

Wednesday, July 13, 2022

12:00 PM J. Reuben Clark Center

Next Meeting:

September 23, 2022 (Homecoming)

ACTION

- | | | |
|---|---|-----------------------|
| 1 | Welcome | Verbal |
| 2 | Election of Officers | Verbal |
| 3 | Approval of Minutes from April 28, 2022 | Tab A |
| 4 | R401 - MSN in Leadership and Administration (2nd Reading) | Tab B |

CONSENT

- | | | |
|----|--|-----------------------|
| 5 | Investment Reports | Tab C |
| 6 | Tenure and Rank Advancements - New Deans | Tab D |
| 7 | Personnel - Early Retirement | Tab E |
| 8 | Academic Calendar 2022-2024 | Tab F |
| 9 | Southwest Technical College - 2022-2023 Articulation Agreements | Tab G |
| 10 | Uintah Basin Technical College - 2022-2023 Articulation Agreements | Tab H |

INFORMATION & REPORTS

- | | | |
|----|----------------------------|--------|
| 11 | Thanking outgoing Trustees | Verbal |
|----|----------------------------|--------|

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| 12 | Motion to Adjourn | Verbal |
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Regular Business Meeting

Trustees Present: Chair Rich Christiansen, Vice Chair Jodi Hart Wilson, Beverly Burgess, Nouman Kante, Eric Schmutz, Marilee Eyre, Sydney Nakken, Myndee Kay Larsen, Michael Wankier, McKay Pollmann. **Others Present:** Mary Jo Anderson, Daneka Souberbielle, Maureen Redeker, Abigail Larson, Mary Pearson, Dan Camp, Katya Konkle, Mike Mower, David Dyches, Steve Carpenter, Paula Mitchell, Ryan Paul.

Welcome by Chair Christiansen

The Chair called the meeting to order at 1:06 pm. He welcomed everyone and thanked Trustee Nouman Kante for his service on the trustees over the last 2 years. Nouman took a few minutes to say thank you to the Trustees for their support of the students. Rich also shared appreciation with Rheana Gardner for her service and introduced Abigail Larson as the new faculty senate president. Abi shared more about her background and what she wants to accomplish as faculty senate president.

Oath of Office – McKay Pollmann

Bailey Bowthorpe administered the oath of office to McKay Pollmann, SUUSA President, as a new member of the Board of Trustees.

ACTION ITEMS

Minutes from previous meeting

The minutes of the March 24, 2022 meeting were presented for approval by Chair Rich Christiansen with a change noting that Trustee Burgess abstained from voting on the Surplus Property item. Trustee Burgess made the motion to approve the minutes with that change. Second by Marilee Eyre. Vote was unanimous.

Policy 6.2 Academic Officers

Associate Provost Bill Heyborne discussed Policy 6.2 Academic Officers. Revisions to this policy reflects current practices on campus and better reflects what SUU values, and capitalizes on the talent and value of the types of individuals who might be appointed to various academic officer positions. Bill offered one friendly amendment: section G.1 associate department chairs remove “SUU 3.8 includes procedures” needs to be stricken from the policy, the same sentence has been stricken from other areas of the policies. Brings policy in alignment with standard practice.

Motion to approve with the amendment noted by Trustee Myndee Kay Larsen second by Jodi Hart Wilson. Vote was unanimous.

CONSENT ITEMS

- Investment Report - Marvin Dodge
 - VP Marvin Dodge briefly reviewed SUU's investment reports. SUU is in a good position and is watching the economy closely.
- R401 Notification Item – Minor in Professional Sales (1st Reading)
 - Associate Provost Heyborne said because this is a minor, this will only have one reading by the trustees and did not have to go through a peer review process, though our peers are in favor of this as it is a USHE led effort.
 - Dean Pearson said that this minor meets the needs of a grant that we received from the state 1.5 years ago to create a sales program. This is one of the pieces that we needed to fulfill the grant requirements. 60% of graduates end up in a sales profession right out of graduate school so we hope that this will provide skills to help in their starting career. We have 2 classes already.
 - No concerns from Trustee Schmutz about this proposal.
 - Bill noted that this minor can be easily tacked on in this field of study or discipline.

Motion to approve the consent items by Trustee Wankier, seconded by Trustee Schmutz. Vote was unanimous.

INFORMATION & REPORTS

Budget Overview

VP Marvin Dodge reviewed the Budget Overview document included in the agenda. He expressed thanks to the budget office and the academic affairs budget team for their help in pulling the budget together. We had a forum for faculty and staff last Wednesday to review the budget. It was a great legislative year. SUU received almost \$40 million dollars in ongoing and one-time funds which is the most ever for the university. Marvin explained each of the funding items that SUU received from the general session.

He also shared that for the 4th year in a row, SUU did not raise tuition. By holding tuition constant for us, it's allowed the other public regional universities to "catch up" to SUU's tuition. By holding tuition constant, we are more comparable to other peers.

For compensation the legislature funded three-quarters of a 5.75% compensation adjustment. SUU is using 5% for a COLA and .75% equity, merit market, and retention hotspot issues. Trustee Eric Schmutz asked about data from other USHE institutions regarding how they are breaking down their compensation dollars from the legislature. That data won't be released until July, but generally we know SUU is similar to our USHE peers.

Legislature funded \$19.5 million music building remodel and expansion. Also provided \$9.2 million for flooding mitigation at the Eccles Coliseum.

Trustee Jodi Hart Wilson asked about the timeline for the stadium flooding mitigation project. Marvin explained that there are supply chain issues making it difficult to get materials for this project. We are several months to a year out on starting the project.

Trustee Larsen asked about our strategy for tuition moving forward. Are we going to continue to hold it flat? VP Dodge said this is a big discussion and ongoing conversation that will continue with a new president. It is likely time to look at minimal tuition increases, at least to meet the state compensation match. Important to remember that Scholarships are not accounted for in this. While we have higher tuition compared to our peers, our discount rate is over 40%, meaning most students are paying less than the “sticker price” that is shown because of scholarships.

VP Stuart Jones added that we are a residential campus. A lot more students move here and live away from home. In some ways we are more expensive because of that which is why we have discounted more.

VP Jared Tippetts said that in conversations with students, he is impressed with how astute they are with the realities around us. They know we can't hold it flat forever. Everything costs more for the university. They have favorite professors and staff members leaving because they can't make more money. They also comment on the fear that we will hold flat and then have a massive increase. Moderate increases would be the plan.

Board Member Reports

Myndee Kay Larsen (Alumni)

Alumni are getting involved with the 125th playing “t-bird tag” on social media. They are encouraging Alumni to tag t-birds who have made a difference in their lives on social media and pass it on to their alumni and fellow T-Birds from all over the world. This will bring awareness to SUU celebrating its 125th anniversary. This summer we will be hosting SUU birthday parties for the 125th. We just finished up the Random Acts of T-Birds campaign.

Michael Wankier (Athletics)

Both Myndee Kay and Mike both spoke with Debbie Corum to get an update in athletics. We have 76 student athletes graduating this year. 12 from fall 53 spring and 11 summer in ALL colleges. Those student athletes are a great representation of the university. 56 athletes recognized in their respective Big Sky All-Academic teams. Graduation rate continues to improve. In 2021, 81% of the student athletes graduated. Facilities updates: new turf, re-surface the track, new LED lights in the stadium. Some of these projects will be difficult because of labor, materials, supply chains. New football coach is excited and brings a great energy and is getting the team focused on the right things. Coach Simon has brought in new athletes through the transfer portal and mentoring them to develop students and athletes. This is a positive for us at SUU to attract great talent. Transition to the WAC continues, we will start playing football in the WAC conference this fall.

Marilee Eyre (Education & Head Start)

Marilee first shared about the College of Education and Human Development. Dean Christiansen just completed their accreditation visit on April 13th everything went well. They are looking forward to hearing the status in July. They have also submitted a report for accreditation for the new social work program. The college is experiencing strong growth in all programs, FLHD increased from 188 to 211 students. New social work program is filling up. Elementary Ed growth 347 to 392 students. MEd is grown as well. This summer all education classes will be online. In Head Start, Jennifer Heyborne is the interim administrator and is doing a great job. They had a review and passed it with flying colors, Jen came at a crucial time and is guiding the ship well. Children getting new playgrounds this week as part of a grant which is exciting. Head Start is working with partners at SUU to rebrand and begin a marketing campaign.

President's Report & Campus Updates

The President invited Paula Mitchell and Ryan Paul to share about the History of SUU class they taught this semester. They began organizing the project-based class last summer . There were 16 students and it was a great success. Ryan Paul added that SUU is the only college level class about the history of the institution in the state. Special collections was crucial to this process. It was a teaching space and a research place. The final project was an exhibit that will be in special collections for the next year. Gratifying to see to see these students become friends and build relationships. It was a great way to showcase campus in creative ways.

There was a Back up the Mountain TV special on KUTV last week. There is great momentum from the 125th. Curriculum in the K-12 schools.

Tomorrow is the best day of the year– commencement. We have 2309 graduates. Largest class ever. 39 countries, 1 US territory, 42 states, youngest 16 oldest is 67 and 75 married couples. We have had over 1700 caps and gowns picked up this year. This will be a wonderful and memorable commencement.

Housing availability discussion is ongoing. We don't want this to be a crisis for us. This year, VP Tippets has hired a staff member who tracks inventory of off-campus housing, communicates with landlords and students. Jared said it's an ongoing process. We are estimating being short some beds but are trying our best to help every student find a place.

Stuart Jones said on the enrollment side, we are trying to fill all beds and no more. PIT comparison we were aware of 950 beds available and today we are at 708. Headcount for summer we are up 20% face to face, online is up 40%. We are really doing a push to increase enrollment, online, during the summer. Right now we are down .6% headcount in enrollment. We can be flat or up a little bit and be okay. Let's make sure we can fill every bed. Online in the fall: we are up by 75 students. Most of our focus has been summer, not fall. Another reality with enrollment is seats available in classes. Hiring the faculty we need is a challenge. We don't have

a large adjunct pool in our rural community for face to face students. Myndee Kay Larsen asked if the faculty issue is an SUU issue or general in higher education? Bill Heyborne said the exhaustion is kicking in because faculty are teaching overloads. There are also timing issues with our legislative session and compensation increases aren't known until later in the spring. President Benson said we also need to focus on better retaining our employees and working on culture so we keep our best talent here. We have some challenges ahead of us. We are aware of them and trying to be proactive.

Chair Christiansen updated the group on the presidential search process and next steps for the search committee. He also gave some time to SUU Aviation Executive Director Mike Mower to share a new partnership with SkyWest airlines.

MOTION TO ADJOURN

Motion to adjourn by Jodi Hart Wilson. Vote was unanimous. Meeting adjourned at 2:53 p.m.

MEMORANDUM

Date: June 7, 2022
To: SUU Board of Trustees
From: James Sage, Associate Provost
RE: R401: Master of Science in Nursing (M.S.N.) in Leadership & Administration (final approval)

On behalf of Provost Jon Anderson, Interim Dean Camille Thomas, and our new Dean Tony Oliver, we are submitting for your review and final approval a new Master of Science in Nursing (M.S.N.) in Leadership and Administration.

This proposal was initially shared with the SUU Board of Trustees on March 24, 2022 as a “first read” (information item). The proposal then underwent a peer review process by the Chief Academic Officers (CAOs) within the Utah System of Higher Education (USHE) in April and May. During this time, Interim Dean Camille Thomas remained in close communication with Trustee Sydney Nakken regarding the proposal, the feedback we received, and our responses.

We are now presenting this R401 proposal to the SUU Board of Trustees for a second review and final approval.

This new M.S.N. in Leadership & Administration program builds on our successful programs within the College of Health Sciences and the Department of Nursing. This new degree program addresses important needs of nursing students who already have a Bachelor of Science in Nursing (B.S.N.) and prepares students for professional advancement within healthcare, especially within leadership and administrative roles.

Within Utah and across the nation, there is a shortage of masters-prepared nurses who help provide leadership for the healthcare industry. This 30-credit graduate program is designed to be completed via 100% online delivery and can be marketed regionally and nationally.

As a new degree program, the M.S.N. in Leadership & Administration proposal has completed the peer review process by the Chief Academic Officers (CAOs) within USHE. A copy of the Peer Review Report from the Commissioner’s Office (dated June 1, 2022) is included immediately after this memo and reflects support from the Commissioner’s Office and the CAOs from around the state. In this Peer Review Report, the following was included: “Comments were received from Weber State University, Utah Valley University, the University of Utah, and the Commissioner’s Office. Support for the program was expressed by all institutions.”

As a result of feedback received during the CAO Peer Review process, the attached proposal was amended slightly and includes updated admission requirements and acknowledgment of a similar program at Weber State University. Likewise, based on feedback from our online program manager partners, the name of the proposed program has been updated to include the term “administration” in the title of the program (hence: “Leadership & Administration”). We believe this better reflects the program's goals and better matches student demand in the workplace.

Thank you for considering this new program proposal. Please let us know if you have any questions or concerns.



June 1, 2022

Richard Christiansen, Board of Trustees Chair
c/o Trisha Robertson, Board of Trustees' Secretary
Southern Utah University
351 W University Blvd
Cedar City, UT 84720

Dear Chair Christiansen,

Pursuant to Board of Higher Education Policy R401, 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:

- **Master of Science in Nursing Leadership**

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,

A handwritten signature in black ink, appearing to read "Dave Woolstenhulme", with a stylized flourish at the end.

David R. Woolstenhulme, EdD
Commissioner of Higher Education

CC: Scott L. Wyatt, President – Southern Utah University
Jon Anderson, Provost and Vice President for Academic Affairs

Peer Review Report

Institution: Southern Utah University

Proposed Program: Master of Science in Nursing Leadership

Date: May 26, 2022

In accordance with Utah Board of Education Policy, Southern Utah University's proposal for a Master of Arts degree in Nursing Leadership underwent peer review by members of the academic community within the Utah System of Higher Education (USHE). Comments were received from Weber State University, Utah Valley University, the University of Utah, and the Commissioner's Office. Support for the program was expressed by all institutions. There were some general questions regarding clinical hours and using adjuncts to teach in a graduate program (a practice that is embraced by CCNE, the nursing accreditation agency). SUU was congratulated for working closely with CCNE during the construction phases of this academic program.

USHE chief academic officers at degree-granting institutions discussed the proposal during a meeting held on May 25, 2022. There were no additional questions raised and SUU provided some additional information regarding the need for this degree in industry and in academia. Market demand for this program is very high. The proposal is now ready for action by the Southern Utah University Board of Trustees.

Peer Comments, SUU's Master of Science in Nursing Leadership

Steve Hood

Mar 28, 2022Mar 28 at 4:05pm

Southern Utah University, Masters of Science in Nursing Leadership

As demands for healthcare professionals grows, SUU's college of Health is seeking to introduce this new program in nursing leadership. The program will be the only one of its kind among USHE institutions in the state and will be an online program designed to attract students who are already trained BSN professionals. It is especially good that SUU wants to offer this degree in a specialization that has mostly been the work of for-profit institutions.

It is difficult to know how much labor demand there is for this program because it is specialized and not one that is typically tracked by DWS or the Labor Department. Is there support from hospital data that shows this type of training is in demand and is as welcome as a regular MSN degree as far as providing applicants to fill needs where MSN's are typically hired?

This program would be accredited by CCNE. Usually, nursing accreditors have preapplication processes to go through before a formal application is submitted. What type of contact has been made with CCNE in regards to this program and does accreditation look to be on course?

We are assuming that the \$750 for initial library expenses and \$500 ongoing expenses is for scholarly journals and other periodical additions to the library. Is that correct?

The ten-course program (30 hours) requires the creation of 7 new courses. This is a heavy burden to start a new program. The department has plans to hire one full-time faculty member and a clinical coordinator. The cost for these hires is placed at \$123K. We want to make sure that is a correct figure, as both of these positions are listed as full-time positions and that dollar figure seems low to hire both a faculty member and a full-time staff admin.

We congratulate SUU on what looks like a wonderful addition to their healthcare program.

Steve Hood, OCHE

[Reply](#)[Reply to Comment](#)

James Sage

May 16, 2022May 16 at 5:31pm

Thank you, Steve, for sharing this feedback and asking these questions. Below are SUU's responses to each prompt.

[1] Is there support from hospital data that shows this type of training is in demand and is as welcome as a regular MSN degree as far as providing applicants to fill needs where MSN's are typically hired?

The National Academies of Science, Engineering, and Medicine (NASEM, 2021) publication named *The Future of Nursing 2020-2030: Charting a Path to Achieve Health Equity* highlights the need to increase leadership skills at all levels of nursing practice. This publication by NASEM (2021) stated that:

Nurses can lead teams, promote community health, advocate for systems change and health policy, foster the redesign of nursing education, and advance efforts to achieve health equity. Even so, educational institutions and health systems can better prepare and empower new and practicing nurses... to develop and grow in leadership roles" (p. 275).

Furthermore, the publication by NASEM (2021) reported that nurses need knowledge and skills to be leaders within multidisciplinary teams that include healthcare systems, community-based organization, policy makers, and others focused on improving quality, safety, and health equity.

Therefore, the SUU's MSN in Leadership meets the demands for improving nursing leadership skills. The MSN in Leadership effectively prepares students for careers as a clinical nurse manager, chief nursing officer, director of nursing, nurse administrator, care management coordinator, health director, medical director, assistant nurse manager, quality improvement manager, safety manager, and risk manager.

SUU's Department of Nursing (DON) believes there is a demand from hospitals and healthcare systems, as well as community-based health organizations for more Registered Nurses (RNs) with education and training in leadership. For instance, as of April 5, 2022, there were:

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- 48 Nurse manager positions advertised with University of Utah Health, Hospitals, and Clinicals
 - 60 Nursing leadership positions advertised with Intermountain Healthcare
 - 55 Nurse manager positions advertised with MountainStar Healthcare, and
 - linkedin.com lists 665 Nursing Manager jobs in Utah.

[2] What type of contact has been made with CCNE [Commission on Collegiate Nursing Education] in regards to this program and does accreditation look to be on course?

According to the Commission on Collegiate Nursing Education (CCNE), to start a new degree program, a substantive change notification must be submitted to CCNE no earlier than 90 days prior to implementation or occurrence of the change, but no

later than 90 days after implementation or occurrence of the change. Therefore, once approvals are obtained, the notification will be submitted in November 2022.

Typically, a degree program must have students enrolled for the equivalent of one academic year. However, CCNE will consider an exception to this requirement if the total length of the degree program is less than 18 months and the program provides a compelling rationale for needing an earlier on-site evaluation" (CCNE Procedures for Accreditation of Baccalaureate and Graduate Nursing Programs, pp. 8-9). SUU's proposed program is indeed less than 18 months and therefore is eligible for an earlier on-site evaluation.

According to feedback received from CCNE's Daniel Michalski (Director of Accreditation Services), because SUU's MSN in Leadership program length is less than 18 months, the proposed program plans to host an on-site evaluation prior to completion by the first cohort of students. The rationale for this will be included in SUU's letter of intent submitted to CCNE in November 2022. The letter of intent and new program fee are due no later than one year prior to hosting the evaluation. Therefore, in anticipation of a Fall 2023 evaluation (August - December), the deadline is November 30, 2022. After all other approvals are obtained for the proposed program, the effective date of accreditation from CCNE will be the first day of the on-site evaluation.

[3] We are assuming that the \$750 for initial library expenses and \$500 ongoing expenses is for scholarly journals and other periodical additions to the library. Is that correct?

Yes, that is correct. According to the Department of Nursing's academic library liaison (Dr. Anne Diekema), the \$750 is for the acquisition of books and ebooks to ensure relevant materials related to nursing leadership. The annual increase of \$500 will be for other relevant books and ebooks. SUU's current health science database subscriptions will provide sufficient coverage for scholarly peer-reviewed articles (email correspondence, 4/6/2022).

[4] The department has plans to hire one full-time faculty member and a clinical coordinator. The cost for these hires is placed at \$123K. We want to make sure that is a correct figure, as both of these positions are listed as full-time positions and that dollar figure seems low to hire both a faculty member and a full-time staff admin?

SUU's Department of Nursing (DON) has calculated the workload required to develop and implement the proposed MSN in Leadership. A course carousel (rotation) has been created to ensure the required 30 credit hours for the proposed program are distributed efficiently to ensure students can progress through the program. The maximum credit hours that the Department of Nursing will teach per semester in support of the proposed program is 24 credits when the program is fully implemented (Fall 2023). Therefore, the Department of Nursing has planned for one (1) full-time faculty who will teach 12-15 credits each semester; the remaining 9-12 credits each semester will be taught by qualified adjunct instructors who have relevant professional experience and contribute in important ways to the program.

The new faculty position includes both salary + benefits (\$102,204) and aligns with the national standard for such a position. This particular figure was determined by citing both the program's Classification of Instructional Program (CIP) code and the relevant salary data provided by the College and University Professional Association (CUPA). Using the CUPA median for the CIP code and hiring rank, SUU identified peer universities to ensure that salary estimates were comparable for similar institutions and similar programs.

SUU has already hired a new full-time faculty member to help fill this instructional need, and she will join the Department of Nursing in Fall 2022. It is anticipated that the Department of Nursing will hire another full-time faculty for Spring 2023.

The R401 proposal includes a full-time Administrative Assistant position that will work with all online programs. Therefore, the expense of a full-time Administrative Assistant will be split evenly between the proposed MSN in Leadership and the existing RN-to-BSN programs. This R401 only requested \$21,300 for an Administrative Assistant (50% of the salary + benefits). The total salaries + benefits for this Administrative Assistant will be \$42,600, which is comparable to other Admin II positions at SUU.

We appreciate your thoughtful and constructive comments and questions, Steve. This feedback helps us to ensure we are designing the best program we can to meet the important needs of our students.

--james

James Sage, Ph.D.
Associate Provost, Southern Utah University

[Reply](#)[Reply to Comment](#)

cao@utah.edu

Apr 8, 2022 Apr 8 at 1:38pm

Thank you for the opportunity to review this proposal.

First, a couple of comments commending the development of this new MS in Nursing Leadership: 1) as it recognizes a need in Southern Utah, there are no graduate programs in Nursing Leadership currently, and, 2) Under Similar Programs, the discussion on collaboration with the Business school. This seems to be an important, positive collaboration.

There several concerns with this program proposal, in response to the 4 questions. These are listed are below in red.

Please let me know if you have any additional questions.

Thank you, Gillian

Gillian Tufts DNP, FNP-BC
Associate Professor of Nursing (Clinical)

Assistant Dean of MS and DNP Programs

Faculty, Primary Care Nurse Practitioner Track

University of Utah College of Nursing

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?

There are concerns here:

- Under Program Proposal, Program Description and Program Evaluation, Program assessment: “Learning objectives for courses are based on the AACN (2011) Essentials for Master's Education in Nursing”. The American Association of Colleges of Nursing (AACN) Essentials, which outlines the necessary curriculum content and expected competencies of graduates from nursing programs, were updated in Spring 2021 (<https://www.aacnnursing.org/AACN-Essentials> (Links to an external site.)). The new Essentials should guide the development of any new Nursing program. Specifically, for a new Master’s program, the advanced-level competencies and subcompetencies included in the Essentials should be used. Not only important for curriculum development but also for future accreditation.

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.

There are several concerns here:

- The narrative and program of study does not appear to include the required clinical hours. The new AACN Essentials requires a minimum of 500 hours as clinical experience in all advanced level nursing programs (either as direct and indirect care experiences). Under Institutional Readiness, Staff: while clinical coordinator and clinical experiences are mentioned, there is no mention of the 500 clinical hours required for a Masters in Nursing. In addition, no mention of potential clinical sites is included, an important area to consider before admitting students. Also, no mention of clinical hours are included or, at least it is not clear, in the program of study. The requirement of 500 direct or indirect clinical hours are part of the new AACN Essentials.
 - In our own Master’s program, the students currently complete clinical hours during there final Capstone project course. There is where students are in a health care setting providing indirect patient care through involvement in an

education or quality improvement project. Our student currently complete 120 clinical hours. Over the next year, we plan to revise this to meet the new 500 hour requirement.

- In our Post-Masters to DNP program, we developed a course for the students to meet the clinical hour requirement. NURS 7910 is a clinical course set-up as an independent study where students spend time in direct or indirect care experiences.
- Additionally, our Post-Masters to DNP Organization Leadership students have clinical hours as part of 2 didactic courses (3 credits total: 2 credits lecture, 1 credit clinical hour). Here the faculty of the course works with our Contracts and Clinical Placements Manager to secure clinical sites for students. Although these examples are in the DNP program, this provides an examples of how we support our students in meeting the clinical hour requirement.

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

There are several concerns here:

- To be clear that the advisors in the program are in the nursing school. Under student advisement the proposal states: "All students, however, will be advised by SUU online advisors." To clarify this is within the SUU's Department of Nursing.
- Under Expensive Narrative, the plan appears to be dependent on adjunct faculty and overload pay for full-time faculty teaching. This is concerning in terms of quality and sustainability.
- Also, is there a plan in place to obtain the needed preceptors to meet the clinical hour requirement.
- Although the programs of study has students completing the degree in 1 year, the first 2 semesters include 12 credits each. This is a heavy load in graduate school, where full-time is considered 9 credits. Would want to know if a part-time option available.
 - The University of Utah Master's program of study semester maximum is 10 credits currently. We recognize many students continue to work during their time as a student, making the program of study doable.
- One area that was not clear is about who and what the role of Online Program Management (OPM) company will be.
 - One reference to the OPM was positive, including the need for this degree: "According to information provided by the OPM contractors demand for a masters programs in Nursing Administration scores in the top 28 nationwide for success potential".
 - However, an earlier comment, under Program Rationale, the following was included and was a little confusing: "The request will partially meet the

obligation for establishing MSN programs in contract with the online platform management (OPM) contractor. The National Academies of Sciences, Engineering, and Medicine (NAEM, 2021) Future of Nursing 2020-2030 highlights the need to increase leadership skills at all levels of nursing practice ...” It’s not clear what the role of OPM company is and will be. For example, will they be involved in developing the curriculum or are they involved in marketing the new program. Is this a plan in place for hiring the needed faculty?

- Another question is whether this Masters’s program is being created in response to the contract now in place with the OPM. The narrative in the Needs Assessment, Program rationale, was concerning for this, stemming from not including the new AACN essentials in guiding the program development and the lack of clinical hours included in the narrative and program of study. The proposal felt a little rushed.

Are there any other concerns not addressed above?

