarding mental health.

Ad Hoc Committees: The Provost's Office has convened four ad hoc committees to address critical concerns. The RFP for Course Evaluation Committee will work to replace the current platform. The Online Presence Committee will create a strategy for how online courses and programs can help to address SUU's growth projections. The Academic Integrity Policy Committee will work to revise the academic integrity policy to reduce confusion and address historic challenges. The P&T Transition Team will serve as a resource to departments through the transition from the previous faculty evaluation policy to the revised faculty evaluation policy.

Walter Maxwell Gibson College of Science & Engineering: Our healthcare professional acceptance successes were strong this year. Data show that 30/33 (91%) of medical school applicants were accepted. 11/14 (79%) dental school applicants were successful. Seven graduates applied to pharmacy programs and five were accepted (71%). Additionally, during 2017-18, the SUU Nursing BSN graduate's first attempt pass rate on the national licensure exam (NCLEX-RN) was 58/60 (97%), exceeding national and state averages for that time period. When considered in the light of our successes over the last 15 years, SUU pre-healthcare continues to provide the best preparation in the intermountain west for admission to healthcare programs. This success is due to strong academic preparation, and the programs provided by our Area Health Education Center (AHEC) directed by Ms. Rita Osborn.

College of Humanities and Social Sciences: The College of Humanities and Social Science started fall 2018 with a faculty and staff retreat focused on discussion around the identity of the College and how we can better share our strengths with students looking for the skills necessary for a career. To that end, we are also discussing curricular innovations we can use to broaden our offerings on-campus and on-line. The university Writing Center has hired an assistant director so that it is better able to respond to the needs of faculty and students around campus regarding writing assignments and enhancing particular skills inherent in strong communication. The College is also welcoming a new development officer and we look forward to working with her and potential donors to increase the number of scholarships we can offer deserving HSS students. Finally, we are excited to note that we interacted with 350 new HSS majors at Thunder U; they were a lively and engaged group.

School of Integrative and Engaged Learning: The Office of Community and Academic Enrichment and the Integrative and Engaged Studies Department have teamed up to launch a new Professional Development service for businesses and organizations that offer ongoing training and certificate programs. Businesses and other organizations partner with SUU to provide professional development with the university managing content, continuing education credits, transcripts, and awarding of SUU Institutional Certificates to those who complete the programs of study. SUU has already landed an agreement with the National Society for Experiential Education to manage their content, and has just learned the institution will now manage the Utah Municipal Clerks Institute and Academy. SUU has also submitted an application to manage professional development for the International Municipal Clerks Academy as well, with high hopes to land the contract.

Library: Professors Cait Gerrity (PI) and Matt Nickerson are putting finishing touches on an online training program designed to help elementary school library paraprofessionals learn the basic management skills and techniques to run elementary school libraries more effectively. Funded through a grant from the Utah Library Services & Technology Act, the program is developed as an Open Educational Resource that can be used by any librarian in Utah and is freely downloadable so that school districts can customize the training to meet their specific needs. Paraprofessionals that participate in the program will find sample documents, tips and teaching ideas that will be immediately applicable to their situations and that will impact thousands of Utah school children every year.

International Affairs: With the start of a new year, International Affairs is pleased to report that the overall international student population increased by 6.5%. We now have approximately 573 international students from 62 different countries and territories. This increase comes at a time when the number of international students studying in the USA is declining. SUU has students from 7 countries that were not represented on campus last fall. The countries include: Argentina, Columbia, Georgia, Hungary, Jamaica, Mauritius, Netherlands Antilles, Morocco, Pakistan, Republic of Congo, Romania, Senegal, Singapore and Venezuela. SUU's Early College High School enrolled its first cohort of about 30 students this fall. These students are living with local families and will obtain an associates degree and high school diploma (awarded by Success Academy) in two years. The retention rate of the 2017 international student cohort is projected to be over 80%, a record rate for this subgroup of students. International Affairs is working with several campus partners to develop a study abroad experience to the D.R. Congo in May of 2019. The American Language and Culture Center welcomes a new Director, Dr. Robb McCollum. Prior to SUU, Robb has worked in the private sector, at BYU, the University of Virginia, and BYU-Hawaii.

# SUU SOUTHERN UTAH UNIVERSITY

## INVESTMENT REPORT


July 31, 2018



- Page 2 - Summary Report of Investment Activity and Income
- Page 3 - Detail of Current Month Transactions
- Pages 4-5 - Investment Portfolio
- Page 6 - Supplemental Summary

### Public Treasurer's Assertion

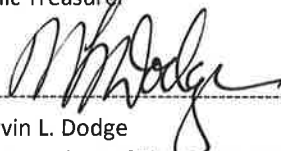
To the best of my knowledge, the University is in compliance with the State Money Management Act, the Rules of the State Money Management Council, the Uniform Prudent Management of Institutional Funds Act, Board of Regents Policy R541, and Southern Utah University's Investment Policy 10.12.



A. Mitchell Bealer  
Public Treasurer

8/20/18

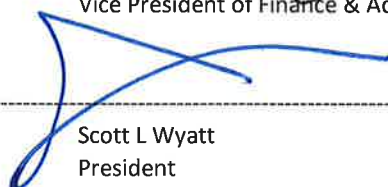
Date



Marvin L. Dodge  
Vice President of Finance & Administration

8/20/18.

Date



Scott L. Wyatt  
President

August 28, 2018

Date

Summary Report of Investment Activity and Income  
 For the Month Ended July 31, 2018

	<b>Cost</b>	<b>Market</b>	<b>Unrealized Gain/Loss</b>
<b>Investment Activity:</b>			
Beginning Balance	\$ 90,376,072	\$ 89,995,710	\$ (380,364)
Monthly Activity (See Page 3)	(3,721,128)	(3,721,128)	
Market Value Change		234,390	234,390
Ending Monthly Balance	<b>\$ 86,654,944</b>	<b>\$ 86,508,972</b>	<b>\$ (145,974)</b>

	<b>Cost</b>	<b>Market</b>
Average Balance	\$ 88,515,508	\$ 88,252,341

<b>Investment Income</b>	<b>Current Month</b>	<b>YTD</b>
Interest	\$ 151,924	\$ 151,924
Dividends	79,782	79,782
Gains/Losses on Sale	39,604	39,604
Investment Income	<b>\$ 271,310</b>	<b>\$ 271,310</b>