Yes, there are additional concerns:

- Under III, Needs Assessment, Program Rationale: States that currently there is no other USHE Nursing Leadership. Weber State has an online MS program that include Nursing Leadership

- - “Master of Science in Nursing (MSN) program for professional advancement and nursing leadership in academia and healthcare organizations. The accredited program offers two leadership role specialties; Nurse Educator and Nurse Executive. Graduate students will experience diverse and evidence-based learning opportunities from highly qualified graduate faculty, culminating in a community-based residency experience in nursing clinical, academia, or administrative leadership.” <https://weber.edu/Nursing/MSN.html> (Links to an external site.)
 - Under “Collaboration with and Impact on Other USHE Institutions”. No mention of the: University of Utah, College of Nursing MS-DNP Program with Organizational-Leadership option (<https://nursing.utah.edu/programs/graduate/dnp/specialty-tracks/ms-dnp> (Links to an external site.)). Although this is a DNP degree, this is an advanced nursing degree with a leadership focus.

[Reply](#)[Reply to Comment](#)

James Sage

May 16, 2022 May 16 at 5:37pm

Thank you for sharing this feedback. Below, we have provided detailed responses to the feedback provided. We believe that our responses include detailed explanations and clarification to ensure the proposed program is ready to move forward for approval from SUU’s Board of Trustees.

[I] SUU Response to the feedback regarding the AACN (2011) *Essentials*

Thank you for sharing this feedback. However, we believe the concern is misplaced.

SUU's Department of Nursing is aware of the updated AACN (2021) *The Essentials: Core Competencies for Professional Nursing Education*. The decision to use the AACN (2011) *Essentials for Master's Education in Nursing* is based on the **current** Commission on Collegiate Nursing Education (CCNE, 2018) *Standards for Accreditation of Baccalaureate and Graduate Nursing Programs*, which refer to the AACN (2011) *Essentials*.

Per the current CCNE (2018) *Standards* "I-B. The mission, goals, and expected program outcomes are consistent with relevant professional nursing standards and guidelines for the preparation of nursing professionals...The *Essentials of Master's Education in Nursing* (AACN, 2011)" (p. 6).

Information received directly from Dr. Daniel Michalski (Director of Accreditation Services for CCNE) outlines the current CCNE *Standards for Accreditation of Baccalaureate and Graduate Nursing Program*

The 2018 CCNE *Standards* continue to require the *Essentials* documents referenced therein. Later this spring, CCNE will commence the process to revise the 2018 standards which will most likely go into effect on January 1, 2024 after a period of review and opportunities for public comment. Programs hosting on-site evaluation in 2023 will be expected to demonstrate compliance with the 2018 *Standards* and in your situation, demonstrate incorporation of the 2011 Master's *Essentials* (personal email communication, 4/12/2022).

Likewise, in an email communication from the Commission on Collegiate Nursing Education (CCNE) received on May 10, 2022 from Elizabeth Ritt (Chair of the Board of Commissioners), she states clearly:

Nursing programs that are working toward incorporation of the new AACN *Essentials* and/or the revised NTF *Standards* are welcome to move forward. CCNE is neither precluding programs from incorporating these updated professional nursing standards and guidelines nor mandating incorporation.

Please note that the 2018 CCNE *Standards* will remain in effect at least through December 31, 2023. Any nursing program that is submitting a report to CCNE or hosting a CCNE on-site evaluation in 2022 or 2023 must address its compliance with the 2018 CCNE *Standards*, which identify the previous editions of the *Essentials* and the 2016 NTF *Criteria for Evaluation of Nurse Practitioner Programs*.

Based on these considerations and official guidance from CCNE, the program proposed by SUU is in fact using the appropriate set of competencies, which are the AACN (2011) *Essentials*.

[II][a] SUU's response to the feedback about clinical hours

Thank you for your feedback about the quality of the proposed program and the future resources needed. In addition, we appreciate the examples provided from the UofU's existing program; however, it is difficult to compare the UofU's face-to-face DNP program requirements with the proposed online MSN in Leadership requirements. That being said, in what follows we hope to further clarify the resources available for the proposed program to provide context for an online program.

Thank you for the feedback regarding the proposed MSN in Leadership program and the new 2021 AACN *Essentials*, which requires a minimum of 500 hours of clinical experience. However, this requirement has not been adopted by CCNE and is not currently required for new programs seeking accreditation. In fact, regarding the 2021 AACN *Essentials*, there is a considerable amount of discussion among graduate nursing faculty nationally as to whether CCNE will adopt the 500 hour minimum for non-clinical Masters in Nursing Programs.

[Note: this topic of clinical hours is addressed below and includes direct correspondence from CCNE leaders clarifying that SUU's proposed MSN in Leadership program has in fact been designed according to the appropriate set of guidelines.]

SUU's Department of Nursing designed the proposed MSN in Leadership program based on the current CCNE (2018) *Standards* which do not have a minimum number of clinical hours for non-clinical Masters in Nursing. Yet, clinical hours are important and these have been incorporated in NURS 6520 Leadership Capstone. If CCNE updates its *Standards* and requires 500 hours of clinical practice, then SUU's Department of Nursing will either adjust the MSN in Leadership program to meet those new accreditation requirements, or pursue accreditation under the Accreditation Commission for Education in Nursing (ACEN).

[II][b] SUU's response to the feedback about clinical sites

Students enrolled in the proposed MSN in Leadership program will be required to develop preceptor agreements with clinical sites for their NURS 6520 Leadership Capstone. This is similar to the existing RN-to-BSN program where students must develop preceptor agreements with clinical sites for their Capstone. CCNE guidelines do not prohibit "students from identifying their own clinical practice experiences" (CCNE, 2016, Clinical Practice Experience FAQs). Throughout the proposed program, students will receive guidance regarding clinical hours and clinical sites. Finally, revenue from the program will allow the Department of Nursing to hire a Clinical Coordinator for all online programs to support students in identifying and arranging clinical sites, if necessary.

[II][c] SUU's response to the comments about the University of Utah's Post-Masters to DNP Organization Leadership program

The examples provided about the University of Utah's MSN and DNP programs are from well established programs located in a large urban university where clinical opportunities are much easier for the University to develop.

SUU's Department of Nursing believes that the proposed online MSN in Leadership program is importantly distinct from the UofU's program and that students in the proposed program will be able to successfully develop and complete MSN in Leadership Capstone projects that meet the outcomes outlined in the AACN (2011) *Essentials for Master's in Nursing Education* (AACN, 2011, p. 29), including the following:

-
- Lead change to improve quality care outcomes,
 - Advance a culture of excellence through lifelong learning
 - Build and lead collaborative interprofessional care teams,
 - Navigate and integrate care services across the healthcare system,
 - Design innovative nursing practices, and
 - Translate evidence into practice.

[III][a] SUU's response to the feedback regarding academic advisement

SUU's Online Advising is centralized, and the Department of Nursing already has an assigned advisor. As enrollment in the proposed program grows and new needs are identified, additional revenue will support the hiring of additional academic advisors assigned to the program.

[III][b] SUU's response to the feedback regarding the expense narrative

Many colleges and universities rely on qualified adjunct instructors and overload pay for full-time faculty. For the proposed program, SUU anticipates using qualified adjunct instructors in strategic ways, especially those who have relevant professional experience that will contribute positively to student outcomes. There is a plan in place to hire full-time faculty to support the MSN in Leadership. According to the curriculum carousel (course rotation), we will need two full-time faculty lines to support the MSN in Leadership, which includes summer instruction. The Department of Nursing has already hired one new full-time faculty member (starting in Fall 2022); therefore, as a contingency and until enrollment in the program begins to generate revenue beyond cost, we intend on utilizing qualified adjuncts to minimize faculty load during the fall and spring semesters, and employ full-time faculty on an overload basis to cover instruction over the summer.

The CCNE (2018) *Standards* list adjunct faculty members under Standard II-E among those faculty who contribute to instruction for accredited nursing programs. The Standards state that: "The faculty (full-time, part-time, adjunct, tenured, non-tenured, or other) for each degree and post-graduate APRN certificate program are sufficient in number and qualifications to achieve the mission, goals, and expected program outcomes" (p. 11). SUU's Department of Nursing will abide by these guidelines and ensure whenever and wherever adjunct faculty are hired, they meet the academic qualifications for instruction and that they bring relevant professional experience.

[III][c] SUU's response to the feedback about preceptors and clinical placements

The final MSN in Leadership course, NURS 6520 Leadership Capstone, is under development. The faculty developing the course will develop policies for clinical preceptors as part of this course. The existing RN-to-BSN program uses the same approach for its Leadership Capstone for RN-to-BSN students.

[III][d] SUU's response to the feedback regarding credit loads for full-time graduate students

According to federal financial aid eligibility parameters, graduate students are considered full-time if they are registered for a minimum of six (6) semester hours of coursework. Federal guidelines recognize anything over six (6) credits per semester as full-time. However, federal guidelines merely establish minimums and are not intended to be guides for specific graduate programs.

At SUU, in particular, university policy #6.26 (Credit Hour Loads) define a full-time graduate student as being enrolled in 6-12 credits per semester, depending on the program. For students enrolled in the proposed MSN in Leadership program who wish to enroll for 12 credits per semester, a Department of Nursing faculty advisor will work with them to ensure they select an appropriate course load for their particular circumstances.

[III][e] SUU's response to the feedback regarding part-time student options

Based on what we have learned from the existing RN-to-BSN program, we anticipate that a majority of students in the proposed MSN in Leadership program will be part-time, taking one class per 7-week (half-semester) session (for a total of 6 credits per semester, which is considered full-time for federal financial aid purposes). Therefore, the curriculum carousel (course rotation) ensures that part-time students can complete the sequence of courses. Moreover, the program was designed to ensure that all courses were 3 credits each, so part-time students would still be eligible for federal financial aid.

[III][f] SUU's response to the feedback regarding the role of the OPM

SUU's existing contract with an online program manager (OPM) outlines a specific set of shared responsibilities. For example, the OPM assists with market analysis, marketing, and recruitment.

SUU's Department of Nursing faculty will develop the curriculum with support from the Office of Online Teaching and Learning (OTL). This will ensure that all new courses are developed according to CCNE's learning outcomes and competencies and that the online course design reflects national best practices, including Quality Matters. Likewise, it is the Department of Nursing that will seek and maintain required accreditation from CCNE.

[III][g] SUU's response to the feedback regarding the need to hire additional faculty

SUU's Department of Nursing has hired three new full-time faculty members since 2019, and a fourth full-time faculty member has been hired to begin in Fall 2022 to

help cover instructional needs in the existing undergraduate program and the proposed MSN program. The result of these recent hires brings the total number of Department of Nursing full-time faculty to 14 who teach across existing undergraduate programs and the proposed graduate program (e.g., pre-licensure BSN, online RN to BSN, and proposed MSN in Leadership).

Six current faculty members have expressed interest in developing and teaching in the proposed MSN program, and the Department of Nursing has in place a sufficient number of nursing faculty to begin the proposed MSN in Leadership program. In addition, SUU administration has agreed to add a half-time Administrative Assistant position to assist the Department of Nursing with managing the workload anticipated with the proposed MSN in Leadership program.

As with any new program the resources required to successfully develop and deliver the program is dependent on the number of students who enroll in the new program, and the Department of Nursing does not expect enrollment to exceed the Department's capacity or resources until the program is accredited in year two. In addition, a curriculum carousel (course rotation) has been thoughtfully prepared and includes enrollment growth projections for the proposed program. In other words, there is a detailed plan in place to hire needed faculty as the program grows.

[III][h] SUU's response to the feedback about the program being created in response to a contract with an online program manager (OPM)

At the time the OPM contract was signed in 2019, the proposed MSN in Leadership program was included within a group of potential future programs that would be included in the partnership. SUU is working toward developing an appropriate suite of online programs to be part of this contract. The proposed MSN in Leadership is one such program.

[IV] SUU's response to the feedback regarding other USHE Nursing Leadership Programs

We apologize for not including Weber State University's online MS program with Nurse Educator and Nurse Executive tracks. However, there are some distinct differences between the WSU Nurse Executive track and the proposed MSN in Leadership at SUU. For example, the MSN in Leadership at SUU will focus on increasing leadership skills at all levels of nursing practice. In addition, we believe the partnership between SUU's Department of Nursing and SUU's established Master of Business Administration (MBA) program will provide interprofessional learning opportunities for graduate nursing and business students not provided by Weber State University's existing Executive track.

Again, we apologize for not including the University of Utah's MS-DNP program with the organizational-leadership option under the R401 discussion on "Collaboration with and Impact on Other USHE Institutions." The University of Utah's Post-MS to DNP program in Leadership "is for Master's prepared nurses to obtain the Doctor of Nursing Practice," and we do not believe this was similar to the MSN in Leadership program proposed by SUU. We believe the development of an MSN in Leadership at

SUU would benefit both the University of Utah DNP with the organizational-leadership option, as well as WSU's DNP program, by preparing nurses for entry into post-masters degree programs. Finally, we believe Utah nurses who are interested in a MSN degree should have a number of programs to choose from to ensure Utah's nursing workforce is prepared to meet current and future healthcare challenges.

Thank you for sharing this feedback. We believe that the details outlined above provide responses to each topic that has been raised.

--james

James Sage, Ph.D.
Associate Provost, Southern Utah University

[Reply](#)[Reply to Comment](#)

Sabine Berlin

May 16, 2022 May 16 at 4:51pm

The proposal was shared with faculty in the Department of Nursing at UVU. The following feedback was provided by Marianne Craven, PHD, RN.

- In the program description it states a student with a baccalaureate degree – does that need to be a baccalaureate degree in nursing or any baccalaureate degree? Could an associate degree RN with a baccalaureate degree in English apply for example? This is discussed in the admission requirements section so I don't know if it should also be addressed in the program description or not.
- Uses great national resources for the curriculum.
- I like the collaboration with business and health care administration that is a plus for this program.
- It meets the school's and profession's strategic plans.
- It appears they do not have the faculty needed to support the program, but they do have plans in place to obtain faculty if approved. I wonder if something needs to be added about faculty preparedness for online teaching as well as preparation in their teaching specialty (for accreditation purposes).
- Does the leadership capstone include a project? I think this would be something to support rigor of the program at the graduate level. May want to add a three credit project to the last semester and bring the total credits to 33 (and last semester to nine credits which is considered full-time in graduate programs).
- Is there clinical experiences other than in the capstone course? This is unclear in the proposal.
- What courses would be interprofessional with business/health care administration? How would these impact the faculty workload for this program – that is unclear in the proposal.

- Would students be prepared to sit for the AONL leadership certification exam? Is that an expectation? That is also unclear but may not be required for the proposal.

[Reply](#)[Reply to Comment](#)

James Sage

May 19, 2022 May 19 at 10:49am

Many thanks to UVU for providing this feedback. Very helpful! Below are SUU's responses.

- **Admission Requirement:** The SUU Department of Nursing MSN faculty have adjusted the admission requirements for the MSN in Leadership as follows -
 2.
 1. A baccalaureate degree in nursing from a nationally accredited nursing program (e.g., ACEN or CCNE).
 2. An active, unrestricted Registered Nursing License to practice in the United States.
 3. Minimum GPA of 2.5 in their BSN program.
 4. Completed Graduate Application
- **National Resources:** Thank you! Yes, we developed the program based on national standards.
- **Collaboration with Business:** We agree! The collaboration with the SUU School of Business on the topic of health care administration is a particularly exciting and rewarding partnership.
- **Strategic Plan Alignment:** Agreed: the development of this leadership program aligns with central aims of the department, the college, and the profession at large.
- **Faculty Needs & Preparation:** The SUU Department of Nursing has hired a new faculty member who will begin teaching in fall 2022. The faculty members who have agreed to develop and teach online MSN in Leadership courses all have education and experience which qualifies them to teach MSN courses. All of the faculty members have experience teaching online courses as part of the existing online RN-to-BSN program. The SUU Center for Teaching Innovation provides support and professional development for SUU faculty teaching online courses, including a comprehensive review based on the national standards created by Quality Matters. Finally, faculty members who will be teaching in the MSN program are encouraged to consider additional specialty certification (e.g., Certified Nurse Manager and Leader Certification) to improve their ability to teach MSN courses.
- **Leadership Capstone:** Within the proposed MSN program, the Leadership Capstone course (i.e., NURS 6520) is a 135 hour clinical course that provides students with an opportunity to apply leadership skills and evidence-based practice in a variety of nursing settings. Students in this course apply the Master of Science in Nursing (MSN) curriculum experience by translating knowledge into

practice through participation in professional activities and the development of a culminating project. Students will develop, implement, and evaluate an evidence-based project. Students will evaluate the success of their capstone project by analyzing results, using the key performance indicators and metrics that were identified while planning the evaluation phase. Students will present the results of the capstone project in a final report and presentation with a focus on lessons learned throughout each of the phases: initiation, planning, implementation, and evaluation. This is the final course in the MSN Leadership program.

- **Clinical Experiences:** The MSN courses are under development, and some of the courses may have a clinical component.
- **Interprofessional Courses with Business:** The MSN in Leadership curriculum requires students to complete three online MBA courses - BA 6000 Business Foundations, MGMT 6100 Managing People and Organizations, and HCA 6100 Management Principles for Healthcare Administration. The MBA program does not expect the addition of MSN students to affect the faculty workload for these courses (as enrollments grow, adjustments are made according to a detailed financial model to ensure increased student demand is met with increased capacity).
- **Preparation for the AONL Leadership Certification Exam:** Content in the MSN in Leadership program prepares students for the AONL Certified Nurse Manager and Leader Certification (CNML) exam. Eligibility requirements for the CNML include - A valid and unrestricted license as a registered nurse; a baccalaureate in nursing degree higher, one year of experience in a nurse manager/leader role. There is no expectation that students who graduate from the MSN in Leadership will be required to take the exam, but it will be encouraged for students who meet the eligibility requirements.

Once again, thank you for your thoughtful and constructive feedback.

--james

James Sage, Ph.D.
Associate Provost
Southern Utah University

[Reply](#)[Reply to Comment](#)

Eric Amsel

May 18, 2022May 18 at 2:50pm

The proposal was sent to Dr. Sally Cantwell, Chair, Annie Taylor Dee School of Nursing at Weber State. She is supportive of the proposal, affirming that the curriculum meets the required national and accreditation standards and that the resources are sufficient. As noted in response to the University of Utah, SUU has acknowledged WSU's online MSN Leadership program, titled MSN-Nurse Executive, and recognizes the differences between the two programs. Dr. Cantwell further

notes that enrollment estimates of the SUU program may be high, given WSU's experience with the MSN Nurse Executive program, which has never had a cohort of over 20 students in a given year.

[Reply](#)[Reply to Comment](#)

James Sage

May 19, 2022 May 19 at 2:21 PM

Thank you for sharing this feedback, Eric. We appreciate WSU's comments and input. In terms of the specific feedback provided, SUU's responses are included below:

Regarding the curriculum, accreditation standards, and resources: thank you for your overall support, for affirming SUU's proposal, and for validating the proposed curriculum and its alignment with national accreditation standards. In terms of resources, especially faculty resources, we have a plan developed with administration to ensure sufficient new faculty lines are added as enrollment grows.

Regarding WSU's online MSN-Nurse Executive program: thanks for your patience in terms of our omission of WSU's program from our original proposal. We appreciate hearing directly from WSU that your existing MSN program is in fact different from SUU's proposed program. That is very reassuring, especially coming directly from WSU.

Regarding enrollment projections: enrollment projections are based on close collaboration with our OPM partner; they have developed a forecast for nation-wide demand and will assist with marketing and promotion of the proposed program in key locations and through targeted marketing efforts.

Once again, thank you again for sharing this feedback in the spirit of improving the proposal and assuring a successful implementation.

James Sage

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

Institution Submitting Request: Southern Utah University

Proposed Program Title: Master of Science in Nursing (MSN) Leadership and Administration (MSN Leadership & Administration)

Are There New Emphases: Yes No

Names of New Emphases (Separated by Commas):

Sponsoring School, College, or Division: College of Health Sciences

Sponsoring Academic Department(s) or Unit(s): Department of Nursing

Classification of Instructional Program Code¹ : 51.3802

Min/Max Credit Hours Required of Full Program: 30 / 30

Proposed Beginning Term²: Fall 2022

Institutional Board of Trustees' Approval Date:

Program Type (check all that apply):

<input 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 ³ :)
<input type="checkbox"/>	Other (specify award type ³ :)
<input type="checkbox"/>	(BA) Bachelor of Arts Degree
<input type="checkbox"/>	(BS) Bachelor of Science Degree
<input type="checkbox"/>	(BAS) Bachelor of Applied Science Degree
<input type="checkbox"/>	Specialized Bachelor Degree (specify award type ³ :)
<input type="checkbox"/>	Other (specify award type ³ :)
<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 ³ :)
<input checked="" type="checkbox"/>	Other (specify award type ³ : Master of Science in Nursing (MSN))
<input type="checkbox"/>	Doctoral Degree (specify award type ³ :)
<input type="checkbox"/>	K-12 School Personnel Program
<input type="checkbox"/>	Out of Service Area Delivery Program <input type="checkbox"/> Attached MOU
<input type="checkbox"/>	Out of Mission Program
<input type="checkbox"/>	NEW Professional School

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

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

³ Please indicate award such as APE, BFA, MBA, MEd, EdD, JD

Changes to Existing Programs or Administrative Units Required (check all that apply, if any):

<input type="checkbox"/>	Program Restructure with or without Consolidation
<input type="checkbox"/>	Emphases transfer from another program or academic unit
<input type="checkbox"/>	Name Change of Existing Program or Academic Unit
<input type="checkbox"/>	Program transfer to a different academic unit
<input type="checkbox"/>	Suspension or discontinuation of a unit or program
<input type="checkbox"/>	Reinstatement of a previously suspended/discontinued program or administrative unit
<input type="checkbox"/>	Other

Chief Academic Officer (or Designee) Signature:

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

Jon Anderson, Provost _____ Date:

I understand that checking this box constitutes my legal signature.

Utah System of Higher Education Program Description - Full Template

Section I: The Request

Southern Utah University requests approval to offer the following Master's degree(s): Master of Science in Nursing (MSN) Leadership and Administration (MSN Leadership & Administration) effective Fall 2022. This program was approved by the institutional Board of Trustees on .

Section II: Program Proposal

Program Description

Present a complete, formal program description.

The Master of Science in Nursing (MSN) Leadership and Administration (MSN Leadership & Administration) program is designed for registered nurses with a bachelor's degree interested in learning and developing leadership skills to advance health equity, promote population health outcomes, and help organizations and governments improve quality and value in healthcare. The 30-credit program includes courses in leadership theory, leadership ethics, evidence-based practice in leadership, innovation and informatics, health policy for nurse leaders, and practice-based clinical experience. The proposed MSN Leadership program meets the requirements established by the Commission on Collegiate Nursing Education (CCNE) Standards for Accreditation (2018) and the American Association of Colleges of Nursing Essentials of Master's Education in Nursing (AACN, 2011), and the American Organization for Nursing Leadership Nurse Executives Competencies for Population Health (AONL, 2015).

Consistency with Institutional Mission

Explain how the program is consistent with the institution's Regents-approved mission, roles, and goals (see mission and roles at higheredutah.org/policies/policy312) or, for "out of mission" program requests, the rationale for the request.

The proposed MSN Leadership & Administration program is consistent with Southern Utah University's Mission of "a dynamic teaching and learning community that engages students in experiential education, leading to personal growth, civic responsibility, and professional excellence." Also, the MSN Leadership & Administration aligns with SUU's role as a Regional University that "provides career and technical education, undergraduate associate and baccalaureate programs, and select master's degree programs to fill regional or state workforce demands" (Utah System of Higher Education, 2020). Finally, the MSN Leadership & Administration degree would also prepare registered nurses for work as Medical and Health Service Managers, rated a five-star occupation by the Utah Department of Workforce Services.

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 College of Health Sciences has requested the Department of Nursing (DON) develop an online MSN Leadership & Administration program at Southern Utah University. The request will partially meet the obligation for establishing MSN programs in contract with the online platform management (OPM) contractor. The National Academies of Sciences, Engineering, and Medicine (NASEM, 2021) Future of Nursing 2020-2030 highlights the need to increase leadership skills at all levels of nursing practice:

"Nurses can lead teams, promote community health, advocate for systems change and health policy, foster the redesign of nursing education, and advance efforts to achieve health equity. Even so, educational institutions and health systems can better prepare and empower new and practicing nurses, ... to develop and grow in leadership roles (p. 275)."

Currently, there is no other USHE school offering an Master of Science in Nursing in Nursing Leadership program.

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) and the Occupation Outlook Handbook (www.bls.gov/oco).

While it is difficult to project the labor market demand for an MSN Leadership & Administration, the Utah Department of Workforce Services gives Medical and Health Services Managers five stars - the most robust employment outlook and high wages. Moreover, the U.S. Bureau of Labor Statistics Occupational Outlook Handbook (2021) projects a 32% increase in the need for Medical and Health Service Managers from 2020-2030. Gray Associates has ranked Nursing Administration in the top 10 graduate programs in high demand based on student demand, employment opportunities, strategic fit, and competitive intensity.

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.

According to information provided by the OPM contractors demand for a masters programs in Nursing Administration scores in the top 28 nationwide for success potential (Gray Associates Program Evaluation Systems, 2021).

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)?

The following Intermountain Region Universities currently offer MSN Leadership degree:

- * Weber State University - MSN - Nurse Educator Emphasis and Nurse Executive Emphasis
- * Arizona University - MSN focused on practices and principles of leadership
- * Capella University - MSN in Nursing Leadership and Administration
- * Regis University - Nursing: Leadership in Health Care Systems
- * University of Wyoming - MS Nurse Leader Concentration
- * Western Governors University - Master of Science Nursing Leadership and Management

The MSN Leadership & Administration program differs from other programs. It combines graduate nursing leadership courses with online courses from the Dixie L. Levitt School of Business Master of Business Administration and Health Care Administration programs. Students enrolled in the MSN Leadership & Administration will have opportunities to learn and interact with graduate students from the MBA/HCA program to increase interprofessional understanding and competence in health care leadership and administration.

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 higher.ed.utah.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 MSN Leadership & Administration is unlikely to impact other USHE institutions based on their current offerings. Weber State University and the University of Utah have Post-Masters to DNP in Leadership, but the proposed MSN Leadership & Administration at SUU is not expected to impact enrollment in these DNP programs. There are no plans to collaborate with other USHE institutions as part of the MSN Leadership & Administration.

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.

No external consultants were involved in the development of the proposed program. SUU has Commission on Collegiate Nursing Education (CCNE)-accredited baccalaureate programs (e.g., pre-licensure BSN, RN to BSN, and Health Profession to BSN). The DON will be required to submit a letter of intent to request an accreditation review for the new MSN Leadership program. There will be a new program fee of \$2,000. In addition, the new MSN Leadership & Administration will have to complete a CCNE accreditation review to assesses whether the program meets the standards and complies with standards for master's in nursing programs. The CCNE accreditation review includes a self-study prior to an on-site evaluation. The on-site evaluation is scheduled a minimum of 12 months in advance. The cost for the evaluation in FY2022 is \$1,750.

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.

Students enrolled in the MSN Leadership & Administration program must maintain a semester grade point average of B- (GPA 2.70 on a 4.0 scale) and no failing courses in order to progress in, and graduate from, the MSN program. Students must successfully complete 30 credits to graduate.

Admission Requirements

List admission requirements specific to the proposed program.

Requirements for students to enroll in the MSN Leadership & Administration program include:

1. A baccalaureate degree in nursing from a nationally-accredited nursing program (e.g., ACEN or CCNE).
2. An active, unrestricted Registered Nursing License to practice in the United States (e.g., State RN License).
3. Minimum GPA of 2.5 in their BSN program.
4. Completed Graduate Application

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?

New organizational structures will be needed to deliver the program. Developing and implementing an online MSN Leadership & Administration program will require additional staff and faculty, including a Graduate Program Director. The Department of Nursing (DON) has already received one new faculty line to support the MSN Leadership & Administration program. However, as the program grows and multiple admission points are added, additional full-time faculty lines and a clinical coordinator will be needed.

Faculty

Describe faculty development activities that will support this program. Will existing faculty/instructions, 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.

The CCNE Standards for Accreditation require faculty to be “academically prepared for the areas in which they teach. Academic preparation of faculty includes degree specialization, specialty coursework, or other preparation sufficient to address the major concepts included in courses they teach” (CCNE, 2018, p. 11). Therefore, additional faculty with graduate teaching experience and experience in leadership needs to be recruited for the MSN Leadership & Administration program, especially as the program grows and additional admission points are added.

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.

As the program grows and the need for additional clinical sites increases, a clinical coordinator for the online programs will be needed. A clinical coordinator will assist online nursing students for the MSN Leadership & Administration and the existing RN to BSN program to complete their clinical requirements. An online clinical coordinator position will be responsible for managing the clinical experiences for online students (e.g., tracking requirements, communicating with students and facilities, managing contracts with facilities, organizing preceptors), as well as supporting the administration of the online programs (e.g., liaison with online admission and advising).

Student Advisement

Describe how students in the proposed program will be advised.

Online nursing students enrolling in the MSN Leadership & Administration program will be recruited by SUU and an OPM. All students, however, will be advised by SUU online advisors.

Library and Information Resources

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

The SUU Library needs a total one-time budget increase of \$750, and \$500 in ongoing funding for the maintenance of collections in nursing leadership, pharmacology, and pathology to support the new MSN Leadership & Administration (see attached Library letter).

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.

Graduates of the MSN Leadership & Administration program will be prepared to

- lead teams, promote community health
- advocate for systems change and health policy, foster the redesign of nursing education,
- advance efforts to achieve health equity

- work with collaborative multisector partnerships to address population health disparities,
- understand how to effect change in organizations and communities, and
- promote innovation and adoption of programs and policies to improve population health outcomes and equity.

Learning objectives for courses are based on the AACN (2011) Essentials for Master's Education in Nursing and the American Organization of Nursing Leadership (2015) Nurse Executive Competencies: Population Health. Online assessment of program goals and learning objectives will be completed at the end of each course.

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.

The Student Standards of Performance will be based on the AONL (2015) Nurse Executive Competencies: Population Health (see <https://www.aonl.org/system/files/media/file/2019/10/population-health-competencies.pdf>) which include

1. Communication and Relationship Building
2. Knowledge of the Health Care Environment
3. Leadership
4. Professionalism
5. Business Skills

And the AACN (2011) [Essentials of Master's Education in Nursing](#).

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					
Required Courses					
+	-	NURS 6110	×	Nursing Leadership Theory	3
+	-	BA 6000		Business Foundations	3
+	-	NURS 6210	×	Integrated Pharmacology, Pathophysiology, and Physical Assess.	3
+	-	HCA 6100		Introduction to Healthcare Administration	3
+	-	NURS 6310	×	Health Policy for Nurse Leaders	3
+	-	NURS 6320	×	Evidence-Based Practice in Nursing Leadership	3
+	-	NURS 6410	×	Ethics in Nursing Leadership	3
+	-	MGMT 6100		Managing People and Organizations	3
+	-	NURS 6510	×	Innovation & Informatics in Nursing Leadership	3
+	-	NURS 6520	×	Leadership Capstone	3
Required Course Credit Hour Sub-Total					30
Elective Courses					
+	-				
+	-				
Elective Credit Hour Sub-Total					
Core Curriculum Credit Hour Sub-Total					30

Program Curriculum Narrative

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

N/A there are no variable credits in the MSN Leadership & Administration program

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.

First Year Fall	Cr. Hr.	First Year Spring	Cr. Hr.
NURS 6110 Nursing Leadership Theory	3	NURS 6310 Health Policy for Nurse Leadership	3
BA 6000 Business Foundations	3	NURS 6320 Evidence-based Practice in Nursing	3
NURS 6210 Integ. Pharm, Patho, & Assess.	3	NURS 6410 Ethics in Nursing Leadership	3
HCA 6200 Management Principles for Healthcare	3	MGMT 6100 Managing People and Organizations	3
Total	12	Total	12
Second Year Fall	Cr. Hr.	Second Year Spring	Cr. Hr.
First Year Summer			
NURS 6510 Innovation & Informatics in Nursing	3		
NURS 6520 Leadership Capstone	3		
Total	6	Total	
Third Year Fall	Cr. Hr.	Third Year Spring	Cr. Hr.
Total		Total	
Fourth Year Fall	Cr. Hr.	Fourth Year Spring	Cr. Hr.
Total		Total	

Appendix C: Current and New Faculty / Staff Information

Part I. Department Faculty / Staff

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	2	2	
Faculty: Part Time with Doctorate	0	0	0
Faculty: Full Time with Masters			10
Faculty: Part Time with Masters			
Faculty: Full Time with Baccalaureate			
Faculty: Part Time with Baccalaureate			
Teaching / Graduate Assistants	////	////	
Staff: Full Time			3
Staff: Part Time			

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							
	Mark	Siemon	TT	PhD, MPH/	University of New Mexico	60%	
	Tana	Crookston	NTT	MSN Leade	Western Governors University	20%	
	Kelly	Cross	NTT	MSN/MPH	CSU-San Bernadino/ CSU-Long Beach	20%	
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		1		Ph.D. or DNP with Nurse Leadership experience	100%
Faculty: Part Time with Doctorate					
Faculty: Full Time with Masters					
Faculty: Part Time with Masters					
Faculty: Full Time with Baccalaureate					
Faculty: Part Time with Baccalaureate					
Teaching / Graduate Assistants	////	////			
Staff: Full Time			1	Administrative Assistant (shared with RN to BSN)	50%
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
Student Data						
# of Majors in Department						
# of Majors in Proposed Program(s)		30	45	60	75	90
# of Graduates from Department						
# Graduates in New Program(s)		30	45	60	75	90
Department Financial Data						
	Department Budget					
	Year Preceding Implementation (Base Budget)	Year 1	Year 2	Year 3		
		Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)	Addition to Base Budget for New Program(s)		
<i>Project additional expenses associated with offering new program(s). Account for New Faculty as stated in Appendix C, "Faculty Projections."</i>						
EXPENSES – nature of additional costs required for proposed program(s)						
<i>List salary benefits for additional faculty/staff each year the positions will be filled. For example, if hiring faculty in year 2, include expense in years 2 and 3. List one-time operating expenses only in the year expended.</i>						
Personnel (Faculty & Staff Salary & Benefits)		\$123,540	\$123,540	\$123,540		
Operating Expenses (equipment, travel, resources)		\$5,000	\$5,000	\$5,000		
Other: Adjunct and Overload Pay		\$57,000	\$57,000	\$57,000		
TOTAL PROGRAM EXPENSES		\$185,540	\$185,540	\$185,540		
TOTAL EXPENSES	\$0	\$185,540	\$185,540	\$185,540		
FUNDING – source of funding to cover additional costs generated by proposed program(s)						
<i>Describe internal reallocation using Narrative 1 on the following page. Describe new sources of funding using Narrative 2.</i>						
Internal Reallocation						
Appropriation						
Special Legislative Appropriation						
Grants and Contracts						
Special Fees						
Tuition		\$201,576	\$302,364	\$403,151		
Differential Tuition (requires Regents approval)						
PROPOSED PROGRAM FUNDING		\$201,576	\$302,364	\$403,151		
TOTAL DEPARTMENT FUNDING	\$0	\$201,576	\$302,364	\$403,151		
Difference						
Funding - Expense	\$0	\$16,036	\$116,824	\$217,611		

Part II: Expense explanation

Expense Narrative

Describe expenses associated with the proposed program.

The MSN Leadership & Administration program includes 1 FTE Tenure-Track faculty, a full-time administrative assistant, and adjunct/overload pay to support the program. The full-time administrative assistant will support the existing RN to BSN program, this MSN Leadership & Administration, and future graduate nursing programs. Overload pay will be used to pay full-time faculty teaching 15 credits (@ \$2000 per credit) during the summer. Adjuncts will be used to teach 6 credits in the fall/spring, and 15 credits in the summer (@ \$1000 per credit). Operating expenses include cost for faculty and staff travel, equipment, and teaching resources.

Part III: Describe funding sources

Revenue Narrative 1

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

Revenue for the MSN Leadership & Administration will be from student tuition. Tuition dollars provided in the table above represent direct revenue to SUU and the Department of Nursing from student tuition for 30, 45, and 60 students, respectively. Federal funding for MSN programs may be available in the future. There are plans for reallocation of revenue from the RN to BSN to pay for 50% of the administrative assistant salary (\$21,300).

Revenue Narrative 2

Describe new funding sources and plans to acquire the funds.

There are no plans for new funding sources at this time.



INVESTMENT REPORT

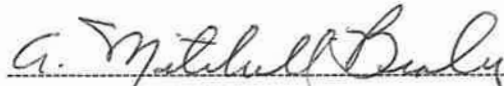
March 31, 2022

- Page 2 - Summarized Investment Balances and Asset Mix
- Pages 3-4 - Summary Report of Investment Activity and Income
- Pages 5-6 - Detail of Current Month Transactions
- Pages 7-13 - Investment Portfolio

Prepared by:
 Melanie Orton/Accounting Manager
 4/11/2022

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.

 4/25/22

 A. Mitchell Bealer Date
 Public Treasurer

 5/27/22

 Marvin L. Dodge Date
 Vice President of Finance & Administration

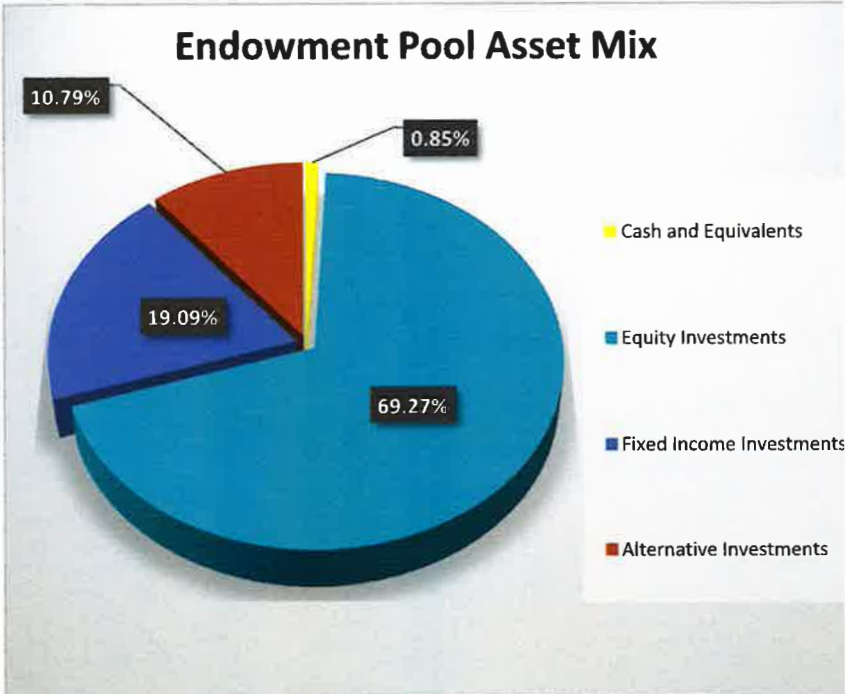
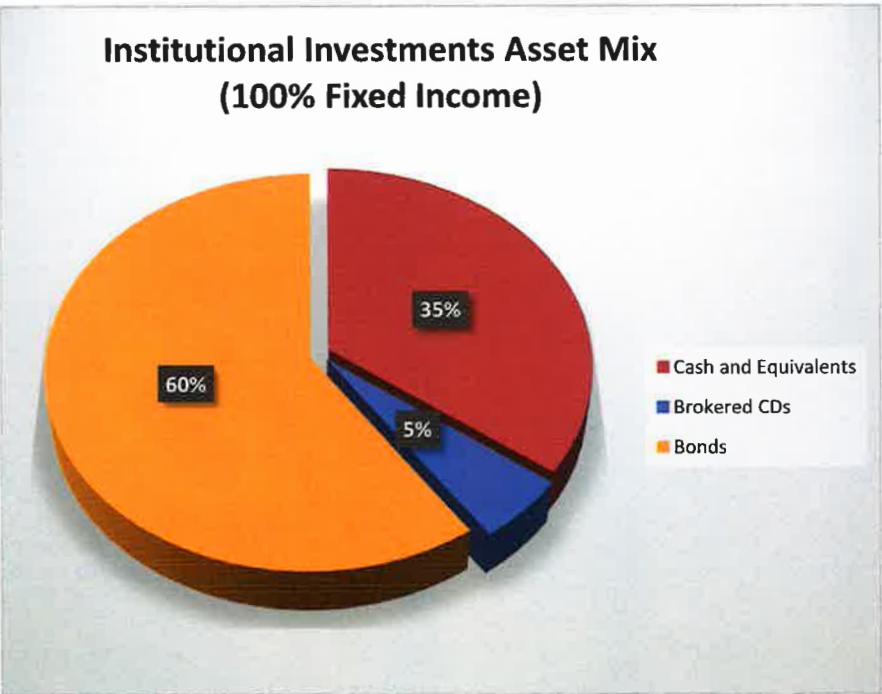
 6/1/22

 Mindy Benson Date
 Interim President

Summarized Investment Balances and Asset Mix
For The Month Ended March 31, 2022

INVESTMENT BALANCES BY CUSTODIAN (Market Value)					
Investment Pool	Moreton Capital Markets	Soltis Investment Advisors	State Treasurer	Alternative Investments	TOTAL
Cash Management Pool	\$ 70,795,648	\$ -	\$ 38,195,863	\$ -	\$ 108,991,511
Endowment Pool	9,659,018	24,008,155	-	1,397,171 *	35,064,344
Trust Fund Pool	663,870	-	-	-	663,870
Debt Service Pool	-	-	1,069,666	-	1,069,666
Ending Monthly Balance	\$ 81,118,536	\$ 24,008,155	\$ 39,265,529	\$ 1,397,171	\$ 145,789,391

* This is a private equity stock that is recorded at book value rather than market value





Summary Report of Investment Activity and Income
For The Month Ended March 31, 2022

INVESTMENT ACTIVITY					
Cash Management Pool					
	Moreton Capital		State		TOTAL
	Markets		Treasurer		
Beginning Balance	\$ 70,066,054	\$	45,576,282		\$ 115,642,337
Cash Transfers In	2,000,052		3,400,000		5,400,052
Cash Transfers Out	(2,072,078)		(10,800,000)		(12,872,078)
Interest Revenue	64,934		19,581		84,515 a
Acquisitions	2,000,000		-		2,000,000
Market Value Change	(1,263,314)		-		(1,263,314)
Cash Management Pool Ending Balance	\$ 70,795,648	\$	38,195,863		\$ 108,991,511
Endowment Pool					
	Moreton Capital	Soltis Investment	Soltis Investment	Alternative	TOTAL
	Markets	Advisors (SUU)	Advisors (ISG)	Investments	
Beginning Balance	\$ 9,634,274	\$ 23,858,001	\$ 120,039	\$ 1,205,620	\$ 34,817,934
Cash Transfers In	49,120	753,335	-	-	802,455
Cash Transfers Out	(121,432)	(752,936)	-	-	(874,368)
Dividends/Capital Gains	18,223	31,645	16	-	49,884 b
Interest Received	-	1,250	-	-	1,250 a
Acquisitions	107,827	752,936	-	84,900	945,663
Dispositions	(49,120)	(765,573)	-	-	(814,693)
Realized Gains/(Losses) on Dispositions	(3,122)	12,239	-	-	9,117 c
Market Value Change	23,248	(4,299)	1,503	106,651	127,103
Endowment Pool Ending Balance	\$ 9,659,018	\$ 23,886,597	\$ 121,558	\$ 1,397,171	\$ 35,064,344
Trust Fund Pool					
	Moreton Capital		TOTAL		
	Markets				
Beginning Balance	\$ 687,358				\$ 687,358
Dividends/Capital Gains	1,230				1,230 b
Market Value Change	(24,718)				(24,718)
Trust Fund Pool Ending Balance	\$ 663,870				\$ 663,870
Debt Reserves Pool					
	TOTAL				
Beginning Balance					\$ 1,069,277
Interest Earnings					389 a
Debt Reserves Pool Ending Balance					1,069,666
Total Investment Pools Ending Balance					\$ 145,789,391



Summary Report of Investment Activity and Income
For The Month Ended March 31, 2022

Investment Income			
	Current Month	YTD	
Interest Received	\$ 86,154		sum of a
Additional Interest Accrued	26,508		
Total Interest Income	112,662	\$ 662,075	
Dividends	51,114	1,223,934	sum of b
Gains/Losses on Sale	(9,117)	220,449	sum of c
Investment Income	\$ 154,659	\$ 2,106,458	

Detail of Current Month Transactions
For The Month Ended March 31, 2022

	Cash Management Pool	Endowment Pool	Trust Fund Pool	Debt Service Pool	Total
Public Treasurer's Investment Fund (PTIF)					
PTIF Deposits	\$ 3,400,000	\$ -	\$ -	\$ -	3,400,000
PTIF Withdrawals	(10,800,000)	-	-	-	(10,800,000)
Interest Revenue	19,581	-	-	-	19,581
Total PTIF	(7,380,419)	-	-	-	(7,380,419)
Moreton Capital Markets					
Cash deposits to purchase new securities	2,000,052				2,000,052
Interest Revenue	64,934				64,934
Funds used to purchase securities	(2,000,052)				(2,000,052)
Cash transferred to SUU	(72,026)				(72,026)
Investment Purchases	2,000,000				2,000,000
Decrease in market value of securities	(1,263,314.05)				(1,263,314)
Sub-Total Moreton Capital Markets	729,594	-	-	-	729,594
Cash proceeds from sale of securities		49,120			49,120
Dividend/Capital Gain Revenue-Cash		18,223			18,223
Funds used to purchase securities		(107,827)			(107,827)
Cash transferred to SUU		(13,605)			(13,605)
Dividends/Capital Gains Reinvested		4,614			4,614
Investment Purchases		103,213			103,213
Investment Sales Proceeds		(49,120)			(49,120)
Net Realized (Gain)/Loss on Sale of Securities		(3,122)			(3,122)
Increase in market value of securities		23,248			23,248
Sub-Total Moreton Capital Markets	-	24,744	-	-	24,744
Dividend/Capital Gain Revenue-Cash			1,230		1,230
Decrease in market value of securities			(24,718)		(24,718)
Sub-Total Moreton Capital Markets	-	-	(23,488)	-	(23,488)
Total Moreton Capital Markets	729,594	24,744	(23,488)	-	730,850
Soltis Investment Advisors					
Cash proceeds from sale of securities		753,335			753,335
Dividends/Capital Gains Revenue-Cash		28,353			28,353
Funds used to purchase securities		(752,936)			(752,936)
Investment Purchases		752,936			752,936
Dividends/Capital Gains Reinvested		4,541			4,541
Investment Sales Proceeds		(765,573)			(765,573)
Net Realized (Gain)/Loss on Sale of Securities		12,239			12,239
Increase/(Decrease) in market value of securities		(4,299)			(4,299)
Sub-Total Soltis Investment Advisors-SUU Share	-	28,595	-	-	28,595
Dividend Revenue-Cash		16			16
Increase/(Decrease) in market value of securities		1,503			1,503
Sub-Total Soltis Investment Advisors-ISG Share	-	1,519	-	-	1,519
Total Soltis Investment Advisors	-	30,115	-	-	30,115



Detail of Current Month Transactions
For The Month Ended March 31, 2022

	Cash Management Pool	Endowment Pool	Trust Fund Pool	Debt Service Pool	Total
Other Alternative Investments					
Investment Purchases		84,900			84,900
Increase/(Decrease) in market value of securities		106,651			106,651
Total Other Alternative Investments	-	191,551	-	-	191,551
Public Treasurer's Investment Fund - Debt Reserves					
Dividend Revenue-Cash				389	389
Total Public Treasurer's Investment Fund - Debt Reserves	-	-	-	389	389
Net Increase (Decrease) in Investments	\$ (6,650,825)	\$ 246,410	\$ (23,488)	\$ 389	\$ (6,427,515)

Investment Portfolio
 For The Month Ended March 31, 2022

CASH MANAGEMENT PORTFOLIO

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
PUBLIC TREASURER'S INVESTMENT FUND (PTIF)					
Public Treasurer's Investment Fund (PTIF)	0.5210%	N/A	\$ 38,195,863.10	\$ 38,195,863.10	\$ -
Pages 7-13					
Fixed Income Investments:					
Brokered Certificates of Deposit:					
Ally BK Midvale Utah	1.9899%	8/15/2022	\$ 240,000.00	\$ 241,216.80	\$ 1,216.80
Citibank National Association Pasadena California	1.9403%	8/23/2022	240,000.00	241,202.40	1,202.40
Firstier BK Kimball Nebraska	1.8929%	8/23/2023	240,000.00	240,902.40	902.40
Merrick BK South Jordan Utah	1.9538%	2/28/2024	240,000.00	239,529.60	(470.40)
Capital One National Association McClean	2.1089%	8/14/2024	240,000.00	238,987.20	(1,012.80)
Capital One BK USA National Association	2.1089%	8/14/2024	240,000.00	238,987.20	(1,012.80)
Enerbank USA Salt Lake City Utah	1.9652%	8/15/2024	240,000.00	238,147.20	(1,852.80)
CFBank Fairlawn Ohio	1.8690%	8/19/2024	240,000.00	237,556.80	(2,443.20)
Medallion BK Salt Lake City Utah	1.9173%	8/19/2024	240,000.00	237,835.20	(2,164.80)
Washington Federal Seattle	1.9661%	8/28/2024	240,000.00	238,036.80	(1,963.20)
Preferred BK Los Angeles California	1.9181%	8/30/2024	240,000.00	237,736.80	(2,263.20)
BMW Bank North American Salt Lake City Utah	0.6780%	10/8/2024	240,000.00	230,083.20	(9,916.80)
Morgan Stanley Pvt Bk	1.8829%	2/6/2025	240,000.00	235,807.20	(4,192.80)
Morgan Stanley NK N A	1.8829%	2/6/2025	240,000.00	235,807.20	(4,192.80)
Salle Mae BK Murray Utah	0.6921%	7/29/2025	240,000.00	225,393.60	(14,606.40)
State BK India New York NY	0.6922%	7/30/2025	240,000.00	225,381.60	(14,618.40)
First National Bank East Lansing Michigan	0.6937%	9/8/2025	240,000.00	224,875.20	(15,124.80)
Texas Exchange BK Crowley	0.7006%	2/26/2026	240,000.00	222,681.60	(17,318.40)
SunWest Bank Irvine California	0.7557%	4/30/2026	240,000.00	222,316.80	(17,683.20)
UBS Banks USA Salt Lake City Utah	0.9141%	6/16/2026	240,000.00	223,168.80	(16,831.20)
Toyota Financial SVGS Bank Henderson Nevada	1.0209%	9/2/2026	240,000.00	223,324.80	(16,675.20)
Goldman Sachs Bank USA New York	1.1248%	9/2/2026	240,000.00	224,037.60	(15,962.40)
Synchrony Bank	1.1779%	11/12/2026	240,000.00	224,124.00	(15,876.00)
JP Morgan Chase Bank Na Columbus	1.1272%	11/17/2026	240,000.00	223,562.40	(16,437.60)
Live Oak Bank Wilmington N C	1.1793%	11/30/2026	240,000.00	223,855.20	(16,144.80)
Total Certificates of Deposit			\$ 6,000,000.00	\$ 5,794,557.60	\$ (205,442.40)

Investment Portfolio
 For The Month Ended March 31, 2022

CASH MANAGEMENT PORTFOLIO (continued)