Detail of Current Month Transactions  
 For the Month Ended July 31, 2018

	Cash Management Pool	Endowment Pool	Debt Service Pool	Total
<b>Acquisitions:</b>				
Amortization of Bond Discount	\$ 1,097	\$ -	\$ -	\$ 1,097
Increase in Moreton Money Market		700,222	2,389	702,610
Increase in Moreton Trust Money Market		5,469		5,469
Increase in Fidelity Money Market		8,256		8,256
Increase in PTIF				-
Increase in Wells Fargo PTIF Debt			2,236	2,236
Increase in SBSU CD				-
HSBC-40428OBQ1-05/18/21-Buy	1,006,500			1,006,500
JPM-46647PAG1-06/01/21-Buy	1,513,800			1,513,800
STB-86787EAU1-01/29/21-Buy	997,710			997,710
WFB-94988J5Q6-07/23/21-Buy	1,509,345			1,509,345
UIT-30305U359 Reinv (378.363sh @ \$9.812)		3,712		3,712
UIT-30304H151 Reinv (508.702sh @ \$9.137)		4,648		4,648
UIT-30304L673 Reinv (570.692sh @ \$10.060)		5,741		5,741
UIT-30304Y865 Reinv (700.675sh @ \$9.042)		6,336		6,336
JSOAX Reinv (187.481sh @ \$11.550)		2,165		2,165
MWTRX Reinv (82.579sh @ \$10.39)		858		858
UIT-30305U359 Reinv (17.807sh @ \$9.812)		175		175
UIT-30304M556 Reinv (97.264sh @ \$9.588)		933		933
UIT-30304Y865 Reinv (38.844sh @ \$9.042)		351		351
CSRSX Reinv (6.567sh @ \$63.62)		418		418
CSRSX Reinv (47.611sh @ \$63.62)		3,029		3,029
CSRSX Reinv (50.156sh @ \$63.62)		3,191		3,191
Rounding		1		1
<b>Total Acquisitions</b>	<b>\$ 5,028,452</b>	<b>\$ 745,504</b>	<b>\$ 4,625</b>	<b>\$ 5,778,581</b>
<b>Dispositions:</b>				
Amortization of Bond Premium	\$ 13,938	\$ 91	\$ -	\$ 14,029
Decrease in Moreton Money Market	1,515,035			1,515,035
Decrease in Moreton Trust Money Market				-
Decrease in Fidelity Money Market				-
Decrease in PTIF	2,165,975			2,165,975
AE-0258MODW6 Redemption	1,000,000			1,000,000
CG-172967JW2-Redemption	1,000,000			1,000,000
STB-86802WAZ1-Redemption	3,150,000			3,150,000
HON Stock-Sell		2,592		2,592
VISA Stock-Sell		2,518		2,518
AT&T Stock-Sell		249,833		249,833
HCP Stock -Sell		99,891		99,891
MCY Stock-Sell		100,481		100,481
ORI Stock-Sell		99,737		99,737
UVV Stock-Sell		99,617		99,617
Rounding				-
<b>Total Dispositions</b>	<b>\$ 8,844,947</b>	<b>\$ 654,761</b>	<b>\$ -</b>	<b>\$ 9,499,709</b>
<b>Increase (Decrease) in Investments</b>	<b>\$ (3,816,495)</b>	<b>\$ 90,743</b>	<b>\$ 4,625</b>	<b>\$ (3,721,128)</b>



Investment Portfolio  
For the Month Ended July 31, 2018

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)	Endowment Portfolio Percentage
<b>Fixed Income Investments:</b>						
<b>Cash Equivalents:</b>						
Public Treasurer's Investment Fund (PTIF)	1.0831%	N/A	\$ 12,145,431	\$ 12,145,431	\$ -	
PTIF - Debt Reserves	1.1077%	N/A	1,092,485	1,092,485	-	
Moreton Investment Money Market	0.0000%	N/A	(1,495,712)	(1,495,712)	-	
Moreton Endowment Money Market	0.0000%	N/A	927,864	927,864	-	
Moreton Trust Money Market	0.0000%	N/A	57,569	57,569	-	
Fidelity Money Market	0.0000%	N/A	123,309	123,309	-	
Total Cash Equivalents			\$ 12,850,946	\$ 12,850,946	\$ -	8.42%
<b>Certificates of Deposit:</b>						
State Bank of Southern Utah	0.4000%	3/2/2019	\$ 1,023,153	\$ 1,023,153	\$ -	
Total Certificates of Deposit			\$ 1,023,153	\$ 1,023,153	\$ -	0.09%
<b>Bonds, Notes &amp; Bills:</b>						
Merrill Lynch (\$1,000,000 Par)	1.7103%	11/15/2018	1,014,882	1,012,590	(2,292)	
Citigroup (\$2,000,000 Par)	1.8226%	12/7/2018	2,001,611	1,997,600	(4,011)	
BPCE (\$1,000,000 Par)	1.9364%	12/10/2018	1,002,007	999,630	(2,377)	
Federal Farm Credit Bank (\$1,000,000 Par)	1.1340%	7/31/2018	999,947	995,940	(4,007)	
Bank of America (\$1,000,000 Par)	2.0500%	9/29/2022	1,003,524	1,000,090	(3,434)	
Lloyd's Bank (\$600,000 Par)	1.6351%	1/22/2019	600,242	602,214	1,972	
JP Morgan (\$600,000 Par)	1.3158%	3/22/2019	600,644	602,598	1,955	
Royal Bank of Canada (\$2,000,000 Par)	1.6438%	4/15/2019	1,992,112	1,986,280	(5,832)	
American Express (\$1,000,000 Par)	1.2787%	5/3/2019	1,001,681	1,001,390	(291)	
Caterpillar (\$1,000,000 Par)	2.2180%	1/10/2020	1,006,738	1,006,150	(588)	
Morgan Stanley (\$1,000,000 Par)	1.6252%	5/22/2017	1,009,987	1,012,410	2,423	
Morgan Stanley (\$2,000,000 Par)	1.7279%	5/22/2017	2,007,616	2,005,700	(1,916)	
Barclays (\$2,000,000 Par)	1.7957%	4/9/2020	2,011,822	2,010,980	(842)	
General Electric (\$2,000,000 Par)	2.5215%	4/15/2020	2,019,443	2,014,920	(4,523)	
Goldman Sachs Group (\$1,000,000 Par)	1.6518%	4/23/2020	1,011,155	1,013,160	2,005	
Barclays (\$1,200,000 Par)	0.0000%	4/26/2020	1,200,000	1,185,024	(14,976)	
Morgan Stanley (\$1,000,000 Par)	2.3011%	6/16/2020	1,009,737	1,012,130	2,393	
Barclays (1,000,000 Par)	1.8424%	8/7/2020	1,002,341	1,003,680	1,339	
Federal Farm Credit Bank (\$3,000,000 Par)	1.8470%	11/16/2020	3,001,391	2,935,650	(65,741)	
Goldman Sachs (\$1,500,000 Par)	2.1005%	12/27/2020	1,510,506	1,507,335	(3,171)	
Goldman Sachs (\$1,515,000 Par)	2.6469%	12/27/2020	1,528,141	1,522,408	(5,733)	
Suntrust Banks (\$1,000,000 Par)	2.5900%	1/29/2021	997,757	990,540	(7,217)	
Citigroup (\$1,000,000 Par)	3.6820%	3/30/2021	1,028,550	1,023,010	(5,540)	
Bank of Montreal (\$1,000,000 Par)	2.5376%	4/13/2021	1,006,823	1,004,110	(2,713)	
HSBC (\$1,000,000 Par)	2.9256%	5/18/2021	1,006,061	1,003,200	(2,861)	
HSBC (\$1,000,000 Par)	2.9256%	5/18/2021	1,006,371	1,003,200	(3,171)	
Federal Home Loan Bank (\$1,000,000 Par)	1.2500%	5/25/2021	999,444	975,620	(23,824)	
JP Morgan (\$1,500,000 Par)	2.9800%	6/1/2021	1,513,800	1,508,175	(5,625)	
Federal Home Loan Bank (\$1,000,000 Par)	1.4000%	8/16/2021	1,000,000	977,910	(22,090)	
Wells Fargo Bank (\$1,500,000 Par)	2.8470%	7/23/2021	1,509,336	1,504,230	(5,106)	
Federal Farm Credit Bank (\$2,000,000 Par)	1.9500%	11/23/2021	2,000,000	1,927,540	(72,460)	
Federal Farm Credit Bank (\$2,300,000 Par)	1.7999%	11/29/2021	2,297,087	2,216,096	(80,991)	
Federal Home Loan Bank (\$1,000,000 Par)	2.0000%	12/29/2021	1,000,000	969,180	(30,820)	
Federal Farm Credit Bank (\$1,000,000 Par)	2.0000%	3/14/2022	1,000,000	964,990	(35,010)	
Federal Home Loan (\$1,000,000 Par)	2.1500%	9/26/2022	1,000,499	964,960	(35,539)	
Federal Home Loan (\$1,000,000 Par)	2.0500%	9/29/2022	1,000,000	965,080	(34,920)	
General Motors (\$250,000 Par)	2.6064%	6/30/2022	252,898	254,258	1,359	
Ford Motor Company (\$250,000 Par)	2.2523%	8/3/2022	251,309	251,708	399	
Capital One (\$250,000 Par)	2.4869%	1/30/2023	250,000	249,048	(953)	
Total Bonds, Notes and Bills			\$ 47,655,462	\$ 47,180,733	\$ (474,729)	6.56%
Total Fixed Income Investments			\$ 61,529,561	\$ 61,054,832	\$ (474,729)	



Investment Portfolio  
For the Month Ended July 31, 2018

Equity Investments:	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)	Endowment Portfolio Percentage
<b>Mutual Funds and ETFs:</b>						
Ishares: Russell Mid-Cap Growth ETF	89.84	2,798.000	251,377	361,446	110,069	
Ishares: S&P 600 Small Cap Value Index ETF	112.48	2,226.000	250,391	372,944	122,553	
Ishares: S&P 600 Growth Index ETF	116.84	2,145.000	250,625	420,313	169,688	
Vanguard Mid-Cap ETF	120.15	2,080.000	249,922	336,190	86,268	
Vanguard Small Cap Value	55.47	24.349	1,351	1,456	105	
Ishares: Core US Aggregate BD ETF	105.71	8,825.000	932,896	935,980	3,084	
JP Morgan TR I Strategic Incm Opptys Fd Cl A	11.59	86,665.021	1,004,430	1,001,848	(2,583)	
PIMCO Enhanced Short Maturity Active Exch	101.47	9,850.000	999,495	1,000,465	970	
Metropolitan West Fds Total Return Bond Fund	10.36	83,673.313	866,858	866,856	(2)	
Ishares: 0 to 5 Year Tips Bond ETF	99.32	10,000.000	993,215	991,400	(1,815)	
UIT Advisors Disciplined	10.23	97,771.000	1,000,002	923,936	(76,066)	
UIT Invesco Unit TRS PFD	9.90	101,026.000	1,000,006	933,480	(66,526)	
UIT First Trust Stonebridge	10.12	106,146.323	1,069,558	964,870	(104,688)	
UIT First Trust Tactical	10.38	96,303.000	999,991	973,623	(26,368)	
UIT First Trust Tactical (2)	10.38	101,826.811	1,055,512	1,029,469	(26,043)	
UIT FT Int Rate Hedge Port	9.81	97,362.175	955,444	961,938	6,494	
UIT FT Int Rate Hedge Port (2)	9.81	101,257.309	993,128	1,000,422	7,294	
UIT FT Strategic Income Select	9.88	95,821.525	947,213	869,101	(78,112)	
UIT FT Strategic Income Select (2)	9.88	102,721.617	1,010,912	931,685	(79,227)	
UIT First Trust Divid & Income	10.17	75,302.000	765,976	726,664	(39,312)	
UIT First Trust Divid & Income (2)	9.97	14,357.036	143,079	138,545	(4,534)	
UIT FT Int Rate Hedge Port	9.81	4,539.825	44,551	44,853	303	
UIT FT Int Rate Hedge Port (2)	9.81	4,765.329	46,750	47,081	331	
UIT FT Strategic Income Select	9.88	5,361.475	52,778	48,629	(4,150)	
UIT FT Strategic Income Select (2)	9.88	5,694.649	55,936	51,650	(4,286)	
Adirondack Small Cap Fund	22.24	5,146.763	114,464	118,478	4,014	
Edgewood Growth Fund Instl CL	32.96	16,293.568	537,056	560,336	23,280	
Artisan Mid Cap Fund Instl	44.95	4,859.340	218,447	223,870	5,422	
Cohen & Steers Realty Shares	61.41	5,326.755	327,138	341,338	14,201	
Grandeur Peak Gbl Reach Fund Instl	17.39	25,275.618	439,563	431,202	(8,361)	
Grandeur Peak Global Stalwarts Instl	15.42	28,504.734	439,563	432,987	(6,576)	
JP Morgan Mid Cap Value Fund Class L	39.94	5,518.978	220,448	228,044	7,596	
Oakmark Intl Advisor Fund	28.16	19,510.973	549,449	530,308	(19,141)	
Oakmark Fund Advisor Class	86.46	7,452.313	644,347	653,791	9,444	
T Rowe Price Emerg Markets Stock Fund I	44.22	7,454.930	329,677	322,053	(7,624)	
Wasatch Small Cap Growth Fund Instl CL	48.81	2,345.093	114,464	120,163	5,699	
William Blair Macro Allocation Fund CL I	11.91	17,940.134	213,687	212,949	(738)	
Innovator ETFs TR II Lunt Low Vol Hig	31.26	20,612.000	644,236	643,581	(655)	
Ishares Core S&P 500 ETF	273.65	3,902.000	1,067,775	1,105,359	37,584	
Ishares MSCI Eafe ETF	70.41	9,299.000	654,745	640,515	(14,230)	
Ishares Core S&P Mid-Cap ETF	194.80	2,825.000	550,310	559,633	9,323	
Ishares Core S&P Small-Cap ETF	82.51	2,771.000	228,626	238,749	10,124	
Vanguard Intl Equity Index Fund Inc FTS	44.81	7,290.000	326,661	319,885	(6,776)	
CGM Realty	29.32	38,260.538	1,121,781	1,119,503	(2,278)	
<b>Total Mutual Funds and ETFs</b>		<b>1,449,131.494</b>	<b>\$ 24,683,833</b>	<b>\$ 24,737,590</b>	<b>\$ 53,755</b>	<b>82.54%</b>
<b>Alternative Investments- Private Equity:</b>						
State Bank of Southern Utah	\$ 104.76	4,215.000	\$ 441,550	\$ 716,550	\$ 275,000	
<b>Total Alternative Investments</b>		<b>4,215.000</b>	<b>\$ 441,550</b>	<b>\$ 716,550</b>	<b>\$ 275,000</b>	<b>2.39%</b>
<b>Total Equity Investments</b>			<b>\$ 25,125,383</b>	<b>\$ 25,454,140</b>	<b>\$ 328,755</b>	
<b>Total Investments</b>			<b>\$ 86,654,944</b>	<b>\$ 86,508,972</b>	<b>\$ (145,974)</b>	