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
Bonds, Notes & Bills:					
Citibank (\$1,000,000 Par)	1.2169%	4/25/2022	\$ 999,986.74	\$ 1,000,080.00	\$ 93.26
Royal Bank of Canada (\$1,000,000 Par)	0.7690%	4/29/2022	997,324.29	1,000,010.00	2,685.71
Sumitomo Mitsubishi (\$3,000,000 Par)	1.0167%	7/12/2022	3,003,532.96	3,003,960.00	427.04
Mitsubishi (\$1,000,000 Par)	1.0454%	7/25/2022	997,015.84	1,001,550.00	4,534.16
Mizuho (\$1,000,000 Par)	1.6211%	9/11/2022	995,958.67	1,002,410.00	6,451.33
Toronto Dominion Bank (\$1,000,000 Par)	1.0513%	12/1/2022	988,912.53	1,001,600.00	12,687.47
Goldman Sachs Group (\$1,000,000 Par)	1.2108%	2/23/2023	982,578.98	1,001,840.00	19,261.02
Mitsubishi (\$1,000,000 Par)	1.2414%	3/2/2023	992,847.66	1,002,080.00	9,232.34
Mizuho Fin Group (\$1,000,000 Par)	1.3684%	3/5/2023	994,436.33	1,003,330.00	8,893.67
Mizuho Fin Group (2) (\$1,600,000 Par)	1.3684%	3/5/2023	1,595,264.83	1,605,328.00	10,063.17
Canadian Imperial Bank (\$1,500,000 Par)	0.8483%	3/17/2023	1,488,980.66	1,503,000.00	14,019.34
Banco Santander SA (\$1,000,000 Par)	1.3507%	4/12/2023	1,007,034.11	1,005,410.00	(1,624.11)
JP Morgan Chase & Company (\$1,500,000 Par)	2.7753%	4/25/2023	1,524,061.02	1,500,390.00	(23,671.02)
American Honda Fin Group (\$1,500,000 Par)	0.7370%	5/10/2023	1,490,533.53	1,497,885.00	7,351.47
Citigroup Inc (\$1,000,000 Par)	1.2059%	7/24/2023	1,003,994.12	1,001,700.00	(2,294.12)
Citigroup Inc (\$1,000,000 Par)	1.9464%	9/1/2023	1,012,746.07	1,003,410.00	(9,336.07)
Morgan Stanley (\$1,500,000 Par)	1.6489%	10/24/2023	1,521,095.10	1,508,235.00	(12,860.10)
Wells Fargo Company (\$1,000,000 Par)	1.5219%	10/31/2023	1,519,180.83	1,506,975.00	(12,205.83)
Federal Home Loan Bank (\$1,000,000 Par)	1.0808%	7/25/2024	998,839.09	971,530.00	(27,309.09)
Federal Home Loan Bank (\$2,500,000 Par)	1.1403%	11/15/2024	2,476,855.81	2,411,725.00	(65,130.81)
Federal Home Loan Bank (\$1,000,000 Par)	1.1929%	12/10/2024	997,219.76	964,040.00	(33,179.76)
Federal Home Loan Bank (\$1,000,000 Par)	0.7638%	12/27/2024	993,568.85	955,730.00	(37,838.85)
Federal Home Loan Bank (\$1,000,000 Par)	1.2941%	1/28/2025	999,764.42	965,920.00	(33,844.42)
Federal Home Loan Bank (\$1,000,000 Par)	1.0393%	2/28/2025	1,000,000.00	962,210.00	(37,790.00)
Federal Home Loan Bank (\$1,000,000 Par)	1.1701%	2/28/2025	995,709.00	961,420.00	(34,289.00)
Federal Home Loan Bank (\$2,000,000 Par)	1.2506%	4/28/2025	1,993,839.52	1,919,100.00	(74,739.52)
Federal Home Loan Bank (\$1,000,000 Par)	0.7921%	5/19/2025	991,527.98	946,800.00	(44,727.98)
Freddie Mac (\$1,000,000 Par)	0.6943%	9/9/2025	1,000,000.00	936,190.00	(63,810.00)
Federal Home Loan Bank Mtg Bank (\$1,000,000 Par)	0.6968%	10/27/2025	997,591.84	932,780.00	(64,811.84)
Freddie Mac (\$1,000,000 Par)	0.7482%	12/23/2025	982,867.78	935,630.00	(47,237.78)
Federal Home Loan Bank (\$2,000,000 Par)	1.4359%	12/26/2025	1,996,178.90	1,915,140.00	(81,038.90)
Federal Home Loan Bank (\$1,000,000 Par)	0.7033%	2/24/2026	993,187.90	924,180.00	(69,007.90)
Federal Home Loan Bank (\$1,000,000 Par)	0.6992%	2/26/2026	994,337.34	929,680.00	(64,657.34)
Federal Home Loan Bank (\$1,000,000 Par)	0.8590%	3/10/2026	999,214.51	931,360.00	(67,854.51)

Investment Portfolio
 For The Month Ended March 31, 2022

CASH MANAGEMENT PORTFOLIO (continued)

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
Bonds, Notes & Bills:					
Farmer Mac (\$520,000 Par)	0.8856%	3/27/2026	520,000.00	487,333.60	(32,666.40)
Federal Home Loan Bank (\$2,000,000 Par)	0.9536%	3/30/2026	2,000,000.00	1,887,640.00	(112,360.00)
Federal Home Loan Bank (\$1,500,000 Par)	0.9038%	3/30/2026	1,499,684.43	1,410,705.00	(88,979.43)
Federal Farm Credit Bank (\$1,300,000 Par)	1.0087%	9/28/2026	1,300,000.00	1,211,405.00	(88,595.00)
Federal Home Loan Bank (\$2,525,000 Par)	1.1675%	9/30/2026	2,519,116.22	2,378,954.00	(140,162.22)
Federal Farm Credit Bank (1,000,000 Par)	4.0180%	10/20/2026	1,000,000.00	936,280.00	(63,720.00)
Federal Farm Credit Bank (2,300,000 Par)	1.7470%	10/20/2026	2,294,642.77	2,153,444.00	(141,198.77)
Federal Home Loan Bank (1,000,000 Par)	1.1869%	10/28/2026	999,917.22	943,670.00	(56,247.22)
Federal Home Loan Bank (1,000,000 Par)	1.1221%	10/28/2026	997,259.20	935,730.00	(61,529.20)
Federal Home Loan Bank (\$1,000,000 Par)	1.3687%	11/24/2026	997,288.63	949,780.00	(47,508.63)
Federal Farm Credit Bank (\$2,000,000 Par)	1.6731%	12/14/2026	1,998,557.89	1,912,600.00	(85,957.89)
Federal Home Loan Bank (\$1,100,000 Par)	1.6695%	12/17/2026	1,098,673.51	1,054,185.00	(44,488.51)
Federal Home Loan Bank (\$1,000,000 Par)	3.9407%	1/27/2027	1,000,000.00	951,600.00	(48,400.00)
Federal Home Loan Bank (\$1,500,000 Par)	2.6272%	1/27/2027	1,491,388.55	1,427,400.00	(63,988.55)
Federal Home Loan Bank (\$1,525,000 Par)	1.7185%	1/27/2027	1,525,000.00	1,464,213.50	(60,786.50)
Federal Home Loan Bank (\$1,250,000 Par)	2.1524%	2/25/2027	1,250,000.00	1,219,562.50	(30,437.50)
Federal Home Loan Bank (\$2,000,000 Par)	2.4186%	3/29/2027	2,000,000.00	1,963,960.00	(36,040.00)
Total Bonds, Notes and Bills			\$ 67,017,715.39	\$ 65,001,090.60	\$ (2,016,624.79)
Total Fixed Income Investments			\$ 73,017,715.39	\$ 70,795,648.20	\$ (2,222,067.19)
Total Cash Management Portfolio-Moretton Capital Markets			\$ 73,017,715.39	\$ 70,795,648.20	\$ (2,222,067.19)
TOTAL CASH MANAGEMENT PORTFOLIO			\$ 111,213,578.49	\$ 108,991,511.30	\$ (2,222,067.19)

Investment Portfolio
 For The Month Ended March 31, 2022

ENDOWMENT POOL

	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)
MORETON CAPITAL MARKETS					
Cash and Money Market:					
Endowment Cash			\$ (54,092.69)	\$ (54,092.69)	\$ -
US Govt Money Market Fund	\$ 1.00	163,874.260	163,874.26	163,874.26	-
Total Cash and Money Market			\$ 109,781.57	\$ 109,781.57	\$ -
Equity Investments:					
Mutual Funds, ETFs, and Common Stocks:					
Ishares Core S&P Mid-Cap ETF	192.18	1,525.000	\$ 293,072.70	\$ 409,218.50	\$ 116,145.80
Ishares Core S&P 500 ETF	294.66	2,905.000	855,976.45	1,317,969.45	461,993.00
Ishares: Russell Mid-Cap Growth ETF	44.92	5,596.000	251,377.00	562,398.00	311,021.00
Ishares: S&P 600 Small Cap Value Index ETF	56.24	4,452.000	250,391.00	455,840.28	205,449.28
Ishares: S&P 600 Growth Index ETF	58.42	4,290.000	250,625.00	536,679.00	286,054.00
Vanguard Mid-Cap ETF	120.15	2,080.000	249,922.00	494,707.20	244,785.20
Ishares Trust Core MSCI Eafe ETF	61.47	4,200.000	258,181.00	291,942.00	33,761.00
Vanguard Intl Equity Index Fund Inc FTS	43.79	2,300.000	100,713.50	106,099.00	5,385.50
Total Equity Investments			\$ 2,510,258.65	\$ 4,174,853.43	\$ 1,664,594.78
Fixed Income Investments:					
Mutual Funds and ETFs:					
Ishares: Core US Aggregate BD ETF	\$ 105.71	8,825.000	\$ 932,895.73	\$ 945,157.50	\$ 12,261.77
JP Morgan Exchange Traded FD TR Ultra Short Income	50.72	25,075.000	1,271,784.63	1,260,520.25	(11,264.38)
Metropolitan West Fds Total Return Bond Fund	10.55	105,329.913	1,111,503.24	1,073,311.81	(38,191.43)
PIMCO Income Fund Class A	11.55	92,402.250	1,066,857.59	1,045,993.47	(20,864.12)
Ishares: 0 to 5 Year Tips Bond ETF	99.32	10,000.000	993,215.00	1,049,400.00	56,185.00
Total Fixed Income Investments			\$ 5,376,256.19	\$ 5,374,383.03	\$ (1,873.16)
Total Endowment Pool-Moreton Capital Markets			\$ 7,996,296.41	\$ 9,659,018.03	\$ 1,662,721.62

Investment Portfolio
 For The Month Ended March 31, 2022

ENDOWMENT POOL (continued)						
SOLTIS INVESTMENT ADVISORS						
SOUTHERN UTAH UNIVERSITY ENDOWMENT SHARE						
	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)	
Cash and Money Market:						
Fidelity Government Cash Reserves	\$ 1.00	95,300.240	\$ 95,300.24	\$ 95,300.24	\$ -	
Total Cash and Money Market			\$ 95,300.24	\$ 95,300.24	\$ -	
Stock Mutual Funds:						
Edgewood Growth Fund Instl CL	\$ 36.72	41,286.906	\$ 1,516,039.77	\$ 2,059,390.87	\$ 543,351.10	
Artisan Mid Cap Fund Instl	44.80	8,904.251	398,869.22	399,533.74	664.52	
Cliffwater Corporate Lending Fund I	10.49	106,563.093	1,118,080.00	1,149,815.77	31,735.77	
Grandeur Peak Gbl Reach Fund Instl	17.05	68,453.951	1,167,267.57	1,245,177.36	77,909.79	
Grandeur Peak Global Stalwarts Instl	15.98	73,774.730	1,179,012.36	1,426,065.53	247,053.17	
Oakmark Intl Advisor Fund	22.53	56,053.175	1,262,645.45	1,436,642.87	173,997.42	
Oakmark Fund Advisor Class	79.88	21,904.915	1,749,710.95	2,542,503.48	792,792.53	
T Rowe Price Emerg Markets Stock Fund I	43.11	18,737.624	807,700.29	755,875.75	(51,824.54)	
Wasatch Small Cap Growth Fund Instl CL	49.18	13,606.544	669,197.79	565,760.09	(103,437.70)	
Wasatch Small Cap Value Institutional	10.33	19,124.743	197,558.60	183,215.03	(14,343.57)	
Total Stock Mutual Funds			\$ 10,066,082.00	\$ 11,763,980.49	\$ 1,697,898.49	
Bond Mutual Funds:						
Metropolitan West Total Return Class I	\$ 11.06	108,480.867	\$ 1,200,080.00	\$ 1,104,335.22	\$ (95,744.78)	
Total Bond Mutual Funds			\$ 1,200,080.00	\$ 1,104,335.22	\$ (95,744.78)	
Total Mutual Funds			\$ 11,266,162.00	\$ 12,868,315.71	\$ 1,602,153.71	
Exchange Traded Funds:						
Equity ETFs:						
First TR Exchange-Traded FD Lunt US Factor	\$ 24.56	25,584.000	\$ 628,250.56	\$ 837,876.00	\$ 209,625.44	
Ishares Core S&P 500 ETF	281.54	6,512.000	1,833,407.53	2,954,429.28	1,121,021.75	
Ishares Core S&P Mid-Cap ETF	199.57	6,002.000	1,197,842.61	1,610,576.68	412,734.07	
Ishares Core S&P Small-Cap ETF	88.07	5,878.000	517,667.28	634,118.64	116,451.36	
Ishares Trust Core MSCI Eafe ETF	59.58	23,435.000	1,396,295.48	1,628,966.85	232,671.37	
Vanguard Intl Equity Index Fund Inc FTS	42.99	14,590.000	627,166.50	673,036.70	45,870.20	
Total Equity ETFs			\$ 6,200,629.96	\$ 8,339,004.15	\$ 2,138,374.19	

Investment Portfolio
 For The Month Ended March 31, 2022

ENDOWMENT POOL (continued)					
	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)
Fixed Income ETFs:					
Ishares: Core US Aggregate BD ETF	\$ 112.72	620.000	\$ 69,884.34	\$ 66,402.00	\$ (3,482.34)
Ishares 0 - 5 Year Tips Bond ETF	105.64	1,400.000	147,901.88	146,916.00	(985.88)
Total Fixed Income ETFs			\$ 217,786.22	\$ 213,318.00	\$ (4,468.22)
Total Exchange Traded Funds			\$ 6,418,416.18	\$ 8,552,322.15	\$ 2,133,905.97
Alternative Investments:					
American Beacon AHL MNGD Futures	10.16	6,284.199	\$ 63,847.49	\$ 71,954.07	\$ 8,106.58
Blackrock GL Long/Short Equity Instl	11.91	6,229.091	74,169.50	71,572.25	(2,597.25)
JP Morgan Hedged Equity Class I	25.74	12,816.505	329,941.50	329,640.50	(301.00)
Stoneridge Alternative Lending Risk Premium	50.45	4,955.401	250,020.00	251,139.72	1,119.72
Cambria ETF TR Tail Risk	18.38	4,458.000	81,936.46	74,225.70	(7,710.76)
Morgan Stanley	100.00	2,000.000	200,000.00	186,470.00	(13,530.00)
Innovator ETFs US DQTY ULTRA BUF	28.09	7,222.000	202,865.98	204,828.91	1,962.93
Innovator ETFs TR US EQTY PWR BUF	29.98	10,967.000	328,791.41	329,777.69	986.28
Blackstone Real Estate Income	14.07	35,822.648	503,928.97	524,465.06	20,536.09
GreenLake Real Estate Fund LLC	1,000.00	326.584	326,584.50	326,584.50	-
Total Alternative Investments			\$ 2,362,085.81	\$ 2,370,658.40	\$ 8,572.59
Total Endowment Share-SUU			\$ 20,141,964.23	\$ 23,886,596.50	\$ 3,744,632.27
INVESTMENT STUDENT GROUP ENDOWMENT SHARE					
Cash and Money Market:					
Fidelity Government Cash Reserves	\$ 1.00	94,086.750	\$ 94,086.75	\$ 94,086.75	\$ -
Total Cash and Money Market			\$ 94,086.75	\$ 94,086.75	\$ -
Equity ETFs:					
Select Sector SPDR Trust Consumer	164.94	56.000	\$ 9,236.36	\$ 10,360.00	\$ 1,123.64
Total Equity ETFs			\$ 9,236.36	\$ 10,360.00	\$ 1,123.64
Total Mutual Funds and ETFs			\$ 9,236.36	\$ 10,360.00	\$ 1,123.64
Alternative Investments:					
Invesco DB Multi-Sector Commod Base Metals Fd	17.24	326.000	\$ 5,620.89	\$ 8,423.84	\$ 2,802.95
United States Gasoline FD LP Unites	27.53	156.000	4,294.54	8,687.64	4,393.10
Total Alternative Investments			\$ 9,915.43	\$ 17,111.48	\$ 7,196.05
Total Endowment Share-ISG			\$ 113,238.54	\$ 121,558.23	\$ 8,319.69
Total Endowment Pool-Soltis Investment Advisors			\$ 20,255,202.77	\$ 24,008,154.73	\$ 3,752,951.96
OTHER ALTERNATIVE INVESTMENTS					
State Bank of Southern Utah-Private Equity Partnership	127.69	4,937.000	630,408.00	1,397,171.00	766,763.00
Total Alternative Investments-Soltis Investment Advisors			\$ 630,408.00	\$ 1,397,171.00	\$ 766,763.00
TOTAL ENDOWMENT POOL INVESTMENTS			\$ 28,881,907.18	\$ 35,064,343.76	\$ 6,182,436.58

Investment Portfolio
For The Month Ended March 31, 2022

TRUST FUND POOL						
	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)	
MORETON CAPITAL MARKETS						
Cash and Money Market:						
US Govt Money Market Fund	\$ 1.00	6,096.690	\$ 6,096.69	\$ 6,096.69	\$	-
Total Cash and Money Market			\$ 6,096.69	\$ 6,096.69	\$	-
Fixed Income Investments:						
Mutual Funds and ETFs:						
PIMCO Total Return Fund Instl CL	10.46	68,661.068	\$ 718,409.70	\$ 657,773.03	\$	(60,636.67)
Total Mutual Funds and ETFs			\$ 718,409.70	\$ 657,773.03	\$	(60,636.67)
TOTAL TRUST FUND POOL			\$ 724,506.39	\$ 663,869.72	\$	(60,636.67)
PUBLIC TREASURER'S INVESTMENT FUND (PTIF)- DEBT RESERVES						
	Yield	Shares	Cost	Market	Unrealized Gain/(Loss)	
PTIF - Debt Reserves	0.4677%	N/A	\$ 1,069,665.83	\$ 1,069,665.83	\$	-
TOTAL PTIF - DEBT RESERVES			\$ 1,069,665.83	\$ 1,069,665.83	\$	-
GRAND TOTAL - INVESTED FUNDS			\$ 141,889,657.89	\$ 145,789,390.61	\$	3,899,732.72



INVESTMENT REPORT

April 30, 2022

- Page 2 - Summarized Investment Balances and Asset Mix
- Pages 3-4 - Summary Report of Investment Activity and Income
- Page 5 - Detail of Current Month Transactions
- Pages 6-12 - Investment Portfolio

Prepared by:
Melanie Orton/Accounting Manager
5/6/2022


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.

 5/12/22


A. Mitchell Bealer
Public Treasurer

Date

 5/27/22

Marvin L. Dodge
Vice President of Finance & Administration

Date

 6/1/22

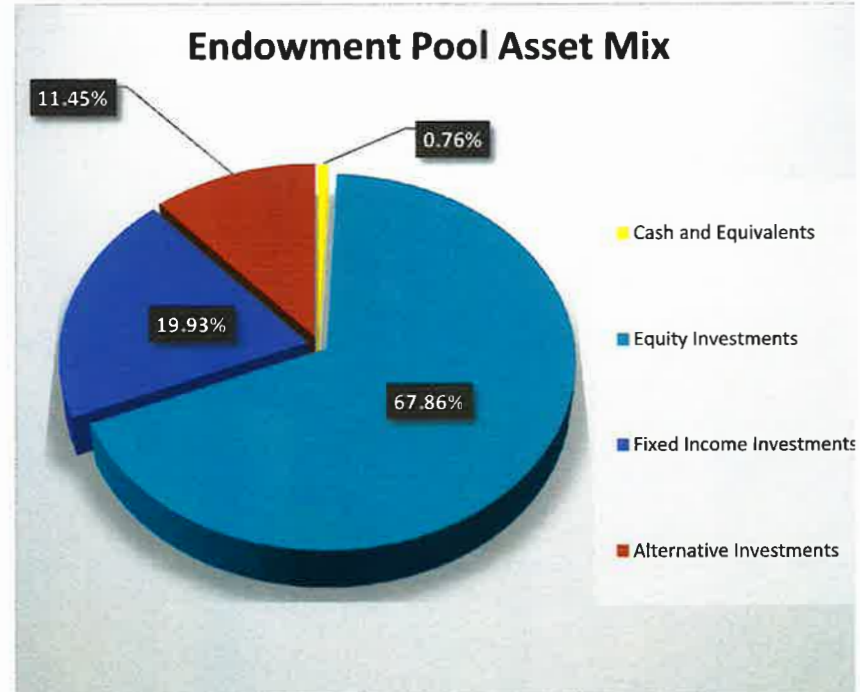
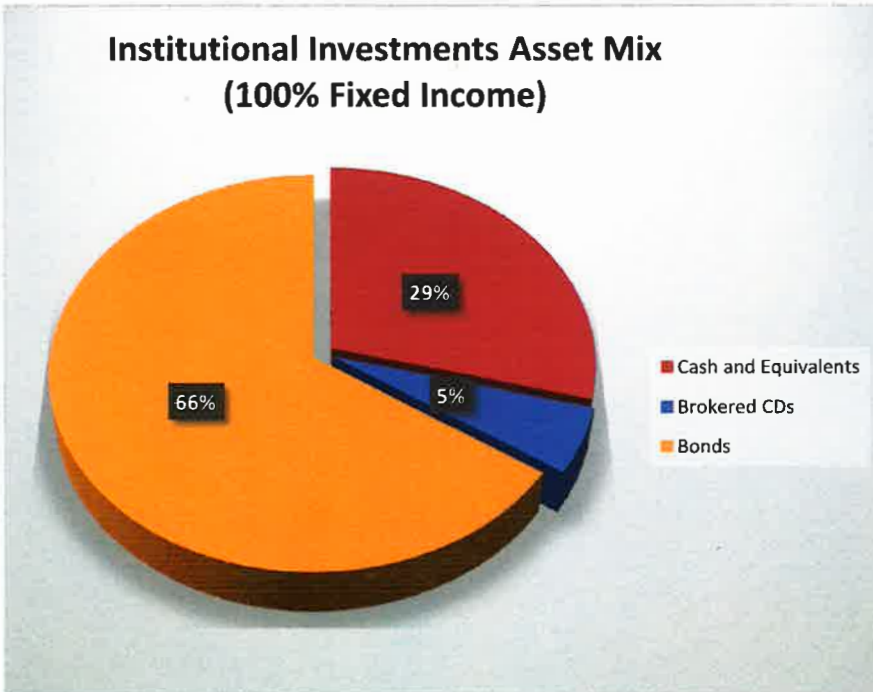
Mindy Benson
Interim President

Date

Summarized Investment Balances and Asset Mix
For The Month Ended April 30, 2022

INVESTMENT BALANCES BY CUSTODIAN (Market Value)					
Investment Pool	Moreton Capital Markets	Soltis Investment Advisors	State Treasurer	Alternative Investments	TOTAL
Cash Management Pool	\$ 76,843,004	\$ -	\$ 30,115,387	\$ -	\$ 106,958,391
Endowment Pool	9,186,064	22,147,291	-	1,397,171 *	32,730,525
Trust Fund Pool	637,707	-	-	-	637,707
Debt Service Pool	-	-	1,068,161	-	1,068,161
Ending Monthly Balance	\$ 86,666,775	\$ 22,147,291	\$ 31,183,548	\$ 1,397,171	\$ 141,394,785

* This is a private equity stock that is recorded at book value rather than market value





Summary Report of Investment Activity and Income
For The Month Ended April 30, 2022

INVESTMENT ACTIVITY					
Cash Management Pool					
	Moreton Capital		State		TOTAL
	Markets		Treasurer		
Beginning Balance	\$ 70,795,648	\$	38,195,863	\$	108,991,511
Cash Transfers In	12,754,301		6,000,000		18,754,301
Cash Transfers Out	(11,845,064)		(14,100,000)		(25,945,064)
Interest Revenue	98,296		19,524		117,820 ^a
Acquisitions	9,252,410		-		9,252,410
Dispositions	(3,501,880)		-		(3,501,880)
Market Value Change	(710,707)		-		(710,707)
Cash Management Pool Ending Balance	\$ 76,843,004	\$	30,115,387	\$	106,958,391
Endowment Pool					
	Moreton Capital	Soltis Investment	Soltis Investment	Alternative	TOTAL
	Markets	Advisors (SUU)	Advisors (ISG)	Investments	
Beginning Balance	\$ 9,659,018	\$ 23,886,597	\$ 121,558	\$ 1,397,171	\$ 35,064,344
Cash Transfers Out	(88,476)	-	-	-	(88,476)
Dividends/Capital Gains	12,824	25,069	1	-	37,894 ^b
Interest Received	-	1,250	-	-	1,250 ^a
Acquisitions	80,497	-	-	-	80,497
Market Value Change	(477,800)	(1,886,147)	(1,037)	-	(2,364,984)
Endowment Pool Ending Balance	\$ 9,186,064	\$ 22,026,768	\$ 120,522	\$ 1,397,171	\$ 32,730,525
Trust Fund Pool					
	Moreton Capital		TOTAL		
	Markets				
Beginning Balance	\$ 663,870				\$ 663,870
Dividends/Capital Gains	1,302				1,302 ^b
Market Value Change	(27,464)				(27,464)
Trust Fund Pool Ending Balance	\$ 637,707				\$ 637,707
Debt Reserves Pool					
	TOTAL				
Beginning Balance					\$ 1,069,666
Cash Transfers In					1,618,306
Cash Transfers Out					(1,620,291)
Interest Earnings					480 ^a
Debt Reserves Pool Ending Balance					1,068,161
Total Investment Pools Ending Balance					\$ 141,394,785



Summary Report of Investment Activity and Income
For The Month Ended April 30, 2022

Investment Income			
	Current Month	YTD	
Interest Received	\$ 121,429		sum of a
Additional Interest Accrued	(66,921)		
Total Interest Income	54,508	\$ 716,582	
Dividends	39,196	1,263,129	sum of b
Gains/Losses on Sale	-	220,449	sum of c
Investment Income	\$ 93,704	\$ 2,200,160	



Detail of Current Month Transactions
For The Month Ended April 30, 2022

	Cash Management Pool	Endowment Pool	Trust Fund Pool	Debt Service Pool	Total
Public Treasurer's Investment Fund (PTIF)					
PTIF Deposits	\$ 6,000,000	\$ -	\$ -	\$ -	6,000,000
PTIF Withdrawals	(14,100,000)	-	-	-	(14,100,000)
Interest Revenue	19,524	-	-	-	19,524
Total PTIF	(8,080,476)	-	-	-	(8,080,476)
Moreton Capital Markets					
Cash deposits to purchase new securities	9,252,422	-	-	-	9,252,422
Interest Revenue	98,296	-	-	-	98,296
Funds used to purchase securities	(9,252,422)	-	-	-	(9,252,422)
Cash transferred to SUU	(2,592,642)	-	-	-	(2,592,642)
Investment Purchases	9,252,410	-	-	-	9,252,410
Investment Redemption Proceeds	(3,501,880)	-	-	-	(3,501,880)
Decrease in market value of securities	(710,706.95)	-	-	-	(710,707)
Sub-Total Moreton Capital Markets	6,047,356	-	-	-	6,047,356
Dividend/Capital Gain Revenue-Cash	-	12,824	-	-	12,824
Funds used to purchase securities	-	(80,497)	-	-	(80,497)
Cash transferred to SUU	-	(7,978)	-	-	(7,978)
Dividends/Capital Gains Reinvested	-	4,840	-	-	4,840
Investment Purchases	-	75,657	-	-	75,657
Increase in market value of securities	-	(477,800)	-	-	(477,800)
Sub-Total Moreton Capital Markets	-	(472,954)	-	-	(472,954)
Dividend/Capital Gain Revenue-Cash	-	-	1,302	-	1,302
Decrease in market value of securities	-	-	(27,464)	-	(27,464)
Sub-Total Moreton Capital Markets	-	-	(26,163)	-	(26,163)
Total Moreton Capital Markets	6,047,356	(472,954)	(26,163)	-	5,548,239
Soltis Investment Advisors					
Dividends/Capital Gains Revenue-Cash	-	24,316	-	-	24,316
Dividends/Capital Gains Reinvested	-	2,002	-	-	2,002
Increase/(Decrease) in market value of securities	-	(1,886,147)	-	-	(1,886,147)
Sub-Total Soltis Investment Advisors-SUU Share	-	(1,859,828)	-	-	(1,859,828)
Dividend Revenue-Cash	-	1	-	-	1
Increase/(Decrease) in market value of securities	-	(1,037)	-	-	(1,037)
Sub-Total Soltis Investment Advisors-ISG Share	-	(1,036)	-	-	(1,036)
Total Soltis Investment Advisors	-	(1,860,864)	-	-	(1,860,864)
Public Treasurer's Investment Fund - Debt Reserves					
Dividend Revenue-Cash	-	-	-	480	480
Funds transferred in to pay debt service	-	-	-	1,618,306	1,618,306
Funds transferred out to pay debt service	-	-	-	(1,620,291)	(1,620,291)
Total Public Treasurer's Investment Fund - Debt Reserves	-	-	-	(1,505)	(1,505)
Net Increase (Decrease) in Investments	\$ (2,033,120)	\$ (2,333,819)	\$ (26,163)	\$ (1,505)	\$ (4,394,607)

Investment Portfolio
 For The Month Ended April 30, 2022

CASH MANAGEMENT PORTFOLIC

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
PUBLIC TREASURER'S INVESTMENT FUND (PTIF)					
Public Treasurer's Investment Fund (PTIF)	0.0000%	N/A	\$ 30,115,386.97	\$ 30,115,386.97	\$ -
MORETON CAPITAL MARKETS					
Cash and Money Market:					
Cash Management Cash			\$ 1,007,533.29	\$ 1,007,533.29	\$ -
Total Cash and Money Market			\$ 1,007,533.29	\$ 1,007,533.29	\$ -
Fixed Income Investments:					
Brokered Certificates of Deposit:					
Ally BK Midvale Utah	1.9922%	8/15/2022	\$ 240,000.00	\$ 240,936.00	\$ 936.00
Citibank National Association Pasadena California	1.9423%	8/23/2022	240,000.00	240,945.60	945.60
Firstier BK Kimball Nebraska	1.9043%	8/23/2023	240,000.00	239,457.60	(542.40)
Merrick BK South Jordan Utah	1.9711%	2/28/2024	240,000.00	237,429.60	(2,570.40)
Capital One National Association McClean	2.1322%	8/14/2024	240,000.00	236,373.60	(3,626.40)
Capital One BK USA National Association	2.1322%	8/14/2024	240,000.00	236,373.60	(3,626.40)
Enerbank USA Salt Lake City Utah	1.9868%	8/15/2024	240,000.00	235,557.60	(4,442.40)
CFBank Fairlawn Ohio	1.8895%	8/19/2024	240,000.00	234,986.40	(5,013.60)
Medallion BK Salt Lake City Utah	1.9383%	8/19/2024	240,000.00	235,252.80	(4,747.20)
Washington Federal Seattle	1.9878%	8/28/2024	240,000.00	235,437.60	(4,562.40)
Preferred BK Los Angeles California	1.9392%	8/30/2024	240,000.00	235,147.20	(4,852.80)
BMW Bank North American Salt Lake City Utah	0.6850%	10/8/2024	240,000.00	227,724.00	(12,276.00)
Morgan Stanley Pvt Bk	1.9039%	2/6/2025	240,000.00	233,205.60	(6,794.40)
Morgan Stanley NK N A	1.9039%	2/6/2025	240,000.00	233,205.60	(6,794.40)
Salle Mae BK Murray Utah	0.7002%	7/29/2025	240,000.00	222,792.00	(17,208.00)
State BK India New York NY	0.7002%	7/30/2025	240,000.00	222,777.60	(17,222.40)
First National Bank East Lansing Michigan	0.7020%	9/8/2025	240,000.00	222,232.80	(17,767.20)
Texas Exchange BK Crowley	0.7094%	2/26/2026	240,000.00	219,897.60	(20,102.40)
SunWest Bank Irvine California	0.7654%	4/30/2026	240,000.00	219,482.40	(20,517.60)
UBS Banks USA Salt Lake City Utah	0.9265%	6/16/2026	240,000.00	220,176.00	(19,824.00)
Toyota Financial SVGS Bank Henderson Nevada	1.0358%	9/2/2026	240,000.00	220,113.60	(19,886.40)
Goldman Sachs Bank USA New York	1.1417%	9/2/2026	240,000.00	220,723.20	(19,276.80)
Synchrony Bank	1.1963%	11/12/2026	240,000.00	220,680.00	(19,320.00)
JP Morgan Chase Bank Na Columbus	1.1448%	11/17/2026	240,000.00	220,118.40	(19,881.60)
Live Oak Bank Wilmington N C	1.1982%	11/30/2026	240,000.00	220,329.60	(19,670.40)
Total Certificates of Deposit			\$ 6,000,000.00	\$ 5,731,356.00	\$ (268,644.00)

Investment Portfolio
 For The Month Ended April 30, 2022

CASH MANAGEMENT PORTFOLIO (continued)

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
Bonds, Notes & Bills:					
Sumitomo Mitsubishi (\$3,000,000 Par)	1.7892%	7/12/2022	\$ 3,002,503.97	\$ 3,001,380.00	\$ (1,123.97)
Mitsubishi (\$1,000,000 Par)	1.9725%	7/25/2022	997,787.63	1,000,750.00	2,962.37
Mizuho (\$1,000,000 Par)	1.6216%	9/11/2022	996,697.94	1,002,120.00	5,422.06
Toronto Dominion Bank (\$1,000,000 Par)	1.0517%	12/1/2022	990,275.75	1,001,220.00	10,944.25
Goldman Sachs Group (\$1,000,000 Par)	1.2130%	2/23/2023	984,167.51	999,980.00	15,812.49
Mitsubishi (\$1,000,000 Par)	1.2413%	3/2/2023	993,486.27	1,002,150.00	8,663.73
Mizuho Fin Group (\$1,000,000 Par)	1.3683%	3/5/2023	994,928.68	1,003,450.00	8,521.32
Mizuho Fin Group (2) (\$1,600,000 Par)	1.3683%	3/5/2023	1,595,683.88	1,605,520.00	9,836.12
Canadian Imperial Bank (\$1,500,000 Par)	0.8486%	3/17/2023	1,489,922.48	1,502,535.00	12,612.52
Banco Santander SA (\$1,000,000 Par)	2.1175%	4/12/2023	1,006,516.89	1,005,890.00	(626.89)
American Honda Fin Group (\$1,500,000 Par)	0.7357%	5/10/2023	1,491,234.63	1,500,630.00	9,395.37
Citigroup Inc (\$1,000,000 Par)	2.1327%	7/24/2023	1,003,744.49	1,000,610.00	(3,134.49)
Citigroup Inc (\$1,000,000 Par)	1.9495%	9/1/2023	1,012,009.31	1,001,800.00	(10,209.31)
Morgan Stanley (\$1,500,000 Par)	2.5748%	10/24/2023	1,519,988.72	1,505,370.00	(14,618.72)
Wells Fargo Company (\$1,000,000 Par)	1.5231%	10/31/2023	1,518,187.01	1,505,835.00	(12,352.01)
Federal Home Loan Bank (\$1,000,000 Par)	1.0912%	7/25/2024	998,880.21	962,280.00	(36,600.21)
Federal Home Loan Bank (\$2,500,000 Par)	1.1506%	11/15/2024	2,477,579.82	2,390,100.00	(87,479.82)
Federal Home Loan Bank (\$1,000,000 Par)	1.2033%	12/10/2024	997,304.44	955,730.00	(41,574.44)
Federal Home Loan Bank (\$1,000,000 Par)	0.7706%	12/27/2024	993,761.40	947,320.00	(46,441.40)
Federal Home Loan Bank (\$1,000,000 Par)	1.3091%	1/28/2025	999,771.40	954,830.00	(44,941.40)
Federal Home Loan Bank (\$1,000,000 Par)	1.0492%	2/28/2025	1,000,000.00	953,080.00	(46,920.00)
Federal Home Loan Bank (\$1,000,000 Par)	1.1814%	2/28/2025	995,829.87	952,300.00	(43,529.87)
Federal Home Loan Bank (\$1,500,000 Par)	2.6575%	4/21/2025	1,492,561.59	1,481,640.00	(10,921.59)
Federal Home Loan Bank (\$1,000,000 Par)	2.7651%	4/21/2025	1,000,000.00	994,530.00	(5,470.00)
Federal Home Loan Bank (\$2,000,000 Par)	1.2637%	4/28/2025	1,994,003.80	1,899,200.00	(94,803.80)
Federal Home Loan Bank (\$1,000,000 Par)	0.8013%	5/19/2025	991,749.76	935,930.00	(55,819.76)
Freddie Mac (\$1,000,000 Par)	0.6995%	9/9/2025	1,000,000.00	929,230.00	(70,770.00)
Federal Home Loan Bank (\$1,500,000 Par)	3.1045%	10/20/2025	1,500,000.00	1,492,980.00	(7,020.00)
Federal Home Loan Bank Mtg Bank (\$1,000,000 Par)	0.7065%	10/27/2025	997,647.20	919,980.00	(77,667.20)
Freddie Mac (\$1,000,000 Par)	0.7624%	12/23/2025	983,244.86	918,210.00	(65,034.86)
Federal Home Loan Bank (\$2,000,000 Par)	1.4543%	12/26/2025	1,996,262.76	1,891,000.00	(105,262.76)
Federal Home Loan Bank (\$1,000,000 Par)	0.7132%	2/24/2026	993,331.31	911,340.00	(81,991.31)
Federal Home Loan Bank (\$1,000,000 Par)	0.7090%	2/26/2026	994,456.39	916,730.00	(77,726.39)
Federal Home Loan Bank (\$1,000,000 Par)	0.8712%	3/10/2026	999,230.97	918,270.00	(80,960.97)

Investment Portfolio
 For The Month Ended April 30, 2022

CASH MANAGEMENT PORTFOLIO (continued)

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
Bonds, Notes & Bills:					
Farmer Mac (\$520,000 Par)	0.8990%	3/27/2026	520,000.00	480,064.00	(39,936.00)
Federal Home Loan Bank (\$2,000,000 Par)	0.9671%	3/30/2026	2,000,000.00	1,861,240.00	(138,760.00)
Federal Home Loan Bank (\$1,500,000 Par)	0.9167%	3/30/2026	1,499,690.91	1,390,860.00	(108,830.91)
Federal Home Loan Bank (\$1,000,000 Par)	3.0239%	4/29/2026	1,000,000.00	992,100.00	(7,900.00)
Federal Farm Credit Bank (\$1,300,000 Par)	1.0254%	9/28/2026	1,300,000.00	1,191,788.00	(108,212.00)
Federal Home Loan Bank (\$2,525,000 Par)	1.1864%	9/30/2026	2,519,223.59	2,341,154.75	(178,068.84)
Federal Farm Credit Bank (1,000,000 Par)	4.0843%	10/20/2026	1,000,000.00	921,090.00	(78,910.00)
Federal Farm Credit Bank (2,300,000 Par)	1.7758%	10/20/2026	2,294,739.35	2,118,507.00	(176,232.35)
Federal Home Loan Bank (1,000,000 Par)	1.2062%	10/28/2026	999,918.70	928,550.00	(71,368.70)
Federal Home Loan Bank (1,000,000 Par)	1.1408%	10/28/2026	997,308.35	920,390.00	(76,918.35)
Federal Home Loan Bank (\$1,000,000 Par)	1.3909%	11/24/2026	997,336.48	934,680.00	(62,656.48)
Federal Farm Credit Bank (\$2,000,000 Par)	1.6994%	12/14/2026	1,998,583.06	1,883,040.00	(115,543.06)
Federal Home Loan Bank (\$1,100,000 Par)	1.6957%	12/17/2026	1,098,696.61	1,037,938.00	(60,758.61)
Federal Home Loan Bank (\$1,000,000 Par)	4.0058%	1/27/2027	1,000,000.00	936,140.00	(63,860.00)
Federal Home Loan Bank (\$1,500,000 Par)	2.6705%	1/27/2027	1,491,535.00	1,404,210.00	(87,325.00)
Federal Home Loan Bank (\$1,525,000 Par)	1.7457%	1/27/2027	1,525,000.00	1,441,399.50	(83,600.50)
Federal Home Loan Bank (\$1,250,000 Par)	2.1935%	2/25/2027	1,250,000.00	1,196,712.50	(53,287.50)
Federal Home Loan Bank (\$2,000,000 Par)	2.4526%	3/29/2027	2,000,000.00	1,936,740.00	(63,260.00)
Federal Home Loan Bank (\$2,150,000 Par)	3.0364%	4/21/2027	2,143,581.81	2,124,200.00	(19,381.81)
Federal Home Loan Bank (\$2,115,000 Par)	3.1734%	4/26/2027	2,115,000.00	2,099,391.30	(15,608.70)
Total Bonds, Notes and Bills			\$ 72,753,364.80	\$ 70,104,115.05	\$ (2,649,249.75)
Total Fixed Income Investments			\$ 79,760,898.09	\$ 76,843,004.34	\$ (2,917,893.75)
Total Cash Management Portfolio-Moreton Capital Markets			\$ 79,760,898.09	\$ 76,843,004.34	\$ (2,917,893.75)
TOTAL CASH MANAGEMENT PORTFOLIO			\$ 109,876,285.06	\$ 106,958,391.31	\$ (2,917,893.75)

Investment Portfolio
For The Month Ended April 30, 2022

ENDOWMENT POOL

	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)
MORETON CAPITAL MARKETS					
Cash and Money Market:					
US Govt Money Market Fund	\$ 1.00	34,130.090	\$ 34,130.09	\$ 34,130.09	\$ -
Total Cash and Money Market			\$ 34,130.09	\$ 34,130.09	\$ -
Equity Investments:					
Mutual Funds, ETFs, and Common Stocks:					
Ishares Core S&P Mid-Cap ETF	192.18	1,525.000	\$ 293,072.70	\$ 380,136.75	\$ 87,064.05
Ishares Core S&P 500 ETF	301.99	3,085.000	931,633.45	1,275,832.60	344,199.15
Ishares: Russell Mid-Cap Growth ETF	44.92	5,596.000	251,377.00	499,107.24	247,730.24
Ishares: S&P 600 Small Cap Value Index ETF	56.24	4,452.000	250,391.00	426,768.72	176,377.72
Ishares: S&P 600 Growth Index ETF	58.42	4,290.000	250,625.00	486,185.70	235,560.70
Vanguard Mid-Cap ETF	120.15	2,080.000	249,922.00	455,020.80	205,098.80
Ishares Trust Core MSCI Eafe ETF	61.47	4,200.000	258,181.00	272,202.00	14,021.00
Vanguard Intl Equity Index Fund Inc FTS	43.79	2,300.000	100,713.50	99,912.00	(801.50)
Total Equity Investments			\$ 2,585,915.65	\$ 3,895,165.81	\$ 1,309,250.16
Fixed Income Investments:					
Mutual Funds and ETFs:					
Ishares: Core US Aggregate BD ETF	\$ 105.71	8,825.000	\$ 932,895.73	\$ 907,827.75	\$ (25,067.98)
JP Morgan Exchange Traded FD TR Ultra Short Income	50.72	25,075.000	1,271,784.63	1,259,266.50	(12,518.13)
Metropolitan West Fds Total Return Bond Fund	10.55	105,477.218	1,113,004.28	1,029,457.65	(83,546.63)
PIMCO Income Fund Class A	11.55	92,697.246	1,070,196.95	1,017,815.76	(52,381.19)
Ishares: 0 to 5 Year Tips Bond ETF	99.32	10,000.000	993,215.00	1,042,400.00	49,185.00
Total Fixed Income Investments			\$ 5,381,096.59	\$ 5,256,767.66	\$ (124,328.93)
Total Endowment Pool-Moreton Capital Markets			\$ 8,001,142.33	\$ 9,186,063.56	\$ 1,184,921.23

Investment Portfolio
For The Month Ended April 30, 2022

ENDOWMENT POOL (continued)					
SOLTIS INVESTMENT ADVISORS					
SOUTHERN UTAH UNIVERSITY ENDOWMENT SHARE					Unrealized
Cash and Money Market:	Cost/share	Shares	Cost	Market	Gain/(Loss)
Fidelity Government Cash Reserves	\$ 1.00	119,616.590	\$ 119,616.59	\$ 119,616.59	\$ -
Total Cash and Money Market			\$ 119,616.59	\$ 119,616.59	\$ -
Stock Mutual Funds:					
Edgewood Growth Fund Instl CL	\$ 36.72	41,286.906	\$ 1,516,039.77	\$ 1,737,353.00	\$ 221,313.23
Artisan Mid Cap Fund Instl	44.80	8,904.251	398,869.22	342,724.62	(56,144.60)
Cliffwater Corporate Lending Fund I	10.49	106,563.093	1,118,080.00	1,139,159.46	21,079.46
Grandeur Peak Gbl Reach Fund Instl	17.05	68,453.951	1,167,267.57	1,124,698.41	(42,569.16)
Grandeur Peak Global Stalwarts Instl	15.98	73,774.730	1,179,012.36	1,263,761.12	84,748.76
Oakmark Intl Advisor Fund	22.53	56,053.175	1,262,645.45	1,349,760.45	87,115.00
Oakmark Fund Advisor Class	79.88	21,904.915	1,749,710.95	2,315,130.46	565,419.51
T Rowe Price Emerg Markets Stock Fund I	43.11	18,737.624	807,700.29	703,223.02	(104,477.27)
Wasatch Small Cap Growth Fund Instl CL	49.18	13,606.544	669,197.79	492,420.82	(176,776.97)
Wasatch Small Cap Value Institutional	10.33	19,124.743	197,558.60	168,297.73	(29,260.87)
Total Stock Mutual Funds			\$ 10,066,082.00	\$ 10,636,529.09	\$ 570,447.09
Bond Mutual Funds:					
Metropolitan West Total Return Class I	\$ 11.06	108,480.867	\$ 1,200,080.00	\$ 1,057,688.45	\$ (142,391.55)
Total Bond Mutual Funds			\$ 1,200,080.00	\$ 1,057,688.45	\$ (142,391.55)
Total Mutual Funds			\$ 11,266,162.00	\$ 11,694,217.54	\$ 428,055.54
Exchange Traded Funds:					
Equity ETFs:					
First TR Exchange-Traded FD Lunt US Factor	\$ 24.56	25,584.000	\$ 628,250.56	\$ 743,471.04	\$ 115,220.48
Ishares Core S&P 500 ETF	281.54	6,512.000	1,833,407.53	2,693,102.72	859,695.19
Ishares Core S&P Mid-Cap ETF	199.57	6,002.000	1,197,842.61	1,496,118.54	298,275.93
Ishares Core S&P Small-Cap ETF	88.07	5,878.000	517,667.28	584,390.76	66,723.48
Ishares Trust Core MSCI Eafe ETF	59.58	23,435.000	1,396,295.48	1,518,822.35	122,526.87
Vanguard Intl Equity Index Fund Inc FTS	42.99	14,590.000	627,166.50	633,789.60	6,623.10
Total Equity ETFs			\$ 6,200,629.96	\$ 7,669,695.01	\$ 1,469,065.05

Investment Portfolio
For The Month Ended April 30, 2022

ENDOWMENT POOL (continued)

	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)
Fixed Income ETFs:					
Ishares: Core US Aggregate BD ETF	\$ 112.72	620.000	\$ 69,884.34	\$ 63,779.40	\$ (6,104.94)
Ishares 0 - 5 Year Tips Bond ETF	105.64	1,400.000	147,901.88	145,936.00	(1,965.88)
Total Fixed Income ETFs			\$ 217,786.22	\$ 209,715.40	\$ (8,070.82)
Total Exchange Traded Funds			\$ 6,418,416.18	\$ 7,879,410.41	\$ 1,460,994.23
Alternative Investments:					
American Beacon AHL MNGD Futures	10.16	6,284.199	\$ 63,847.49	\$ 74,342.07	\$ 10,494.58
Blackrock GL Long/Short Equity Instl	11.91	6,229.091	74,169.50	71,509.96	(2,659.54)
JP Morgan Hedged Equity Class I	25.74	12,816.505	329,941.50	314,645.19	(15,296.31)
Stoneridge Alternative Lending Risk Premium	50.45	4,955.401	250,020.00	252,576.78	2,556.78
Cambria ETF TR Tail Risk	18.38	4,458.000	81,936.46	75,652.26	(6,284.20)
Morgan Stanley	100.00	2,000.000	200,000.00	174,530.00	(25,470.00)
Innovator ETFS US DQTY ULTRA BUF	28.09	7,222.000	202,865.98	196,041.91	(6,824.07)
Innovator ETFS TR US EQTY PWR BUF	29.98	10,967.000	328,791.41	314,643.23	(14,148.18)
Blackstone Real Estate Income	14.07	35,957.742	505,931.46	532,998.01	27,066.55
GreenLake Real Estate Fund LLC	1,000.00	326.584	326,584.50	326,584.50	-
Total Alternative Investments			\$ 2,364,088.30	\$ 2,333,523.91	\$ (30,564.39)
Total Endowment Share-SUU			\$ 20,168,283.07	\$ 22,026,768.45	\$ 1,858,485.38
INVESTMENT STUDENT GROUP ENDOWMENT SHARE					
Cash and Money Market:					
Fidelity Government Cash Reserves	\$ 1.00	94,087.560	\$ 94,087.56	\$ 94,087.56	\$ -
Total Cash and Money Market			\$ 94,087.56	\$ 94,087.56	\$ -
Equity ETFs:					
Select Sector SPDR Trust Consumer	164.94	56.000	\$ 9,236.36	\$ 9,121.28	\$ (115.08)
Total Equity ETFs			\$ 9,236.36	\$ 9,121.28	\$ (115.08)
Total Mutual Funds and ETFs			\$ 9,236.36	\$ 9,121.28	\$ (115.08)
Alternative Investments:					
Invesco DB Multi-Sector Commod Base Metals Fd	17.24	326.000	\$ 5,620.89	\$ 7,749.02	\$ 2,128.13
United States Gasoline FD LP Unites	27.53	156.000	4,294.54	9,564.36	5,269.82
Total Alternative Investments			\$ 9,915.43	\$ 17,313.38	\$ 7,397.95
Total Endowment Share-ISG			\$ 113,239.35	\$ 120,522.22	\$ 7,282.87
Total Endowment Pool-Soltis Investment Advisors			\$ 20,281,522.42	\$ 22,147,290.67	\$ 1,865,768.25
OTHER ALTERNATIVE INVESTMENTS					
State Bank of Southern Utah-Private Equity Partnership	42.56	14,811.000	630,408.00	1,397,171.00	766,763.00
Total Alternative Investments-Soltis Investment Advisors			\$ 630,408.00	\$ 1,397,171.00	\$ 766,763.00
TOTAL ENDOWMENT POOL INVESTMENTS			\$ 28,913,072.75	\$ 32,730,525.23	\$ 3,817,452.48



Investment Portfolio
For The Month Ended April 30, 2022

TRUST FUND POOL						
	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)	
MORETON CAPITAL MARKETS						
Cash and Money Market:						
US Govt Money Market Fund	\$ 1.00	7,398.350	\$ 7,398.35	\$ 7,398.35	\$ -	
Total Cash and Money Market			\$ 7,398.35	\$ 7,398.35	\$ -	
Fixed Income Investments:						
Mutual Funds and ETFs:						
PIMCO Total Return Fund Instl CL	10.46	68,661.068	\$ 718,409.70	\$ 630,308.60	\$ (88,101.10)	
Total Mutual Funds and ETFs			\$ 718,409.70	\$ 630,308.60	\$ (88,101.10)	
TOTAL TRUST FUND POOL			\$ 725,808.05	\$ 637,706.95	\$ (88,101.10)	
PUBLIC TREASURER'S INVESTMENT FUND (PTIF)-DEBT RESERVES						
	Yield	Shares	Cost	Market	Unrealized Gain/(Loss)	
PTIF - Debt Reserves	0.5210%	N/A	\$ 1,068,161.27	\$ 1,068,161.27	\$ -	
TOTAL PTIF - DEBT RESERVES			\$ 1,068,161.27	\$ 1,068,161.27	\$ -	
GRAND TOTAL - INVESTED FUNDS			\$ 140,583,327.13	\$ 141,394,784.76	\$ 811,457.63	



INVESTMENT REPORT

May 31, 2022

- Page 2 - Summarized Investment Balances and Asset Mix
- Pages 3-4 - Summary Report of Investment Activity and Income
- Page 5 - Detail of Current Month Transactions
- Pages 6-12 - Investment Portfolio

Prepared by:
Melanie Orton/Accounting Manager
6/6/2022

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.