Supplemental Summary  
For the Month Ended July 31, 2018

During the month:

- The Dow Jones Industrial Average increased 1143.78 points 4.71%
- The Nasdaq Composite increased 97.92 points 3.6%
- The S&P 500 increased 161.49 points 2.15%
- **The SUU Equity Investment Portfolio increased by 0.74%**

Holdings (FMV):

Percent Change

● Ishares: Core US Aggregate BD ETF	0.33
● JP Morgan TR I Strategic Incm Opptys Fd Cl A	-0.26
● PIMCO Enhanced Short Maturity Active Exch	0.10
● Metropolitan West Fds Total Return Bond Fund	0.00
● Ishares: 0 to 5 Year Tips Bond ETF	-0.18
● UIT Advisors Disciplined	0.32
● UIT Invesco Unit TRS PFD	0.54
● UIT First Trust Stonebridge	0.00
● UIT First Trust Tactical	-0.20
● UIT First Trust Tactical (2)	-0.20
● UIT FT Int Rate Hedge Port	2.38
● UIT FT Int Rate Hedge Port (2)	2.38
● UIT FT Strategic Income Select	0.22
● UIT FT Strategic Income Select (2)	0.22
● Ishares: Russell Mid-Cap Growth ETF	2.26
● Ishares: S&P 600 Small Cap Value Index ETF	3.10
● Ishares: S&P 600 Growth Index ETF	4.87
● Vanguard Mid-Cap ETF	3.14
● Vanguard Small Cap Value	2.52
● Adirondack Small Cap Fund	4.92
● Edgewood Growth Fund Instl CL	4.12
● Artisan Mid Cap Fund Instl	3.04
● Cohen & Steers Realty Shares	2.41
● Grandeur Peak Glbl Reach Fund Instl	-1.78
● Grandeur Peak Global Stalwarts Instl	-1.49
● JP Morgan Mid Cap Value Fund Class L	4.08
● Oakmark Intl Advisor Fund	0.04
● Oakmark Fund Advisor Class	2.49
● T Rowe Price Emerg Markets Stock Fund I	-1.50
● Wasatch Small Cap Growth Fund Instl CL	4.61
● William Blair Macro Allocation Fund CL I	0.76
● Innovator ETFs TR II Lunt Low Vol Hig	-0.14
● Ishares Core S&P 500 ETF	3.87
● Ishares MSCI Eafe ETF	-0.75
● Ishares Core S&P Mid-Cap ETF	1.71
● Ishares Core S&P Small-Cap ETF	4.01
● Vanguard Intl Equity Index Fund Inc FTS	-1.64
● UIT First Trust Divid & Income	0.84
● UIT First Trust Divid & Income (2)	0.84
● UIT FT Int Rate Hedge Port	2.38
● UIT FT Int Rate Hedge Port (2)	2.38
● UIT FT Strategic Income Select	0.22
● CGM Realty	-2.56

# SUU SOUTHERN UTAH UNIVERSITY

## INVESTMENT REPORT

August 31, 2018



Page 2 - Summary Report of Investment Activity and Income

Page 3 - Detail of Current Month Transactions

Pages 4-5 - Investment Portfolio

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### Public Treasurer's Assertion

To the best of my knowledge, the University is in compliance with the State Money Management Act, the Rules of the State Money Management Council, the Uniform Prudent Management of Institutional Funds Act, Board of Regents Policy R541, and Southern Utah University's Investment Policy 10.12.

A. Mitchell Bealer  
Public Treasurer

9/7/18

Date

Marvin L. Dodge  
Vice President of Finance & Administration

9/11/18

Date

Scott L. Wyatt  
President

September 12, 2018

Date

Summary Report of Investment Activity and Income  
 For the Month Ended August 31, 2018

	<b>Cost</b>	<b>Market</b>	<b>Unrealized Gain/Loss</b>
<b>Investment Activity:</b>			
Beginning Balance	\$ 86,654,945	\$ 86,508,972	\$ (145,975)
Monthly Activity (See Page 3)	11,546,045	11,546,045	
Market Value Change		261,447	261,447
Ending Monthly Balance	<b>\$ 98,200,990</b>	<b>\$ 98,316,464</b>	<b>\$ 115,472</b>

	<b>Cost</b>	<b>Market</b>
Average Balance	<b>\$ 92,427,968</b>	<b>\$ 92,412,718</b>

	<b>Current Month</b>	<b>YTD</b>
<b>Investment Income</b>		
Interest	\$ 131,408	\$ 283,333
Dividends	68,290	148,072
Gains/Losses on Sale	1,910	41,513
Investment Income	<b>\$ 201,608</b>	<b>\$ 472,918</b>

Detail of Current Month Transactions  
 For the Month Ended August 31, 2018

	Cash Management Pool	Endowment Pool	Debt Service Pool	Total
<b>Acquisitions:</b>				
Amortization of Bond Discount	\$ 1,126	\$ -	\$ -	\$ 1,126
Increase in Moreton Money Market	1,495,712			1,495,712
Increase in Moreton Trust Money Market		5,437		5,437
Increase in Fidelity Money Market		54		54
Increase in PTIF	10,028,073			10,028,073
Increase in Wells Fargo PTIF Debt			-	-
Increase in SBSU CD				-
BRC-06746XMB6-08/24/21-Buy	1,005,000			1,005,000
CSRSX-Buy (1566.171sh @ \$63.85)		100,000		100,000
IVV-Buy (700.00sh @ \$284.47)		199,144		199,144
EFA-Buy (3000.00sh @ \$66.669)		200,022		200,022
UIT-30305U359 Reinv		2,947		2,947
UIT-30304H151 Reinv		4,670		4,670
UIT-30304L673 Reinv		5,611		5,611
UIT-30304Y865 Reinv		6,379		6,379
JSOAX Reinv		2,330		2,330
MWTRX Reinv		1,914		1,914
UIT-30305U359 Reinv		139		139
UIT-30304M556 Reinv		939		939
UIT-30304Y865 Reinv		354		354
<b>Total Acquisitions</b>	<b>\$ 12,529,912</b>	<b>\$ 529,939</b>	<b>\$ -</b>	<b>\$ 13,059,851</b>
<b>Dispositions:</b>				
Amortization of Bond Premium	\$ 13,142	\$ 91	\$ -	\$ 13,233
Decrease in Moreton Money Market		498,232		498,232
Decrease in Moreton Trust Money Market				-
Decrease in Fidelity Money Market				-
Decrease in PTIF				-
BRC-06744CFV8-Sell	1,002,341			1,002,341
<b>Total Dispositions</b>	<b>\$ 1,015,483</b>	<b>\$ 498,323</b>	<b>\$ -</b>	<b>\$ 1,513,806</b>
<b>Increase (Decrease) in Investments</b>	<b>\$ 11,514,429</b>	<b>\$ 31,616</b>	<b>\$ -</b>	<b>\$ 11,546,045</b>

Investment Portfolio  
For the Month Ended August 31, 2018

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)	Endowment Portfolio Percentage
<b>Fixed Income Investments:</b>						
<b>Cash Equivalents:</b>						
Public Treasurer's Investment Fund (PTIF)	1.0831%	N/A	\$ 22,173,505	\$ 22,173,505	\$ -	
PTIF - Debt Reserves	1.1077%	N/A	1,092,485	1,092,485	-	
Moreton Investment Money Market	0.0000%	N/A	-	-	-	
Moreton Endowment Money Market	0.0000%	N/A	429,631	429,631	-	
Moreton Trust Money Market	0.0000%	N/A	63,007	63,007	-	
Fidelity Money Market	0.0000%	N/A	123,363	123,363	-	
Total Cash Equivalents			\$ 23,881,991	\$ 23,881,991	\$ -	7.31%
<b>Certificates of Deposit:</b>						
State Bank of Southern Utah	0.4000%	3/2/2019	\$ 1,023,153	\$ 1,023,153	\$ -	
Total Certificates of Deposit			\$ 1,023,153	\$ 1,023,153	\$ -	0.08%
<b>Bonds, Notes &amp; Bills:</b>						
Merrill Lynch (\$1,000,000 Par)	1.7103%	11/15/2018	1,010,570	1,008,680	(1,890)	
Citigroup (\$2,000,000 Par)	1.8226%	12/7/2018	2,001,224	1,998,040	(3,184)	
BPCE (\$1,000,000 Par)	1.9364%	12/10/2018	1,001,536	1,000,090	(1,446)	
Federal Farm Credit Bank (\$1,000,000 Par)	1.1340%	7/31/2018	999,959	996,760	(3,199)	
Bank of America (\$1,000,000 Par)	2.0500%	1/15/2019	1,002,874	1,000,110	(2,764)	
Lloyd's Bank (\$600,000 Par)	1.6351%	1/22/2019	600,201	602,082	1,881	
JP Morgan (\$600,000 Par)	1.3158%	3/22/2019	600,558	602,298	1,740	
Royal Bank of Canada (\$2,000,000 Par)	1.6438%	4/15/2019	1,993,060	1,988,360	(4,700)	
American Express (\$1,000,000 Par)	1.2787%	5/3/2019	1,001,491	1,001,480	(11)	
Caterpillar (\$1,000,000 Par)	2.2180%	1/10/2020	1,006,343	1,005,530	(813)	
Morgan Stanley (\$1,000,000 Par)	1.6252%	1/27/2020	1,009,419	1,012,120	2,701	
Morgan Stanley (\$2,000,000 Par)	1.7279%	2/14/2020	2,007,196	2,004,400	(2,796)	
Barclays (\$2,000,000 Par)	1.7957%	4/9/2020	2,011,229	2,011,980	751	
General Electric (\$2,000,000 Par)	2.5215%	4/15/2020	2,018,477	2,012,180	(6,297)	
Goldman Sachs Group (\$1,000,000 Par)	1.6518%	4/23/2020	1,010,608	1,013,040	2,432	
Barclays (\$1,200,000 Par)	0.0000%	4/26/2020	1,200,000	1,186,824	(13,176)	
Morgan Stanley (\$1,000,000 Par)	2.3011%	6/16/2020	1,009,297	1,011,600	2,303	
Federal Farm Credit Bank (\$3,000,000 Par)	1.8470%	11/16/2020	3,001,340	2,940,570	(60,770)	
Goldman Sachs (\$1,500,000 Par)	2.1005%	12/27/2020	1,510,136	1,507,425	(2,711)	
Goldman Sachs (\$1,515,000 Par)	2.6469%	12/27/2020	1,527,678	1,522,499	(5,179)	
Suntrust Banks (\$1,000,000 Par)	2.5900%	1/29/2021	997,833	991,680	(6,153)	
Citigroup (\$1,000,000 Par)	3.6820%	3/30/2021	1,027,641	1,022,730	(4,911)	
Bank of Montreal (\$1,000,000 Par)	2.5376%	4/13/2021	1,006,608	1,004,780	(1,828)	
HSBC (\$1,000,000 Par)	2.9256%	5/18/2021	1,005,877	1,002,980	(2,897)	
HSBC (\$1,000,000 Par)	2.9256%	5/18/2021	1,006,180	1,002,980	(3,200)	
Federal Home Loan Bank (\$1,000,000 Par)	1.2500%	5/25/2021	999,461	978,440	(21,021)	
JP Morgan (\$1,500,000 Par)	2.9800%	6/1/2021	1,513,387	1,508,535	(4,852)	
Federal Home Loan Bank (\$1,000,000 Par)	1.4000%	8/16/2021	1,000,000	980,680	(19,320)	
Wells Fargo Bank (\$1,500,000 Par)	2.8470%	7/23/2021	1,509,070	1,504,860	(4,210)	
Barclays (\$1,000,000 Par)	3.5700%	8/24/2021	1,004,995	997,000	(7,995)	
Federal Farm Credit Bank (\$2,000,000 Par)	1.9500%	11/23/2021	2,000,000	1,934,300	(65,700)	
Federal Farm Credit Bank (\$2,300,000 Par)	1.7999%	11/29/2021	2,297,162	2,226,124	(71,038)	
Federal Home Loan Bank (\$1,000,000 Par)	2.0000%	12/29/2021	1,000,000	972,530	(27,470)	
Federal Farm Credit Bank (\$1,000,000 Par)	2.0000%	3/14/2022	1,000,000	969,290	(30,710)	
Federal Home Loan (\$1,000,000 Par)	2.1500%	9/26/2022	1,000,489	969,600	(30,889)	
Federal Home Loan (\$1,000,000 Par)	2.0500%	9/29/2022	1,000,000	969,770	(30,230)	
General Motors (\$250,000 Par)	2.6064%	6/30/2022	252,835	253,115	280	
Ford Motor Company (\$250,000 Par)	2.2523%	8/3/2022	251,281	249,128	(2,153)	
Capital One (\$250,000 Par)	2.4869%	1/30/2023	250,000	248,913	(1,088)	
Total Bonds, Notes and Bills			\$ 47,646,015	\$ 47,213,502	\$ (432,512)	5.92%
Total Fixed Income Investments			\$ 72,551,159	\$ 72,118,646	\$ (432,512)	