 6/8/22

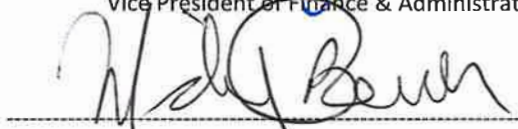
A. Mitchell Bealer
Public Treasurer

Date

 6/22/22

Marvin L. Dodge
Vice President of Finance & Administration

Date

 6/29/22

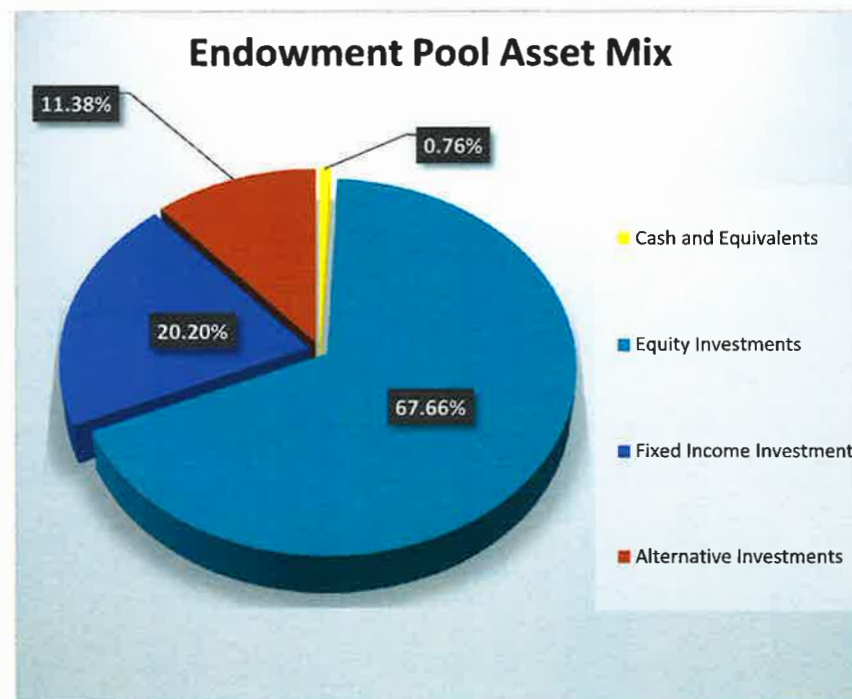
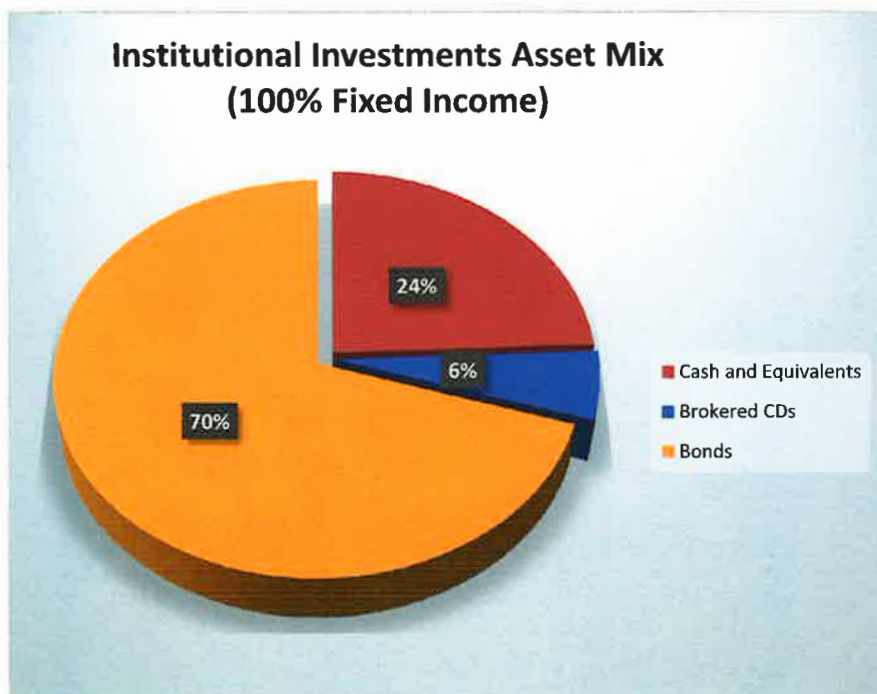
Mindy Benson
Interim President

Date

Summarized Investment Balances and Asset Mix
For The Month Ended May 31, 2022

INVESTMENT BALANCES BY CUSTODIAN (Market Value)						
Investment Pool	Moreton Capital Markets	Soltis Investment Advisors	State Treasurer	Alternative Investments	TOTAL	
Cash Management Pool	\$ 78,096,450	\$ -	\$ 25,134,500	\$ -	\$ 103,230,950	
Endowment Pool	9,448,468	22,175,623	-	1,397,171 *	33,021,262	
Trust Fund Pool	641,127	-	-	-	641,127	
Debt Service Pool	-	-	1,069,012	-	1,069,012	
Ending Monthly Balance	\$ 88,186,045	\$ 22,175,623	\$ 26,203,512	\$ 1,397,171	\$ 137,962,351	

* This is a private equity stock that is recorded at book value rather than market value





Summary Report of Investment Activity and Income
For The Month Ended May 31, 2022

INVESTMENT ACTIVITY					
Cash Management Pool					
	Moreton Capital		State		TOTAL
	Markets		Treasurer		
Beginning Balance	\$ 76,843,004	\$	30,115,387		\$ 106,958,391
Cash Transfers In	2,000,000		6,000,000		8,000,000
Cash Transfers Out	(3,042,763)		(11,000,000)		(14,042,763)
Interest Revenue	36,512		19,113		55,625 ^a
Acquisitions	2,000,000		-		2,000,000
Market Value Change	259,697		-		259,697
Cash Management Pool Ending Balance	\$ 78,096,450	\$	25,134,500		\$ 103,230,950
Endowment Pool					
	Moreton Capital	Soltis Investment	Soltis Investment	Alternative	TOTAL
	Markets	Advisors (SUU)	Advisors (ISG)	Investments	
Beginning Balance	\$ 9,186,064	\$ 22,026,768	\$ 120,522	\$ 1,397,171	\$ 32,730,525
Cash Transfers In	-	365,726	-	-	365,726
Cash Transfers Out	(14,369)	(365,570)	-	-	(379,939)
Dividends/Capital Gains	14,380	10,257	30	-	24,667 ^b
Interest Received	-	1,250	-	-	1,250 ^a
Acquisitions	242,409	365,570	-	-	607,979
Dispositions	-	(381,193)	-	-	(381,193)
Realized Gains/(Losses) on Dispositions	-	15,467	-	-	15,467 ^c
Market Value Change	19,984	15,647	1,149	-	36,780
Endowment Pool Ending Balance	\$ 9,448,468	\$ 22,053,922	\$ 121,701	\$ 1,397,171	\$ 33,021,262
Trust Fund Pool					
	Moreton Capital				TOTAL
	Markets				
Beginning Balance	\$ 637,707				\$ 637,707
Dividends/Capital Gains	1,360				1,360 ^b
Market Value Change	2,060				2,060
Trust Fund Pool Ending Balance	\$ 641,127				\$ 641,127
Debt Reserves Pool					
					TOTAL
Beginning Balance					\$ 1,068,161
Interest Earnings					851 ^a
Debt Reserves Pool Ending Balance					1,069,012
Total Investment Pools Ending Balance					\$ 137,962,351



Summary Report of Investment Activity and Income
For The Month Ended May 31, 2022

Investment Income			
	Current Month	YTD	
Interest Received	\$ 57,726		sum of a
Additional Interest Accrued	86,564		
Total Interest Income	144,290	\$ 860,873	
Dividends	26,027	1,289,156	sum of b
Gains/Losses on Sale	(15,467)	204,982	sum of c
Investment Income	\$ 154,850	\$ 2,355,011	



Detail of Current Month Transactions
For The Month Ended May 31, 2022

	Cash Management Pool	Endowment Pool	Trust Fund Pool	Debt Service Pool	Total
Public Treasurer's Investment Fund (PTIF)					
PTIF Deposits	\$ 6,000,000	\$ -	\$ -	\$ -	6,000,000
PTIF Withdrawals	(11,000,000)	-	-	-	(11,000,000)
Interest Revenue	19,113				19,113
Total PTIF	(4,980,887)	-	-	-	(4,980,887)
Moreton Capital Markets					
Cash deposits to purchase new securities	2,000,000				2,000,000
Interest Revenue	36,512				36,512
Funds used to purchase securities	(2,000,000)				(2,000,000)
Cash transferred to SUU	(1,042,763)				(1,042,763)
Investment Purchases	2,000,000				2,000,000
Decrease in market value of securities	259,697.15				259,697
Sub-Total Moreton Capital Markets	1,253,446	-	-	-	1,253,446
Dividend/Capital Gain Revenue-Cash		14,380			14,380
Funds used to purchase securities		(4,991)			(4,991)
Cash transferred to SUU		(9,378)			(9,378)
Dividends/Capital Gains Reinvested		4,991			4,991
Stock Gifts		237,418			237,418
Increase in market value of securities		19,984			19,984
Sub-Total Moreton Capital Markets	-	262,404	-	-	262,404
Dividend/Capital Gain Revenue-Cash			1,360		1,360
Decrease in market value of securities			2,060		2,060
Sub-Total Moreton Capital Markets	-	-	3,420	-	3,420
Total Moreton Capital Markets	1,253,446	262,404	3,420	-	1,519,270
Soltis Investment Advisors					
Cash proceeds from sale of securities		365,726			365,726
Dividends/Capital Gains Revenue-Cash		4,229			4,229
Funds used to purchase securities		(365,570)			(365,570)
Investment Purchases		365,570			365,570
Dividends/Capital Gains Reinvested		7,277			7,277
Investment Sales Proceeds		(381,193)			(381,193)
Net Realized (Gain)/Loss on Sale of Securities		15,467			15,467
Increase/(Decrease) in market value of securities		15,647			15,647
Sub-Total Soltis Investment Advisors-SUU Share	-	27,153	-	-	27,153
Dividend Revenue-Cash		30			30
Increase/(Decrease) in market value of securities		1,149			1,149
Sub-Total Soltis Investment Advisors-ISG Share	-	1,179	-	-	1,179
Total Soltis Investment Advisors	-	28,332	-	-	28,332
Public Treasurer's Investment Fund - Debt Reserves					
Dividend Revenue-Cash				851	851
Total Public Treasurer's Investment Fund - Debt Reserves	-	-	-	851	851
Net Increase (Decrease) in Investments	\$ (3,727,441)	\$ 290,736	\$ 3,420	\$ 851	\$ (3,432,434)

Investment Portfolio
 For The Month Ended May 31, 2022

CASH MANAGEMENT PORTFOLIO						
	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)	
PUBLIC TREASURER'S INVESTMENT FUND (PTIF)						
Public Treasurer's Investment Fund (PTIF)	0.7922%	N/A	\$ 25,134,499.82	\$ 25,134,499.82	\$ -	
Cash and Money Market:						
Cash Management Cash			\$ 1,282.19	\$ 1,282.19	\$ -	
Total Cash and Money Market			\$ 1,282.19	\$ 1,282.19	\$ -	
Fixed Income Investments:						
Brokered Certificates of Deposit:						
Ally BK Midvale Utah	1.9962%	8/15/2022	\$ 240,000.00	\$ 240,458.40	\$ 458.40	
Citibank National Association Pasadena California	1.9461%	8/23/2022	240,000.00	240,482.40	482.40	
Firstier BK Kimball Nebraska	1.9091%	8/23/2023	240,000.00	238,860.00	(1,140.00)	
Merrick BK South Jordan Utah	1.9741%	2/28/2024	240,000.00	237,069.60	(2,930.40)	
Capital One National Association McClean	2.1360%	8/14/2024	240,000.00	235,953.60	(4,046.40)	
Capital One BK USA National Association	2.1360%	8/14/2024	240,000.00	235,953.60	(4,046.40)	
Enerbank USA Salt Lake City Utah	1.9901%	8/15/2024	240,000.00	235,164.00	(4,836.00)	
CFBank Fairlawn Ohio	1.8925%	8/19/2024	240,000.00	234,612.00	(5,388.00)	
Medallion BK Salt Lake City Utah	1.9415%	8/19/2024	240,000.00	234,871.20	(5,128.80)	
Washington Federal Seattle	1.9911%	8/28/2024	240,000.00	235,048.80	(4,951.20)	
Preferred BK Los Angeles California	1.9423%	8/30/2024	240,000.00	234,770.40	(5,229.60)	
BMW Bank North American Salt Lake City Utah	0.6853%	10/8/2024	240,000.00	227,635.20	(12,364.80)	
Morgan Stanley Pvt Bk	1.9058%	2/6/2025	240,000.00	232,968.00	(7,032.00)	
Morgan Stanley NK N A	1.9058%	2/6/2025	240,000.00	232,968.00	(7,032.00)	
Salle Mae BK Murray Utah	0.7008%	7/29/2025	240,000.00	222,595.20	(17,404.80)	
State BK India New York NY	0.7009%	7/30/2025	240,000.00	222,578.40	(17,421.60)	
First National Bank East Lansing Michigan	0.7029%	9/8/2025	240,000.00	221,925.60	(18,074.40)	
Texas Exchange BK Crowley	0.7121%	2/26/2026	240,000.00	219,060.00	(20,940.00)	
SunWest Bank Irvine California	0.7691%	4/30/2026	240,000.00	218,428.80	(21,571.20)	
UBS Banks USA Salt Lake City Utah	0.9314%	6/16/2026	240,000.00	219,026.40	(20,973.60)	
Toyota Financial SVGS Bank Henderson Nevada	1.0417%	9/2/2026	240,000.00	218,865.60	(21,134.40)	
Goldman Sachs Bank USA New York	1.1485%	9/2/2026	240,000.00	219,415.20	(20,584.80)	
Synchrony Bank	1.2041%	11/12/2026	240,000.00	219,256.80	(20,743.20)	
JP Morgan Chase Bank Na Columbus	1.1523%	11/17/2026	240,000.00	218,700.00	(21,300.00)	
Live Oak Bank Wilmington N C	1.2060%	11/30/2026	240,000.00	218,901.60	(21,098.40)	
Total Certificates of Deposit			\$ 6,000,000.00	\$ 5,715,568.80	\$ (284,431.20)	

Investment Portfolio
For The Month Ended May 31, 2022

CASH MANAGEMENT PORTFOLIO (continued)

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
Bonds, Notes & Bills:					
Sumitomo Mitsubishi (\$3,000,000 Par)	1.7895%	7/12/2022	\$ 3,001,440.68	\$ 3,000,780.00	\$ (660.68)
Mitsubishi (\$1,000,000 Par)	1.9728%	7/25/2022	998,585.15	1,000,630.00	2,044.85
Mizuho (\$1,000,000 Par)	1.6221%	9/11/2022	997,461.86	1,001,770.00	4,308.14
Toronto Dominion Bank (\$1,000,000 Par)	1.0511%	12/1/2022	991,684.41	1,001,850.00	10,165.59
Goldman Sachs Group (\$1,000,000 Par)	2.2579%	2/23/2023	985,808.99	998,260.00	12,451.01
Mitsubishi (\$1,000,000 Par)	1.2407%	3/2/2023	994,146.17	1,002,640.00	8,493.83
Mizuho Fin Group (\$1,000,000 Par)	1.3699%	3/5/2023	995,437.44	1,002,230.00	6,792.56
Mizuho Fin Group (2) (\$1,600,000 Par)	1.3699%	3/5/2023	1,596,116.90	1,603,568.00	7,451.10
Canadian Imperial Bank (\$1,500,000 Par)	0.8489%	3/17/2023	1,490,895.69	1,501,860.00	10,964.31
Banco Santander SA (\$1,000,000 Par)	2.1238%	4/12/2023	1,005,982.43	1,002,920.00	(3,062.43)
American Honda Fin Group (\$1,500,000 Par)	1.7703%	5/10/2023	1,491,959.10	1,500,555.00	8,595.90
Citigroup Inc (\$1,000,000 Par)	2.1341%	7/24/2023	1,003,486.54	999,940.00	(3,546.54)
Citigroup Inc (\$1,000,000 Par)	1.9506%	9/1/2023	1,011,247.99	1,001,240.00	(10,007.99)
Morgan Stanley (\$1,500,000 Par)	2.5767%	10/24/2023	1,518,845.46	1,504,245.00	(14,600.46)
Wells Fargo Company (\$1,000,000 Par)	2.4614%	10/31/2023	1,517,160.06	1,504,035.00	(13,125.06)
Federal Home Loan Bank (\$1,000,000 Par)	1.0863%	7/25/2024	998,922.70	966,600.00	(32,322.70)
Federal Home Loan Bank (\$2,500,000 Par)	1.1444%	11/15/2024	2,478,303.83	2,403,025.00	(75,278.83)
Federal Home Loan Bank (\$1,000,000 Par)	1.1966%	12/10/2024	997,391.94	961,060.00	(36,331.94)
Federal Home Loan Bank (\$1,000,000 Par)	0.7661%	12/27/2024	993,960.37	952,870.00	(41,090.37)
Federal Home Loan Bank (\$1,000,000 Par)	1.3026%	1/28/2025	999,778.61	959,590.00	(40,188.61)
Federal Home Loan Bank (\$1,000,000 Par)	1.0432%	2/28/2025	1,000,000.00	958,630.00	(41,370.00)
Federal Home Loan Bank (\$1,000,000 Par)	1.1745%	2/28/2025	995,954.77	957,850.00	(38,104.77)
Federal Home Loan Bank (\$1,500,000 Par)	2.6448%	4/21/2025	1,492,773.73	1,488,765.00	(4,008.73)
Federal Home Loan Bank (\$1,000,000 Par)	2.7540%	4/21/2025	1,000,000.00	998,560.00	(1,440.00)
Federal Home Loan Bank (\$2,000,000 Par)	1.2562%	4/28/2025	1,994,173.56	1,910,520.00	(83,653.56)
Federal Home Loan Bank (\$1,000,000 Par)	0.7967%	5/19/2025	991,978.93	941,440.00	(50,538.93)
Freddie Mac (\$1,000,000 Par)	0.6953%	9/9/2025	1,000,000.00	934,870.00	(65,130.00)
Federal Home Loan Bank (\$1,500,000 Par)	3.0962%	10/20/2025	1,500,000.00	1,496,985.00	(3,015.00)
Federal Home Loan Bank Mtg Bank (\$1,000,000 Par)	0.7003%	10/27/2025	997,704.40	928,210.00	(69,494.40)
Freddie Mac (\$1,000,000 Par)	0.7576%	12/23/2025	983,634.51	923,920.00	(59,714.51)
Federal Home Loan Bank (\$2,000,000 Par)	1.4455%	12/26/2025	1,996,349.41	1,902,420.00	(93,929.41)
Federal Home Loan Bank (\$1,000,000 Par)	0.7088%	2/24/2026	993,479.50	917,060.00	(76,419.50)
Federal Home Loan Bank (\$1,000,000 Par)	0.7083%	2/26/2026	994,579.41	917,700.00	(76,879.41)
Federal Home Loan Bank (\$1,000,000 Par)	0.8658%	3/10/2026	999,247.97	924,020.00	(75,227.97)

Investment Portfolio
For The Month Ended May 31, 2022

CASH MANAGEMENT PORTFOLIO (continued)

	Yield	Maturity	Cost	Market	Unrealized Gain/(Loss)
Bonds, Notes & Bills:					
Farmer Mac (\$520,000 Par)	0.8939%	3/27/2026	520,000.00	482,809.60	(37,190.40)
Federal Home Loan Bank (\$2,000,000 Par)	0.9612%	3/30/2026	2,000,000.00	1,872,740.00	(127,260.00)
Federal Home Loan Bank (\$1,500,000 Par)	0.9111%	3/30/2026	1,499,697.61	1,399,440.00	(100,257.61)
Federal Home Loan Bank (\$1,000,000 Par)	3.0070%	4/29/2026	1,000,000.00	997,680.00	(2,320.00)
Federal Farm Credit Bank (\$1,300,000 Par)	1.0279%	9/28/2026	1,300,000.00	1,188,837.00	(111,163.00)
Federal Home Loan Bank (\$2,525,000 Par)	1.1789%	9/30/2026	2,519,334.54	2,356,102.75	(163,231.79)
Federal Farm Credit Bank (1,000,000 Par)	4.0589%	10/20/2026	1,000,000.00	926,850.00	(73,150.00)
Federal Farm Credit Bank (2,300,000 Par)	1.7647%	10/20/2026	2,294,839.15	2,131,755.00	(163,084.15)
Federal Home Loan Bank (1,000,000 Par)	1.1986%	10/28/2026	999,920.23	934,430.00	(65,490.23)
Federal Home Loan Bank (1,000,000 Par)	1.1337%	10/28/2026	997,359.14	926,140.00	(71,219.14)
Federal Home Loan Bank (\$1,000,000 Par)	1.3820%	11/24/2026	997,385.92	940,680.00	(56,705.92)
Federal Farm Credit Bank (\$2,000,000 Par)	1.6884%	12/14/2026	1,998,609.07	1,895,340.00	(103,269.07)
Federal Home Loan Bank (\$1,100,000 Par)	1.6847%	12/17/2026	1,098,720.48	1,044,692.00	(54,028.48)
Federal Home Loan Bank (\$1,000,000 Par)	3.9800%	1/27/2027	1,000,000.00	942,210.00	(57,790.00)
Federal Home Loan Bank (\$1,500,000 Par)	2.6533%	1/27/2027	1,491,686.33	1,413,315.00	(78,371.33)
Federal Home Loan Bank (\$1,525,000 Par)	1.7342%	1/27/2027	1,525,000.00	1,450,930.75	(74,069.25)
Federal Home Loan Bank (\$1,250,000 Par)	2.1786%	2/25/2027	1,250,000.00	1,204,900.00	(45,100.00)
Federal Home Loan Bank (\$2,000,000 Par)	2.4358%	3/29/2027	2,000,000.00	1,950,080.00	(49,920.00)
Federal Home Loan Bank (\$2,150,000 Par)	3.0193%	4/21/2027	2,143,691.37	2,136,283.00	(7,408.37)
Federal Home Loan Bank (\$2,115,000 Par)	3.1575%	4/26/2027	2,115,000.00	2,109,966.30	(5,033.70)
Freddie Mac (\$2,000,000 Par)	3.5433%	5/18/2027	2,000,000.00	2,003,800.00	3,800.00
Total Bonds, Notes and Bills			\$ 74,759,736.35	\$ 72,379,599.40	\$ (2,380,136.95)
Total Fixed Income Investments			\$ 80,761,018.54	\$ 78,096,450.39	\$ (2,664,568.15)
Total Cash Management Portfolio-Moreton Capital Markets			\$ 80,761,018.54	\$ 78,096,450.39	\$ (2,664,568.15)
TOTAL CASH MANAGEMENT PORTFOLIO			\$ 105,895,518.36	\$ 103,230,950.21	\$ (2,664,568.15)

Investment Portfolio
 For The Month Ended May 31, 2022

ENDOWMENT POOL

	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)
MORETON CAPITAL MARKETS					
Cash and Money Market:					
Endowment Cash			\$ -	\$ -	\$ -
US Govt Money Market Fund	\$ 1.00	34,141.060	\$ 34,141.06	\$ 34,141.06	\$ -
Total Cash and Money Market			\$ 34,141.06	\$ 34,141.06	\$ -
Equity Investments:					
Mutual Funds, ETFs, and Common Stocks:					
DFA US Core Equity	28.29	2,913.476	82,422.24	\$ 85,772.73	\$ 3,350.49
Ishares Core S&P Mid-Cap ETF	192.18	1,525.000	293,072.70	383,049.50	89,976.80
Ishares Core S&P 500 ETF	301.99	3,085.000	931,633.45	1,279,873.95	348,240.50
Ishares: Russell Mid-Cap Growth ETF	44.92	5,596.000	251,377.00	479,857.00	228,480.00
Ishares: S&P 600 Small Cap Value Index ETF	56.24	4,452.000	250,391.00	436,652.16	186,261.16
Ishares: S&P 600 Growth Index ETF	58.42	4,290.000	250,625.00	493,307.10	242,682.10
Vanguard Mid-Cap ETF	120.15	2,080.000	249,922.00	453,377.60	203,455.60
DFA International Core Eqty	14.41	1,660.862	23,933.02	24,331.63	398.61
Fidelity Global Ex Us Index	13.35	117.487	1,568.45	1,606.05	37.60
Ishares Trust Core MSCI Eafe ETF	61.47	4,200.000	258,181.00	276,780.00	18,599.00
Vanguard Intl Equity Index Fund Inc FTS	43.79	2,300.000	100,713.50	100,372.00	(341.50)
Total Equity Investments			\$ 2,693,839.36	\$ 4,014,979.72	\$ 1,321,140.36
Fixed Income Investments:					
Mutual Funds and ETFs:					
Ishares: Core US Aggregate BD ETF	\$ 105.71	8,825.000	\$ 932,895.73	\$ 913,122.75	\$ (19,772.98)
Fidelity Salem Str Tr Shrt	6.27	6,912.185	43,335.28	70,089.56	26,754.28
Fidelity Salem Tr	17.35	4,031.189	69,951.31	43,657.78	(26,293.53)
JP Morgan Exchange Traded FD TR Ultra Short Income	50.72	25,075.000	1,271,784.63	1,257,762.00	(14,022.63)
Metropolitan West Fds Total Return Bond Fund	10.55	105,644.469	1,114,636.65	1,033,202.91	(81,433.74)
PIMCO Income Fund Class A	11.54	93,003.118	1,073,555.43	1,023,964.33	(49,591.10)
Ishares: 0 to 5 Year Tips Bond ETF	99.32	10,000.000	993,215.00	1,040,800.00	47,585.00
Fidellity Real Estate Invstmt	45.92	352.959	16,207.88	16,747.90	540.02
Total Fixed Income Investments			\$ 5,515,581.91	\$ 5,399,347.23	\$ (116,234.68)
Total Endowment Pool-Moretton Capital Markets			\$ 8,243,562.33	\$ 9,448,468.01	\$ 1,204,905.68

Investment Portfolio
For The Month Ended May 31, 2022

ENDOWMENT POOL (continued)						
SOLTIS INVESTMENT ADVISORS						
SOUTHERN UTAH UNIVERSITY ENDOWMENT SHARE						
	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)	
Cash and Money Market:						
Fidelity Government Cash Reserves	\$ 1.00	124,001.870	\$ 124,001.87	\$ 124,001.87	\$ -	
Total Cash and Money Market			\$ 124,001.87	\$ 124,001.87	\$ -	
Stock Mutual Funds:						
Edgewood Growth Fund Instl CL	\$ 36.72	41,286.906	\$ 1,516,039.77	\$ 1,653,127.71	\$ 137,087.94	
Artisan Mid Cap Fund Instl	44.80	8,904.251	398,869.22	329,546.32	(69,322.90)	
Cliffwater Corporate Lending Fund I	10.49	106,563.093	1,118,080.00	1,137,028.20	18,948.20	
Grandeur Peak Gbl Reach Fund Instl	17.05	68,453.951	1,167,267.57	1,077,465.18	(89,802.39)	
Grandeur Peak Global Stalwarts Instl	15.98	73,774.730	1,179,012.36	1,207,692.33	28,679.97	
Oakmark Intl Advisor Fund	22.53	56,053.175	1,262,645.45	1,417,584.79	154,939.34	
Oakmark Fund Advisor Class	79.88	21,904.915	1,749,710.95	2,388,073.83	638,362.88	
T Rowe Price Emerg Markets Stock Fund I	43.11	18,737.624	807,700.29	712,404.46	(95,295.83)	
Wasatch Small Cap Growth Fund Instl CL	49.18	13,606.544	669,197.79	465,343.80	(203,853.99)	
Wasatch Small Cap Value Institutional	10.33	19,124.743	197,558.60	171,166.44	(26,392.16)	
Total Stock Mutual Funds			\$ 10,066,082.00	\$ 10,559,433.06	\$ 493,351.06	
Bond Mutual Funds:						
Metropolitan West Total Return Class I	\$ 11.06	108,480.867	\$ 1,200,080.00	\$ 1,060,942.87	\$ (139,137.13)	
Total Bond Mutual Funds			\$ 1,200,080.00	\$ 1,060,942.87	\$ (139,137.13)	
Total Mutual Funds			\$ 11,266,162.00	\$ 11,620,375.93	\$ 354,213.93	
Exchange Traded Funds:						
Equity ETFs:						
First TR Exchange-Traded FD Lunt US Factor	\$ 24.56	25,584.000	\$ 628,250.56	\$ 772,892.64	\$ 144,642.08	
Ishares Core S&P 500 ETF	281.54	6,512.000	1,833,407.53	2,701,633.44	868,225.91	
Ishares Core S&P Mid-Cap ETF	199.57	6,002.000	1,197,842.61	1,507,582.36	309,739.75	
Ishares Core S&P Small-Cap ETF	88.07	5,878.000	517,667.28	595,323.84	77,656.56	
Ishares Trust Core MSCI Eafe ETF	59.58	23,435.000	1,396,295.48	1,544,366.50	148,071.02	
Vanguard Intl Equity Index Fund Inc FTS	42.99	14,590.000	627,166.50	636,707.60	9,541.10	
Total Equity ETFs			\$ 6,200,629.96	\$ 7,758,506.38	\$ 1,557,876.42	