Investment Portfolio  
For the Month Ended August 31, 2018

Equity Investments:	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)	Endowment Portfolio Percentage	
<b>Mutual Funds and ETFs:</b>							
Ishares Core S&P 500 ETF	284.49	700.000	199,144	204,708	5,564		
Ishares: Russell Mid-Cap Growth ETF	89.84	2,798.000	251,377	382,235	130,858		
Ishares: S&P 600 Small Cap Value Index ETF	112.48	2,226.000	250,391	384,653	134,262		
Ishares: S&P 600 Growth Index ETF	116.84	2,145.000	250,625	448,455	197,830		
Vanguard Mid-Cap ETF	120.15	2,080.000	249,922	344,552	94,630		
Vanguard Small Cap Value	55.47	24.349	1,351	1,491	140		
Ishares MSCI Eafe ETF	66.67	3,000.000	200,022	202,020	1,998		
Ishares: Core US Aggregate BD ETF	105.71	8,825.000	932,896	939,068	6,173		
JP Morgan TR I Strategic Incm Opptys Fd Cl A	11.59	86,866.614	1,006,761	1,004,178	(2,583)		
PIMCO Enhanced Short Maturity Active Exch	101.47	9,850.000	999,495	1,001,056	1,561		
Metropolitan West Fds Total Return Bond Fund	10.36	83,858.038	868,772	872,962	4,190		
Ishares: 0 to 5 Year Tips Bond ETF	99.32	10,000.000	993,215	992,200	(1,015)		
UIT Advisors Disciplined	10.23	97,771.000	1,000,002	927,847	(72,155)		
UIT Invesco Unit TRS PFD	9.90	101,026.000	1,000,006	935,501	(64,505)		
UIT First Trust Stonebridge	10.12	106,657.558	1,074,229	980,183	(94,046)		
UIT First Trust Tactical	10.38	96,303.000	999,991	975,549	(24,442)		
UIT First Trust Tactical (2)	10.38	102,384.542	1,061,123	1,037,155	(23,968)		
UIT FT Int Rate Hedge Port	9.81	97,362.175	955,444	968,754	13,309		
UIT FT Int Rate Hedge Port (2)	9.81	101,552.878	996,075	1,010,451	14,376		
UIT FT Strategic Income Select	9.88	95,821.525	947,213	869,101	(78,112)		
UIT FT Strategic Income Select (2)	9.88	103,425.158	1,017,291	938,066	(79,225)		
Cohen & Steers Realty Shares	63.85	1,566.171	100,000	103,336	3,336		
UIT First Trust Divid & Income	10.17	75,302.000	765,976	734,948	(31,028)		
UIT First Trust Divid & Income (2)	9.96	14,453.730	144,018	141,068	(2,950)		
UIT FT Int Rate Hedge Port	9.81	4,539.825	44,551	45,171	621		
UIT FT Int Rate Hedge Port (2)	9.81	4,779.239	46,889	47,553	665		
UIT FT Strategic Income Select	9.88	5,361.475	52,778	48,629	(4,150)		
UIT FT Strategic Income Select (2)	9.88	5,733.652	56,290	52,004	(4,286)		
Adirondack Small Cap Fund	22.24	5,146.763	114,464	121,567	7,103		
Edgewood Growth Fund Instl CL	32.96	16,293.568	537,056	588,850	51,794		
Artisan Mid Cap Fund Instl	44.95	4,859.340	218,447	236,455	18,008		
Cohen & Steers Realty Shares	61.41	5,326.755	327,138	351,459	24,322		
Grandeur Peak Gbl Reach Fund Instl	17.39	25,275.618	439,563	434,488	(5,075)		
Grandeur Peak Global Stalwarts Instl	15.42	28,504.734	439,563	435,267	(4,296)		
JP Morgan Mid Cap Value Fund Class L	39.94	5,518.978	220,448	232,735	12,287		
Oakmark Intl Advisor Fund	28.16	19,510.973	549,449	504,359	(45,090)		
Oakmark Fund Advisor Class	86.46	7,452.313	644,347	665,268	20,921		
T Rowe Price Emerg Markets Stock Fund I	44.22	7,454.930	329,677	307,367	(22,310)		
Wasatch Small Cap Growth Fund Instl CL	48.81	2,345.093	114,464	133,412	18,948		
William Blair Macro Allocation Fund CL I	11.91	17,940.134	213,687	201,288	(12,399)		
Innovator ETFs TR II Lunt Low Vol Hig	31.26	20,612.000	644,236	655,049	10,813		
Ishares Core S&P 500 ETF	273.65	3,902.000	1,067,775	1,141,101	73,326		
Ishares MSCI Eafe ETF	70.41	9,299.000	654,745	626,195	(28,550)		
Ishares Core S&P Mid-Cap ETF	194.80	2,825.000	550,310	577,289	26,979		
Ishares Core S&P Small-Cap ETF	82.51	2,771.000	228,626	250,249	21,623		
Vanguard Intl Equity Index Fund Inc FTS	44.81	7,290.000	326,661	306,472	(20,190)		
CGM Realty	29.32	38,260.538	1,121,781	1,119,503	(2,278)		
<b>Total Mutual Funds and ETFs</b>		<b>1,457,001.666</b>	<b>\$ 25,208,281</b>	<b>\$ 25,481,268</b>	<b>\$ 272,984</b>	<b>84.32%</b>	
<b>Alternative Investments- Private Equity:</b>							
State Bank of Southern Utah	\$	104.76	4,215.000	\$ 441,550	\$ 716,550	\$ 275,000	
<b>Total Alternative Investments</b>			<b>4,215.000</b>	<b>\$ 441,550</b>	<b>\$ 716,550</b>	<b>\$ 275,000</b>	<b>2.37%</b>
<b>Total Equity Investments</b>			<b>\$ 25,649,831</b>	<b>\$ 26,197,818</b>	<b>\$ 547,984</b>		
<b>Total Investments</b>			<b>\$ 98,200,990</b>	<b>\$ 98,316,464</b>	<b>\$ 115,472</b>		