Investment Portfolio
For The Month Ended May 31, 2022

ENDOWMENT POOL (continued)

	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)
Fixed Income ETFs:					
Ishares: Core US Aggregate BD ETF	\$ 112.72	620.000	\$ 69,884.34	\$ 64,151.40	\$ (5,732.94)
Ishares 0 - 5 Year Tips Bond ETF	105.64	1,400.000	147,901.88	145,712.00	(2,189.88)
Total Fixed Income ETFs			\$ 217,786.22	\$ 209,863.40	\$ (7,922.82)
Total Exchange Traded Funds			\$ 6,418,416.18	\$ 7,968,369.78	\$ 1,549,953.60
Alternative Investments:					
American Beacon AHL MNGD Futures	11.09	13,607.980	\$ 150,927.25	\$ 160,029.84	\$ 9,102.59
Blackrock GL Long/Short Equity Instl	11.76	9,264.598	108,986.77	105,245.83	(3,740.94)
JP Morgan Hedged Equity Class I	26.08	6,423.876	167,505.51	157,577.67	(9,927.84)
Stoneridge Alternative Lending Risk Premium	50.45	4,955.401	250,020.00	252,477.68	2,457.68
Cambria ETF TR Tail Risk	17.54	9,635.000	168,985.64	161,868.00	(7,117.64)
Innovator ETFs US DQTY ULTRA BUF	27.91	9,139.000	255,065.89	248,032.46	(7,033.43)
Innovator ETFs TR US EQTY PWR BUF	30.13	3,652.000	110,034.76	105,652.36	(4,382.40)
Ishares TR 20 YR BD ETF	119.07	877.000	104,423.86	102,223.12	(2,200.74)
Morgan Stanley	100.00	2,000.000	200,000.00	175,990.00	(24,010.00)
Blackstone Real Estate Income	14.07	36,091.310	507,930.71	540,214.72	32,284.01
GreenLake Real Estate Fund LLC	1,000.00	331.862	331,862.41	331,862.41	-
Total Alternative Investments			\$ 2,355,742.80	\$ 2,341,174.09	\$ (14,568.71)
Total Endowment Share-SUU			\$ 20,164,322.85	\$ 22,053,921.67	\$ 1,889,598.82
INVESTMENT STUDENT GROUP ENDOWMENT SHARE					
Cash and Money Market:					
Fidelity Government Cash Reserves	\$ 1.00	94,117.550	\$ 94,117.55	\$ 94,117.55	\$ -
Total Cash and Money Market			\$ 94,117.55	\$ 94,117.55	\$ -
Equity ETFs:					
Select Sector SPDR Trust Consumer	164.94	56.000	\$ 9,236.36	\$ 8,654.24	\$ (582.12)
Total Equity ETFs			\$ 9,236.36	\$ 8,654.24	\$ (582.12)
Total Mutual Funds and ETFs			\$ 9,236.36	\$ 8,654.24	\$ (582.12)
Alternative Investments:					
Invesco DB Multi-Sector Commod Base Metals Fd	17.24	326.000	\$ 5,620.89	\$ 7,488.22	\$ 1,867.33
United States Gasoline FD LP Unites	27.53	156.000	4,294.54	11,441.04	7,146.50
Total Alternative Investments			\$ 9,915.43	\$ 18,929.26	\$ 9,013.83
Total Endowment Share-ISG			\$ 113,269.34	\$ 121,701.05	\$ 8,431.71
Total Endowment Pool-Soltis Investment Advisors			\$ 20,277,592.19	\$ 22,175,622.72	\$ 1,898,030.53
OTHER ALTERNATIVE INVESTMENTS					
State Bank of Southern Utah-Private Equity Partnership	42.56	14,811.000	630,408.00	1,397,171.00	766,763.00
Total Alternative Investments-Soltis Investment Advisors			\$ 630,408.00	\$ 1,397,171.00	\$ 766,763.00
TOTAL ENDOWMENT POOL INVESTMENTS			\$ 29,151,562.52	\$ 33,021,261.73	\$ 3,869,699.21

Investment Portfolio
 For The Month Ended May 31, 2022

TRUST FUND POOL					
	Cost/share	Shares	Cost	Market	Unrealized Gain/(Loss)
MORETON CAPITAL MARKETS					
Cash and Money Market:					
US Govt Money Market Fund	\$ 1.00	8,758.480	\$ 8,758.48	\$ 8,758.48	\$ -
Total Cash and Money Market			\$ 8,758.48	\$ 8,758.48	\$ -
Fixed Income Investments:					
Mutual Funds and ETFs:					
PIMCO Total Return Fund Instl CL	10.46	68,661.068	\$ 718,409.70	\$ 632,368.44	\$ (86,041.26)
Total Mutual Funds and ETFs			\$ 718,409.70	\$ 632,368.44	\$ (86,041.26)
TOTAL TRUST FUND POOL			\$ 727,168.18	\$ 641,126.92	\$ (86,041.26)
PUBLIC TREASURER'S INVESTMENT FUND (PTIF)-DEBT RESERVES					
	Yield	Shares	Cost	Market	Unrealized Gain/(Loss)
PTIF - Debt Reserves	0.6139%	N/A	\$ 1,069,012.26	\$ 1,069,012.26	\$ -
TOTAL PTIF - DEBT RESERVES			\$ 1,069,012.26	\$ 1,069,012.26	\$ -
GRAND TOTAL - INVESTED FUNDS			\$ 136,843,261.32	\$ 137,962,351.12	\$ 1,119,089.80

May 20, 2022

Dr. Jeffrey Miller's curriculum vitae outlines his work as a faculty member and department chair at the University of Alaska – Anchorage and at the University of Southern California. His efforts at these institutions exceed the expectations regarding teaching, scholarship, and service necessary for tenure as a full professor within the Department of Computer Science & Information Security at Southern Utah University.

I support granting Dr. Miller tenure at Southern Utah University with an appointment at the rank of Professor.

Sincerely,



Jim Brandt
Interim Dean, College of Engineering and Computational Sciences
Professor of Mathematics
Southern Utah University

CONFIDENTIAL

LETTER OF SUPPORT FOR DR. JEFFREY MILLER

May 9, 2022

It is my pleasure to write a letter of support for Dr. Jeffrey Miller.

Dr. Miller was recently hired as the new Dean of the College of Engineering and Computational Sciences. As part of the process, he has submitted a comprehensive professional vita, as well as other appropriate application materials. His hiring negotiations include the desire to be hired with tenure. This decision is currently under consideration.

I have thoroughly read Dr. Miller's vita and application materials. I note that he has been tenured at his previous institutions. He has engaged in sufficient professional activity to earn the rank of Full Professor with tenure by Southern Utah University's policies.

In every way, Dr. Miller deserves to be recognized for his professional contributions and leadership as a teacher, administrator and faculty member. Therefore, **I support Dr. Miller being hired with tenure** in the Department of Computer Science and Information Security. I look forward to his leadership at the college level, as well as his teaching performance in the classroom.

Respectfully submitted,



Derek W. Hein

Professor of Mathematics

Interim Department Chair, Computer Science and Information Security

Southern Utah University

(435) 586-7902 voice

hein@suu.edu

LETTER OF SUPPORT FOR DR. JEFFREY MILLER

May 13, 2022

It is our pleasure to write a letter of support for Dr. Jeffrey Miller to be granted Full Professor with tenure.

As stated in Dr. Miller's CV, he has been a tenured Full Professor at his previous institution due to his professional activity. He has also included numerical teaching evaluation scores in his CV which indicate his commitment to education.

Dr. Miller has met the required SUU expectations. We, the College P&T Committee, recommend that Dr. Jeff Miller be appointed as a full professor with tenure by Southern Utah University.

Respectfully,



Ali S. Siahpush, Ph.D. (College P&T Committee chair)
Professor of Engineering
(435) 586-7989
alياهوpush@suu.edu

Committee members:

Sarah Duffin, duffin@suu.edu
Scott Hansen, hansens@suu.edu
Shalini Kesar, kesar@suu.edu
Jana Lunt, janalunt@suu.edu

April 9, 2022

Dear Provost Anderson,

I have reviewed Jon “Tony” Oliver’s vita and application material. Dr. Oliver has met the conditions specified in the Department of KOR P&T Criteria for full professor with tenure, and has demonstrated increased proficiency and effectiveness in his engagement and contributions at previous institutions.

Therefore, I support Dr. Oliver’s appointment to full professor with tenure at SUU.

Sincerely,



Camille Thomas, Ph.D., ASCM, CSCS
Interim Dean, College of Health Sciences
Southern Utah University
351 W. University Blvd
Cedar City, UT 84720
435-586-7815
camillethomas1@suu.edu

TO: Board of Trustees

May 13, 2022

As the Interim Chair of the Department of Kinesiology and Outdoor Recreation, I would support the appointment of Dr. J. Tony Oliver as a full professor with tenure as he assumes the position of Dean of the College of Health Sciences.

In addition to his outstanding record of scholarship, teaching, service and other professional contributions, he has nearly 20 years of experience at Eastern Illinois University (EIU). At EIU he was awarded tenure and the rank of full professor. With respect to the fact that EIU is a nationally recognized and accredited institution, I would support the appointment of Dr. Oliver to the rank of full professor with tenure at Southern Utah University.



Julie E. Taylor, PhD, CSCS
Interim Department Chair
Department of Kinesiology and Outdoor Recreation
taylorj@suu.edu

12 May 2022

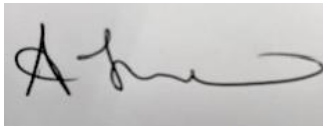
Dear SUU Board of Trustees,

The College of Health Sciences Promotion and Tenure Committee believes that Dr. John “Tony” Oliver meets criteria for tenure and rank of full professor at Southern Utah University as evidenced by his current standing at Eastern Illinois University. We are of the opinion that comparable academic institutions likely have comparable tenure and promotion criteria. As a tenured, full professor from a comparable, accredited institution, Dr. Oliver has demonstrated his exceptional abilities as an educator, scholar, and service member of academia.

We support his appointment to SUU as Full Professor with tenure.

Respectfully,

College of Health Sciences Promotion and Tenure Committee



Dr. Abigail Larson, Chair of CoHS Promotion and Tenure Committee, Department of Kinesiology & Outdoor Recreation



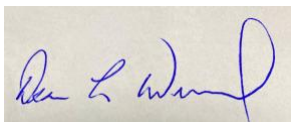
Dr. Chad Gasser, Department of Agriculture & Nutrition Science



Dr. Kelly Goonan, Department of Kinesiology & Outdoor Recreation



Professor Matt Schmidt, Department of Agriculture & Nutrition Science



Professor Dean Winward, Department of Agriculture & Nutrition Science

Board of Trustees
July 13, 2022

PERSONNEL - EARLY RETIREMENT

Bradley Brown submitted an application for early retirement effective August 1, 2022. Brad serves as the Director of Purchasing and Contract Management and has been with Southern Utah University for 20 years. He started as a purchasing agent in 2001 and was promoted to senior purchasing agent in 2006. In 2014, Brad was promoted to Director of Purchasing.

MEMORANDUM

Date: June 7, 2022
To: SUU Board of Trustees
From: James Sage, Associate Provost
RE: Adjustments to 2022-2024 Academic Calendar



On behalf of Provost Jon Anderson, the Deans' Council, and the Faculty Senate, I am submitting for your consideration and approval of two adjustments to SUU's 2022-2024 Academic Calendar (first starting in August 2022). What follows is a brief history of this latest set of revisions.

The first adjustment is to include Juneteenth as an official holiday that's now recognized in the State of Utah and the Utah System of Higher Education (USHE). Based on the rules stipulated in H.B. 238, Juneteenth is always observed on a Monday, on or around June 19. Based on USHE Policy [R821](#), no classes are to be scheduled and campus is closed in observation of Juneteenth. Hence, this new holiday required an adjustment to SUU's Academic Calendar. Elimination of a single meeting day during Summer term preserves the number of scheduled meeting days within tolerable limits. No further changes are needed to accommodate this adjustment.

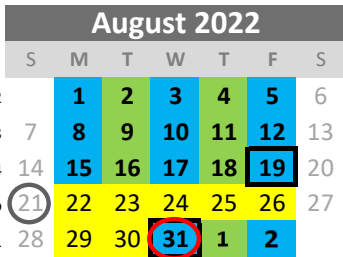
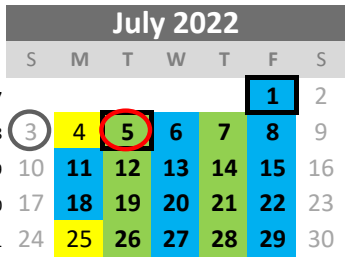
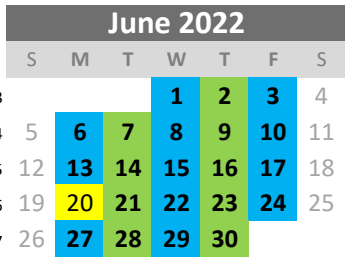
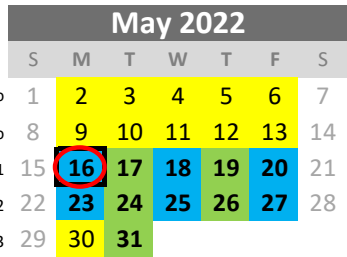
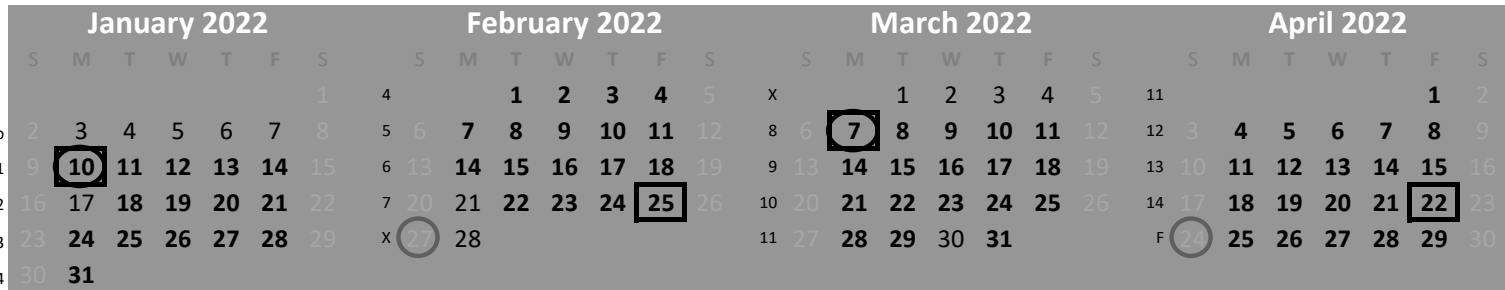
The second adjustment is to shift the Festival of Excellence from the last *Wednesday* in March to the last *Tuesday* in March. This small change was reviewed by the Faculty Senate and by the Deans' Council and has their support. Importantly, this adjustment will help to preserve the overall parity between M/W/F and T/R class schedules.

The attached document (below) includes the Academic Calendar from Summer 2022 through Summer 2024 with these two adjustments. No other changes are being made at this time.

Thank you for taking time to consider these two adjustments to SUU's Academic Calendar (2022-2024). Please let us know if you have any questions or concerns.

2021-2022

Academic Calendar - Ver. 18.999



- No Class
- MWF
- TR
- First/Last Day of Instruction
- Start of 7-Week Online
- End of 7-Week Online

days minutes

Fall A	MWF	20	1000
33	T/R	13	975

Fall B	MWF	19	950
33	T/R	14	1050

Fall Full	MWF	39	1950
66	T/R	27	2025
Finals		120	3975

4095

Spring A	MWF	19	950
33	T/R	14	1050

Spring B	MWF	20	1000
34	T/R	14	1050

Spring Full	MWF	39	1950
67	T/R	28	2100
Finals		120	4050

4170

Summer A	MWF	19	950
33	T/R	14	1050

Summer B	MWF	19	950
33	T/R	14	1050

Summer Full	MWF	38	1900
66	T/R	28	2100
			4000

2022-2023

Academic Calendar - Ver. 18.999

September 2022

	S	M	T	W	T	F	S
1				31	1	2	3
2	4	5	6	7	8	9	10
3	11	12	13	14	15	16	17
4	18	19	20	21	22	23	24
5	25	26	27	28	29	30	

October 2022

	S	M	T	W	T	F	S
							1
6	2	3	4	5	6	7	8
7	9	10	11	12	13	14	15
8	16	17	18	19	20	21	22
9	23	24	25	26	27	28	29
10	30	31					

November 2022

	S	M	T	W	T	F	S
							1
10		1	2	3	4	5	
11	6	7	8	9	10	11	12
12	13	14	15	16	17	18	19
xx	20	21	22	23	24	25	26
13	27	28	29	30			

December 2022

	S	M	T	W	T	F	S
							1
13					1	2	3
14	4	5	6	7	8	9	10
F	11	12	13	14	15	16	17
oo	18	19	20	21	22	23	24
oo	25	26	27	28	29	30	31

			days	minutes
Fall A	MWF	19	950	
32	T/R	13	975	

Fall B	MWF	20	1000	
33	T/R	13	975	

Fall Full	MWF	39	1950	
65	T/R	26	1950	
<i>Finals</i>		120	3900	

4020

Spring A	MWF	19	950	
33	T/R	14	1050	

Spring B	MWF	20	1000	
33	T/R	13	975	

Spring Full	MWF	39	1950	
66	T/R	27	2025	
<i>Finals</i>		120	3975	

4095

Summer A	MWF	19	950	
33	T/R	14	1050	

Summer B	MWF	19	950	
32	T/R	13	975	

Summer Full	MWF	38	1900	
65	T/R	27	2025	
			3925	

January 2023

	S	M	T	W	T	F	S
oo	1	2	3	4	5	6	7
1	8	9	10	11	12	13	14
2	15	16	17	18	19	20	21
3	22	23	24	25	26	27	28
4	29	30	31				

February 2023

	S	M	T	W	T	F	S
							1
4				1	2	3	4
5	5	6	7	8	9	10	11
6	12	13	14	15	16	17	18
7	19	20	21	22	23	24	25
x	26	27	28				

March 2023

	S	M	T	W	T	F	S
x							1
				1	2	3	4
8	5	6	7	8	9	10	11
9	12	13	14	15	16	17	18
10	19	20	21	22	23	24	25
11	26	27	28	29	30	31	

April 2023

	S	M	T	W	T	F	S
							1
12	2	3	4	5	6	7	8
13	9	10	11	12	13	14	15
14	16	17	18	19	20	21	22
F	23	24	25	26	27	28	29
	30						

May 2023

	S	M	T	W	T	F	S
oo							1
		1	2	3	4	5	6
oo	7	8	9	10	11	12	13
1	14	15	16	17	18	19	20
2	21	22	23	24	25	26	27
3	28	29	30	31			

June 2023

	S	M	T	W	T	F	S
							1
3					1	2	3
4	4	5	6	7	8	9	10
5	11	12	13	14	15	16	17
6	18	19	20	21	22	23	24
7	25	26	27	28	29	30	

July 2023

	S	M	T	W	T	F	S
							1
8	2	3	4	5	6	7	8
9	9	10	11	12	13	14	15
10	16	17	18	19	20	21	22
11	23	24	25	26	27	28	29
12	30	31					

August 2023

	S	M	T	W	T	F	S
							1
12					1	2	3
13	6	7	8	9	10	11	12
14	13	14	15	16	17	18	19
oo	20	21	22	23	24	25	26
1	27	28	29	30	31	1	

No Class
MWF
TR

Commencement
Final Exams
First/Last Day of Term

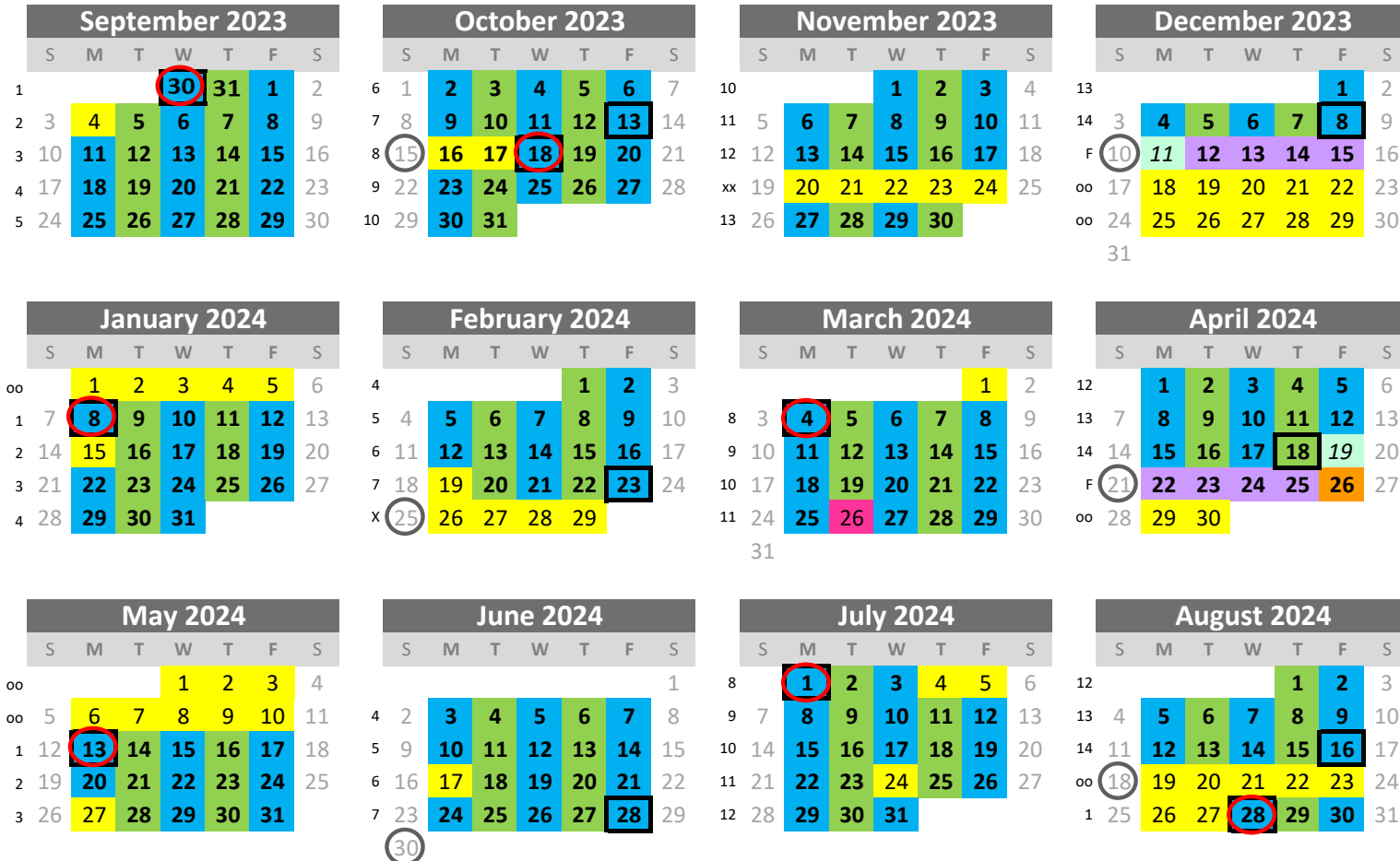
oo Break Between Semesters
x Spring Break xx Thanksgiving
Start of 7-Week Online

Festival of Excellence
Final Exams
End of 7-Week Online

Study Day

2023-2024

Academic Calendar - Ver. 18.999



days minutes

Fall A	MWF	19	950
32	T/R	13	975

Fall B	MWF	20	1000
33	T/R	13	975

Fall Full	MWF	39	1950
65	T/R	26	1950
<i>Finals</i>		120	3900

4020

Spring A	MWF	19	950
33	T/R	14	1050

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Spring Full	MWF	39	1950
66	T/R	27	2025
<i>Finals</i>		120	3975

4095

Summer A	MWF	19	950
33	T/R	14	1050

Summer B	MWF	19	950
32	T/R	13	975

Summer Full	MWF	38	1900
65	T/R	27	2025
			3925

MEMORANDUM

Date: June 17, 2022
To: SUU Board of Trustees
From: James Sage, Associate Provost
RE: SUU-STECH Articulation Agreements – Annual Updates

On behalf of Provost Jon Anderson, we are submitting for your consideration annual updates for two types of articulation agreements between Southern Utah University (SUU) and Southwest Technical College (STECH). Both articulation agreements have been reviewed by the University Curriculum Committee (UCC) and has their support.

The *first* update is to the long-standing program-level articulation agreement between SUU and STECH for the 2022-2023 academic year. In accordance with USHE policy R473, this is an annual update of our articulation agreements that outlines the conversion of “clock hour” certificates offered by STECH to “credit hour” degrees offered by SUU. This creates a transfer pathway for students who begin their post-secondary studies at STECH and wish to continue their education at SUU. This is provided as an information item to ensure the SUU Board of Trustees remains updated on this important partnership.