Supplemental Summary  
For the Month Ended August 31, 2018

During the month:

- The Dow Jones Industrial Average increased 549.63 points 2.16%
- The Nasdaq Composite increased 85.23 points 3.03%
- The S&P 500 increased 437.75 points 5.71%
- **The SUU Equity Investment Portfolio increased by 0.91%**

Holdings (FMV):

Percent Change

● Ishares: Core US Aggregate BD ETF	0.33
● JP Morgan TR I Strategic Incm Oppty Fd Cl A	0.00
● PIMCO Enhanced Short Maturity Active Exch	0.06
● Metropolitan West Fds Total Return Bond Fund	0.48
● Ishares: 0 to 5 Year Tips Bond ETF	0.08
● UIT Advisors Disciplined	0.42
● UIT Invesco Unit TRS PFD	0.22
● UIT First Trust Stonebridge	1.10
● UIT First Trust Tactical	0.20
● UIT First Trust Tactical (2)	0.20
● UIT FT Int Rate Hedge Port	0.71
● UIT FT Int Rate Hedge Port (2)	0.71
● UIT FT Strategic Income Select	0.00
● UIT FT Strategic Income Select (2)	0.00
● Ishares: Russell Mid-Cap Growth ETF	5.75
● Ishares: S&P 600 Small Cap Value Index ETF	3.14
● Ishares: S&P 600 Growth Index ETF	6.70
● Vanguard Mid-Cap ETF	2.49
● Vanguard Small Cap Value	2.41
● Adirondack Small Cap Fund	2.61
● Edgewood Growth Fund Instl CL	5.09
● Artisan Mid Cap Fund Instl	5.62
● Cohen & Steers Realty Shares	2.97
● Grandeur Peak Gbl Reach Fund Instl	0.76
● Grandeur Peak Global Stalwarts Instl	0.53
● JP Morgan Mid Cap Value Fund Class L	2.06
● Oakmark Intl Advisor Fund	-4.89
● Oakmark Fund Advisor Class	1.76
● T Rowe Price Emerg Markets Stock Fund I	-4.56
● Wasatch Small Cap Growth Fund Instl CL	11.03
● William Blair Macro Allocation Fund CL I	-5.48
● Innovator ETFs TR II Lunt Low Vol Hig	1.78
● Ishares Core S&P 500 ETF	3.23
● Ishares MSCI Eafe ETF	-2.24
● Ishares Core S&P Mid-Cap ETF	3.15
● Ishares Core S&P Small-Cap ETF	4.82
● Vanguard Intl Equity Index Fund Inc FTS	-4.19
● UIT First Trust Divid & Income	1.14
● UIT First Trust Divid & Income (2)	1.14
● UIT FT Int Rate Hedge Port	0.71
● UIT FT Int Rate Hedge Port (2)	0.71
● UIT FT Strategic Income Select	0.00
● CGM Realty	0.00

Professor Kay Andersen is a graduate of Southern Utah University and New York University. He returned to his alma mater in 1997 following an extensive career as a professional dancer where he toured worldwide. Kay is known for his energetic and passionate teaching and received SUU's Distinguished Educator Award and Professor of the Year Award. Kay was presented the 2017 Lifetime Achievement Award by the Utah Dance Education Organization for his vast contribution as both an educator and artist. He served nine years as Department Chair of Theatre Arts and Dance where his thoughtful leadership style was appreciated by students, faculty and staff, he will be deeply missed.

## PERSONNEL

Board of Trustees  
October 12, 2018

### RECOMMENDATION FOR APPOINTMENT

It is recommended that **Russ Benton** be appointed Assistant Professor of Theatre-Musical Theatre in the Department of Theatre Arts & Dance, College of Performing and Visual Arts, non-tenure-track, effective May 16, 2018. He holds a B.A. from Southern Utah University and an M.F.A. from Asolo Conservatory. This is a one-year appointment to replace Melinda Vaughn.

It is recommended that **Dr. Ganesh S. Ethiraj** be appointed Lecturer of Chemistry in the Department of Physical Science, Walter Maxwell Gibson College of Science and Engineering, non-tenure-track, effective August 16, 2018. He holds a B.S. and M.S. from University of Madras and a Ph.D. from Bangalore Institute of Science. This is a new position.

It is recommended that **Nathan Johnson** be appointed Visiting Professional in Residence in the Department of Engineering & Technology, Walter Maxwell Gibson College of Science and Engineering, non-tenure-track, effective August 16, 2018. He holds a B.S. from Utah State University and an M.A. from Western Governors University. This is a one-year appointment.

It is recommended that **Rebecca Karpel** be appointed Lecturer of Chemistry in the Department of Physical Science, Walter Maxwell Gibson College of Science and Engineering, non-tenure-track, effective August 16, 2018. She holds a B.A. from San Jose State University and an M.S. from University of California-Davis. This is a new position.

It is recommended that **Dr. Crystal M. Riley Koenig** be appointed Visiting Assistant Professor of Psychology in the Department of Psychology, non-tenure-track, effective August 16, 2018. She holds a B.A. from The College of Wooster, an M.A. from New Mexico University, and an M.A. and Ph.D. from Washington University in St. Louis. This is a one-year emergency hire.

It is recommended that **Dillon Monroe** be appointed Lecturer of Biology in the Department of Biology, Walter Maxwell Gibson College of Science and Engineering, non-tenure-track, effective August 16, 2018. He holds a B.S. from Southern Utah University and is completing an M.S. from California State University, Northridge. This is a one-year appointment.

It is recommended that **Dr. Lisa Quoresimo** be appointed Assistant Professor of Theatre- Musical Theatre Vocal Instruction in the Department of Theatre Arts & Dance, tenure-track but without tenure, effective August 16, 2018. She holds a B.A. from Grove City College, an M.A. from Carnegie Mellon University, and a Ph.D. from University of California, Davis. This is a new position. It is recommended that one year be granted towards rank and tenure.

It is recommended that **Dr. Kevin Tipton** be appointed Associate Professor of Nursing in the Department of Nursing, tenure-track but without tenure, effective September 1, 2018. He holds a B.S.N. from Brigham Young University, an M.S.N. from University of Phoenix, and a Ph.D. from Capella University.

It is recommended that **Blane Bergson** be appointed Professional-In-Residence: Line Instructor, Fixed Wing in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 1, 2018. He holds a B.S. in Aeronautical Flight Operations. This is an appointment to replace TJ Houze.

## PERSONNEL

Board of Trustees  
October 12, 2018

It is recommended that **John Burnett** be appointed Professional-In-Residence: Line Instructor, Fixed Wing in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 16, 2018. He is a Certified Flight Instructor and a Certified Commercial Pilot. This is a new position.

It is recommended that **Joshua Caskey** be appointed Professional-In-Residence: Line Instructor, Rotor Wing in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 16, 2018. He is a Certified Commercial Pilot, a Certified Flight Instructor, and a Certified Flight Instrument Instructor. This is an appointment to replace Daniel Garcia.

It is recommended that **James Dotterer** be appointed Professional-In-Residence: Line Instructor-Rotor Wing, in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 29, 2018. He is a Certified Flight Instructor, Certified Commercial Pilot-Helicopter, and a Certified Flight Instrument Instructor. This is an appointment to replace Jonathan Varner.

It is recommended that **Courtland Hansen** be appointed Professional-in-Residence: Assistant Chief Flight Instructor-Fixed Wing in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 16, 2018. He is a Certified Flight Instructor and a Certified Commercial Pilot. He holds a B.S. from Oklahoma State University. This is an appointment to replace Lee Sherman.

It is recommended that **Sean Howard** be appointed Professional-In-Residence: Line Instructor, Rotor Wing in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 16, 2018. He is a Certified Commercial Pilot and a Certified Flight Instructor-Instrument. This is an appointment to replace John Kalon Langston.

It is recommended that **Joshua Larsen** be appointed Professional in Residence: Line Instructor, Rotor Wing, in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective September 1, 2018. He is a Certified Commercial Helicopter Pilot-Instrument, and a Certified Flight Instructor-Instrument. This is a new position.

It is recommended that **Landon Parke** be appointed Professional in Residence: Line Instructor, Fixed Wing, in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 16, 2018. He is a Certified Flight Instructor and a Certified Flight Instrument Instructor. This is a new position

It is recommended that **Scott Norwood** be appointed Professional in Residence: Line Instructor, Rotor Wing, in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective September 1, 2018. He is a Certified Flight Instructor, a Certified Flight Instrument Instructor, and a Certified Commercial Pilot-Rotor Wing. This is an appointment to replace Benjamin Hubatcher.

It is recommended that **Jaden Racker** be appointed Professional in Residence: Line Instructor, Fixed Wing, in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective September 1, 2018. He is a Certified Flight Instructor, a Certified Flight Instrument Instructor, and a Certified Commercial Pilot This is a new position

## PERSONNEL

Board of Trustees  
October 12, 2018

It is recommended that **Dustin Reidhead** be appointed Professional-In-Residence: Line Instructor, Rotor Wing in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 1, 2018. He is a certified Commercial Flight Instructor and Commercial Pilot. This is a new position.

It is recommended that **Micah Rockwell** be appointed Professional-In-Residence: Line Instructor-Rotor Wing, in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 29, 2018. He is a Certified Flight Instructor and a Certified Flight Instrument Instructor. This is an appointment to replace Mallory Barrons.

It is recommended that **Christopher Timpano** be appointed Professional-In-Residence: Line Instructor-Rotor Wing, in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 20, 2018. He is a Certified Commercial Pilot-Helicopter, a Certified Flight Instructor, and a Certified Instrument Instructor. This is an appointment to replace Brad Beadles.

It is recommended that **Samantha Zvonkovic** be appointed Professional-In-Residence: Line Instructor, Rotor Wing in the Department of Aviation Science, School of Integrative and Engaged Learning, non-tenure-track, effective August 16, 2018. She is a Certified Commercial Helicopter Pilot, a Certified Flight Instructor, Certified Flight Instructor-Instrument, and a Certified Instrument Ground Instructor. This is an appointment to replace Ian Richards.