The *second* update is related to Dual Enrollment partnership between SUU and STECH. These articulation agreements have been developed through close collaboration between faculty at each institution and approved by our accrediting body (NWCCU). Included in these updates are a total of nine (9) separate disciplinary clusters, including:

1. Agriculture
2. Art & Design
3. Business & Accounting
4. Computer Science
5. Culinary Arts
6. Engineering Technology
7. Graphics & Media
8. Nursing
9. Transportation

In contrast to the program-level articulation agreements (above), these articulation agreements include course-by-course equivalencies that support our unique Dual Enrollment partnership. In turn, this allows for the creation of real-time transcripts at both institutions to better serve students who participate in the Dual Enrollment program and enhances greater flexibility for students.

Thank you for considering these two annual updates to the articulation agreements between SUU and STECH. Please let us know if you have any questions or concerns. Full details are provided below in the attached documents.

Utah System of Higher Education
Credit Articulation Agreement for Non-Credit Courses
April 25, 2022

This Credit Articulation Agreement, between Southern Utah University (SUU), a USHE credit-granting institution, and Southwest Technical College (Southwest Tech), specifies the terms and conditions for the granting of Southern Utah University credit for non-credit course work successfully completed with an external education or training provider. The parties enter into this Agreement effective the first day of July 2022 for the 2022-2023 academic year.

I. Articulation Agreement

This Agreement reaffirms the existing articulation between SUU and Southwest Tech for students wishing to pursue the Associate of Applied Sciences (A.A.S.) in General Technology (with various specialties noted on page 3 of this agreement). The scope of this agreement aligns with State Board of Higher Education Policy R473 as it pertains to A.A.S. degrees.

II. Overview of Changes

For the 2022-2023 academic year, no changes have been made to program-level articulation agreements. Full details are included in the matrix included on page 3.

III. Credit Articulation Considerations

- a. Overall administration of this Agreement is coordinated by the Provost's Office.
- b. The student that transfers from Southwest Tech must meet the current SUU admissions standards. Students may apply at <https://www.suu.edu/apply.html>.
- c. The student must be admitted to SUU within 12 months of completing a non-credit Certificate at Southwest Tech to apply for higher education credit.
- d. Upon fulfillment of the AAS degree requirements at SUU, the student will receive thirty (30) semester hours of credit for his/her certificate from Southwest Tech. The student must provide an official transcript from Southwest Tech to SUU when he/she applies for graduation.
- e. According to Board of Higher Education policy R401, the AAS degree requires a minimum of 63 credits, although additional credits may be needed to meet program requirements or course prerequisites.
- f. SUU program course availability will be dependent upon student enrollments.
- g. The student will be charged the current SUU undergraduate tuition and fees according to the current tuition and fee schedule at <https://www.suu.edu/cashier/tuition-undergrad.html>.
- h. The student will be eligible for federal financial aid for this program. The student must be admitted to SUU in order to receive financial aid.
- i. SUU will provide advising to the student. Southwest Tech agrees to help advertise the AAS degree with students at its sites.
- j. The Agreement will be reviewed annually by the SUU Provost's Office and will be renewed after consultation with the relevant Colleges/Schools and Departments at SUU.
- k. Any agreements whether written or verbally communicated cannot be in violation of Board of Higher Education policy R473.

IV. EVALUATION & AMENDMENT

This agreement is in effect for instruction completed during the 2022-2023 academic year. Both parties must communicate changes in curriculum and/or in credit articulation in a timely manner. The Agreement may be terminated at the end of the academic year by either party. The decision to renew or terminate the credit articulation agreement should be made by no later than 30 days before the beginning of the next academic year.

V. EXECUTION

The parties hereby execute this Credit Articulation Agreement as of the day and year first written above.

For Southern Utah University (SUU)

By Jon Anderson, Provost, Southern Utah University

Date

For Southwest Technical College (Southwest Tech)

By Brennan M. Wood, President, Southwest Technical College

Date

OVERVIEW OF SUU/Southwest Tech A.A.S ARTICULATION PATHWAYS

SOUTHWEST TECHNICAL COLLEGE							
SOUTHERN UTAH UNIVERSITY							
A.A.S. in General Technology: Pathways & Articulations							
SOUTHWEST TECH PROGRAM & CERTIFICATES	CIP Code	Length of Program in Hours	A.A.S. Business Technology	A.A.S. Construction Technology	A.A.S. Culinary Arts Management	A.A.S. Integrated Health Sciences	A.A.S. Livestock Management
TRANSPORTATION							
Automotive Technician	47.0604	1384	√				
ALLIED HEALTH PROFESSIONS							
Practical Nursing	51.3901	900				√	
Medical Clinical Assistant	51.0801	960	√			√	
TRADES							
Production Welder	48.0508	930	√	√			
GENERAL TECHNOLOGY (Agricultural Technology)							
Advanced Swine Production	1.0906	943					√
CULINARY ARTS							
Culinary Arts	12.0503	1030			√		
<i>History of Updates:</i>			Articulation Codes				
Articulation updated January 2012			√	APPROVED			
Revised and Updated June 2013							
Revised and Updated April 2014							
Revised and Updated June 2015							
Revised and Updated April 2016							
Revised and Updated April 2017							
Revised and Updated June 2018							
Revised and Updated April 2019							
Revised and Updated February 2020							
Revised and Updated February 2021							



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			
Advanced Swine Production Core (358 hours)								
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			9 total			
One complete specialization (listed below)								
Breeding Management (585 hours)								
PORK 3020	Feeding for Breeding and Gestation	90	AGSC 1950	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	Farrowing Management (585 hours)					and		
PORK 3030	Feeding in the Farrowing Barn	45				AGSC 2600	Swine Production Practices	2
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	Finishing Herd Technician (585 hours)							
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	Late Lactation Management (585 hours)							
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	Nursery Herd Technician (585 hours)							
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			14 total			

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 1040	Digital Photography II	30	ART 1050	Introduction to Photography	3
SWDM 1012	Intro to Media Design	60	COMM 1030	Introduction to Social Media	3
SWDM 1030	Typography	30	ART 3230	Graphic Design I	3
SWDM 1033	Intro to Design Principles	45			
BETC 2050	Social Media and the Internet	60	COMM 2030	Social Media Branding	3
SWDM 1039	Digital Audio	30	COMM 1560	Audio Production	3
SWDM 1038	Graphic Designs Applications (In Design)	45	COMM 1070 <i>or</i> ART 2210	Intro to Visual Communication Graphics <i>or</i> Digital Tools	3 <i>or</i> 3
SWDM 1020A	Digital Photography I (Photoshop)	45			
SWDM 1037	Computer Illustration (Adobe Illustrator)	45			

Course-by-Course Equivalency List

Business and 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
ACCT 1330	Accounting I	60	ACCT 2010	Accounting Principles	3
ACCT 1340	Accounting II	90			
BTEC 2050	Social Media and the Internet	60	COMM 2030	Social Media Branding	3
ACCT 2311	Computerized Accounting	45	ACCT 2000E	Accounting elective	2
SWDM 1032	Entrepreneurship	30	BA 1010	Business and Society	3
BTEC 2365	Marketing	90	MKTG 3010	Marketing Principles	3
BTEC 1131	Word Processing Applications I	45	BA 1000E	Business administration elective	2
BTEC 2131	Word Processing Applications II	60			
BTEC 1141	Spreadsheet Applications I	45	IS 2410	Spreadsheet Applications	3
BTEC 2141	Spreadsheet Applications II	45			
BTEC 3101	Professionalism	15	BA 1000E	Business administration elective	3
BTEC 2001	Keyboarding/Calculator	15			
BTEC 1161	Electronic Presentations	30			

Course-by-Course Equivalency List

Southwest Tech Computer Science / SUU CSIS Articulation

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
CSCI 1161	Development Fundamentals	45	CSIS 1000E	Computer Science Elective	1
CSCI 1105	Introduction to Programming	90	CS 1400	Fundamentals of Programming	3
CSCI 1111	Object Oriented Programming I	90	CS 1410	Object Oriented Programming	3
CSCI 1112	Object Oriented Programming II	90			
CSCI 1116	Algorithms & Data Structures	60	CS 2420	Introduction to Algorithms and Data Structures	3
ITEC 1307	A+ Essentials	150	EET 2750	PC Hardware	3
ITEC 1312	A+ Essentials Practical	30			
ITEC 1501	Networking Technology	105	IS 2600	Data Communications & Networking	3
ITEC 2213	Security Professional	105	IS 2670	Fundamentals of Security	3
ITEC 2702	Linux Fundamentals	105	IS 3610	System Administration II	3
ITEC 1102	IT Fundamentals	45	CS 4850	Special Topics	3
CSCI 1146	Customer Support	30			
CSCI 1106	Development Intermediate	45	CS 4850	Special Topics	2
CSCI 1175	Industry Projects	60	CS 2890	Internship	4
ITEC 2906	Capstone Project	60			

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 3082	Restaurant Practical	180	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 3131	Black Box Skills	30	HRHM 1000E	Hospitality elective	1
CULA 3140	Food Ethics and Social Responsibility	40	HRHM 1000E	Hospitality elective	1.5

Course-by-Course Equivalency List

Engineering Technology

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
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 1051	Electrical Safety, Meters, and Motor Controls	75			
INMA 1061	Electronics, PLCs, & Process Instrumentation 1	70			
INMA 1065	Electronics, PLCs, & Process Instrumentation 2	60			
INMA 1070	Fluid Power Devices & Principles	60			
WELD 1000	Welding Safety	15	TECH 1210	Introduction to Welding, Safety, and Testing	1.5
WELD 1146	Welding Inspection, Metallurgy, and Blueprints	60	TECH 1215	Oxy-fuel Gas Welding Lab	1
WELD 1280	Cutting Processes and Brazing	45	TECH 1235	SMAW Welding Lab	1
WELD 1301	Shielded Metal Arc Welding I	54	TECH 1255	GMAW Welding I Lab	1
WELD 1390	Gas Metal Arc Welding I	56	TECH 1275	FCAW II (Self Shield) Lab	1
WELD 1511	Flux Core Arc Welding 2 (Self Shield)	45	TECH 1295	GTAW Welding II (Aluminum) Lab	1
WELD 1611	Gas Tungsten Arc Welding 2 (Aluminum)	90	TECH 1305	GMAW Aluminum Lab	1
WELD 2450	Gas Metal Arc Welding II - Aluminum	30	TECH 3000	Occupational Safety	3
INMA 1011	Industrial Safety & Essential Skills	45			

Course-by-Course Equivalency List

Graphics and Media

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 1038	Designs Applications (In Design)	45	COMM 1070	Intro to Visual Communication	3
SWDM 1020A	Digital Photography (Photoshop)	45	or	or	or
SWDM 1037	Computer Illustration (Adobe Illustrator)	45	ART 2210	Digital Tools	3
SWDM 1039	Digital Audio	30	COMM 1560	Audio Production	3
SWDM 1023	Video Production	60	COMM 4750	Advanced Video Editing	3
SWDM 1029	Video Production II	60	COMM 4760	Advanced Video and Film Production	3
SWDM 1040	Digital Photography II	30	ART 1050	Introduction to Photography	3
SWDM 1030	Typography	30	ART 3230	Graphic Design I	3
SWDM 1033	Intro to Design Principles	45			
SWDM 1012	Intro Media Design	60	COMM 1030	Introduction to Social Media	3
BETC 2050	Social Media & the Internet	60	COMM 2030	Social Media Branding	3

Also requires a student portfolio to demonstrate competencies.

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	Nursing Assistant Classwork	90	SCI 1000E	Foundational Healthcare Skills	2.0
NA 8010X	Nursing Assistant Clinicals	24			
PHLB 1010	Phlebotomy Classwork	60	SCI 1000E	Foundational Healthcare Skills	2.0
PHLB 1011X	Phlebotomy Externship	20			
EMT 1106m	EMT Classwork	172	SCI 2300	Emergency Medical Technician - Basic Course	4.0
EMT 1105X	EMT Practicum	24			
AEMT 1115	AEMT Classwork	152	SCI 2310	Emergency Medical Technician - Adv Course	3.0
AEMT 1115X	AEMT Practicum	48			
MEDA 1105	Medical Terminology	60	KIN 2010	Medical Terminology [Direct Articulation]	2.0
MEDA 2113A	MAC Procedures II A	90	SCI 1000E	Competency Based 1 credit per course (i.e., MAC IIA = 1 credit SCI Foundational Health Care Skills 1011)	1.0
MEDA 2113B	MAC Procedures II B	90	SCI 1000E		1.0
MEDA 2127	MAC Procedures III A	90	SCI 1000E		1.0
MEDA 2128	MAC Procedures III B	90	SCI 1000E		1.0
MEDA 2202	Pharmacology for the Medical Assistant	75	SCI 1000E	Pharmacology	1.0

Course-by-Course Equivalency List

Transportation Articulation

STECH Clock-Hour Courses			SUU Course Credit to be Awarded		
Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
SWAM 1105	Workshop Practices and Safety*	80	STCH 1000	Automotive Technician Orientation	2
AUTO 1020	Math for Automotive Techs *	60	STCH 1000	Automotive Technician Academic Skills	1.5
SWAM 1210	Steering & Suspension Systems*	108	STCH 1000	Basic Automotive Systems	9
SWAM 1320	Brake Systems*	108			
SWAM 1420	Engine Repair*	126			
SWAM 1520	Automotive Electrical Systems I*	120	STCH 2000	Automotive Electrical Systems	6
SWAM 1530	Automotive Electrical Systems II*	120			
SWAM 1610	Automotive Engine Performance I*	120	STCH 2000	Automotive Engine Performance	6
SWAM 2620	Automotive Engine Performance II*	120			
SWAM 2720	Heating and Air Conditioning	108	STCH 2000	Automotive Heating & Cooling	3
SWAM 2820	Manual Drive Trains & Axles*	108	STCH 2000	Automotive Drive Trains	6
SWAM 2920	Automatic Transmissions & Transaxles	126			
SHML 3000	Principles of Structural Assembly	160	STCH 1000	Principles of Structural Assembly	4
PTDR 1050	CDL – Classroom	56	STCH 1000	Professional Truck Driving	4
PTDR 1060	CDL – Skills Training	24			
PTDR 1070	CDL – Road Training	100			
PTDR 1080	CDL – Testing	3			

Utah System of Higher Education
Credit Articulation Agreement for Non-Credit Courses
April 27, 2022

This Credit Articulation Agreement (Agreement), between Southern Utah University (SUU), a USHE credit-granting institution, and Uintah Basin Technical College (UBTech), specifies the terms and conditions for the granting of SUU credit for non-credit course work successfully completed with an external education or training provider. The parties enter into this Agreement effective the first day of July 2022 for the 2022-2023 academic year.

I. Articulation Agreement

This Agreement establishes program-level articulation agreements between SUU and UBTech for students who complete a qualifying 900+ clock hour certificate program (see below) and who wish to pursue the Associate of Applied Sciences (A.A.S.) in General Technology – Integrated Health Sciences Specialty. The scope of this agreement aligns with State Board of Higher Education Policy R473 as it pertains to A.A.S. degrees.

II. Overview of Changes

Because the 2022-2023 academic year is the first year UBTech and SUU are working to establish this Agreement, there are no changes to include other than the creation of these new program-level pathways.

III. Credit Articulation Considerations

- a. Overall administration of this Agreement is coordinated by the Provost's Office.
- b. The student that transfers from UBTech must meet the current SUU admissions standards. Students may apply at <https://www.suu.edu/apply.html>.
- c. The student must be admitted to SUU within 12 months of completing a non-credit Certificate at UBTech to apply for higher education credit.
- d. Upon fulfillment of the AAS degree requirements at SUU, the student will receive thirty (30) semester hours of credit for his/her certificate from UBTech. The student must provide an official transcript from UBTech to SUU when he/she applies for graduation.
- e. According to Board of Higher Education policy R401, the AAS degree requires a minimum of 63 credits, although additional credits may be needed to meet program requirements or course prerequisites.
- f. SUU program course availability will be dependent upon student enrollments.
- g. The student will be charged the current SUU undergraduate tuition and fees according to the current tuition and fee schedule at <https://www.suu.edu/cashier/tuition-undergrad.html>.
- h. The student will be eligible for federal financial aid for this program. The student must be admitted to SUU in order to receive financial aid.
- i. SUU will provide advising to the student. UBTech agrees to help advertise the AAS degree with students at its sites.
- j. The Agreement will be reviewed annually by the SUU Provost's Office and will be renewed after consultation with the relevant Colleges/Schools and Departments at SUU.
- k. Any agreements whether written or verbally communicated cannot be in violation of Board of Higher Education policy R473.

IV. EVALUATION & AMENDMENT

This agreement is in effect for instruction completed during the 2022-2023 academic year. Both parties must communicate changes in curriculum and/or in credit articulation in a timely manner. The Agreement may be terminated at the end of the academic year by either party. The decision to renew or terminate the credit articulation Agreement should be made by no later than 30 days before the beginning of the next academic year.

V. EXECUTION

The parties hereby execute this Credit Articulation Agreement as of the day and year first written above.

For Southern Utah University (SUU)

By Jon Anderson, Provost, Southern Utah University

Date

For Uintah Basin Technical College (UBTech)

By Aaron K. Weight, President/CEO, Uintah Basin Technical College

Date

OVERVIEW OF SUU / UBTECH A.A.S ARTICULATION PATHWAYS

Uintah Basin Technical College Certificate Program	CIP Code	Clock Hours	SUU A.A.S. – General Technology Program
Practical Nursing	51.3901	900	A.A.S. – Gen Tech – Integrated Health Sciences Specialty
Surgical Technician	51.1009	900	A.A.S. – Gen Tech – Integrated Health Sciences Specialty
Medical Assistant	51.0801	940	A.A.S. – Gen Tech – Integrated Health Sciences Specialty
Business Manager	52.0401	900	A.A.S. – Gen Tech – Business Specialty
Culinary Arts	12.0505	900	A.A.S. – Gen Tech – Culinary Arts Management Specialty
Auto Technology	47.0604	990	A.A.S. – Gen Tech – Construction Technology Specialty
Security Technician	11.0901	1050	A.A.S. – Gen Tech – Business Specialty
Welding Advanced Technician	48.0508	900	A.A.S. – Gen Tech – Construction Technology Specialty
Diesel Technician II	47.0605	900	A.A.S. – Gen Tech – Construction Technology Specialty



MEMORANDUM

Date: April 25, 2022
To: SUU Board of Trustees
From: James Sage, Associate Provost
RE: SUU-UBTECH Articulation Agreements – New Partnership

On behalf of Provost Jon Anderson, we are providing information related to a new transfer articulation agreement between Southern Utah University (SUU) and Uintah Basin Technical College (UBTECH). This includes two types of transfer articulation agreements: program-level and course-level. Both types of articulation agreements have been reviewed by qualified faculty and the University Curriculum Committee.

First, similar to our existing partnership with Southwest Technical College, this year SUU has worked with UBTECH to develop a series of program-level articulation agreements for the upcoming 2022-2023 academic year. In accordance with USHE policy R473, these program-level articulation agreements outline the conversion of 900+ “clock hour” certificates offered by UBTECH to “credit hour” degrees offered by SUU (known as Associate of Applied Science degrees). This creates a new transfer pathway for students who begin their post-secondary studies at UBTECH and wish to continue their education at SUU. A total of nine (9) program-level articulation agreements are included in this new partnership, including:

1. Business Manager
2. Culinary Arts
3. Medical Assistant
4. Practical Nursing
5. Surgical Technician
6. Auto Technology
7. Security Technician
8. Welding Advanced Technician
9. Diesel Technician II

This is provided as an information item to ensure the SUU Board of Trustees remains updated on this important new partnership with Uintah Basin Technical College.

Second, SUU has worked with UBTECH to develop a series of course-to-course equivalencies to better support students who wish to transfer from UBTECH to SUU. The details of these course-level articulation agreements have been reviewed by the appropriate faculty. Included in these updates are a total of five (5) separate disciplinary clusters, including:

1. Business & Accounting
2. Computer Science
3. Engineering Technology
4. Nursing
5. Transportation

Thank you for considering these two annual updates to the articulation agreements between Southern Utah University and Uintah Basin Technical College. Please let us know if you have any questions or concerns about either the program-level articulation agreements or the course-level articulation agreements. Full details can be found in the attachments included below.

Course-by-Course Equivalency List

Business and Accounting Articulation

Uintah Basin Technical College

Clock-Hour Courses

Southern Utah University

Course Credit to be Awarded

Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
ACCT 1330	Accounting I	60	ACCT 2010	Accounting Principles	3
ACCT 1340	Accounting II	60			
ACCT 2311	QuickBooks	60	BA 1000E	Business Administration Elective	1
BTEC 1020	Math Essentials	60	BA 1000E	Business Administration Elective	1
BTEC 1045	Basic Office Skills	60	BA 1000E	Business Administration Elective	3
BTEC 1130	Word Processing	60			
BTEC 1151	Data Processing	60			
BTEC 1510	Business English	60	BA 1000E	Business Administration Elective	4
BTEC 1520	Office Communication	60			
BTEC 1522	Digital Communication	60			
BTEC 1532	Marketing Communication	60			
BTEC 1530	Professionalism	60	BA 1000E	Business Administration Elective	1
BTEC 2040	Office Management	60	BA 1000E	Business Administration Elective	3
BTEC 2080	Collaboration	60			
BTEC 2090	Applied Skills	60			

Course-by-Course Equivalency List

Computer Science Articulation

Uintah Basin Technical College

Clock-Hour Courses

Southern Utah University

Course Credit to be Awarded

Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
ITEC 1000	Career Fundamentals for IT	60	CSIS 1000E	Computer Science Elective	2
ITEC 1310	A+ Course/Practicum	200	EET 2750	PC Hardware	3
ITEC 1515	Networking Fundamentals	80	IS 2600	Data Communications & Networking	3
ITEC 2510	Networking	250			
ITEC 1615	Security Fundamentals	80	IS 2670	Fundamentals of Security	3
ITEC 2610	Security	250			

Course-by-Course Equivalency List

Engineering Technology Articulation

Uintah Basin Technical College Clock-Hour Courses

Southern Utah University Course Credit to be Awarded

Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
IAMT 1005	Basic Safety	30	STCH 1000	Basic Safety	1
IAMT 1020	Six Sigma	30	STCH 1000	Six Sigma	1
IAMT 1025	Basic Electrical	60	STCH 1000	Basic Electrical and Motor Controls	2
IAMT 1030	Basic Motor Controls	30			
IAMT 1035	Documentation	30	STCH 1000	Documentation	1
IAMT 1040	Pneumatics I	30	STCH 1000	Pneumatics & Hydraulics	1
IAMT 1045	Hydraulics I	30			
IAMT 1050	Basic Ladder Logic	90	STCH 1000	Ladder Logic	2
IAMT 2050	Advanced Ladder Logic	60			
IAMT 1055	Industrial Measurement Devices	60	STCH 1000	Industrial Measurement Devices	1
IAMT 1060	Basic Structed Text	30	STCH 1000	Basic Skills and Knowledge	3
IAMT 1065	Basic Function Blocks	30			
IAMT 1070	Basic HMI	30			
IAMT 1075	Basic Networking Fundamentals	30			
IAMT 1080	Career Fundamentals for Automation	30	STCH 1000	Automation Academic Skills	1
WELD 1000	Intro to Welding	60	TECH 1210	Introduction to Welding, Safety, and Testing	1
WELD 1401	Beginning GMAW	60	TECH 1255	GMAW Welding I Lab	2
WELD 1411	Advanced GMAW	60			
WELD 1301	Beginning SMAW	60	TECH 1235	SMAW Welding Lab	2
WELD 1311	Advanced SMAW	60			
WELD 2201	Basic Fabrication	60	TECH 1000E	Fabrication	3
WELD 2211	Intermediate Fabrication	60			
WELD 2221	Advanced Fabrication	60			
WELD 1251	Arc Cutting & Gouging -Weld Inspection	60	TECH 1000E	Weld Inspection	1
WELD 1600	Beginning GTAW	60	TECH 1295	GTAW Welding Lab	3
WELD 1610	Intermediate GTAW	60			
WELD 1620	Advanced GTAW	60			
WELD 2300	Pipe Welding	60	TECH 1000E	Pipe Welding	1

Course-by-Course Equivalency List

Department of Nursing Articulation

Uintah Basin Technical College

Clock-Hour Courses

Southern Utah University

Course Credit to be Awarded

Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
MEDA 1105	Medical Terminology	60	KIN 2010	Medical Terminology	2
NAHA 1016	Nursing Assistant Classroom	90	SCI 1000E	Foundational Healthcare Skills	2
NAHA 1010	Nursing Assistant Clinicals	24			
PHMT 1010	Pharmacy Practice	50	SCI 1000E	Introduction to Pharmacy	2
PHMT 1020	Pharmacy Calculations	36			
PHMT 1030	Pharmacology I	54	SCI 1000E	Pharmacology I	2
PHMT 1040	Pharmacy Simulation	50			
PHMT 1050	Pharmacology II	80	SCI 1000E	Pharmacology II	2
PHMT 1080	Pharmacy Simulation II	70			
PHMT 1060	Compounding	40	SCI 1000E	Compounding	1
PHMT 1070	National Certification Prep	20	SCI 1000E	Pharmacy Capstone	4
PHMT 1090	Pharmacy Externship	200			

Course-by-Course Equivalency List

Transportation Articulation

Uintah Basin Technical College

Clock-Hour Courses

Southern Utah University

Course Credit to be Awarded

Course Prefix & Number	Course Title	Clock Hours	Course Prefix & Number	Course Title	Credits Awarded
AUTO 1001	Introduction to Automotive	60	STCH 1000	Automotive Technician Orientation	2
AUTO 1030	Steering and Suspension 1	60	STCH 1000	Basic Automotive Systems	9
AUTO 2030	Steering and Suspension 2	60			
AUTO 1040	Brakes 1	60			
AUTO 2040	Brakes 2	30			
AUTO 1410	Engine Repair	90			
AUTO 1510	Electrical/Electronic Systems 1	60	STCH 2000	Automotive Electrical Systems	6
AUTO 2510	Electrical/Electronic Systems 2	120	STCH 2000	Automotive Engine Performance	6
AUTO 1610	Engine Performance 1	60			
AUTO 1616	Engine Performance 2	120	STCH 2000	Automotive Heating & Cooling	2
AUTO 1701	Heating, Ventilation, & Air Conditioning	60			
AUTO 1413	Automatic Transmissions	90	STCH 2000	Automotive Drive Trains	5
AUTO 1203	Manual Drive Train & Axles	60			
TDRV 1002	Introduction to Truck Driving	70	STCH 1000	Professional Truck Driving	4
TDRV 1020	Defensive Driving for the Prof. Truck Driver	4			
TDRV 1040	Truck Driver Practicum	132			
TDRV 1045	Air Brake Awareness	4			